NOTISes

For users of NOTIS library information systems

Customer Support Services: The Year in Review

BULLETIN

Thanks Again for Another

Successful NUGM!

Look for details on NUGM in

November's issue of *NOTISes*.

On October 9, 1992, the NOTIS Customer Support Services Department celebrated the first anniversary of NOTIS Direct and the Real Time Phone Support Center. This was a milestone event for us, culminating a changing year, in which we evaluated existing services according to your needs, and developed new procedures designed to improve our service to you.

Before we plunged into planning 1993, we took a few minutes to reflect on how far we have come. We want to share with you what we accomplished in 1992.

Created the Real Time Phone Support Center

We constructed a facility completely dedicated to telephone support. At the same time, we established three levels of problem resolution phone support. We staffed the Phone Support Facility to provide you with responsive level one service. Librarians and systems engineers are now scheduled on a rotating basis to cover these phones. The three levels of support are as follows:

Level One Support:

1. Establish the severity of your call. Refer your call immediately if it is critical.
2. Document your problem.
3. Resolve your problem.
4. Refer your problem for level two support when necessary.

Level Two Support:

When Librarians and systems engineers are not staffing the Phone Support Center, they are working on level two problem solving, which requires more in-depth research and analysis, and follow-up with customers.

NOTIS NEWS

RID Standardizes Assembly JCL

I n response to customer comments and as part of the RID (Release Integration and Distribution Department) initiative to establish standards, RID has improved the assembly JCL that we distributed with LMS, MDAS, and GTO. For LMS Release 5.1, MDAS Release 1.3, and GTO 3.1, we have made the following changes:

- MVS will have separate assembly jobs for each program type, without use of cataloged procedures. This is how the VSE jobs have worked since Release 5.0. This means that the "MAKEALL" job has been eliminated.
- VSE and MVS jobs will have the same names.
- We will improve the documentation of the jobs parameters within the jobs themselves.

Assembly JCL for new products, such as PACLink, will also follow these standards.

To accompany these changes, Documentation Services has revised the Introduction to the *Technical Reference Manual* to provide more clear explanations of each assembly job. The few "program-specific" assembly jobs (such as LKBASMJC for LKBFILES) are also listed.

Finally, we have provided a list of all programs that NOTIS expects customers will modify, with the name of the related assembly job for each one.

We expect these assembly jobs will prove much easier to use, especially for newer TECH1's. They will also require less work when you install a new release. ■

☎ 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.

Customer Support Services Continued from Page 1

Level Three Support:

During the past year, we found that only a small percentage (5-7%) of calls become level three issues. These may be software bugs which we refer to Systems Development. We have continued to use the problem escalation procedures outlined in the NOTIS Basic Support Policy. NOTIS Managers continue to regularly review problems with a P1 or P2 priority level.

How Teamwork Means Better Service

We built an integrated team structure to deliver service to you. Our teams are now comprised of both librarians and systems engineers working together on specialized areas. This teamwork approach enables us to answer your questions more quickly and manage your problems more efficiently. It also helps us in our internal training.

Overhauling Our Training Program

We completely overhauled and upgraded our internal training program , focusing on product knowledge, communication skills, and improved problem solving. Four people must be on the phones at all times to meet your needs; therefore, our commitment to staffing the phones requires creativity in developing training opportunities.

Our training program covers a wide range of formats, from formal classroom instruction, to individualized, self-paced learning, to working at a customer site, to "brown bag" lunch time presentations. To ensure ongoing training, we established a routine of meeting every day for fifteen minutes to communicate important customer and product issues.

These meetings enable us to share vital information and maintain a uniform level of knowledge on current issues. We are also committed to supporting 5.1 early release sites.

Measuring Our Performance with the Scorecard

We used your suggestions on the Customer Satisfaction Survey to determine what areas of service you identified as the most important ones to target for improvement. The most important areas were: response time, resolve time, expertise, status, and professionalism.

We quantified service level goals for these areas, developed tracking procedures to enable us to gather performance statistics, and developed a scorecard to measure our performance. We publish the scorecard in each issue of *NOTISes* so you can monitor our performance.

Improved Customer Communications

Team NOTIS

We implemented several activities to improve customer communications. The MVS/VSE SIG Chairs helped us create Team NOTIS, an advisory body of NOTIS TECH1's, to work as a team with NOTIS staff and SIGs.

We meet quarterly with Team NOTIS, which helps us make tough decisions about how we develop products and services.

Support Calls

To stay connected to customers, we began contacting every customer every quarter. Each quarter we alternate contacting TECH1's and LIB1's. We have gotten exceptionally valuable feedback from these calls, and have used this information to stay focused on your concerns.

NOTIS-L

We started systematically monitoring NOTIS-L. A librarian and systems engineer are assigned on a rotating basis for a one-month period to monitor this communication channel. They are responsible for identifying when (and how) a NOTIS response is appropriate.

Automation

We implemented automation tools to help us provide you with more efficient, productive service.

NOTIS Direct

NOTIS Direct, our automated attendant, directs your call to the right support person. Our goal is to pick up the phone and get you to the right person as quickly as possible.

This process successfully eliminated voice mail as a first line of support, and instead moved it to an option. NOTIS Direct also helped us by keep-

ing track of all your incoming calls. From January 1992 through August 1992, NOTIS Direct logged 9,375 calls, tracking the products and modules that you were calling about. We used this important statistical information to staff the phones with the resources that your calls indicated you need.

We also established additional communication channels for you to contact us:

Internet

We created a Customer Support Services Internet address to give customers another method to communicate support issues or questions.

FAX

We purchased a fax machine for the Support Center and have used this constantly to communicate with customers.

NOTISrv

We established a Support Line on the Bulletin Board so customers could use this vehicle to report problems. We also participated in proactive customer alerts.

GTO

We equipped the Phone Support Center with all the hardware and software needed to support GTO.

We Received Awards of Recognition

We received some meaningful and motivational recognition during the past year. The Software Support Professional Association awarded us their Software Technical Assistance Recognition (STAR) Award for being the "most improved Support Center operation at the fastest rate of change." Luis Lacayo received a Bum Steer Award at NUGM 1991 and Jerry Specht was selected by members of Customer Support Services to receive an internal Star Award in recognition of his contribution to his coworkers.

Our Staff Has Experience

Through all the changes we have remained remarkably stable. As a result, the average experience level of our staff has increased, which we hope is becoming increasingly evident to you.

What Else Have We Accomplished?

Customer Support Services has also made accomplishments in other areas.

- We reviewed all the JCL for release 5.1 and rewrote it to meet standards. Documentation Services will reissue the *Technical Reference Manual* in its entirety for Release 5.1.
- We contributed to the quality initiative by participating in new product testing.
- We reviewed updates and new documentation.

From January through September we delivered 114 days of training and consulting to NOTIS customers. Our training covered everything from basic support training on all of the LMS modules, to Implementation training, to GTO installations, to setting LSYS values, to release upgrades.

Working with you at your sites provides us with a wealth of knowledge, which we use to provide you with better phone support.

Our Vision for 92-93

Thank you for your positive feedback about the changes we have already implemented. Many of you have told us that we have greatly improved in responding to your needs.

Your positive reinforcement will help us continue the work we need to do in the coming year. We can see clearly from our scorecard results that more change and improvement is required, specifically in the areas of resolve time and status reporting.

We want to continue expanding teamwork, both within the company and with customers. We'd like to be more proactive with customer alerts to help you work more efficiently.

We also want to continue the trend toward early involvement in new products. We want to participate more in the NOTIS quality initiative.

We plan to investigate how additional new technology can help us provide better service. Most importantly, we will be surveying you throughout the year to see what is most important to you, and to make sure we stay focused. ■
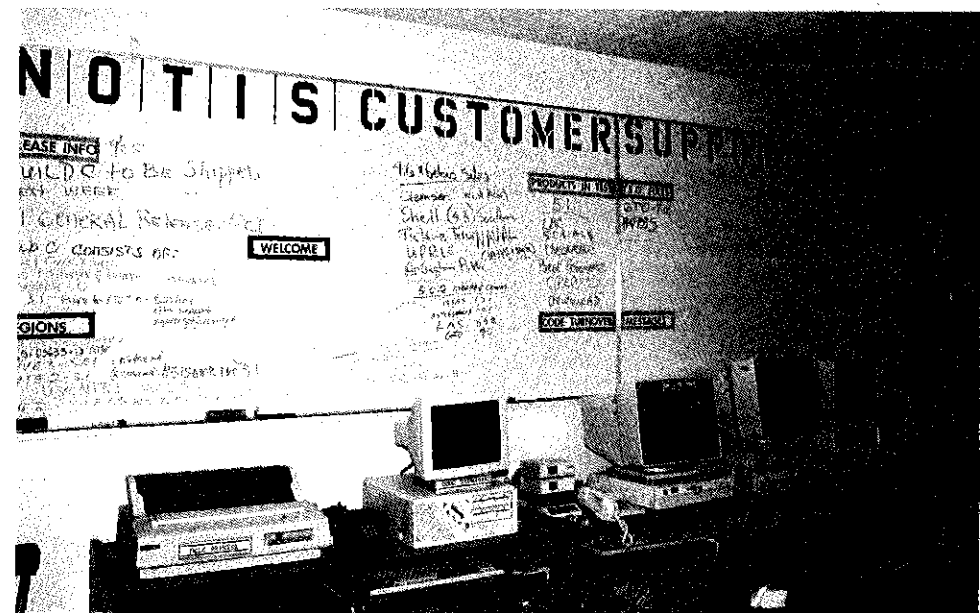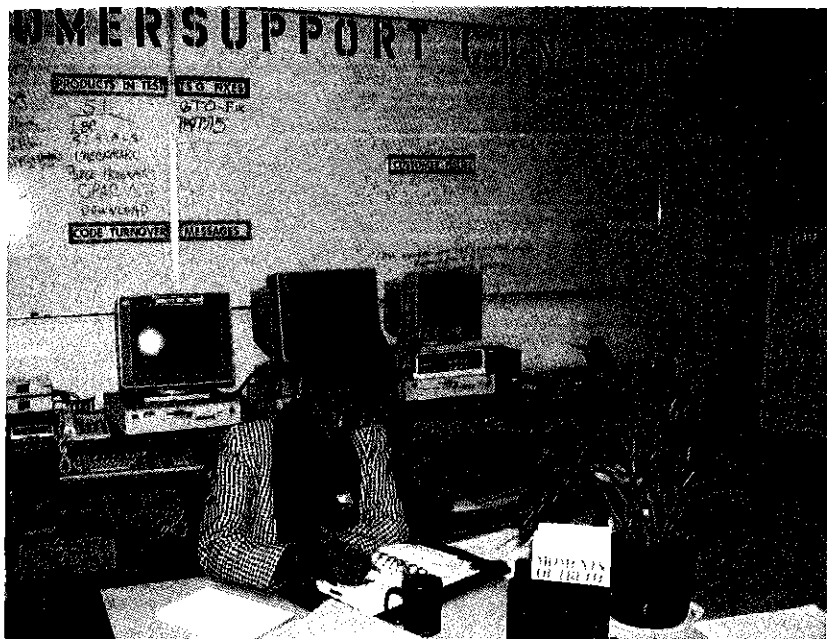

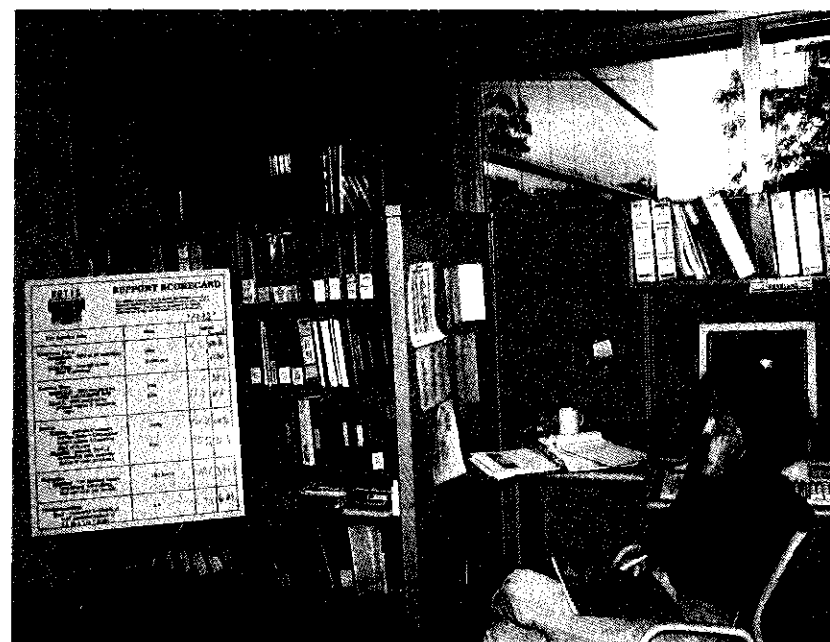*Up-to-date information board in the Phone Support Center and GTO workstations.*
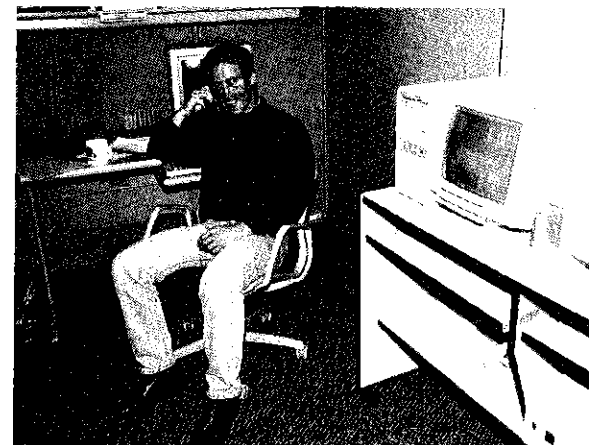
Chuck Spatz, Systems Engineer, helps out a customer. NOTIS Direct is to the right.

Gina Lacava, Systems Engineer, takes a break from problem solving.

Cheryl Wallace, Support Center Administrator, makes sure everything runs smoothly.

Vicki Praemer, Librarian, specializes in OPAC and Location-Based Catalogs. The Support Scorecard is shown on the left.

SUPPORT SCORECARD

NOTIS
SYSTEMS, INC.
CUSTOMER
SUPPORT
SERVICES

"Customer
Assistance"

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.

AUGUST, 1992

Key Service Area	Goal	Actual
Response Time Immediate - 95% of all incoming calls Hold Time - Average is less than 2 minutes	95% 2 minutes	100% .040min.
Resolve Time Initial Call - 50% resolved on initial call or first day Level 2 - 80% resolved or passed within 5 business days	50% 80%	39.6% 61.5%
Status Written - provide Customer Service Review Committee status within 2 business days of review Monthly - provide 70% of customers with monthly status of open problems	100% 70%	100% 40%
Expertise Training - 120 student hours in training, consulting, and research per month	120 hours	349.9 hours
Professionalism Staff - customer feedback of staff professionalism of 4.5 on a 1 to 7 scale	4.5	6.14

Customer Support Services Trains to Support New Products

NOTIS will be distributing many exciting new product offerings in the next 3-6 months, and we in Customer Support Services want to be sure to provide you the kind of service that you expect. Our training efforts are a significant part of our preparation to keep our service commitment to you.

In the month of August, we have dedicated almost 350 hours of training to prepare us to support our new products. This training has been accomplished by reviewing documentation, attending presentations on the new products, attending informal lunch-time training sessions and daily round ups, working with early release sites, and practicing new functionality. We continue to read professional journals and attend outside training sessions and courses to keep current in the library and data processing fields. ■

NOTIS Customer Support Guidelines for Additional Institutions

In the past year, several NOTIS sites have become host institutions for new consortia, providing other libraries with access to the full array of NOTIS products. Host institutions make their own arrangements with these additional institutions.

NOTIS Systems generally considers each additional institution as part of the host institution in terms of providing basic support as described in the following guidelines.

If you have any questions about the guidelines or the standard basic support policy, please call Customer Support Services at (708) 866-1100.

Guidelines

1. The staff of the host institution is responsible for mastering the installation, operation, and maintenance of NOTIS software prior to adding an additional institution.
2. In all cases the additional institutions call the host institution, not NOTIS, for information, assistance, and support.
3. If additional support days are supplied as part of the additional institution, NOTIS recommends that the additional support days not be used for implementation training of the additional institution by NOTIS, but rather that the host institution itself conduct the implementation training for the additional institution. The host should be in control of implementation decisions and the training related to these decisions in order to ensure that they can be supported.
4. Conversion training should be requested for an additional institution only after the additional institution has received implementation training.
5. NOTIS recommends that the host institution ask the additional institutions to follow the NOTIS Basic Support Policy when calling the host institution.
6. Additional institutions may send any number of people to the NOTIS Users' Group Meeting (NUGM).
7. Additional institutions may purchase any extra-cost product or service directly from NOTIS, or the host institutions may act as the purchasing agent.
8. Each additional institution will receive one set of NOTIS documentation and two copies (per issue) of NOTISes as part of the additional permanent license fee/annual maintenance fee. The host institution is responsible for informing NOTIS whether to send this material to the additional institution or to the host institution. NOTIS will supply forms for this purpose to the host institution.
9. The host institution receives the annual enhancement survey. The host institution consults with the additional institution and submits one survey. ■

Regional Workshops: Success in 1992 and What's on Tap in 1993

Reactions to our first year of regionally scheduled workshops have been positive. More than 200 of you have attended the New Serials Control Workshop since the beginning of the year. More than 200 of you attended pre- and post–NUGM workshops earlier this month in Chicago. We're happy to announce we are continuing this program in 1993. Based upon this year's experience, we've made some changes for next year.

> We are happy to announce we are continuing to sponsor workshops and are improving them for 1993!

showed that there is a demand for training in these two areas, we have found that not enough people are interested—even in areas with a large number of NOTIS sites—to support a regional workshop. Given the limited number of people at each site who actually perform these functions, workshops on these topics in conjunction with NUGM seemed to be the best approach for 1993.

1993 NUGM will also follow the more usual pattern—NUGM on Wednesday and Thursday with Monday, Tuesday, and Friday available for full day workshops rather than the half-day sessions we scheduled this year.

We've dropped those workshops on topics for which we didn't receive a response in 1992. It appears that our catalog, NOTISes articles, the NUGM booklet, and postings on NOTISrv got the word out, but some topics that we thought might be of interest obviously were not a concern. Nonetheless, if you don't see a workshop on a topic that you want, let us know.

Scheduling Sessions in Advance

In response to your suggestions, we have scheduled 1993 sessions further in advance—all NUGM registrants received a copy of the NOTIS Catalog of 1993 Workshops. Your site's Tech1 and Lib1 may also already have received a copy in the mail. If not, look for it to arrive soon. We've also decided to extend the registration deadline three weeks prior to the scheduled date.

More Sessions During NUGM

We took the advice of Team NOTIS to schedule many technical workshops during the 1993 NUGM week—the only event to which many NOTIS Tech1's travel. We have still scheduled some of the general-topic workshops at regional sites close to a large number of NOTIS users. The "Tech1 Week" in particular has been well-received—more advance notice will, we hope, allow more people to attend.

Our scheduling of regional workshops for library staff draws on this year's success with the New Serials Control Workshop—clearly a topic of interest even into 1993 as sites begin to implement. We have also introduced a workshop that deals with future directions of NOTIS products, another timely topic.

We've also decided to schedule workshops on fund management and global heading changes during the 1993 NUGM week. While this year

Workshops On Demand

We have also begun to schedule workshops on demand or under special arrangements with a site or a group of sites. For example, Oklahoma and Louisiana users have arranged for a New Serials Control workshop. Users in Indiana, California, and three other sites have also inquired about scheduling special sessions. We will continue to offer this as an alternative in 1993. For details, please contact Stuart Miller at the number shown below or call (708) 866-4891 and ask to speak with the Professional Services staff person assigned to your area of the country.

We're pleased at the positive response to our efforts to extend more training opportunities to more users. We look forward to continuing this effort in 1993. Please send any requests, suggestions, or comments on the workshop program to Stuart Miller, NOTIS Systems, 1007 Church St., Evanston, IL 60201, or call him at (708) 866-0171. ■

OPAC NAMES

ACORN.......Vanderbilt University
ALADIN.....Washington Research Library
            Consortium
AMELIA.......University of Alabama
ANSER.........Ball State University
ANSWER.....Library of Michigan
AUCAT.......University of Auckland
BARRCAT....The Bibliographic Association of the
            Red River Consortium
BEACON.....Grand Valley State University
BISON.........SUNY-Buffalo
BOSUN.......Naval Postgraduate School
BRAIN.........Bergen Community College
Broncho......University of Central Oklahoma
BYLINE.......Brigham Young University
CATALYST...Kent State University
CENTRA.....Central Michigan University
CHESTER.....West Chester University
CLIO...........Columbia University
COAST........California State-Long Beach
CRISTAL......Upper Peninsula (Michigan) Region
            of Library Cooperation
CUNY+.......City University of New York
DELCAT.......University of Delaware
ELIXIR.........SUNY-Binghamton
FELIX...........Florida Institute of Technology
FINDER.......Western Michigan University
FOCUS........Michigan Technological University
Franklin......University of Pennsylvania
Homer.........University of Connecticut
HUPAC.......Hampton University
JANUS.........Johns Hopkins University
LIBRIS.........Rice University
LIBROS.......National University
LOLA..........Louisiana State University
LUIS...........(pronounced loo-EECE)
            University of Texas-El Paso
LUMINA......University of Minnesota
LUNA..........N.A.S.A.
LYNX..........Kansas State University
MAGIC.......Michigan State University
MCLUIS.....Montgomery College

MINERVA...University of Louisville
MIRLYN......University of Michigan
MORRIS......McMaster University
MURLIN.....University of Regina
MUSE..........McGill University
OASIS.........University of Iowa
PETE............Oklahoma State University
OLIN...........University of Oklahoma
ORBIS.........National Geographic,
            ....Yale University
PEGASUS...University of California-Santa
            Barbara
PennLIN.....University of Pennsylvania
PITTCAT......University of Pittsburgh
PONI...........Southern Methodist University
Portal..........The Port Authority of NY & NJ
QUEST.......Boston College
QLINE.........Queen's University
RIPPET.........INTEVEP
Robcat.........Robert Morris College Library
ROCky.........Iona College
SADIE..........Southeast Missouri State University
Scholar........Cleveland State University
SCROLL.......Supreme Court of Ohio Law Library
SOL............University of Texas-Dallas
SOUTHcat...University of South Alabama
STARS.........SUNY-Stony Brook
Sterling.......Howard University
SUMMIT......Syracuse University
TECHCAT....Kansas College of Technology
THOR..........Purdue University
TOPCAT......Fort Hays State University,
            Western Kentucky University
TULANET....Tulane University
UNACAT.....University of North Alabama
UNICAT......Burroughs Wellcome Company
UNIS..........University of Utah
UNLOC......University of Notre Dame
UTMOST.....University of Toledo
VICTOR.......University of Victoria
VIRGO........University of Virginia
YORKLINE...York University

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, Johns Hopkins University, City University of New York, Cheery Creek Schools, McGill University, Queen's University, University of Pittsburgh, Rice University, Washington Research Library Consortium, CTW Consortium, University of Central Oklahoma, University of Victoria, George Mason University, State University of New York-Stony Brook, University of Vermont, Oklahoma State University, McMaster University

Special thanks to the following for their extra contributions in diagnosis and problem resolution.
Tim Prettyman and the staff at the University of Michigan

I. Code Solutions

As with all product releases, we will incorporate as many fixes into LMS 5.1, MDAS 1.3, and GTO 3.1 as possible. To maximize that number, we will make fixes to our products at the upcoming release levels. Since the time required to code and test fixes at various levels would significantly reduce the total number of fixes we could provide, these fixes will not be ported to earlier levels. Exceptions will be made for critical problems. Between now and the general distribution of LMS 5.1, MDAS 1.3, and GTO 3.1 we will use the Support Solutions column to notify you of fixes that will be incorporated in those products.

LMS

Release Level: 5.0, 5.0.1, 5.0.2
Operating System: MVS & VSE
Description: Fines for patrons owing less than the Bill & Fine threshold are printing.
PTS Number: PPP5610

This problem is fixed in LMS 5.1 so that the fine notices will only print when the patron owes more than the threshold amount.