

NOTISes

*For users of
NOTIS
library
information
systems*

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SEPTEMBER 1992 • Number 82

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NOTIS Introduces QuikReports with Special Offer

You can now generate reports easily and quickly with NOTIS' new reporting package, QuikReports. More than 50 reports are available in QuikReports covering all modules of the NOTIS system and general reports including accreditation statistics, programmer reports, and collection management reports.

NOTIS is announcing QuikReports with an introductory offer. If you purchase the complete report package by October 31, 1992, you'll receive a 15% discount off the price plus we'll defer payment until July 1993.

QuikReports is user friendly, enabling you to submit report requests online and locally tailor the record selection of criteria and sorting of elements in each report. Reports that are required at regular intervals need to be scheduled only once and non-scheduled reports can easily be requested through online menus.

In addition, data not available in the NOTIS system can be collected in a cumulative file for reporting. Because QuikReports is written in SAS, the standard reports can be modified to fit your needs.

QuikReports has a modular structure; therefore, you can purchase any one of the module or general report portions of the QuikReports package separately.

QuikReports is easy to install allowing you to generate reports immediately through simple menu selections.

We developed QuikReports directly from customer suggestions. We look for your continued ideas to enhance and expand this product with additional reports to meet your needs.

For more information on QuikReports, please contact your Marketing Representative or NOTIS Sales and Marketing at (708) 866-0150. ■

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BULLETIN

Check out the cassette order form for NUGM presentations inserted in this issue.

NOTIS NEWS

Release 5.1 New Serials Control and the Vendor Invoice Tape Load Program

NOTIS users should be aware that Release 5.1 does not require your vendors to make any changes to the invoice tapes that you produce. We have not changed the Vendor Invoice Tape Load Program Specifications as updated following Release 5.0.

Nonetheless, with Release 5.1, NOTIS users who load vendor invoice tapes should be aware that we have changed the program that produces the exception report, "Line Items Loaded with Warnings." The program continues to check the receipt statements from the order record, but it also looks for receipts in the receipt history that were created by using the new serials check-in function. Therefore, the exception report tracks all receipts no matter where they are recorded.

If your vendor still needs a copy of the invoice tape specifications, ask your vendor to send a self-addressed envelope or mailing label to NOTIS Systems, Inc., 1007 Church St., 2nd Floor, Evanston, IL 60201-3622, Attn: Jody Terry. ■



NUGM 1992 Information

If you need accommodations at 1992 NUGM for a disability, please contact Marla Levitt at Events inc., 916 Belle Plaine, Chicago, IL 60613, (312) 975-3515. Please call within 5 working days of NUGM.

The 1992 NUGM registration bays will be open as follows:

Wednesday	October 7	3:00 pm—6:00 pm
Thursday	October 8	8:00 am—6:30 pm
Friday	October 9	7:30 am—6:30 pm
Saturday	October 10	7:30 am—4:30 pm
Sunday	October 11	7:30 am—4:30 pm

Register for all pre- and post-NUGM workshops when you register for NUGM. If you're attending pre-NUGM workshops in Evanston on October 5-7, you should have received separate instructions. ■

NOTIS

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CONTRIBUTIONS: We welcome articles and suggestions from the user community. Please call for formatting suggestions before submitting items for publication.

MANAGER, DOCUMENTATION SERVICES
Jane Larkin

EDITOR
Robyn McMurray

ASSISTANT EDITOR
Sherri Miller

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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.

NOTIS Announces PACLoan for IntraSystem Loans

Instead of asking patrons to manually fill out a loan request form and requiring your Interlibrary Loan Office to validate the information and communicate it through mail or fax to another campus library, you can now automate the entire process with IntraSystem Loan, a subset of PACLoan, NOTIS' new interlibrary loan system.

Making Requests through IntraSystem Loan

IntraSystem Loan offers electronic processing and enables you to transmit requests between library units utilizing the same NOTIS package. Patrons can request materials in the local OPAC and have them delivered to the location that is most convenient for them.

A patron can make a request by using the request loan command and completing the menus on the loan request screens. The bibliographic information automatically appears on the request screen, eliminating errors and incomplete information to process the loan request.

The patron can enter the delivery location and the date after which the material is no longer needed. The delivery location list is defined by the library and may vary based upon a patron's authorization, which is identified through an ID on the Patron Sign On screen.

The delivery location may be another campus library, a different library on the same campus, or an individual's office. If photocopy requests are allowed, and a patron makes such a request, screens prompt the patron for needed information and displays a copyright notice. This is a great benefit for MDAS libraries.

PACLoan Increases Service to Patrons

The patron can enter the help command from any screen in the loan request process. PACLoan increases service to patrons by giving them a convenient way to request and receive materials.

All requests are sent electronically to the lending office associated with the pickup location. The

requests print automatically on a CICS addressable printer.

The printed request contains bibliographic information and patron identification. It can be used as a pickup slip and as a mailing label. The accuracy of information for the loan request is greatly improved through an automated process, reducing both staff and patron time to fulfill the request.

A Cost-Effective Solution for Handling Loan Requests

IntraSystem Loan offers the most cost-effective solution for handling the growing number of intercampus loan requests. IntraSystem Loan is one component of NOTIS' new PACLink system. PACLink seamlessly interconnects a library's OPAC to other non-affiliated libraries' holdings through an OPAC-to-OPAC connection and automatically processes requests for document delivery and interlibrary loans.

PACLink uses the "open systems protocol" Z39.50 and communicates with remote libraries via the TCP/IP Internet.

Sites that purchase IntraSystem Loan now, and decide to upgrade to the entire PACLink system in the future, will receive credit for their PACLoan inter-campus system. For more information on PACLoan, please contact your Marketing Representative or NOTIS Sales and Marketing at (708) 866-0150. ■

Request Verification Screen

Intercampus Loan Request	Request Verification
This item will be requested for you:	
AUTHOR..... Yee, Barbara Homer.	
TITLE..... Cardiac critical care nursing /	
PUBLISHER..... Boston : Little, Brown, c1986.	
Provide the following data if appropriate. Press CENTER when finished.	
Date item no longer needed (mm/dd/yy): 08 / 24 / 92	
If not free, will you pay for the item? (Y/N): N	
Notes:	
Delivery Location: MAIN LIBRARY	
COMMANDS:	CANCEL HELP Display Locations
NEXT COMMAND:	

Downloading Records with MDAS 1.3

With MDAS 1.3, you can download citations to a personal computer. In *msys* and *lsys*, you define brief and long formats for each database and OPAC that has downloading capabilities. In *nsys*, you define the downloading option as part of terminal group definition.

The MDAS 1.3 *send* command works with both the MS-DOS Kermit and the IND\$FILE protocols. NOTIS will provide Kermit PC software and documentation to all MDAS and InfoBase customers. IND\$FILE is available from IBM.

Once you send the citations to the PC's hard drive, the file can be translated into word processing programs, such as Word for Windows. You can use the translated file in a bibliography or use it to format and print customized search results. You can then edit the citations before you print them.

MDAS 1.3 creates brief and long send formats based upon the existing display format for each database. You can customize these formats for your site. You can also decide whether or not to include labels and MARC tags in the send format.

In *nsys*, you define a system-wide default send format. The *set send* command changes this default during a search session. The *mark* command flags records for downloading. The *send* command instructs the system to download the records. When a patron issues a *send* command, the system displays a message that instructs the user to invoke the download protocol, either Kermit or IND\$FILE.

Executing a Send Command

Kermit is a widely used file transfer program that allows your PC to interact with a mainframe. Install the Kermit software on both the PC and the mainframe. The PC must belong to a *nsys* terminal control grouping that has Kermit defined as the download option. (This definition is set in a new *nsys* field on the Terminal Control Basic Parameters Screen.)

Below are screens from an author search done through a Kermit dial-in. We'll follow the process through the *mark* and *send* commands and then transfer to Kermit to receive the record. Finally, we'll take a look at the downloaded citation translated into a word processing file.

The command line on Screen 1 shows that the system is ready to mark records 2, 3, 4, 5, 9, and 12.

Screen 1

```

Search Request: A=SEUSS                      EVERY COLLECTION
Search Results: 34 Entries Found              Author Index
-----
SEUSS DR
1 *For Information on this Heading, Type 1
SEUSS DR
2 AND TO THINK THAT I SAW IT ON MULBERRY STREE <1937> (TS)
3 BARTHOLOMEW AND THE DOBLECK <1949> (TS)
4 BUTTER BATTLE BOOK <1984> (TS)
5 CAT IN THE HAT <1957> (TS)
6 CAT IN THE HAT <1957> (TS)
7 CAT IN THE HAT COMES BACK <1958> (TS)
8 CAT IN THE HAT DICTIONARY <1964> (TS)
9 DR SEUSS ABC <1963> (TS)
10 EYE BOOK <1968> (TS)
11 FOOT BOOK <1968> (TS)
12 FOX IN SOCKS <1965> (TS)
-----
START over      Type number to display record  <FB> FORWARD page
HELP           PRINT
OTHER options  MARK
NEXT COMMAND: MARK 2-5 9 12
Esc-ctrl-@ help: *11 port: 1 speed: 2400 parity: even echo:ren VT320...
    
```

The command line on Screen 2 shows the mark was successful and the send command is ready.

Screen 2

```

Search Request: A=SEUSS                      EVERY COLLECTION
Search Results: 34 Entries Found              Author Index
-----
SEUSS DR
1 *For Information on this Heading, Type 1
SEUSS DR
2 AND TO THINK THAT I SAW IT ON MULBERRY STREE <1937> (TS)
3 BARTHOLOMEW AND THE DOBLECK <1949> (TS)
4 BUTTER BATTLE BOOK <1984> (TS)
5 CAT IN THE HAT <1957> (TS)
6 CAT IN THE HAT <1957> (TS)
7 CAT IN THE HAT COMES BACK <1958> (TS)
8 CAT IN THE HAT DICTIONARY <1964> (TS)
9 DR SEUSS ABC <1963> (TS)
10 EYE BOOK <1968> (TS)
11 FOOT BOOK <1968> (TS)
12 FOX IN SOCKS <1965> (TS)
-----
START over      Type number to display record  <FB> FORWARD page
HELP           PRINT
OTHER options  MARK
Mark command successfully processed.
NEXT COMMAND: SEND
Esc-ctrl-@ help: *11 port: 1 speed: 2400 parity: even echo:ren VT320...
    
```

Screen 3 shows that the *send* command was successful and that Kermit is ready to receive the file on the PC.

Screen 3

```

Search Request: A=SEUSS                      EVERY COLLECTION
Search Results: 34 Entries Found              Author Index
-----
SEUSS DR
1 *For Information on this Heading, Type 1
SEUSS DR
2 AND TO THINK THAT I SAW IT ON MULBERRY STREE <1937> (TS)
3 BARTHOLOMEW AND THE DOBLECK <1949> (TS)
4 BUTTER BATTLE BOOK <1984> (TS)
5 CAT IN THE HAT <1957> (TS)
6 CAT IN THE HAT <1957> (TS)
7 CAT IN THE HAT COMES BACK <1958> (TS)
8 CAT IN THE HAT DICTIONARY <1964> (TS)
9 DR SEUSS ABC <1963> (TS)
10 EYE BOOK <1968> (TS)
11 FOOT BOOK <1968> (TS)
12 FOX IN SOCKS <1965> (TS)
-----
START over      Type number to display record  <FB> FORWARD page
HELP           PRINT
OTHER options  MARK
Please escape to local Kermit now to RECEIVE the file(s).
NEXT COMMAND: SEND
Esc-ctrl-@ help: *11 port: 1 speed: 2400 parity: even echo:ren VT320...
    
```

Now, type the standard MS-DOS Kermit command, ALT-X. This command switches you over to your PC session. At the bottom of the screen, type RECEIVE at the Kermit prompt. A screen displays as shown in Screen 4.

Screen 4

```

MS DOS Kermit: 3.11  7 Sept 1991 patch level 9

File name: CFTR701.TS
KBytes transferred:1
Percent Transferred:100%
Receiving: Completed

Number of Packets:14
Packet Length: 4
Number of retries: 1
Last Error:
Last Message: Renaming file to CFTR707.TS

MS-Kermit>
Esc-ctrl-@ help: *11 port: 1 speed: 2400 parity: even echo:ren VT320...
    
```

You can now return to the mainframe session and resume searching or remain on the PC. Two possibilities for viewing the files are:

- Type <filename> |more at the DOS prompt.
- Start up your word processing program and open the file as a text document.

Below is how the citations can look if you download them as we did in screens 1-4. We defined this database's format to include MARC tags.

```

100:00: |a Seuss, |c Dr.
245:10: |a And To Think That I Saw It On Mulberry Street /
260:0: |a Eau Claire, Wis. : |b e. m. hale, |c c1937.

100:00: |a Seuss, |c Dr.
245:10: |a Bartholomew And The Oobleck;
260:0: |a New York, |b Random House |c <1949>

100:10: |a Seuss, |c Dr.
245:14: |a The Butter Battle Book /
260:0: |a New York : |b Random House, |c c1984.

100:00: |a Seuss, |c Dr.
245:14: |a The Cat In The Hat,
260:0: |a Boston, |b Houghton Mifflin |c <1957>

100:10: |a Seuss, |c Dr.
245:10: |a Dr. Seuss's ABC.
260:0: |a New York : |b Random House, |c c1963.

100:10: |a Seuss, |c Dr.
245:10: |a Fox In Socks,
260:0: |a New York : |b Beginner Books, |c c1965. ■
    
```

NOTIS Is Distributing KERMIT Books with MDAS 1.3 and InfoBase

The Kermit protocol, which is widely used for data transfer, is available as shareware and will be supported in NOTIS download functions starting with MDAS 1.3 and InfoBase. To ensure that NOTIS customers have easy access to both the software and its use, NOTIS is sending a copy of *Using MS-DOS Kermit: Connecting Your PC To The Electronic World* (Second Edition, by Christine M. Gianone, published by Digital Press) to each MDAS 1.3 and InfoBase customer.

The book includes a diskette with Version 3.11 of Kermit. One copy will be mailed to the Lib1 contact at MDAS/InfoBase sites. Our experience with PC-based products in the past has been that Lib1 contacts are more likely to be involved in PC implementations than are Tech1's. We will ask Lib1's to forward the book and diskette to whomever is most closely involved with downloading activities at each site.

NOTIS will ask customers to test download problems with Version 3.11 of the Kermit software before reporting them to Customer Support. The reason we ask this is to insure that the problem is not specific to other implementations of the Kermit protocol.

You may wish to consider ordering quantities of this book from your local bookstore to aid library users who will be using the download capability. Wholesale orders for this book can be made through:

Prentice-Hall
200 Old Tappan Road
Old Tappan, NJ 07675

Phone: (800) 223-1360
Fax: (800) 445-6991

OR
(201) 767-5852 from New Jersey
Please refer to ISBN 0-13-952276-X. The retail cost for this book is \$34.95. ■

Now Available: The Acquisitions Self-Paced Study Guide

We have completed the new *Acquisitions Self-Paced Study Guide* and it is now available. This study guide is a great resource for anyone who wants to learn more about the NOTIS acquisitions 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 acquisitions 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 goes into the topic of acquisitions covering both the basic and advanced sections.

The Basic Acquisitions Section Teaches You the Elementary Tasks

The elementary tasks of the acquisitions process include placing an order for one copy of an item, receiving the item, and posting payments for the item.

You will learn which records must already exist before you can place an order for an item. You will also learn to read the copy holdings record, the order/pay/receipt record, and the invoice record.

The guide contains exercises that teach you to identify the record's fields and interpret their values. You will learn how these records are used in the acquisitions process.

The guide has lessons on reading these records in the order that you use them. In this way, when you are completing a task and need to check information in one of these records, the record will already be familiar to you.

For example, before you place an order for an item, you will learn to read the copy holdings

record. Before you post payment for an item, you will have a lesson on reading and understanding the invoice record.

The Advanced Acquisitions Section Covers the More Complex Tasks

The more complex tasks of the acquisitions process includes ordering a monographic series and ordering added volumes. You will also learn to place an order for multiple copies of one item and post receipt for them.

You will learn when and how to create multiple division orders, and finally, you will learn how to cancel orders and produce claims and other correspondence.

For each acquisitions feature, you can complete practices to help you understand a particular acquisitions 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 *Acquisitions Self-Paced Study Guide* is great for novices and experienced users. It will familiarize you with the NOTIS acquisitions 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. The cost of this guide is \$50. To order the *Acquisitions Self-Paced Study Guide*, call (708) 866-0199. ■

JCL Revamped for Release 5.1

Customer Support Services revised the job control language (JCL) for Release 5.1 of the Library Management System. Last winter, we sent a survey to all Tech1's after we rewrote the JCL for Release 5.0. We asked Tech1's how they liked the rewritten JCL and what additional changes they would like to see.

The majority of our customer sites that completed our survey responded favorably to the rewritten JCL and liked running jobs from procedure libraries.

As you may recall from the article we published in the January 1991 issue of *NOTISes*, "Technical Support Is Rewriting JCL for LMS Release 5.0," our goal in rewriting the JCL included structuring MVS and VSE jobs to make them as similar as possible; minimizing any local changes needed to run distributed JCL; and easing documentation requirements.

We are making additional changes to the JCL in Release 5.1 because we want to make it easier to install, easier for you to use, and more predictable. Customer Support Services reviewed 160 of the jobs that we distributed with Release 5.0 and completed the following changes to the JCL for Release 5.1.

Job Control Members Get Updated

- Job Descriptions—At the request of Team NOTIS, we added the one-line job descriptions that are found in the *Technical Reference Manual* to the job control members.
- JOBLIBs—We updated the JOBLIB statements so the job control members now have JOBLIBs pointing to 5.1 libraries.
- Additional Parameters—We have ensured that all parameters in the procedures are in the job control members.

We Revised Procedure Members

- Parameter Defaults—We removed the parameter defaults that were defined in the procedures. Instead, all parameter values are defined in the job control members.
- Hard-Coded Space Definitions—We removed all hard-coded space definitions and made them parameters and added them

- to the job control members.
- Comments—We removed the comments so that the *Technical Reference Manual* is the sole source of job descriptions allowing you to find the most up-to-date information in one place.
- Imbedded UPSI Switches—We removed imbedded UPSI switches and made them parameters.
- VSE PROCs—We parameterized the RECS field to allow greater flexibility in file definitions.

We Reviewed and Updated Documentation

- Reviewed all documentation for completeness, accuracy, and clarity.
- Revamped the entire *Technical Reference Manual*. Documentation Services is reissuing the entire manual for Release 5.1.
- Included new parameters in the documentation.
- Created flowcharts if the job involved more than one step.

Customer Support Services and Documentation Services have worked hard to improve the JCL for Release 5.1. We made these changes to ensure that the JCL is easier to use, easier to install, and more predictable. We'd like to thank the Tech1's and TeamNOTIS for taking the time to provide us with suggestions on how to improve the JCL. ■

Team NOTIS and RID Improve Upgrade and Install Procedures

Team NOTIS and NOTIS's Release Integration and Distribution group have redesigned the procedures used to upgrade and install NOTIS products. Over the course of the past few months, Team NOTIS members assisted the RID staff in examining the installation and upgrade procedures. The end result of that examination process was:

- established a standard order, structure, and content for installation and upgrade documents and tapes
- drafted the *Installation and Upgrade* document for the LMS 5.1 product for our early release sites to use

To help meet these goals, the *Installation and Upgrade* document is now divided into three sections: Release Notes, Installation, and Upgrade.

The Release Notes section will assist you in planning the installation or upgrade of a product; it lists the disk storage requirements, summarizes the upgrade steps, and provides a description of what is new, changed, or deleted in this version of the product.

The Installation section provides instructions on creating a new CICS region with NOTIS training files and standard software. This region can be used to gain familiarity with the new product or release, to train staff, and to test problems reported in your other regions (after they have this product or release installed).

Finally, the Upgrade section will be used to put this new product or version into existing regions. It covers file conversions, CICS region modifications, and other tasks typically performed during an upgrade.

We anticipate many benefits to you, the Lib1 and Tech1, from this process:

- High quality, predictable installation and upgrade instructions
- High quality, predictable tape contents
- Minimal time required by computer center staff to install and upgrade

- Better estimate of the time required to perform an installation or upgrade
- An easy process to create a training and testing CICS region
- Use of the same job for unloading any NOTIS product tape

Come visit us at the RID Poster Session at NUGM '92 for more details on these and other improvements. ■

Team NOTIS Tries to Fulfill a Broad Agenda

By Alan Alexander-Manifold, Purdue University

The Team NOTIS meeting in July was packed with formal and informal discussions, presentations, and demonstrations. Informal discussions began on Tuesday evening and resumed at a 7:15 breakfast meeting on Wednesday morning before moving to NOTIS headquarters.

Customer Services Explains Their Efforts to Provide Customers with Quality Support

Maribeth Ward, NOTIS vice president for Customer Services, spoke to the group about NOTIS efforts to provide quality support. She said, "Unlike a car, NOTIS has no warning lights that say that part of the system is wearing out. The best we can do is to provide a quick response when something breaks."

In addition to speed; however, they must consider the cost of any fix and react accordingly. Meanwhile, Customer Services is working more closely with development to identify potential support issues, and engineer the system up front to make it easier to provide support.

The group then heard brief presentations from four NOTIS staff members. Paula Cates discussed staff training, including training in NOTIS modules and phone skills, cross-training, intern-

ships at user sites, and transitional teams for new releases.

Cheryl Wallace presented a new form for problem status reporting that will involve customer response. Tom Marqui discussed their review and standardization of the JCL, which should be completed for the 5.1 general release. Finally, Helen Gbala discussed the modifications to GTO to handle OCLC and RLIN changes for support of MARC Update 4.

Criteria for Technical Support Awards

The group agreed that creativity, responsiveness, initiative, and communication were important criteria for an award for a NOTIS technical support staff member. They agreed to let Team NOTIS member Leigh Williams of Stephen F. Austin University handle the process of general nominations and voting through NOTIS-L. The award will be presented at NUGM at the "Bum Steer Roast."

How NOTIS Can Use NOTIS-L

Team NOTIS creator Carole Norris, manager of Customer Support Services, mentioned that they monitor NOTIS-L. The team encouraged NOTIS to get involved in NOTIS-L discussions. The main purpose of NOTIS-L is for the users to receive and send assistance and ideas directly to each other. All participants agreed that sometimes a message from NOTIS would be helpful, if it is timely, accurate, well tested, and factual. Also, NOTIS could report when they are working on a solution.

RID Simplifies Tape Production

Team NOTIS then heard from Jim Miesse and John Bodfish of the Release Integration and Distribution Department about their simplified and standardized tape production. Team members gave comments about draft 5.1 release installation documents.

Performance Data Given on 5.1

After an open lunch with NOTIS staff, Team NOTIS member Tim Prettyman of the University of Michigan, gave performance data collected from TMON on their beta version of LMS 5.1. NOTIS appreciated the data, which they would like to provide with each general release. Team members Paul Asay of Indiana State and Alan

Alexander-Manifold of Purdue are both at 5.1 early release sites and were also interested in the data.

NOTIS Products in the Works

Maribeth Ward and John Kolman, vice president for Systems Development, gave the group a NOTIS product update. Their new client/server model, implementing the ANSI Z39.50 for inter-system communication, gives NOTIS much more flexibility in tailoring the system to different hardware, software, and network environments.

They may be able to sell selected products to sites that are not interested in their total solution. They may also be able to mix and match user interfaces and database servers to come up with an appropriate solution for almost any site. "One size won't fit all, but one flexible architecture will," Kolman stated.

PACLink, NOTIS' first announced Z39.50 product, is currently being beta tested by sites in Indiana and New York, and should be ready for general release soon. But InfoBase, a product that permits MDAS-type local database mounting and searching on a UNIX-based computer, was already being prepared for shipment to the launch sites. Team NOTIS members got a demonstration of InfoBase, which was also featured at the ALA annual meeting in San Francisco.

Ideas and Plans for Team NOTIS

The group discussed how to extend the Team NOTIS concept to actually help with problem solving. Everyone agreed that setting up a formal process for sites to assist NOTIS in solving problems from other sites would be administratively cumbersome and unproductive. They recommended leaving things as they are, with sites requesting help through NOTIS-L and other channels and getting help from whoever is willing.

Team NOTIS plans to meet next with the MVS and VSE SIG chairs at NUGM in October. This will be the first opportunity for the SIG chairs to meet with the group they helped to create. Together they will discuss the relationship between Team NOTIS and the SIGs. The team bid farewell to member Michael Seadle, who planned to leave Cornell in late July. He plans to work on a book on databases. ■

Support Scorecard

Questions and Answers Submitted for the ALA Annual Conference Meeting of the NOTIS Serials SIG

LSYS

Q. Is it possible to set up LSYS so an operator has authority to create/update LSER records for some processing units/locations and have view-only access to other processing units/locations?

A. It depends upon the processing action to be performed. For example, for check-in, operators see only the locations for which they are authorized to receive materials. The same operators could, however, be authorized to view another processing unit's caption/pattern records in order to copy data to their own records.

Record Selection

Q. How will the UPC index be created? Will we have to type in the number somewhere in the caption/pattern data or will this index be supplied somehow?

A. You will type or scan the UPC number into an 029 field in your NOTIS bibliographic record. The number will automatically be indexed in the NOTIS standard number index. You can retrieve the record in staff mode by using the new index code "nu."

The decision to use the 029 field was made before MARBI (in January 1992) approved use of the 037 field for the UPC number. The 037 field is used for stock numbers, is indexed in the NOTIS standard number index (retrievable by a "nk" search), and is repeatable.

Unfortunately, the timing of that decision did not allow us the time to investigate whether or not the use of two different number types with the same field tag would affect the NOTIS standard number index. For the time being, then, enter the UPC number into an 029 field.

Q. Can we use the same kind of barcode readers for LSER that we use for circulation?

A. The devices your library currently uses for

circulation purposes may be able to handle the UPC and SISAC barcodes. In the (probably unlikely) event you have any extra ones available, check the manuals or ask the vendor to determine: (1) if the device can read UPC and/or SISAC barcodes; and (2) if the device needs to be manually reset to handle different types of barcodes, a common requirement with older scanners.

For convenience in serials check-in, we recommend you use a scanning device that automatically resets to handle different barcode types. Based on our experience, a hand-held device provides greater flexibility.

Scanning devices can be attached to most terminals and/or microcomputers, but make sure that the device you select can be used with your particular model.

Q. When you scan a SISAC barcode, does it match only on the 022 subfield |a or does it also match on 022 subfields |y and |z?

A. Scanning the SISAC barcode is equivalent to an "ns" search with an ISSN number in the NOTIS standard number index. The index includes ISSNs from all three subfields. Therefore, a SISAC barcode scan matches on an ISSN from any of the three subfields.

Holdings Maintenance

Q. What is an "*" (uncoded) pattern and how does it differ from "x" (irregular)?

A. "Uncoded" is equivalent to a blank and should be used if the publication is regular but there is no MARC code for the particular frequency, e.g., quadrennial, quinquennial, etc. "Uncoded" requires a receipt interval for prediction. "Irregular" and the other frequencies should be used as defined by cataloging practice.

Q. Why are "First Item Expected On" (and other dates in LSER) expressed as mm/dd/yyyy? Staff

are used to entering dates as mm/dd/yy.

A. This has been corrected. You can enter the date as mm/dd/yy.

Receive New Item

Q. Currently, NOTIS has not committed to the support of serials check-in on the order/pay/receipt record after Release 5.1. Since LSER does not provide for the check-in of many business and legal materials with multiple receipt patterns, i.e., materials now checked in on multiple divisions, or for check-in of materials with irregular receipt patterns, is NOTIS planning any alternative to the order/pay/receipt record which would permit check-in of these materials? Will NOTIS continue to support the current check-in methods until a suitable solution is provided?

A. First, the new serials control module will most certainly accommodate check-in of materials with irregular receipt patterns. Using the frequency code of "irregular" and specifying a receipt interval (up to 9999 days), the system will predict virtually any interval.

By using the actual receipt dates, the system will, in time, have a more accurate predicted date of arrival of the next expected issue. Of course, if a title is completely random in its frequency and in its captions, it could hardly be predicted under any system.

Some publications with multiple receipt patterns will be accommodated by establishing a caption/pattern for the basic unit and a caption/pattern for its supplement. For multiple supplements, it is also possible to use copy statements to represent each of the supplementary materials.

Each copy statement would have its own caption/pattern record for prediction. Use of the various notes fields could be used to identify each supplement in the OPAC holdings displays.

The current method of serials check-in will be supported in Release 5.1. We anticipate that most users will implement new serials control features over a period of time. It is quite possible that support for the current method will be extended beyond Release 5.1, but no decision has been made at this time.

Q. Will the NOTIS User's Guide include examples of how to code a few common and a few more complex patterns?

A. Yes. The Release 5.1 training file will also have examples.

Q. If two people are authorized to check-in for the same location, would it be possible for them simultaneously to check-in an issue at the same time?

A. No. Once the receipt screen appears, the record is locked until receipt is recorded and the record released.

Q. Does the system automatically know which pattern record to use? For example, if there is a skipped issue, the pattern changes, a new caption/pattern is created, and then the issue is received, will the skipped issue be checked in using the older pattern?

A. Yes. In fact, you must use the older pattern in order to receive the item.

Receipt Status/History and Outstanding Items

Q. What happens to outstanding items that are never received but may or may not be coded using one of the action response codes? Do items ever drop off the Outstanding Items display? Should there be another status code besides EX (Expected) for issues that will never come?

A. Any issue never received and with no action response code entered will always remain an outstanding item with a status code of AL. The items do not drop off the outstanding items display.

We are currently still testing the status code issue. RC, AL, LO for received, action listing, and lost are working correctly. We understand that an action response of, e.g., "Not Published" might logically be expected to translate to a status code of, e.g., "NP." This has yet to be clarified.

In any event, the status codes will appear only to staff. The use of specific messages for issues listed under the "Missing" label in the OPAC has been dropped. Patrons will see all non-received

items as "Missing" without any further information. (Of course, the next expected issue appears by itself under its own label if so desired. The next expected issue is never "missing" until it fails to be received by the predicted date of arrival.)

Cancellations

Q. Does cancelling or closing an order/pay/receipt record (by making it ZN or XN) have any affect on LSER? Or, vice versa, does cancelling in LSER have any impact on the associated order/pay/receipt record?

A. No. Only the copy status code affects LSER.

Q. In NOTIS Solutions: Serials Control, there is Cancellations: Selected Copy screen. Is there such a thing as Cancellations: List of Copies? Would it list everything that has been cancelled using this option?

A. There is a Cancellation: List of Copies Screen, but it lists only the locations at which the title is received. There is no online listing of all titles for which you have entered cancellation information. An exceptions report identifies titles for which cancellations have been entered. That report is, however, non-cumulative. A list of all cancelled titles by location is a likely report to be considered for our QuikReports product coming out this fall.

OPAC Display

Q. If you opt to display "Missing" in the OPAC, does an item appear with the "claimed" message even if a decision has been made to wait to produce a claim or not claim at all?

A. No messages will appear for any individual issues listed under "Missing." This is a change from previously announced functionality.

Q. Is it possible to have the OPAC display issues with some statuses (e.g., "not published") as "Missing" but not display as "Missing" issues with other statuses (e.g., "claimed")?

A. No. But it's a nice idea to keep in mind.

Q. If we decide to display "Missing" issues in OPAC, will there be any way of deleting the

display of individual issues so that the display does get overly long after a few years?

A. Such a feature does not currently exist. We believe that by the time this becomes a problem, we will have a solution (if, of course, this is a priority for our users).

Q. Supplements and indexes received in LSER do not display in the OPAC if received on their own patterns. I understand that this was an intentional design feature. Can you explain the philosophy behind this?

A. Supplements and indexes received in LSER display in OPAC if you choose that as one of your OPAC options.

Q. Do "Current Issues" display in enumeration/chronology order or in receipt date order? Receipt date order would be confusing for patrons when items are received out of sequence.

A. "Current Issues" always display in enumeration/chronology order. However, the order is highest first, e.g.,
vol.2 no.2 1992 Feb.
vol.2 no.1 1992 Jan.
vol.1 no.12 1991 Dec.
vol.1 no.11 1991 Nov.

Reports

Q. If an item appears on the Item Receipt Maintenance Action Notification Report and you do not want to claim it at that time, is there a way to set something so it will appear on the report at a later time?

A. The reports do not cumulate. If you do not wish to act on each item on the report, you will need to mark items appropriately and save the report.

Q. Has the vendor invoice tape load program been modified for Release 5.1 to check LSER to report "No Recent Receipts"?

A. Yes. The program continues to read the receipt statements as well. ■

Workshops, Workshops!

Another round of workshops is coming up in October and November. Register now using either the registration form found in the NOTIS Catalog of 1992 Workshops (July 1992), the form reproduced in this issue, or you can call (708) 866-4891.

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, California, and three other sites have also inquired about scheduling special sessions.

Please contact Stuart Miller at the above number for details or call (708) 866-4891 and ask to speak with the Professional Services staff person assigned to your area of the country.

NOTIS Workshops

October—December 1992*

Title	Date/Location	Fee
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†
Release 5.1: Internals	10/10; Chicago, IL	\$75†
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

†Half-day workshop.

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

NOTIS Professional Services REGISTRATION FORM

Please use a separate form for each registrant.
(Photocopy as necessary)

Name: _____

Organization: _____

Address: _____

City: _____

State: _____

Zip: _____

Telephone: _____

Workshop Number: _____

Date: _____

Amount Enclosed: _____

Bill My Organization: _____

(please supply Purchase Order No.)

Mail with payment to:

NOTIS Systems, Inc.
1007 Church Street, 2nd floor
Evanston, IL 60201-3622
Attn: Professional Services Secretary

A NUGM Session on Automated Library Binding Systems

By Barbara Sagraves, Chair of the Preservation Interest Group

In February 1991, the median commercial binding expenditure for each of the 119 academic research libraries (ARL) was over \$167,000. Does that sound like your library? If so, you will not want to miss Automated Library Binding Systems (Session #68, Friday, October 9, 3:45-5:15 pm) a program co-sponsored by the Serials Interest Group and the Preservation Interest Group.

The presenters will be Patricia Palmer, head of Preservation Services at Virginia Commonwealth University; and Julian Stam, binding librarian for Widener Library at Harvard University. Duties of moderator will be performed by Barbara Sagraves, head of Preservation Assessment and Replacement at Northwestern University.

Libraries contract out to commercial binders each year to bind hundreds of thousands of serials and monographs. Increasingly, the binders are moving toward using automated systems to increase the accuracy and speed of their work. Unfortunately, a system integration does not exist with NOTIS that allows library staff to communicate vital bibliographic and technical information online with their binder. Our presenters will address the situation and its impact on their workflow.

Patricia Palmer will present automated binding operations at Virginia Commonwealth University. Patricia has served as co-chair of the Preservation Interest Group and chairs a taskforce to identify generic information necessary to an effective integrated system.

Julian Stam will discuss the Widener Library's use of an automated binding system (ABLE) with emphasis on its use in a Local Area Network (LAN). In the course of his presentation he will give an overview of binding workflow and discuss the need for an integrated system.

Please join us for what will certainly be an informative presentation of automated library binding.

The Preservation Interest Group will also hold an informal meeting during Session #26. Visitors are welcome. ■

Support Solutions

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

Make the program and documentation changes each month when you receive your copy of *NOTISes*, carefully following the instructions that we provide.

All code and documentation changes will automatically be included in any future releases/updates of the appropriate NOTIS product or manual.

Tips are periodically indexed and reprinted in a manual made available to all customers.



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

Wayne State University, University of Pittsburgh, University of Central Oklahoma, Tulsa City-County Library system, University of Oklahoma, Oklahoma State University, University of Toledo, Oklahoma Department of Libraries, University of Windsor, University of Delaware, Trinity University, Boston College, Auburn University, Syracuse University, Library of Michigan, Western Michigan University, California State University-Long Beach, Kentucky State University, Burroughs Wellcome Co., Wichita State University, West Virginia University, Vanderbilt University, Michigan Technological University, City University of New York, Public Library of Des Moines, Indiana University, Southern Methodist University, National Geographic Society, University of California-Santa Barbara, University of Minnesota, Purdue University, Washington Research Library Consortium, NASA Center for Aerospace Information, Virginia Commonwealth University, Texas A&M University, Princeton Theological Seminary, University of Kentucky, University of Iowa, Ball State University, Louisiana State University Medical Center, Johns Hopkins University, University of Wisconsin, University of Connecticut, Southeast Missouri State University, University of Windsor, Alabama A&M University.