

# NOTISes

*For users of  
NOTIS  
library  
information  
systems*

JANUARY 1993

IN THIS ISSUE

## 1st Time PACSearch Links to Non-NOTIS Server

Washington University, a NOTIS customer since 1982, has licensed PACSearch to provide access to OCLC's FirstSearch through their NOTIS OPAC. Washington University is the first NOTIS site to use the Z39.50 capabilities of PACSearch to access a non-NOTIS server.

The users of LUISPLUS, the NOTIS OPAC at Washington University, will be able to search the various databases on FirstSearch and see, through the NOTIS link-to-holdings feature, if the cited journal is held at the Olin Library or any other library on the campus. When used in this manner, PACSearch provides several important benefits.

### Seamless Linking between Systems

The end user simply selects FirstSearch from the menu displayed and is taken invisibly to

the OCLC system via the Internet.

### Common Searching Techniques

Because the local OPAC is acting as the client to the OCLC server, the searching techniques used are identical to those used in the local OPAC. No unique bibliographic instruction is required.

### Common User Interface

The records from the FirstSearch database are displayed according to the local library's display parameters, so that all resources are presented similarly.

### Hook to Holdings

Because PACSearch allows you to define remote databases, the hook to holdings feature of MDAS works on the FirstSearch databases. The user is told automatically if the periodical is held in the library, where it is located and what the holdings are.

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# NOTIS NEWS

## Considering an Upgrade to the VSE/ESA Operating System? NOTIS Can Help!

We realize that many of our customers may not have the time or resources to perform an upgrade of the VSE/SP operating system to VSE/ESA. We also understand that this is a matter of pressing concern for our customers as IBM has withdrawn VSE/SP from marketing and will drop support for VSE/SP3 in September 1993.

Why is this important to the VSE/SP customer? Because, after September 30, 1993, IBM will no longer fix problems in VSE/SP3. Furthermore, NOTIS software will not be supported in the VSE/SP3 environment after September 30, 1993.

With this in mind, the Professional Services group is pleased to announce VSE/ESA migration support services for NOTIS customers. These services include migration planning, migration management, training, and complete operating system upgrades. This is in addition to our existing system tuning services.

If you have any questions or need more information, please call Ricc Ferrante in Professional Services at (708) 866-4891. ■

## Delaying the Implementation of Serials and Location-Based Catalogs?

Do you who want to move quickly to LMS Release 5.1, without fully implementing the new serials and location-based catalogs features right away? We can provide you with the documentation necessary for this partial implementation. Contact Celeste Williams in NOTIS Documentation Services at (708) 866-0199. ■

### NOTIS<sup>es</sup>

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

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**Problem after hours? No problem!**

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

### 1st Time (Continued from page 1)

#### Client/Server Implementation

PACSearch allows all of the installed terminals to be used to access the FirstSearch server by linking the local NOTIS computer to OCLC's ERIC machine. It is a true peer-to-peer link.

#### True Z39.50 Protocol

PACSearch uses the Z39.50 Version 2 protocol. It is a complete and tested implementation.

Washington University also uses MDAS to locally mount databases. Presently, they have four Wilson databases locally mounted. They are now evaluating databases available on FirstSearch.

For more information on PACSearch, please contact your marketing representative. ■

## 5.1 Documentation Being Shipped

By now all of our LMS customers should have received the *NOTIS User's Guide: Online Public Catalog* and the *NOTIS User's Guide: Acquisitions and Serials*. You'll be receiving the rest of the Release 5.1 documentation in the near future. ■

## Michigan Site Is Up and Running in 5.1

Western Michigan, a 5.1 early release site, is one of our first NOTIS customers to go into production with Release 5.1 and GTO 3.1. Western Michigan was instrumental in testing GTO 3.1 and making it a better product.

NOTIS worked with Western Michigan and helped to take them from Release 4.6 to Release 5.1 in a couple of months.

Rich Zawislak worked with Paula Gilchrist, the Tech1 at Western Michigan, and her team to ensure the 5.1 region was installed properly before NOTIS' Professional Services staff arrived.

Rich said the installation went smoothly.

"Much of the success of Western Michigan University's moving from Release 4.6 to 5.1 in such a short amount of time is due to the dedication of the staff. They were a pleasure to work with."

Three representatives from Professional Services spent a week at Western Michigan entering in LCR values based upon 4.6 tables. They also trained the staff at Western Michigan to get them up to speed on Release 5.1. ■

## Librarian's Guide to 5.1 Functional Changes

Many of you asked NOTIS to publish a document describing the changed functionality of our new releases. In November, we responded to your request by mailing such a document to all Lib1's.

The "Librarian's Guide to LMS/KeyNOTIS Release 5.1, GTO Release 3.1, and MDAS Release 1.3," lists all of the fixes and functional changes NOTIS has made to these products since they were last released.

We hope this document clarifies how the new releases have changed and serves as a pointer to those publications that you will need to read when you implement the new releases.

If you are a Lib1 and haven't received the Librarian's Guide, please call Jody Terry at (708) 866-4859. ■

## Focus Groups Canceled at ALA

Because of the lack of customers attending ALA Midwinter, NOTIS is canceling the two focus groups we scheduled. We will reschedule these two focus groups at the annual ALA meeting this summer. ■

## NOTIS Responds to Faxon's Letter about X.12 and EDI

*This affects any of our customers who use Faxon's machine-readable invoice service.*

In late November 1992, NOTIS received from Faxon a copy of the letter that Faxon sent to our customers who use the Faxon machine-readable invoice service. We'd like to respond to this letter.

Faxon stated that in the second quarter of 1993 they will begin to phase in charges for any machine-readable invoice service that requires data to be converted from the standard SISAC X.12 mapping convention. This applies to a number of NOTIS customers who use VITLS (Vendor Invoice Tape Loading System), a submodule of the Library Management System (LMS).

After considerable thought, we have reluctantly decided that we cannot address this issue during 1993. It has always been NOTIS' policy to respond to what our customers tell us is important to them and to work closely with our customers to set our development goals. Our 1993 development resources for the LMS are committed to Release 5.2. As you know, Release 5.2 is a large effort and focuses on redesigning the Circulation module. We have worked closely with customers on designing Release 5.2. If we drop our circulation priorities to begin working on the SISAC X.12 standard, it means delaying Circulation 5.2.

NOTIS has a long-standing commitment to support and incorporate ANSI and NISO standards into our system. X.12 and EDI (Electronic Data Interchange) are important to NOTIS. To incorporate these enhancements; however, requires a major rewrite of the Acquisitions module. That is not possible in 1993. As we develop products in the future, NOTIS will maintain its commitment to ANSI and NISO standards for libraries.

If you are a Faxon customer and have not received this letter from Faxon, or if you have any questions regarding their changes, please contact Faxon. We look forward to seeing all of you at ALA Midwinter. We will be happy to try and answer any questions you may have regarding how we are working with Faxon in this area. ■

## NOTIS Supports Two Ways to Download in MDAS 1.3

NOTIS supports two methods of downloading in MDAS 1.3: KERMIT and IND\$FILE. IND\$FILE Send/Receive is a download method that many terminal emulation programs support.

NOTIS cannot test all of these packages individually; however, we expect emulations that support IND\$FILE will work in the MDAS 1.3/NOTIS environment. NOTIS uses EXTRA as its standard terminal emulation for mainframe applications, and we have tested the download in both the DOS and Windows versions of EXTRA. Below are our suggestions for EXTRA setup.

IND\$FILE is an IBM mainframe program, while send and receive are PC programs that communicate with the IND\$FILE protocol. Three types of file transfers are available through IND\$FILE send/receive:

- 1) VM/CMS
- 2) MVS/TSO
- 3) Send/Receive CICS

NOTIS uses the Send/Receive CICS type of IND\$FILE transfer for the MDAS download function. To install the IBM CICS File transfer program, refer to the IBM document "CICS/VS 3270-PC File Transfer Program (#5798-DHQ)." This documentation explains the characteristics needed in your CICS tables for the file transfer program to work.

### Using EXTRA for Windows

If you perform a Mark/Send download using IND\$FILE and EXTRA for Windows, then after you issue the NOTIS "send" command, you will get a message that says "Switch to PC Session now and Receive Your File Using \* as the Name." At that point, you want to click on the File option in the menu bar on your EXTRA session.

Then you want to select "File Transfer." You should get a file transfer configuration box where you select which file transfer options you want. The options we tested successfully at NOTIS are:

PC file name: (name of your choice)  
Host file name: \*  
Direction: Receive from host

**Method:** Buffered Transfer

**Buffer size:** 2k (depends on site; may need to work with your data center)

**Environment:** CICS

**Insert line ends (CR/LF):** (Put an 'X' in this box—ignore others)

### Using EXTRA for DOS

If you perform a Mark/Send download using the IND\$FILE and EXTRA for DOS, then after you issue the NOTIS "send" command, you will see a message that says "Switch to PC Session Now and Receive Your File Using \* as the Name." At that point, toggle over to your DOS session, and at the "EXTRA>" prompt, type:

```
RECEIVE {TARGET DRIVE}:{PC FILE-  
NAME} {EXTRA MAINFRAME SESSION  
NAME} : *
```

An example would look like this:

```
EXTRA> RECEIVE X:TESTFILE.DOC Y:*
```

where X is the target PC drive,

Y is the source Extra mainframe session you just transferred from,

and TESTFILE.DOC is the target PC file name you've selected.

**Note:** The EXTRA documentation explains the download process more fully. Consult EXTRA's documentation before attempting a download. Similarly, if you use emulation software other than EXTRA, be sure to read download instructions before attempting file transfer.

### KERMIT

NOTIS supports KERMIT version 3.11 as an alternative download method. Customers whose environment allows them to use KERMIT can refer to the September 1992 *NOTISes* for information about support for MDAS download using KERMIT.

KERMIT is shareware and may be a lower cost alternative to IND\$FILE-based file transfers. The mainframe and the PC software for KERMIT is shipped as a part of MDAS 1.3 to all MDAS customers.

MDAS 1.3 Continued on page 7

# What Is TAG and How Does it Work?

This article describes the TAG, a communications gateway bundled with many of NOTIS' new client/server products. The TAG provides numerous benefits including:

- Support for connection of UNIX-based servers, such as InfoBase to existing mainframe systems. This allows you to utilize your existing mainframe communication network and take advantage of lower cost UNIX disk and processors.
- Linkage of VSE-based systems to TCP/IP and the Internet without purchasing VM.
- An interface between CICS and TCP/IP-based PC's allowing innovative new products, such as the Microsoft Windows-based Inter-Library Loan workstation to operate as a client to your existing NOTIS system.
- Migration of gateway communication protocol conversion from higher cost mainframes to low cost UNIX and PC-based systems.

NOTIS bundles the TAG with the PACLink, PACLoan, InfoBase, and DocLink products. The sidebar article explains NOTIS' support for the TAG product.

## What Is TAG?

TAG is an external gateway device, standing for TCP/IP to APPC Gateway. APPC is a CICS term that stands for Advanced Peer-to-Peer Communication.

TCP/IP is the most commonly used network for multi-vendor, open system connections. The TCP/IP is an established set of protocols developed to allow cooperating computers to share resources across a network.

## How Does the TAG Work?

The TAG software performs advanced gateway protocol mapping between TCP/IP and SNA networks. Gateway programs convert the upper layers of a protocol "stack" from one network protocol to another. These upper layers are where communications, such as Z39.50 are carried. To use an analogy, the TAG is like the electrical adapters that European travelers carry. These

adapters convert one type of electric current to a format that U.S. appliances can use.

For the technically curious, the TAG maps SNA APPC LU6.2 conversations to TCP/IP socket data streams. LU6.2 is standard peer-to-peer protocol within CICS. Sockets perform a similar function within TCP/IP.

The TAG handles session control, some levels of protocol mapping, byte to block conversion, and character set mapping. Your UNIX devices see the CICS mainframe as a standard UNIX socket, while CICS sees the UNIX server as another LU6.2 peer.

The good news is that this all works under the covers and, once set up, needs only minimal maintenance.

## Communicating Host to Host

NOTIS is developing its newer products using host-to-host communication. This method of communication is designed to transmit blocks of information between two intelligent computers.

Host-to-host communication requires less overhead and has more features than terminal-based communication methods. PACSearch, PACLoan, and InfoBase use host-to-host communication. ■

## TAG Support Services

### Documentation

Documentation is provided for one set of SNA profiles for all supported connection methods. These connection methods are hardware-dependent, and we cannot replicate all six possible connection methods. NOTIS will provide additional assistance to the first customer to connect using the following methods:

- Connection via SDLC link
- Local 3174 Token Ring link
- Remote 3174 Token Ring link
- FEP attached to a Token Ring
- Connection via rack-mounted Integrated Token Ring Adapter
- Connection via 3172 LAN Attachment Unit

### Phone Support

Phone support is provided to interpret or clar-

ify the TAG installation instructions. Additional phone support for troubleshooting is available when your library has done the following:

- installed relevant NOTIS mainframe software
- configured the TAG
- established a connection and an attachment

Phone support includes NOTIS staff accessing your data. If your data cannot be properly accessed, the problem resides with the NOTIS software, and NOTIS Customer Support will work with you to resolve the problem.

If your data can be accessed by NOTIS, the problem resides outside the NOTIS software environment, and you have two options. First, you can troubleshoot the problem with your technical staff. Second, you can discuss the problem with NOTIS Professional Services and contract for troubleshooting assistance.

### Additional Services

Services beyond basic support are provided by the Professional Services Group. If you are interested in additional services, training, or consultation, please contact Professional Services. ■

## MDAS 1.3 (Continued from page 5)

### Bulletin Board System for Sharing Download Information

Given the wide range of PC-based terminal emulation software that supports IND\$FILE, NOTIS Customer Support will not be able to supply the specific PC parameters that give good download results with MDAS 1.3.

To make successful download settings available to as many customers as possible, however, NOTIS will create a directory folder on the NOTISrv Bulletin Board for sites that have downloaded using software other than EXTRA and KERMIT 3.11.

If you are one of those sites, we would appreciate your contributing this information. You can mail the necessary information to the NOTISrv Support mailbox on the Bulletin Board.

Please supply the name of your site, the name/phone/e-mail addresses of a contact person at your site, and notify us of the software that you used and any options that were needed

to get it to work effectively.

NOTIS will then transfer this information to the Bulletin Board. We would like to thank you in advance for your help in building a base of information that can benefit all NOTIS customers. ■

## Taping Calls to Train Phone Support

Some of you may have heard the new message on NOTIS Direct that your calls may be taped for purposes of training our staff. As part of our ongoing commitment to provide better service to you, the customer support analysts are randomly taping calls.

The device we are using is attached to the support analyst's phone and it is up to the analyst whether to have it turned on to tape or not. So the analyst is always aware of the taping. These tapes will be used in training programs.

Some tapes will be selected to use in training a new analyst. The tapes will give them an idea of what kind of questions we get on the phone and an opportunity to hear how an experienced analyst handles the call.

For the more experienced analyst, we will use the tapes in training sessions to ask questions, such as how could we have better handled the call? Were there clues that the analyst missed that would help solve the problem? Did the analyst ask enough questions?

We are constantly trying to provide better service and in 1993, we will continue to focus on our technical and problem solving skills. ■



# New Serials Control: OPAC Display of Holdings

**E**ditor's Note: The following originally appeared as a section of the article, "Q's and A's About Release 5.1's New Serials Control Screen Designs" in the January 1992 issue of *NOTISes*. At that time, the new serials control module of Release 5.1 was still in development. Changes have been made (and announced to users) since that time. As a convenience to our customers, we have updated and reissued the section on the OPAC so that it reflects the final, distributed version of Release 5.1.

The new serials control module creates new possibilities for displaying holdings data in the OPAC. As before, holdings data is updated online—as new issues are received, an issue's status changes, or retrospective holdings data is updated, the OPAC immediately and automatically displays the most current information to users.

Several options now exist for displaying holdings data in the OPAC, using locally defined labels. All of the labels used in the following examples are only suggestions and we have chosen to display all possible data in the OPAC to give you a sense of how the greatest amount of information would display. Your choices are set in the online control file (LSYS) on the OPAC Holdings Detail Definition screen as shown in the following example.

Institution Group:	OPAC HOLDINGS DETAIL DEFINITION	Language:	LODH02
IN		English	
LABEL:	SOURCE OF DISPLAY INFORMATION:		DISPLAY?
(LOCATION:)	Location Information		
(CALL NUMBER)	Call Number		
(ITEM STATUS:)	Circulation/Order Status		
(OTHER INFO:)	Copy level notes (multi-volume items only)		
(NEXT ISSUE:)	Serials check-in info (next predicted item)		Y
(CURRENT ISSUES:)	Serials check-in info (unbound items)		
(SHELVED AS:)	Shelving title (tag 852, \$1)		
(NOTES:)	Public Notes (tag 852, \$2)		
(LIBRARY HAS:)	Enum/chron--unformatted (tag 899, \$a,\$z)		
	Enum/chron--alternate (tag 866, \$a,\$z)		Y
	Enum/chron--formatted (check-in data, bound)		Y
(SUPPLEMENTS:)	Supplements--alternate (tag 867, \$a,\$z)		
	Supplements--formatted (check-in data, bound)		Y
(INDEXES:)	Indexes--alternate (tag 868, \$a,\$z)		
	Indexes--formatted (check-in data, bound)		Y
(CIRC STATUS:)	Item level status info (multi-vol. items only)		Y
(MISSING:)	Item level status from check-in data		Y

To modify a label, tab to appropriate label and overwrite existing information  
 CLEAR-EXIT PFI=HELP PF3=BACK PF4=OPAC DEFINITION MENU

Online Control File (LSYS): OPAC Holdings Detail Definition Screen

You can mix upper and lowercase for labels (the example shows all uppercase) and the braces (which are optional) mean that the labels are highlighted on a monochrome terminal or appear in a different color on a color terminal.

In the example, the six optional sets of data are set to "yes" so that all extant data displays. With the exception of the circulation status information, all of the optional data comes from the new online receipt history and prediction features of the new module.

Notice that the 852, 866, 867, 868, and 899 field tag numbers refer to the MHLD record (the MARC holdings record linked to a copy statement in a copy holdings record) that typically contains the retrospective summary holdings and other information that you already had in your system before you implemented the new serials control module.

The order of the labels (and the order of data from different places in the system under the same label) as shown in the above example is the order of the OPAC Holdings Detail screen display. If there is no corresponding data, the label does not display. The 866, 867, 868, and 899 fields in the MHLD record and the public note subfield 1z of the 852 field are repeatable and will display in the same order in the OPAC as they appear in the MHLD.

Remember that if you have data in an 899 field of the MHLD record, the system (for OPAC display purposes) ignores 866, 867, or 868 fields that may also be present. This might occur if, after converting your volume holdings record data to 899 fields in the MHLD records, an operator updated an MHLD record by adding 86x fields and by mistake left the 899 field(s).

In such cases, the 899 field data should be moved to an appropriate field and the 899 tag deleted or the field tag can be changed to 866, 867, or 868 depending upon the type of data.

Also recall that the existence of holdings at a specific location may still be completely suppressed from the OPAC by using the appropriate Classification Type Code in the copy statement

in the copy holdings record. The new location-based catalog feature of Release 5.1 also allows you to choose what holdings displays are included/excluded from your locally defined catalogs.

In the OPAC itself, the Brief or Long View screen provides an abbreviated level of information on holdings by using data from the copy holdings record as shown in the following examples.

```

LTZU DONE                                AAB5728 1016
ZU SERL ISSN 0024-2519 S/STAT c FREQ q S/T p  NOTIS COPY HOLDINGS
The Library quarterly, v. 1, Jan. 1931 -- Chicago, IL : University of Chicago
Press, 1931-
STATUS h DT 08/21/92 AD none
NOTES
001 2L CN |a main |d Z392 |d 08/21/92
NOTES |a ci:pr
MHLD PTRH ITEM RECORDS 5
00-001-001
002 2Z CN |a main |d 10/21/92
NOTES
MHLD
003 2A CN |d 12/08/92
NOTES |d 12/08/92
004 2A CN |d 12/08/92
NOTES |d 12/08/92
005 2A CN |d 12/08/92
NOTES |d 12/08/92
006 2A CN
NOTES
  
```

Copy Holdings Record for a Serial Title with Two Active Copy Statements

```

Search Request: T-LIBRARY QUARTERLY          ALMA MATER UNION Catalog
SERIAL - Record 1 of 1 Entry Found          Brief View
Title: |a The Library quarterly.
LOCATION:          CALL NUMBER          ITEM STATUS:
MAIN General Stacks  Z392          Enter HOL 1 for holdings
-----
Start over          Holdings
HELP              LONG view
Other options
NEXT COMMAND:
-----
Page 1 of 1
  
```

OPAC Brief View Screen for a Serial Title

## How Does OPAC Find the Data?

The OPAC uses the labels as defined in the online control file and then finds the data as follows.

### Location

Here is shown the name of the shelving location as taken from the location/sublocation code in the copy statement in the copy holdings record—in this case, "MAIN General Stacks" for "main" the

location code. If there is more than one active copy statement with linked holdings, the order of the display is the same as the order of the copy statements.

Notice that by using a Classification Type Code of Z, the second copy statement in the example has been suppressed from the OPAC.

### Call Number

Here, the call number displays as it appears in the copy statement in the copy holdings record. If the copy statement contains no call number, the system-supplied message "No call number available" appears.

### Item Status

For all multipart items, the system supplies the standard message, "Enter HOL n for holdings" so that the user may view the Holdings Detail screen. Notice that the number now appears in the message itself (not to the left of the location name as in the pre-5.1 OPAC). The user is now prompted to select the specific location.

If a number is omitted, the system assumes "1." OPAC users may page through all of the holdings regardless of where they begin—they do not need to return to the record view to select other locations.

The OPAC Holdings Detail screen also uses the copy holdings record as a source for data, but in addition, includes information from the MHLD record, the online receipt history, linked item records, and, depending upon circumstances, the receipt statements in a linked order record and order status information.

The following examples show the linked MHLD record and the online receipt history being used in the OPAC Holdings Detail screen. (In this example, no receipt statements exist in the linked order record, there is no order status information to display, and the item record—which has the circulation status information—is not shown.)

```

Search Request: T=LIBRARY QUARTERLY ALMA MATER UNION Catalog
SERIAL - Record 1 of 1 Entry Found Holdings Detail
Title: The Library quarterly
Location 1
LOCATION: MAIN General Stacks
CALL NUMBER: Z392
OTHER INFO: Current issues in MAIN Periodicals Room.
NEXT ISSUE: v.63:no.1 (1993:Jan.)
CURRENT ISSUES: v.62:no.4 (1992:Oct.)
v.62:no.3 (1992:July)
v.62:no.2 (1992:Apr.)
v.61:no.3 (1992:July)
SHELVED AS: University of Chicago Library Quarterly
NOTES: Early volumes also on microfilm in Microform Reading Room.
LIBRARY HAS: v.1-60 (1931-1990)
v.61:no.1 (1991:Jan.)
+ Page 1 of 2
START over VIEW record <F7> FORWARD page
HELP LONG view
OTHER options
NEXT COMMAND:

```

OPAC Holdings Detail Screen for a Serial Title: Page 1

```

Search Request: T=LIBRARY QUARTERLY ALMA MATER UNION Catalog
SERIAL - Record 1 of 1 Entry Found Holdings Detail
Title: The Library quarterly
Location 1 (continued)
LOCATION: MAIN General Stacks
CALL NUMBER: Z392
SUPPLEMENTS: Premier Issue, Jan. 1931. Bound in vol. 1.
INDEXES: v.1-20
CIRC STATUS: v.56 Overdue as of 09/23/92
MISSING: v.62:no.1 (1992:Jan.)
(Earlier issues may also be missing.)
+ Page 2 of 2
START over VIEW record <F7> BACK page
HELP LONG view
OTHER options
NEXT COMMAND:

```

OPAC Holdings Detail Screen for a Serial Title: Page 2

```

12/18/92 Receipt Status/History: Selected Copy LSRH2
IDENTIFIERS: ZU AAB5728 SERIAL:
TITLE: The Library quarterly, Chicago, IL : University of Chicago Press.
Location: main MAIN General Stacks Smt: 001
Call Number: Z392
Type: base Pattern Starts: 01/15/1991 Frequency: quarterly
No. Status Item
1. BD v.61:no.1 (1991:Jan.)
2. BD v.61:no.2 (1991:Apr.)
3. RC v.61:no.3 (1991:July)
4. BD v.61:no.4 (1991:Oct.)
5. LO v.62:no.1 (1992:Jan.)
6. RC v.62:no.2 (1992:Apr.)
7. RC v.62:no.3 (1992:July)
8. RC v.62:no.4 (1992:Oct.)
EX v.63:no.1 (1993:Jan.)
View Details for Item:
CLEAR=Exit PF1=Help PF3=List of Copies PF4=Search PF7=Bind PF8=Fwd

```

Online Receipt History for a Serial Title

```

LTZU DONE AAB5728-001
ZU SERL ISSN 0024-2519 S/STAT c FREO q S/T p NOTIS MARC HOLDINGS W510
The Library quarterly, v. 1, Jan. 1931 - Chicago, IL : University of Chicago
Press, 1931-
-0001 STATUS: 2L LOCK: MAIN General Stacks COPY: ITCMS: 5
CALL: 1b Z392
ZU- AAB5728 FMT H DT 08/21/92 R/DT 09/23/92 STAT c RT y E/L 3
R/STAT ? MTHD ? DT/CAH G/RTN ? S/RTM CMPLT ? LEND ? REPOL ? LAN eng
052: 2: 1] University of Chicago Library Quarterly |z Early volumes also on
microfilm in Microform Reading Room.
066/1:31: 0 0 |a v.1-60 (1931-1990).
067/1:31: 0 0 |a Premier Issue, Jan. 1931. |z Bound in vol. 1.
068/1:31: 0 0 |a v.1-20

```

MHLD Record for a Serial Title

### Location & Call Number

These are identical to what appears on the Brief or Long View screen. They are repeated when a subsequent page is needed to continue the display.

### Item Status

This is the same label that appears on the Brief or Long View screen. It appears on the Holdings Detail screen only under specific conditions. Note that the label does not appear in our example.

If there is an activated copy statement in the copy holdings record, the label is followed by the system-supplied message, "In Pre-Order Process." If there is an open order, the label is followed by the system-supplied message, "On Order." If the Classification Type Code in the copy statement in the copy holdings record is I, the label is followed by the system-supplied message, "In Process."

When the Classification Type Code is updated appropriately during processing and no linked item records have been created, the label is followed by the system-supplied message, "Check Shelf." If you then create linked item records and there is no active circulation status in any of them, the label is still followed by the system-supplied message, "Check Shelf." However (and as shown in the above example), if there is active circulation data in any linked item record, the label does not appear at all.

If the location is not circulated (a value set in the online control file), the system-supplied message, "Circ. info not available" displays.

### Other Info

This data comes from the copy level notes field in the copy statement in the copy holdings record.

The message is taken from codes set in the online control file or a free text message if preceded by "um=". In this case, the code "ci:pr" is used in the copy statement and translates to the message as shown on the first screen of the OPAC Holdings Detail screen.

### Next Issue

A library can choose to display or suppress the next issue expected. This data is available as soon as you establish caption/pattern record for a location to predict the arrival of the next issue.

The issue shown as "next" is the one predicted by the system as the next expected. It matches the next predicted issue that appears in the new serials control module on the Receive New Material screen—which is also the same as the very last issue with the status of EX shown in the online receipt history.

Display of "next issue" data conforms to the Z39.44 Level 4 standard. The system automatically updates the data whenever check-in occurs and resets the next predicted issue. Remember that the display of this information is optional.

### Current Issues

To find data for this label, the system first looks in the online receipt history—automatically created whenever you check in an issue using the new serials control module. The system displays up to 60 basic issues that have a status of RC ("received"). The system begins with the last issue received and works backward until it reaches the end of the history or the display limit (whichever occurs first), formulating the list in reverse chronological order.

For purposes of constructing a list to display, the system ignores issues with a status of BD ("bound") or LO ("lost") or are otherwise missing—simply skipping over those issues. (Note that the next predicted issue to arrive (which always appears at the end of the online receipt history with a status of EX ("expected") is not considered a "current issue.")

If the system finds no information in the online receipt history or finds less than 60 issues that meet the "current issues" criteria, it then looks for any receipt statements of the linked order/pay/receipt record and displays the data for no more than 15 receipt statements, one statement per line—even if there are less than 45 lines

taken up with eligible "current issues" from the online receipt history. In no case will the system display more than 60 lines of data for this label.

In our example, the system is using only the online receipt history for this label—note how it ignores the LO ("lost") and BD ("bound") items, skipping over those to use only the RC ("received") issues. In the example, volume 61 was bound without issue number 3; therefore, that issue is still considered "current."

Notice that the data from the online receipt history is issue information, one issue per line, and the system automatically formulates the data according to the Z39.44 Level 4 standard. Those of you using receipt statements know that you can enter either issue-specific or summary holdings, following the Z39.44 standard or not depending upon local practice.

If you will have OPAC Holdings Detail screens that pull "current issue" information from both sources, this could result in a display of data that is not internally consistent, depending upon your practices. However, a display that combines data from both sources only occurs if you begin check-in with the new module before you close out any existing receipt statements (usually by moving the data to update the MHLD record). You may never have this situation depending upon your implementation procedures.

For holdings linked to a title whose bibliographic record includes the S/T element in the fixed field, appropriate coding of that element suppresses in the OPAC any display of "current issues" data—from either the online receipt history and/or receipt statements.

### Shelved As

Data here comes from the MHLD record (852 field, subfield 11). Whatever is entered in that subfield is what displays in the OPAC. Shelving titles may not be used in many instances—our example is probably unlikely, but it is there to show how the data displays.

### Notes

This data comes from the MHLD record (852 field, subfield 1z). Whatever is entered in that subfield is what displays in the OPAC. The subfield is repeatable; notes display in the order in which you have them in the MHLD record.

### Library Has

Data displayed under this label is for retrospective holdings and associated notes. Data shown here comes from the MHL D record (either the 866 or 899 fields, subfields |a and |z) and data stored in the online receipt history. You may choose to display only the MHL D data. If both, the MHL D data displays first.

Whatever is entered in the MHL D fields is what is displayed in the OPAC. The fields are repeatable and display in the order in which they appear in the MHL D record. If you choose to display data from the online receipt history, the system displays an open entry—following the Z39.44 Level 4 standard using the earliest issue with a status of BD ("bound"), followed by a dash.

### Supplements and Indexes

Data here displays under the same rules as used for LIBRARY HAS. When you use the new module, you check in supplements and indexes separately to create their own receipt histories (in conformity with USMARC).

Notice in the SUPPLEMENTS label how the 867 |z subfield information follows the subfield |a data on the OPAC Holdings Detail screen. If an 866, 868, or 899 field contained a |z subfield, the display format would be the same.

### Circ Status

Information shown under this label comes from circulation status information in linked item records. When there is more than one linked item record with active circulation status, the system lists them in enumeration/chronology order provided that you created the records in that order or reordered them on the Item Summary screen to reflect that order. Otherwise, the items appear in the order in which they were created. The enumeration/chronology data shown in such a display comes from the ENUM/CHRON field of the linked item record.

NOTIS circulation messages (all system-supplied) include the standards (e.g., "charged," "recalled," "overdue") as well as "lost," "missing," "at bindery," etc.

Display of data under this label is optional. Displaying data will be useful if most of your serials locations are non-circulating and you do not want an OPAC display of circulation information when you make the occasional exception.

### Missing

Information shown under this label comes only from the online receipt history. Any issue with a status other than "received," "bound," or "next expected" appears under this label. "Earlier issues may also be missing" appears at the end of any listing as a system-supplied message. In this example, the issue shown under the label is marked as LO ("lost") in the online receipt history.

Displaying this data is optional. If you charge an item to the "lost" pseudo-patron and you mark the individual issue(s) as "lost" in the online receipt history and you choose to display data for both the CIRC STATUS and MISSING labels, you will have the same item(s) listed twice, once under each label. However, the MISSING data is always issue specific. The CIRC STATUS data is either issue-specific and/or volume-specific, depending upon what you have circulated.

In our example, v. 56 is shown under the CIRC STATUS label as overdue. But no online receipt history exists for any issues from volume 56 (since it was received prior to implementing the new serials control module—its existence is recorded in the summary holdings information that appears under the LIBRARY HAS label in the OPAC, taken from the 866 field in the MHL D record). Our OPAC display in the example shows that if all four issues of volume 56 had been checked in using the new module and were marked as LO ("lost") in the online receipt history, and the linked item record for v. 56 had been charged to the "lost" pseudo-patron, each of the four issues of volume 56 would have appeared individually under the MISSING label (in reverse enumeration/chronology order) and v. 56 would have appeared under the CIRC STATUS label as "lost."

Questions concerning specifics on the new serials control module or OPAC Holdings Detail displays should be directed to NOTIS Customer Support at (708) 866-1100. You should now also have the 5.1 version of the *NOTIS User's Guide: Acquisitions and Serials* and *NOTIS User's Guide: Online Public Catalog*. The basic training session, "Introduction to Serials Control on NOTIS," has been revised for the new module and is now available for delivery onsite or here at NOTIS. Call NOTIS Professional Services at (708) 866-4891 for information on this training. ■

## ALA Room Assignments for SIG Meetings

Room assignments for ALA Midwinter's Special Interest Group meetings are listed below. The Preservation, LIB1, and BNA/NOTIS SIG meetings do not have assigned rooms at this time. Please check NOTIS "L" for updated information on these meetings, or contact Jutta Kehoe at (708) 866-0156.

### Special Interest Group Meeting ALA Midwinter '93

Friday, January 22, 1993

Circulation Group  
Location: Conv. Ctr. Rm. A104  
Time: 2:00-4:00 p.m.

NUGM Plng. Group  
Location: Radisson—Grand Ballroom  
Section A  
Time: 2:00-4:00 p.m.

Saturday, January 23, 1993

Consortium Group  
Location: Conv. Ctr. Rm. A210  
Time: 8:00-10:00 p.m.

Government Documents  
Location: Conv. Ctr. Rm. C105  
Time: 8:00-10:00 p.m.

Cartographic Materials SIG  
Location: Marriott—Homestead  
Time: 8:00-10:00 p.m.

Sunday, January 24, 1993

Cataloging & Authorities  
Location: Conv. Ctr. C209  
Time: 8:00-10:00 p.m.

Faxon/NOTIS SIG Meeting  
Location: Conv. Ctr. Rm. C103  
Time: 4:30-5:30 p.m.

Preservation Group  
Location: TBA  
Time: 10:00-12:00 noon

LIB1 Group  
Location: TBA  
Time: 2:00-4:00 p.m.

Monday, January 25, 1993

MDAS SIG Group  
Location: Marriott—Colorado Ballroom  
Salon I,J  
Time: 12:00-2:00 p.m.

Tuesday, January 26, 1993

Acquisitions Group  
Location: Conv. Ctr. Rm. A106  
Time: 2:00-4:00 p.m.

OPAC Users Group  
Location: Conv. Ctr. Rm. A207  
Time: 10:30-12:30 p.m.

RLG Interest Group  
Location: Conv. Ctr. Rm. C111  
Time: 8:30-10:30 a.m.

Serial Control Group  
Location: Conv. Ctr. Rm. A207  
Time: 8:30-10:30 a.m.

BNA/NOTIS Group  
Location: TBA  
Time: 11:30-12:30 p.m.

### Special Meetings ALA Midwinter '93

Friday, January 22, 1993

NOTIS Professional Services Workshop  
Location: Conv. Ctr. Rm. A102  
Time: 8:00-5:00 p.m.

Wednesday, January 27, 1993

NOTIS Professional Services  
Location: Conv. Ctr. Rm. A102  
Time: 8:00-5:00 p.m. ■

**NOTIS**  
SYSTEMS, INC.

**CUSTOMER  
SUPPORT  
SERVICES**

"Consistent and  
Timely  
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## 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.

**November, 1992**

Key Service Area	Goal	Actual
<b>Response Time</b> <u>Immediate</u> - 95% of all incoming calls <u>Hold Time</u> - Average is less than 2 minutes	95% 2 minutes	100% .025min.
<b>Resolve Time</b> <u>Initial Call</u> - 50% resolved on initial call or first day <u>Level 2</u> - 80% resolved or passed within 5 business days	50% 80%	47.6% 70.6%
<b>Status</b> <u>Written</u> - provide Customer Service Review Committee status within 2 business days of review <u>Monthly</u> - provide 70% of customers with monthly status of open problems	100% 70%	100% 50%
<b>Expertise</b> <u>Training</u> - 120 student hours in training, consulting, and research per month	120 hours	269.9 hours
<b>Professionalism</b> <u>Staff</u> - customer feedback of staff professionalism of 4.5 on a 1 to 7 scale	4.5	


# 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.

Central Michigan University, University of Vermont, Auburn University, University of Wisconsin, St. Louis Community College, University of California-Santa Barbara, Louisiana State University, Syracuse University, McGill University, University of Pittsburgh, Wichita Public Schools, Boston College

## I. Code Solutions

### LMS

**Release Level:** 5.0, 5.0.1, 5.0.2  
**Operating System:** MVS & VSE  
**Description:** Abend 0C4 (MVS) or PROTECTION EXCEPTION (VSE) in step LB890020 of job LB890JC when the LB890BAL program attempts to process some volume holdings records.  
**PTS Number:** PPQ5340

This problem is fixed in LMS 5.1 so that the program skips records which are not authority or bibliographic records.

**Release Level:** 5.0, 5.0.1, 5.0.2  
**Operating System:** MVS & VSE  
**Description:** Protection exception in step LB680030 of job LB680JC when the LB681BAL program processes a patron record with a large number of D14 (patron id) fields.  
**PTS Number:** PPQ6417

This problem is fixed in LMS 5.1 so that the program can process a sufficiently large number of these fields.