NOTIS es

NOTIS Database Server Based on New Technology

A t ALA, NOTIS announced InfoBase, a powerful information storage and retrieval system for UNIX-based computer systems. InfoBase offers a cost-effective way to mount and access local databases. It uses a powerful, full feature search engine and is built on the Z39.50 communication protocol.

InfoBase's high performance configuration allows multiple simultaneous users to access online databases on affordable UNIX platforms. InfoBase offers libraries greater system flexibility and substantially lower cost storage options, while offering patrons more access to information.

John Kolman, NOTIS vice president of systems development, said, "UNIX data storage, either CD-ROM or magnetic, is a proven, affordable technology. InfoBase gives libraries a way to reduce their storage costs for local databases."

InfoBase has a fully functional search engine that supports Boolean search, proximity and adjacency functions. The same search techniques are used to access all databases.

InfoBase is implemented using the Z39.50 intersystem retrieval protocol. This assures interoperability with a variety of clients. For NOTIS customers, InfoBase provides full compatibility with the online catalog, including hook to serial holdings for citation databases. Any institution with a Z39.50 client may also access InfoBase, either on the campus Ethernet or across the Internet.

InfoBase is the first Z39.50 server designed to index and deliver large databases efficiently.

For more information on InfoBase, please call your NOTIS Marketing Representative, or call NOTIS' Marketing Department directly at (708) 866-0156. ■

BULLETIN

University of Michigan's 5.1 performance data is available on NOTISrv.

We appreciate Tim Prettyman's effort in compiling this data.

NOTIS NEWS

Plan Ahead for MDAS 1.3 Screen Changes

Plan ahead for your site's upgrade to MDAS 1.3. This release includes the same standardized footers as the 5.1 OPAC. These footers provide consistent commands and support the NISO Common Command Language. You will need to evaluate your Explain, Help, and Other Information screens to determine how the upcoming release will affect your screens.

Like the 5.1 OPAC, all informational screens will be 15 lines long, except where a longer command line is necessary. For those screens, the text will be 13 lines long to accommodate two additional command lines.

Which Screens Will Be Affected?

All of the Explain, Help, and Other Information screens will be affected. All but two MDAS 1.3 screens will be 15 lines long. The Explain Keyword and Review Help screens will be 13 lines. These changes are identical to the 5.1 OPAC, but the 5.1 OPAC includes an additional 13 line screen: the Set Catalog panel.

LMS 5.1 and MDAS 1.3 will truncate any lines beyond the 13th

or 15th line. To avoid having these screens truncated, NOTIS recommends that you review your current LMS and MDAS screens and edit them as necessary. This will alleviate losing information on the screens when they are converted to a new release.

After the upgrade is complete, your technical staff can print a report that lists any remaining truncations. The report includes a print out of the screen, showing where the screen was truncated and what text was deleted.

See last month's issue of *NOTISes* for more information on 5.1 screen changes. Plan ahead now to avoid losing screen data in LMS Release 5.1 and MDAS 1.3. ■

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.

Navigator, MDAS, and PACLink

How Navigator Brings Them All Together

In our last issue of *NOTISes* (*NOTISes/80*), we published an article called, "Navigator: The Guiding Force behind NOTIS." We apologize if the article misled any of our customers to believe that Navigator is automatically a part of LMS Release 5.1.

NOTIS users will automatically receive Navigator with MDAS Release 1.3, PACLink Release 1.0, and InfoBase Release 1.0. Anyone with just LMS will not receive Navigator unless they have purchased zero-level MDAS. Zero-level MDAS includes Navigator and all other MDAS specific functionality, such as search stacking and the mark, print, and download feature of Release 1.3.

Navigator is a NOTIS-designed front end that serves as your system's environment manager. It provides an easy, consistent method for accessing your NOTIS and non-NOTIS applications.

With Navigator, you can select from the multiple OPACs or MDAS databases that your library has defined or from the other libraries with whom you are connected via PACLink. You can even use Navigator to access non-NOTIS applications.

Advantages of Using Navigator

If your library has multiple OPACs, MDAS databases, or the PACLink System, using Navigator offers you numerous advantages, such as:

- Provides a mechanism for navigating among NOTIS' public access products.
- Allows for a truly integrated solution that minimizes program modifications to all existing products.
- Creates a menu structure that lets you access non-NOTIS applications that are CICS based.
- Utilizes the Common Command Language command structure (Z39.58) as implemented in other NOTIS applications.

- Operates at both locked and unlocked terminals.
- Supports a broad range of customer options for defining each local implementation.

Navigator is the answer to integrating the variety of databases available on your NOTIS system. With Navigator, your products look similar, and moving from one product to another is easy. ■

New Function Added to Serials Checkin

We are adding a new function to Serials Check-in. The Pattern Data Entry Screen will have a new function key to preview the predicted enumeration and chronology.

The **PF9** key will be functional after you have completely edited and added a pattern to the database. If you press the **PF9** key before you add a pattern, an error message displays ("Please complete pattern before previewing").

Once you have entered the Preview key, the Preview Screen displays, which is similar to the Receipt History Screen. The system calculates a screen's worth of data (enumeration chronology) at a time. When you enter the **PF8** key, the system calculates the next screen's worth of data.

The Preview function always predicts from the start date of the pattern and you can use it to check how a pattern will predict. The Preview function will work with a pattern that has receipts. The received issues will not be noted as received.

After the pattern has been added and before any issues have been received, the pattern can be changed as often as necessary to produce the correct enumeration and chronology for each expected issue and skipped or combined issues. The start date may be changed to narrow the Preview scope. An example of the Preview Pattern Screen is shown on the next page.

Preview Pattern Screen in Serials Checkin


```
06/19/92              Preview Pattern                    LSEPR1

IDENTIFIERS:   XP  ACU1111  BOOK          ISBN 0888447035
      TITLE:   Etienne Gilson, a bibliography = Etienne gilson, une bibliographie

   Location:  gesw     GARRETT SEABURY
Call Number:  Ref. B2430: .G47M4
       Type:  base   Pattern Starts:  01/15/1992    Frequency:  quarterly

Issue Data                                       Expected Date
vol. 62: No. 1  (1992: Jan.)                       01/15/1992
vol. 62: no. 2  (1992: Apr.)                       04/15/1992
vol. 62: no. 4  (1992: July)                       07/15/1992
vol. 62: no. 4  (1992: Oct.)                       10/15/1992
vol. 63: no. 1  (1993: Jan.)                       01/15/1993
vol. 63: no. 2  (1993: Apr.)                       04/15/1993


CLEAR=Exit              PF3=Back                   PF8=Fwd
```

More Good News about New Serials Control

We have several announcements of interest for users anticipating the new serials control module coming in the next release. Several changes have been made in response to comments and suggestions made by the two beta test sites, representatives from the NOTIS Serials Special Interest Group that visited NOTIS to view and test the new software, other users, and NOTIS staff.

Expanding the "Current Issues" Display

A change has been made to the OPAC display of current issues from the new serials control module (LSER) and from receipt statements in the order record. The line limitation has been increased from 15 to 60.

The paragraph "Current Issues" at the top of the second column, page 14, *NOTISes,* January 1992, should be corrected to read as follows. The changes/additions are in boldface.

"The system first looks in LSER and displays up to **60** basic issues that have a status of 'received'. 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 **sixtieth** 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 for the receipt statement(s) of the relevant order/pay/receipt record and displays the data for up to 15 receipt statements. If, in LSER, the system finds fewer than 60 issues with a status of 'received', it then checks for any existing receipt statements in the order/pay/receipt record and displays data from there—but no more than 15 receipt statements. In no case will the system display more than 60 lines, with **no more than 15 of those 60 lines from receipt statements.**

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."

Changes for "Missing"

A change has been made to the OPAC display of missing issues from the new serials control module (LSER). This was done primarily in response to user concerns about patron interpretation of OPAC holdings data.

The first paragraph "Missing" at the top of the second column, page 15, *NOTISes,* January 1992, should be corrected to read as follows.

"Issues listed under this label are those that have not been recorded as received by the predicted date of arrival. Specific status information on the issue may appear in the receipt status/history. The specific status information does not display in the OPAC. "Earlier issues may also be missing" appears at the end of any listing as a system-supplied message."

The OPAC example used in the article is also now out-of-date; erase the issue-specific messages for those shown under the "Missing" label to make the example reflect current functionality.

Deleting Receipts Made in Error

After seeing earlier versions of the new module, several users commented favorably on the check-in features that provide protection against recording the receipt of an issue in error. Nonetheless, they also pointed out that mistakes happen. The ability to delete receipt information in cases where an issue is received in error is a critical need. A new feature has been added that allows you to delete receipt on an issue-by-issue basis. Authorization to perform this function must be explicitly assigned to any operator ID; those without the authorization will not see the delete prompt as shown in the following example.


```
07/28/92           Receipt Status/History: Selected Item          LSERH3

IDENTIFIERS: ZU  AAB5764  SERIAL  ISSN 1054-7134
     TITLE: Information center quarterly. Boston, MA : Weingarten Publications

   Location: main.per    MAIN Periodicals Room              Stmt: 001
Call Number:
      Type: base   Pattern Starts: 02/15/1991   Frequency: quarterly
      Item: vol.8:no.1 (1992:Wint.)

   Received (RC): 02/20/1991
   Expected (EX): 02/20/1992

   Bound (BD): N    Lost (LO): N

Action Listing (AL): <none>


   DELETE (Y or K):  N
Modify status as needed.  Press ENTER.
CLEAR=Exit        PF1=Help       PF3=List of Items      PF4=List of Copies
```

Receipt Status/History: Selected Item with Delete Prompt

Receipt Interval Increased

With an irregular or uncoded frequency, the system requires a receipt interval so that it can predict a next expected date of arrival for the next expected issue. Originally, the system imposed a maximum value of 255 days.

We received several comments that this would clearly not be adequate in many cases (e.g., for predicting a quadrennial, an interval not defined by the MARC format). We agree and it has been changed. The maximum receipt interval is now 9999 days.

Pattern Preview Added

We have also added a brand new feature: the ability to set up your caption/pattern data and then preview the pattern as far out in time as you wish. The following example shows the first screen you would see after pressing PF9 while viewing the caption/pattern data.


```
07/28/92              Preview Pattern                    LSEPR1

IDENTIFIERS: ZU  AAB5764-001  SERIAL  ISSN 1054-7134
TITLE: Information center quarterly. Boston, MA : Weingarten Publications

Location: main.per   MAIN Periodicals Room
Call Number:
Type: base   Pattern Starts: 02/15/1991   Frequency: quarterly

Issue Data                                       Expected Date
vol.7:no.1  (1991:Wint.)                           02/15/1991
vol.7:no.2  (1991:Spr.)                            03/20/1991
vol.7:no.3  (1991:Summ.)                           04/25/1991
vol.7:no.4  (1991:Fall)                            05/30/1991
vol.8:no.1  (1992:Wint.)                           07/05/1991
vol.8:no.2  (1992:Spr.)                            08/10/1991

CLEAR=Exit             PF3=Back                   PF8=Fwd
```

Preview Pattern Screen

The preview always starts at the date specified in your caption/pattern data and is available as soon as you create your caption/pattern data. This will be particularly convenient for checking to make sure that you have set up "normalized irregular" patterns correctly.

You can see the preview into the indefinite future by continuing to press PF8. There is no limit on how far into the future you can preview the pattern. Pressing PF3 takes you back (at any point in the preview) to the caption/pattern record.

Cancellation Improvements

When you set up a cancellation request in the new module, you now create a block whenever

the last issue as specified has been received. If an operator tries to check in a subsequent issue, the system blocks the transaction and supplies an appropriate error message.

You can cancel a cancellation by entering a delete command on the cancellation screen. That action removes the block and allows you to continue to receive the item.

Like all other features in the new module, cancellations are location-specific.

Test Results

Several suggestions from the beta test sites concerning changes to specific features have been incorporated into the new module. We are most appreciative of the thorough testing performed by the staffs at both Vanderbilt University and the University of Michigan.

Of the problems reported by the two beta test sites and by NOTIS staff performing internal testing, there was an approximate 80% overlap. This is a high degree of correspondence among three different groups of testers in three different environments. It also provides a reasonable certainty that we have identified and fixed major problems—the whole point of beta testing.

Testing continues and we continue to incorporate fixes and other changes until the final freeze date for the general release. All outstanding problems reported from any source will be investigated and, as appropriate, fixed for the release.

Please continue to send your questions to the NOTIS Serials SIG, care of Donna Alsbury at FCLDDA@NERVM; (904) 392-9185 Fax. Donna's address is FCLA, 2002 NW 13th St., #320, Gainesville, FL 32609. The next deadline is September 20, 1992 for responses to be delivered at the Serials SIG meeting at NUGM in Chicago.

Our workshop, "New Serials Control: Overview of Functionality and Implementation Issues," has also been scheduled around the country. The initial response after the first three sessions has been very positive, both about the features of the software and the quality of the workshop. Register now to reserve your space. The schedule appears on our new bulletin board service, NOTISrv, as well as in the *NOTIS Catalog of 1992 Workshops* and *NOTISes*. ∎

PACSearch: Searching Remote OPACs

PACLink is a client/server application that permits patrons at one site to connect seamlessly to online catalogs at other sites. PACLink complies with the Z39.50 information retrieval protocol and the Common Command Language standard. NOTIS is now developing PACLink in two parts:
- PACSearch for seamless remote searching
- PACLoan for interlibrary loans

About PACSearch

PACSearch is the search component of NOTIS' PACLink product. PACSearch provides a seamless interface to remote databases through your local OPAC, allowing your patrons and staff to search at other sites running PACLink. PACSearch is managed primarily through the PACSearch System Control File (psys) transaction. Through a series of menu-driven screens, the psys transaction allows you to
- add new remote databases and update or delete existing remote databases
- define client and server system parameters
- define and edit help screens

The PACSearch interface makes the selection and link to another site as seamless as possible. Patrons do not visibly disengage from one system and connect to another. Instead, they are able to broaden their search to include a database that happens to be at a remote site.

Client Server and PACSearch

PACSearch is based on client/server architecture and uses the NISO Z39.50 standard for exchanging MARC formatted information through the TCP/IP communications protocol. Although client and server may reside on a single computer, for purposes of our discussion, the client exists on one machine, and the server it searches, on another, at a remote site.

A Definition of Client Server

In basic terms, a client controls how data is displayed and a server controls how data is stored. A client requests information from the server and displays that information to patrons. Because the client completely controls how information displays, your patrons see record displays with your local library's field labels and display screens when they search a remote site's database.

A server stores data and, when a client requests, runs searches on that data and sends the search results to the client. In PACSearch, a server sends guide and index information, bibliographic records with their associated holdings information, and authority records.

A Client Server Transaction

When a patron enters a search on a remote database, the local computer (the client) sends a search request to that database (the server). This search request includes information on how many records the server is to send in the search response. The server performs the search and retrieves a result set. Depending on the size of the result set, the server sends a search response containing all the records, or only the number specified by the client.

For example, when a patron enters a search statement, the first search response will consist of an index listing a number of bibliographic records.

The patron then asks the client to display a record by entering the record's line number on the index. When this happens, the client makes a present request for the additional records. This present request includes information on how many records the server is to send in the present response. The server will send additional present responses as the client requests more records.

Through the psys transaction, you can define the size of search and present results to provide the best response times for your patrons.

Summary

PACSearch provides seamless searching of remote databases through use of client/server architecture and Z39.50 communications.

Remember, with PACSearch, your site will act as both client and server.
- As a client, your site can request searches and data from servers and display that information to your patrons.
- As a server, your site can perform searches and send the search results to clients. ∎

RDO to Debut with LMS 5.1

IBM has announced its intention to gradually withdraw support for the CICS table definition macros, just as it is withdrawing support for macro level program interfaces. By the time CICS 3.x is in place, most of the old macro tables will be gone.

In anticipation of this change, NOTIS will distribute CICS RDO (Resource Definition Online) information for LMS and associated products beginning with Release 5.1. This is also the last release for which old-style macro table definitions will be provided for the PPT and PCT.

The RDO Advantage

The most obvious advantage of RDO is that it permits interactive, dynamic modification of many system control parameters without requiring that the CICS region be shut down and restarted.

RDO also allows greater flexibility in the way in which these definitions are distributed, permitting NOTIS to provide multiple system models if necessary. The user will be able bring up sample systems in several configurations by changing a single JCL parameter. No PPT or PCT table assemblies will be needed when adding or removing a NOTIS product or feature.

Note that under CICS 1.7 or 2.1, modification of RDO-controlled parameters from a batch utility is limited, requiring that the CICS region be active to permit modification (just the opposite of the old macro tables).

How RDO Works

In summary, RDO acts as an "override" mechanism for the macro tables if they are present. When CICS initializes, it reads the old-style tables for the PPT, PCT, and TCT. It then checks the GRPLST= parameter in the SIT or JCL overrides, and reads the specified resource list (if any) from the CSD file. When identical items are defined in both a table and in RDO, the RDO definition takes precedence.

By specifying PPT=NO, PCT=NO, and/or TCT=NO in your SIT or JCL, you can force CICS

to use only RDO for the specified table, ignoring anything that may have been previously coded in macro format. CICS 3.2 and above will depend exclusively on RDO, and will no longer accept macro tables for these values.

Within certain limits (dependent on the type of entity involved), you can change the RDO definitions while CICS is active. These changes become effective immediately if you issue the ceda install command for the modified resource groups. The entities that are of particular interest to NOTIS users at this time include program, mapset, transaction, and terminal definitions.

Distribution and Installation

Since there is not an adequate facility in CICS Release 1.7 or 2.1 to permit building RDO definitions from a machine-readable source file, NOTIS will distribute a model CSD file on the LMS 5.1 upgrade or installation tape. The CSD file is a standard indexed VSAM cluster.

At the appropriate time in the installation process, customers will run IBM's DFHCSDUP utility to copy the necessary group definitions from the sample file into a working CSD file. These definitions can then be activated either temporarily (by using the ceda install command) or permanently (by using DFHCSDUP or the ceda add command to connect the definitions to a list of resources installed automatically when CICS starts up.)

The distributed model CSD file should not be used directly, because there may be differences in the CSD system structures between your CICS release and the one under which the file was created. The copied program and transaction definitions are compatible across all currently supported releases of CICS.

Outline of RDO Conversion Process

If you are not presently using RDO in your CICS region, you will need to perform the following steps during (or prior to) the LMS 5.1 upgrade:
- Define a suitable DFHCSD VSAM cluster. Sample IDCAMS parameters can be found in *IBM's Installation and Operations Guide* for your release of CICS. A basic CSD file for LMS 5.1 with all products requires about 1600 records with a maximum record size of 500 bytes, or approximately 5 tracks on a 3380 disk drive.
- Initialize the DFHCSD cluster by running IBM's DFHCSDUP utility against it as directed in the same document.
- Add an entry to your FCT for the DFHCSD file. You should specify SERVREQ=(ADD,READ,UPDATE,DELETE,BROWSE) for this entry in order to permit online updates through the ceda transaction. You must also add a DD or DLBL statement for this file to your CICS JCL.
- Run the DFHCSDUP utility to copy NOTIS PPT and PCT definitions from the distributed model CSD file into your new working CSD. *The LMS 5.1 Release Notes and Installation Instructions* contain additional details for this step.
- Use the DFHCSDUP utility in batch or the ceda transaction online to create a resource list containing the RDO groups you wish to have automatically installed when CICS initializes. IBM documents the ceda command options in the *Resource Definition (Online)* manual for your release of CICS.
- Modify your SIT to include a GRPLST= parameter with the name of the resource list created in the previous step. Reassemble and link the SIT.
- Restart your CICS region. If you specified PCT=NO and PPT=NO in the SIT or as JCL parameters, CICS will activate only the programs and transactions defined in the CSD. If you did not override your existing PCT and PPT macro tables, CICS reads the tables and then applies resource definitions from the CSD resource list over the top of the macro definitions. CSD resources with the same name and entity type as a macro definition take precedence over the macro definition.

Sites that are already using RDO in their CICS regions can omit most of the steps above. In this case, you will need to:
- Compare your existing CSD group names to those provided in the model CSD to avoid any conflicts. See the *Installation Instructions* for a list of the group names used in the distribution file. Rename any locally defined groups with conflicting names, and change your list structure accordingly.
- The RDO facility always applies definitions in the order in which they were added to the CSD, so a newer definition with the same name and resource type should take precedence. But, to avoid possible difficulties you should remove any groups containing older NOTIS software definitions from your active list structure.
- Run the DFHCSDUP utility to copy NOTIS PPT and PCT definitions from the distributed model CSD file into your working CSD. *The LMS 5.1 Release Notes and Installation Instructions* contain more details for this step.
- Use the DFHCSDUP utility in batch or the ceda transaction online to add the desired NOTIS resource groups to your default resource list (the one specified on the GRPLST= parameter in your SIT).
- Restart your CICS region to incorporate the new resource definitions.

Additional Information about RDO

For additional information about the features and capabilities of the RDO facility, consult the IBM documentation for your CICS release and operating system. The most relevant titles are the *Installation and Operations Guide*, *Resource Definition (Online)*, *Resource Definition (Macro)*, and *Customization Guide*. ∎

NOTIS Needs Your Input...

So we can continue our efforts to make it easier for you to install and maintain our products. For example, based upon your input, the major new features of Release 5.1—Serials Control and Location-Based Catalogs—can be enabled after installing the base 5.1 programs.

This makes it easier to test and implement the base 5.1 release. We have also moved much of the functionality that previously required source code changes to lsys and nsys.

Please take a moment to fill out the questionnaire that's inserted into this issue of NOTISes.

We would like to continue these efforts to make new releases of NOTIS as easy to install as possible. We have found through working with our beta test sites and Team NOTIS, that there are some site specific source code changes that you must migrate from one release to the next.

NOTIS would like to incorporate as many of these modifications into the base system as possible. Of course, not all changes are appropriate for all sites. Where appropriate, either user exits or lsys options can be used to implement less widely applicable features.

It would be impossible to incorporate every site specific modification into LMS, but we would like to continue the efforts we began in Release 5.0 to make each release a little easier and faster to install. To do this we need your help.

In this issue of *NOTISes* we have included a questionnaire to assist us in determining where you are making source code modifications. Please fill out this questionnaire (or pass it on to your TECH1) and return it to:

> Modifications Survey
> Systems Development
> NOTIS Systems Inc.
> 1007 Church Street
> Evanston IL 60201 ∎

What Are the Tech1's Saying?

To stay connected to you, our customers, the Customer Support Services department makes Support Coordination calls every quarter. This past quarter we successfully contacted 76% of the Tech1's and asked them about their current release of LMS; installing GTO; and about Customer Support Services' expertise and professionalism.

Overall, Tech1's are positive about the NOTIS system and are favorable about how Customer Support Services meets their needs. Most Tech1's like NOTIS Direct and appreciate reaching a support analyst right away.

Jon Howe, the Tech1 from the University of Minnesota, said, "NOTIS Direct is much better than the old way. Programs, documentation, and support have all improved a lot in the past two years. I think NOTIS is very good about getting back to us in a timely manner."

Most Customers on Current Release

Data from our Support Coordination calls show us that the majority of our customers are either on the current release, or planning to be on it in the near future. This is good, because it means most of our customers have the latest functionality.

It is also important for our customers to move to the current release because support for Release 4.6.1 and our license for the BRS search engine ends in August, 1992.

Installing GTO

Of the responding sites, 91% have installed GTO in production. We asked Tech1's about their experiences installing GTO. The data resulted in an almost perfect bell curve, skewed slightly toward GTO being easy to install. If the sites did have difficulty installing GTO, it was generally from the hardware or local network connections.

Professionalism Is Highly Regarded

Customer Support Services' level of professionalism is highly regarded by most sites who responded to our Support Coordination calls. Unlike the subtle bell curve for GTO, this curve shoots up at the high end with an average score of 6.14 on a scale from 1 to 7 (7 being the highest).

The score on professionalism is reflected in the Support Scorecard, published in *NOTISes*.

Many customers took the time to specifically mention individuals who they found to be highly professional and very helpful.

Expertise Is on the Rise

We were also pleased to see that so many of our customers recognize the efforts we are devoting to increasing our level of expertise. Our question on expertise achieved similar results to the professionalism question. On a scale of 1 to 7, the average score was 5.71. Ben Schapiro, Customer Support Coordinator, said that the staff's expertise improved during the quarter in a way that was noticeable to clients.

Areas to Work On

We use our discussions with Lib1's and Tech1's to stay focused on meeting your needs. Feedback from the calls indicates that we need to work on status reporting, so we can make sure that customers are kept up-to-date with their problems and are assured that we are still working on them.

In addition to working on improving status reporting, we want to ensure that any member of a team can assist you when you call. We are striving to improve the knowledge and experience of the support staff. We are also working to improve the number and quality of the channels of communication you have with us, such as NOTIS-L, Bitnet, telephone, FAX, and NOTISrv.

Successes to Date

We have found that most of our customers like NOTIS Direct; they appreciate getting a support analyst right away and believe it is an improvement over voice mail. Many customers said if the analyst who answered the phone couldn't answer their question, then their call was immediately passed to an analyst who could.

Our Support Coordination calls alternate between calling Lib1's and Tech1's every quarter. Next quarter we will be calling Lib1's and pursuing questions on their current release in production; professionalism; expertise; and their experience with the Real Time Phone Support Center. ∎

NOTIS SYSTEMS, INC.

CUSTOMER SUPPORT SERVICES

"Consistent and Timely Customer Assistance"

SUPPORT SCORECARD

The NOTIS Systems, Inc. **Support Scorecard** provides a monthly update of our service level commitments to you, our customers. Our service is measured by clearly defining our goals, and monitoring our performance.

JUNE, 1992

Key Service Area	Goal	Actual
Response Time Immediate - 95% of all incoming calls	95%	100%
Hold Time - Average is less than 2 minutes	2 minutes	.40 min.
Resolve Time Initial Call - 50% resolved on initial call or first day	50%	38.5%
Level 2 - 80% resolved or passed within 5 business days	80%	49.5%
Status Written - provide Customer Service Review Committee status within 2 business days of review	100%	100%
Monthly - provide 70% of customers with monthly status of open problems	70%	65%
Expertise Training - 120 student hours in training, consulting, and research per month	120 hours	81.5 hours
Professionalism Staff - customer feedback of staff professionalism of 4.5 on a 1 to 7 scale	4.5	6.04

NOTIS Hosts SSPA Roundtable

Focus Is on Delivering Quality Software Support

The Software Support Professionals Association (SSPA), held its quarterly National Roundtable here on June 17. Hosted by NOTIS Systems, Inc., the full-day roundtable drew over 40 of the nation's top software support managers to discuss, among other issues, how to ensure that companies deliver the best possible service to their customers.

After a brief welcoming address by Bill Rose, SSPA founder and director, the attendees were introduced to the roundtable panel. Moderated by Maribeth Ward, NOTIS Systems' vice president of customer support; the panel featured Jerry Concannon from Xerox Corporation, Jan Jones from Kraft General Foods, Laura Radke of Software Publishing Corporation, Jim Sauter from IBM, and Bob Fortelka from CUSTOMATION.

The panel began with a discussion of product quality versus service quality: Where should the emphasis be placed? Xerox's Jerry Concannon stressed the need for a "common commitment to quality among all employees." Jim Sauter from IBM discussed "self-empowered teams which would drive product quality horizontally rather than vertically."

Sauter stressed the importance of "non-administrative project teams engaged in a repeatable development process with well-defined roles." An expert in ISO-9000 certification, Sauter described how this new standard for service would affect U.S. companies over the next five years.

To the question, "What is Quality?", Concannon expanded on his view that "quality is a satisfied customer, and quality must be built into each employee's job function." Laura Radke of Software Publishing stated that quality is also a factor of hiring good people and that at SOC, "measuring results at each level of product development is all-important." Jan Jones of Kraft Foods echoed the philosophy that measurement at all points is key, and that companies must consider utilizing outside research organizations that look at industries as a whole.

Reinforcing support representatives for outstanding performance should be a high priority, according to the panel. Radke described SPC's "PAC-Time" and "Three-Letter Club" programs, while CUSTOMATION's Bob Fortelka emphasized that "building team spirit is of utmost importance to ensuring performance excellence; otherwise, some people will tend to hoard knowledge as a means of gaining power."

Fortelka also suggested that support managers "ask the people who are being measured for performance, 'what do you think we should be measuring?'"

Finally, Concannon commented on preparing customers for an upgrade in service quality by recommending that companies conduct a customer roundtable to define what customers want and what they are willing to pay; "benchmarking" to set the precedent for delivering a new level of service.

Following an open discussion segment during which a variety of software support issues were raised, participants were escorted on a comprehensive tour of NOTIS Systems' Support Center. The afternoon session featured a presentation by Carole Norris, NOTIS' technical support manager, as well as the keynote address by Maribeth Ward.

In her keynote, Ward detailed how NOTIS worked to upgrade the level and quality of service being delivered to their customers. She provided insight into NOTIS' emphasis on focused support, their customer-driven staff, self-directed work teams, a commitment to exceptional service delivery, new delivery tools, and customer feedback.

SSPA Director Bill Rose was excited about the success of this roundtable and felt that the attendees picked up some valuable information. "Delivering quality service doesn't just happen because we want it to happen," stated Rose. "It's the result of putting some specific and tested programs into place. We learned about those programs at today's roundtable. The SSPA will continue to provide forums where this topic, as well as many others, can be addressed and explored in detail," concluded Rose. ∎

Check out these modifications in this issue's Support Solutions.

GTO Updated to Reflect USMARC Format Changes

OCLC implemented Update No. 4 to USMARC Format for Bibliographic Data on Aug. 1, 1992. This update includes the 003 field (Control Number Identifier), which is a fixed field containing the National Union Catalog (NUC) symbol of the system whose control number is present in the 001 field. In the case of OCLC, this is OCoLC.

NOTIS modified LGT300P so that OCLC GTO processes records exported through PRISM correctly. Prior to the change, we found that the 003 tag created an extra line in the fixed fields of the bibliographic record. After we implemented the fix, OCLC records containing the 003 field transferred correctly.

OCLC is also validating and defining Field 029 (Other system control number) for OCLC use only. In cases where the 029 displays, it will appear on PRISM exported records unless the user deletes it. Since NOTIS defines this field for the UPC (Universal Product Code) used in 5.1 LSER, we recommend that users delete this field from the OCLC online record before the record is exported.

Several minor changes to codes, indicators, and subfields are also being made. For example, New Country of Publication codes for the former states of the Soviet Union and 074—GPO item number will now be repeatable. NOTIS will update the Tag Table for these changes in GTO 3.1, which will be released with LMS 5.1.

In the meantime, you can modify your tag tables to accept these changes. RLIN also implemented Update No. 4 to USMARC on August 1, 1992, except for the 003 field which they will postpone until February 1993 to coordinate with LC.

We sent this modification over NOTIS-L and NOTISrv to our OCLC GTO customers so they could continue to use the GTO product successfully without interruption. This modification also appears in Support Solutions. ∎

Pre- & Post-NUGM Workshops

Don't forget that you can register for a number of pre- and post-NUGM workshops. We have a variety of offerings for both library and data center staffs. More details are available in both your NUGM booklet and in the workshop catalog.

Register for these workshops using either the registration form found in the *NOTIS Catalog of 1992 Workshops* (July 1992), the form reproduced in this issue, or the NUGM registration form in your NUGM booklet. Or you can call (708) 866-4891. ■

Pre- and Post-NUGM Workshops

Role as LIB1	10/5-7; Evanston, IL	$300
MDAS Management	10/6-7; Evanston, IL	$500
MARC Format	10/8; Chicago, IL	$75†
Everything Computer Center	10/8; Chicago, IL	$75†
Everything Library	10/8; Chicago, IL	$75†
Release 5.1: Internals	10/8; Chicago, IL	$75†
Release 5.1: Operations	10/8; Chicago, IL	$75†
CICS Dump Analysis	10/8; Chicago, IL	$75†
MARC Format	10/10; Chicago, IL	$75†
Everything Computer Center	10/10; Chicago, IL	$75†
Everything Library	10/10; Chicago, IL	$75†
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Release 5.1: Operations	10/10; Chicago, IL	$75†
CICS Dump Analysis	10/10; Chicago, IL	$75†
New Serials Control	10/11; Chicago, IL	$95
Project Management	10/11; Chicago, IL	$95

Updated Regional Workshop Calendar

Many customers have told us how much they appreciate our scheduling a series of regional workshops. The locations and the low cost allow many staff people to attend a NOTIS training session—persons who ordinarily do not get an opportunity to attend events at ALA or NUGM.

Unfortunately, we have had to cancel the workshops on fund management and global heading changes in July due to insufficient registration. If anyone can suggest better times or better locations to get enough people (25-30), contact Stuart Miller.

We can also schedule workshops on demand or under special arrangements with a site or a group of sites. For example, Oklahoma users have arranged for a New Serials Control workshop in October. Users in Indiana and California have also inquired about scheduling a session in their states. Other sites have arranged to have workshops conducted for their staffs only.

Call Stuart Miller at (708) 866-0171 or call (708) 866-4891 and ask for the Professional Services staff person assigned to your area of the country. ■

NOTIS Workshops — August—December 1992*

Title	Date/Location	Fee
Profiling Circ Policy	8/19; Philadelphia, PA	$250
New Serials Control	9/12; Denver, CO	$120**
Fund Management	9/17; St. Louis, MO	$95
MDAS Management	9/22-23; Washington, D.C.	$500
Role as LIB1	10/5-7; Evanston, IL	$300
MDAS Management	10/6-7; Evanston, IL	$500
MARC Format	10/8; Chicago, IL	$75†
Everything Computer Center	10/8; Chicago, IL	$75†
Everything Library	10/8; Chicago, IL	$75†
Release 5.1: Internals	10/8; Chicago, IL	$75†
Release 5.1: Operations	10/8; Chicago, IL	$75†
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Release 5.1: Operations	10/10; Chicago, IL	$75†
CICS Dump Analysis	10/10; Chicago, IL	$75†
New Serials Control	10/11; Chicago, IL	$95
Project Management	10/11; Chicago, IL	$95
Fund Management	10/16; Detroit, MI	$95
GLCH/GLOB	10/16; Detroit, MI	$95
New Serials Control	10/19; Washington, D.C.	$95
New Serials Control	10/20; Philadelphia, PA	$95
New Serials Control	10/21; New York, NY	$95
Fund Management	11/10; Washington, D.C.	$95
GLCH/GLOB	11/10; Washington, D.C.	$95
Fund Management	11/11; Philadelphia, PA	$95
GLCH/GLOB	11/11; Philadelphia, PA	$95
Fund Management	11/12; New York, NY	$95
GLCH/GLOB	11/12; New York, NY	$95

**Before LITA; hotel costs mandate this higher fee. †Half-day workshop.
*All workshops subject to cancellation two-weeks in advance if minimum registration is not met.

The 1992 NUGM Planning Committee Presents

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A FREE WORKSHOP FOR PRESENT AND FUTURE
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TIPS AND GUIDELINES TO HELP MAKE YOU A MORE EFFECTIVE PRESENTER
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- HOW TO USE YOUR AUDIO VISUAL EQUIPMENT EFFECTIVELY
- HANDLING THOSE TOUGH QUESTIONS
- UNDERSTANDING YOUR AUDIENCE
- KEEPING CALM WHEN CONFRONTED WITH THE UNEXPECTED
- USING EFFECTIVE BODY LANGUAGE
- HOW TO KEEP TO YOUR SCHEDULED TIME
- ETC.

OPEN TO ALL 1992 NUGM ATTENDEES

Palmer House

THURSDAY

OCTOBER 8, 1992

1992 NOTIS USERS' GROUP MEETING

THURSDAY MORNING MODERATOR/PRESENTER

TRAINING/PRACTICE

SIGN-UP FORM

_____*SOUNDS LIKE A GREAT IDEA! COUNT ME IN!!*

NAME:_____

SITE:_____

ADDRESS:_____

_____

_____

_____

SESSION(S)

_____I would also like to practice my presentation and work with the equipment I will be using.

I will need approximately_____minutes.

Signature_____ Date _____

RETURN BY AUGUST 31, 1992 TO:

Liz Feltmann
NOTIS Systems, Inc.
1007 Church Street, 2nd Floor
Evanston, IL 60201
Phone: (708) 866-0180
FAX: (708) 866-0178

OPAC SIG Has NUGM Programs to Tempt You...

By Mary Pagliero Popp, Head Library Instruction
Indiana University

The OPAC, User Education and Staff Training SIG has a great show planned for you at this year's NUGM. We will have four programs to tempt you!

"Evaluating OPAC Screens," Session 2
Thursday, October 8 from 2:30-3:30 pm

Features three different methods of evaluating the effectiveness of your OPAC screens. Barbara Prior of the University of Louisville will give you ideas about ways to use staff to evaluate screens, describing criteria, procedures, and costs.

Gwen Pershing, Indiana University, will describe using targeted transaction logs to answer specific questions about how users work with the catalog. Laurie Cohen, from the University of Pittsburgh, will show the user surveys Pitt developed to find out how users search, whether they use help screens and other instructional materials, and what they think about 5.0 changes, such as labels on bibliographic record screens, brief and long view, and the redirected search.

The surveys were done both before and after MDAS implementation. All of the speakers will talk about changes made to their screens or instructional materials as a result of their evaluations. Mary Pagliero Popp of Indiana University will moderate the session.

"Access to Internet OPAC Catalogs," Session 11
Thursday, October 8 from 3:45-4:45 pm

Attend this session to learn some of the exciting ways NOTIS sites have implemented access to OPACs through the Internet, where more than 270 catalogs are available.

Andrew Perry of SUNY-Binghamton will talk about PACLink and Z39.50 compared with telnet/tn3270 and telnet front ends. He will discuss challenges for the PACLink consortium and speculate about the future.

Norman Langston of Purdue University will describe three gateways: CATNET (developed at Purdue), LIBTEL (a UNIX shell script to more than 200 OPACs), and GOPHER (a University of Minnesota development that gives a peek at the future of distributed processing). Toni Olshen will describe the LIBNET system developed at York University and integrated into their OPAC, providing information about the background and rationale of the program, process, requirements, and evaluation. Daniel Ferrer of Central Michigan University will moderate the session.

"Location Based Searching: User Needs, System Realities," Session 20
Thursday, October 8 from 5:00-6:00 pm

Eagerly awaiting the new location-based catalogs feature of 5.1? Find out the realities of implementation by attending this session.

The session is moderated by Betty Landesman of the George Washington University. The session features Ramona Steffey Madewell of Vanderbilt University and Beth Warner of the University of Michigan. They will describe the experiences of their beta test sites.

They will address philosophical and technical considerations in defining catalogs, display options, system resource implications, and user reactions. Since they are still in beta testing as of this writing, we (and they) do not yet know exactly what they will say. But we should come away with a number of issues to chew on as we plan for 5.1 implementation. This session is co-sponsored by the Consortium SIG.

"K=NOTIS User Training not Bibliographic Instruction," Session 35
Friday, October 9 from 9:15-10:15 am

This session is aptly titled because strategies for user training introduced in this session will NOT include bibliographic instruction, moderated by Brenda Turner of Lexington Community College.

Point-of-use instruction may be the most effective form of training because the user, having clearly established a need, is receptive to learning. Carol Caro will explain how point-of-use instruction is handled at Boston College.

Nancy Buchanan, from Texas A&M University, will introduce methods used to identify and train the remote user. Nancy will share information about remote user training programs they have implemented and offer suggestions that may work at your site.

Computer-based end user training may be a very desirable alternative, particularly when reference desks are experiencing low staffing or users are too timid to ask questions. At the University of Delaware, tutorial and hypercard programs are made available. Kristin Antelman will describe how the programs work and explain users' responses to these programs.

And not least is the OPAC SIG business meeting—always a lively event! Mark your calendar for Friday, October 9 from 5:30-6:30 p.m. Carol Caro and Mary Pagliero Popp, SIG co-chairs, will plan a program with plenty of discussion. Go to dinner after the meeting to discuss 5.1, staff training, user education or...

We look forward to seeing YOU in Chicago. ∎

NOTIS Classics Presents: The NOTIS Taste Test at NUGM

By Nancy John
University of Illinois at Chicago

The NOTIS Classics Inc. SIG will present "The NOTIS Taste Test" at the 1992 NUGM on Saturday, October 10, 1992 at 10:30–11:30 a.m. The program will feature two classics who need no introduction—Jim "The Source" Aagaard and Mark "The MVS Kid" Hinnebusch. Jim and Mark will address designing and developing the system, the architecure of the system, and the LMS in our future. An edited version of the premise given to the speakers follows.

NOTIS has chosen a particular strategy toward systems development and there are certain values that affect the software construction; the values of today may conflict with the values of the software when we old-timers bought in. Some possible examples are the efficiency of code and more importantly, execution of code (cpu, i/o), the flexibility (did we used to be able to enhance the software more easily?), the durability (did the online system validate more data?).

The system is more complex and has more functionality, so maybe any change in values is good? necessary? unfortunate? What are the design features (not functionality) of the system we'd like to have in our future?

Should NOTIS go UNIX/AIX? C? What should client-server stuff really mean for NOTIS, just PACLink and TechLink, or other things? The modest goals of the session are to identify some strategic opportunities NOTIS Systems, Inc. might pursue to improve the software. In short, we want a few good ideas!

The NOTIS Classics are the NOTIS teams at the 13 NOTIS sites that ran a version of NOTIS. NOTIS Classics Inc. SIG meetings, programs, and gatherings are always open to any NOTIS-ee, but attendees must pay for their own refreshments. ∎