NOTISes

For users of NOTIS library information systems

IN THIS ISSUE

ANNOUNCEMENT

The Support Solutions column is not included in this issue.

PACLink Provides First Z39.50 Link

One of the first Z39.50 links between different library systems will be implemented at the University of California–Santa Barbara by Fall 1993 with the installation of NOTIS' PACLink.

The NOTIS Library Management System (LMS) at the Santa Barbara campus will be the first system connected online to the University of California's MELVYL catalog via the Z39.50 open systems communications standard. MELVYL is the union catalog for nine California campuses' state library holdings.

Santa Barbara library patrons currently use two terminals, one for the NOTIS system and one for MELVYL. After PACLink is installed, patrons will only need to use one terminal with the familiar NOTIS interface to access both.

Patrons will continue to use the regular NOTIS screens and commands. As a result, library officials expect to reduce the number of dedicated MELVYL terminals immediately and elimi-nate them completely in the future.

The University of California–Santa Barbara has used NOTIS' LMS for nearly three years. The 18,500 students and 1,000 faculty members can use one of the 100 NOTIS terminals in the library or access the system through the campus network.

PACLink, together with another NOTIS product, PACLoan, forms a complete collection sharing system. PACLink is a client/server application using the Z39.50 protocol to seamlessly search remote online catalogs using the same user interface as the home catalog.

PACLoan allows patrons to initiate interlibrary loan requests and enables ILL staff at both libraries to track the request and gather statistics. PACLink and PACLoan can be used together or separately.

The Santa Barbara library system holds two million volumes in addition to 3/4 million items in its government publications collection. About 1.1 million records reside in the NOTIS system. ▥

NOTIS NEWS

Work Is in Progress with Release 5.1.1

NOTIS plans to ship Release 5.1.1 near the beginning of June 1993. The actual shipping date depends upon how thoroughly tested the release is by that date.

Release 5.1.1 includes the following products:

- LMS 5.1.1
- MDAS 1.3.1
- InfoShare 1.1
- PACLink 1.0.1

What's New with this Release?

All of the products shipped with Release 5.1.1 support our new product, DocDirect. We highlighted DocDirect in the March issue of *NOTISes* (*NOTISes/88*, p. 4). DocDirect is a document delivery system that allows patrons to request that a document be printed or faxed to them.

Release 5.1.1 also includes more than 60 fixes, including resolutions to nearly all of the problems reported by Release 5.1 sites through the end of February 1993.

In this release, MDAS 1.3.1 will let you set your own Z39.50 attributes so you can tailor your searching when you search non-NOTIS databases.

The new release of InfoShare 1.1 supports the optional EasyLoad product. EasyLoad indexes and loads both unstructured and structured ASCII files. NOTIS designed EasyLoad to let sites create their own customized InfoShare databases. InfoShare 1.1 also includes support for the Z39.50 scan capability for use with Z39.50 clients, such as MDAS and ProPAC.

Additionally, Release 5.1.1 includes a new Session Control Values option on the NSYS Authority Values Menu. The Session Control Values option gives you more flexibility and makes it easier for you to control the number of Z39.50 servers your mainframe NOTIS clients can access.

This list of Release 5.1.1 features is not all inclusive, rather it is intended to give you a brief overview of what you can look forward to in Release 5.1.1. We will include instructions for upgrading to Release 5.1.1 from Release 5.1 in the product shipment. As the shipping date of Release 5.1.1 gets closer, we will update you on how testing is going. 📠

☎ 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 or fax us at (708) 866-4908.

The University of Delaware Codes Caption/Patterns in Record Time

The University of Delaware has successfully coded 6,000 caption/pattern records for serials check-in. They did it with a check-in team that consisted of six people working at four terminals. The entire process took only two months.

Josie Williamson, Head of Acquisitions, said the task of coding the caption/pattern records "is not nearly as daunting as it looks. Once you figure out a way to do it generically, so much of the information applies to 80% of the titles."

Tackling Serials Check-In

The team at the University of Delaware decided to key in the information directly rather than setting up templates and using the copy command. For them, this was a better method. "We started keying faster than we expected," said Williamson about their approach to tackling serials check-in.

> *"It's really not as daunting as it seems....It's even been fun," exclaims Josie Williamson, Head of Acquisitions.*

For Delaware, training was not a big issue. "The experienced serials librarians didn't have a problem at all," said Williamson. Even training went a lot faster than expected. Of course an occasional randomly combined issue existed to add a little excitement and challenge to the process.

On top of creating patterns for their collection of serial publications, Delaware also has been able to establish some patterns for their documents collection. They originally thought this would be difficult because of the irregularity of many of the documents. But they have had tremendous success with those as well.

The Key to a Speedy Transition

So, what's the key to a successful and speedy transition to the new serials check-in module?

Josie Williamson contends that it's all in the receipt history. "If you have a good receipt history, using Cardex or some other automated methods, it's not difficult at all."

The University of Delaware actually started checking in serials, and even some documents on March 22. When asked if she had any words of wisdom for those who have yet to dive into serials check-in, Williamson replied, "It's really not as daunting as it seems. For us it has been a real learning experience. It's even been fun."

The team at Delaware wants to share what they have learned with the rest of the NOTIS community. They are currently working on a database of 40-50 generic patterns that they plan to put out on the Internet. They will send out a notice when these patterns are available. The University of Delaware is pleased with the results of their transition to the serials check-in module. So are we here at NOTIS. Congratulations! 📠

New Media Scheduling SIG

The new Media Management SIG joins the ranks. This group is responsible for managing media collections and services. We are holding a meeting at summer ALA; the meeting details will be announced closer to ALA. At the ALA meeting we will discuss whether it's necessary to have a NOTIS media scheduling module. We encourage anyone who is interested in participating in this discussion to attend the meeting. If you plan to attend, please contact:

Dr. Fred Olive, Head of Educational Technology Services, Mervyn H. Sterne Library University of Alabama at Birmingham Birmingham, AL 35294-0014 You can reach him by phone: (205) 934-2379 Bitnet:SLB2006.UABDPO Internet:SLB2006@UABDPO.DPO.UAB.EDU.

Release 5.1 Documentation

I f you are an LMS customer with a user or technical update subscription, you should have received the following 5.1 documentation:

LMS User Documentation:
- *NOTIS User's Guide: Acquisitions and Serials*
- *NOTIS User's Guide: OPAC*
- *NOTIS User's Guide: Circulation*
- *NOTIS User's Guide: Cataloging and Authorities*
- *NOTIS Library Implementation: Planning for Implementation*
- *NOTIS Library Implementation: The System Control File*
- *NOTIS System Messages Guide*

LMS Technical Documentation:
- *NOTIS Internals Reference Manual*
- *NOTIS Technical Reference Manual*
- *NOTIS Abend Codes and Error Messages*

MDAS Documentation
If you are an MDAS customer with an update subscription, you should have received the following documentation:
- *MDAS Manual 1.3*
- *NSYS Manual*
- *MDAS/InfoBase Field Mapping Manual* 🐛

Clarification to ProPAC

I n the March issue of *NOTISes* we published an article on ProPAC. We'd like to clarify that ProPAC for Windows is in beta testing. ProPAC for the Macintosh is scheduled to begin beta testing later this year. We plan to complete ProPAC for X-Windows late this year. 🐛

A Borrower or a Lender Be–PACLoan's Help System Makes it Easy

P ACLoan is one of several new NOTIS products to include an online context sensitive help system. The PACLoan help system contains information to assist you in performing the borrowing and lending activities in your library.

A Little Background on PACLoan
PACLoan is a Windows-based graphical user interface for managing your interlibrary loan (ILL) requests. With PACLoan, you can process online ILL requests that your library receives from its patrons or from other lending institutions. You then can track these requests through up to 15 statuses, including:
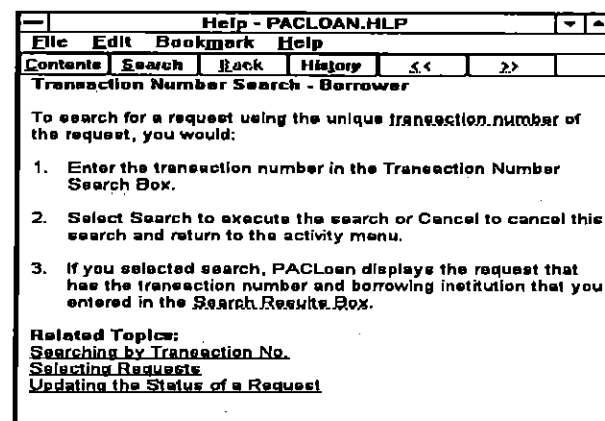- pending
- in process
- shipped
- received
- complete

You also can generate the patron correspondence associated with the ILL process.

How the PACLoan Help System Works
You can access PACLoan help either from the Help menu in the application or by pressing the **PF1** key. When you ask for help from the menu, you can view an index of all help topics or a list of all commands or procedures in the help system. When you press the **PF1** key, you get specific information about the function you were performing at the time you asked for help. This is context sensitive help.

In addition to accessing useful information about PACLoan quickly and easily, you can annotate the help system to customize it to the needs of your library. The **annotate** command from the Edit menu lets you electronically paper clip your own notes or comments to a particular help screen and saves these comments for future reference.

You can also place an electronic bookmark on the topics in the help system that contain frequently used or important information. The Bookmark menu lets you put place holders in the system to get to certain topics quickly. Once you have defined the topics you want to bookmark, you can access those topics easily from the Bookmark menu.

```
┌─────────────── Help - PACLOAN.HLP ──────── ▼ ▲ ┐
│ File  Edit  Bookmark  Help                     │
│ Contents │ Search │ Back │ History │ << │ >> │ │
│ Transaction Number Search - Borrower           │
│                                                 │
│ To search for a request using the unique        │
│ transaction number of the request, you would:   │
│                                                 │
│ 1. Enter the transaction number in the          │
│    Transaction Number Search Box.               │
│                                                 │
│ 2. Select Search to execute the search or       │
│    Cancel to cancel this search and return to   │
│    the activity menu.                           │
│                                                 │
│ 3. If you selected search, PACLoan displays     │
│    the request that has the transaction number  │
│    and borrowing institution that you entered   │
│    in the Search Results Box.                   │
│                                                 │
│ Related Topics:                                 │
│ Searching by Transaction No.                    │
│ Selecting Requests                              │
│ Updating the Status of a Request                │
└─────────────────────────────────────────────────┘
```

An example of a PACLoan Help Screen

Other features include the ability to:
- search for a particular word or phrase that you need more information on
- access a search history of all the help topics you have viewed
- view a glossary of all important words and concepts in the help system

Why Use the Help System?
When you use the PACLoan help system, you have immediate access to information you need to assist you in the tasks you want to perform. You also have the option to view other topics or related information about the PACLoan system. You can do all of this without leaving your workstation.

You also have the added flexibility of making the help system your very own. By annotating and bookmarking the help system, you create a system that best meets the specific needs of your library.

Additionally, you have the power of a Windows-based system. Not only do you have the information that you need right at your finger tips, you also have it in a format that's easy to use.

The PACLoan help system contains a wealth of information to assist you in your day-to-day ILL activities, and it provides the information quickly and easily. So, use it and unleash the full capabilities of all that PACLoan has to offer. 🐛

QuikReports— Circulation Reports

T his is the third in a series of articles about the features and uses of QuikReports. This month's QuikReports article focuses on the Circulation reports.

Who Uses Your Library?
The Summary Patron Usage Statistics Report (CIR017) tracks charges for each patron category. These demographic statistics tell you who is using your library, and which groups you may want to target for specific reasons. For example, if faculty use is low, you could encourage faculty to use the library more through publicity.

Patron Category Information
The Patron by Status Report (CIR001) provides a total number for each patron category and a cumulative patron total. This gives you an overall picture of your library's patron population.

Track Terminal Activity
The Item Charge-out (CIR006), Item Renewal (CIR007), and Item Discharge Reports (CIR008), track terminal activity. This information can help you determine your staffing needs and discover when patrons are using the library. It also may help you determine how much a terminal is used, and whether you need to dedicate a terminal to a single task at any time during the day.

The Items Charged Out Statistics Report (CIR012), Items Discharged Statistics Report (CIR013), and Items Renewed Statistics Report (CIR014), provide cumulative statistics about CIR006, 007, and 008. This information on terminal activity can help you allocate staff and analyze collection use.

The Items Charged, Discharged, and Renewed Reports, CIR018 and CIR019, provide summary information for reports CIR006, CIR007, and CIR008. The two reports contain the same information, but CIR018 displays the numeric information in a table, while CIR019 displays that information graphically.

The All Item Activity by Terminal Report

(CIR020) provides summary statistics from CIR012, CIR013, and CIR014. This data shows you which terminals are the most used and can help you plan staff allocation and hardware upgrades.

Assist Collection Development by Tracking Lost Items

The Lost Items Report (CIR003) can assist you with collection development. If you run it on a regular basis it provides you with a list of items to locate or eventually replace.

Track Hold and Recall Activity and Services

The Items Recalled/Held by Statistics Report (CIR016) lets you know how frequently patrons are using hold and recall services. Because this report sorts by terminal ID, you can also tell which service units place the most holds or recalls.

The Most Popular Titles Recalled Report (CIR010) can help Acquisitions identify heavily used items of which you may require more copies.

In-House Use

The most Popular Titles Browsed Report (CIR011) gives you a sense of where your patrons are browsing the most items. This information can help you schedule staff for stack maintenance.

Prepare for Annual Budget Reports

The Statistical Reports, CIR012, CIR013, CIR014, CIR015, and CIR016 provide overall totals of library activity for annual budget reports and professional surveys or questionnaires.

Regardless of your library's circulation policies, QuikReports' Circulation Reports gives you many ways to track activity and gather information about your library and your patrons. 📖

NOTISrv Reminder...

We published an article in the March issue of *NOTISes* about how you can dial into NOTISrv to access PTS records. We want to remind you that you can access NOTISrv directly over the Internet.

If you have Internet access, you can telnet to NOTISrv.notis.com. 📖

1993 Workshop Offerings: New Directions and Old Favorites

A revised version of the *NOTIS Catalog of 1993 Workshops* should now be in the hands of your Lib1 and Tech1. This new version supersedes the edition distributed last NUGM dated October 1992.

If you need your own copy, please call (708) 866-4891 or send a self-addressed mailing label to: NOTIS Systems, 1007 Church St., Evanston, IL 60201-3665, Attn: Professional Services Secretary.

What's in the New Catalog?

In addition to a revised schedule (see below), the new catalog contains details on new workshops not previously announced. Many of these focus on the new directions in NOTIS software by including sessions on using UNIX and Microsoft Windows ™ with NOTIS products.

Also included are more general workshops that discuss client/server architecture and networking. These workshops include:
- Introduction to UNIX
- Clients, Servers, Networks & New Directions in Library Automation
- Establishing a Client/Server Infrastructure
- UNIX Performance Management
- Optimizing NOTIS Products for Microsoft Windows™
- VTAM, Communications & NOTIS

Our continued support for our currently available software is seen in the workshops on the new serials control module, fund management, and global heading change features for the library staff. The popular "New Serials Control" workshop has been modified for 1993 to incorporate a half-day session on practicing how to create caption/pattern records for irregular or normalized irregular serials.

For the technical staff, we are repeating our popular "Tech1 Week" and the workshop on MDAS management.

Pre-NUGM workshops are also identified in the new catalog. These workshops will be included in the NUGM registration materials scheduled for mailing in May.

Special, reduced fees will be available if you take more than one pre-NUGM Workshop. See the forthcoming NUGM registration form for details.

To register for any workshop, use the form on page 9 of this issue. Register early and often! 📖

WORKSHOP CALENDAR

Workshop	Location/Date*	Fee
Tech 1 Week	Evanston, IL 5/17-21/93	$1200
New Serials	Providence, RI 6/9/93	$125
Tech 1 Week	Dallas, TX 6/14-18/93	$1200
MDAS Management	Ann Arbor, MI 6/24-25/93	$500
New Serials	New Orleans, LA 6/25/93	$125
Client/Server	New Orleans, LA 6/30/93	$195
New Serials	Boston, MA 7/16/93	$125
Intro to UNIX	Chicago, IL 10/11/93	$195
Est. Client/Server Infra.	Chicago, IL 10/11/93	$195
Client/Server	Chicago, IL 10/12/93	$195
UNIX Performance	Chicago, IL 10/12/93	$195
MDAS Management	Chicago, IL 10/12-13/93	$500
VTAM	Chicago, IL 10/13/93	$195
New Serials	Chicago, IL 10/13/93	$125
C/PR Clinic	Chicago, IL 10/13/93	$95**
Fund Management	Chicago, IL 10/13/93	$125
Global Heading Change	Chicago, IL 10/13/93	$125
Windows	Chicago, IL 10/14/93	$95**
C/PR Clinic	Chicago, IL 10/14/93	$95**
Tech 1 Week	Washington, D.C. 11/15-19/93	$1200

*All workshops subject to cancellation if minimum registration is not met.
**Half-day

Librarians Form an Advisory Group

by Alan Alexander-Manifold
Purdue Universities Libraries

A process that began almost two years ago will soon bear fruit when a group of librarians forms to advise NOTIS staff on issues about functionality and support for NOTIS products.

This as yet unnamed advisory group will work closely with NOTIS staff, Special Interest Groups, and users to bring a users' perspective to issues and problems that face NOTIS Systems, Inc. The group will complement the Team NOTIS Technical Advisory Group, established last year to address issues from a technical standpoint.

The LIB1 SIG chair, Mary Alice Ball, took the initiative to form an advisory group after the ALA Annual Meeting in June 1991. Mary Alice's first step was to form a committee to explore the possibilities of putting a formal channel in place for users' comments and ideas.

This committee went through various incarnations and finally presented a proposal for an advisory group at the ALA Midwinter Meeting in January. NOTIS users who attended the meeting accepted the proposal and the decision was made to implement it. NOTIS enthusiastically supported this decision and expressed willingness to pay for the group's travel and other expenses.

The proposal specifies that the advisory group will consist of six members, with each member serving a two-year term. Terms will be staggered so that half of the members rotate off each year to maintain continuity within the group.

Each member will be assigned to act as a liaison to a number of the SIGs. In this capacity, the members will serve as advocates for the concerns and interests of the SIGs they represent. The plan is for the group to be balanced across as many criteria as possible, despite its relatively small size.

The ideal member of this group would be someone who has broad knowledge of NOTIS products, is in touch with the issues that concern the user community, and is able to work well with NOTIS staff on difficult issues in a positive manner.

Each of the functional SIGs can nominate an individual who they believe would make a good member of the advisory group. Volunteers are also welcome. In June 1993, all nominations and volunteer letters will be forwarded to the chairs of the Acquisitions, Cataloging and Authorities, Circulation, LIB1, and OPAC and Training SIGs who will recommend a slate of six names to NOTIS at or shortly after ALA.

If you would be willing to serve on this group, please send a letter by June 1, 1993 to:

Alan Alexander-Manifold
Systems Implementation Manager
1530 Stewart Center, Room 363
Purdue University
West Lafayette, IN 47907-1530
or send electronic mail to:
alanam@vm.cc.purdue.edu
or
ALANAM@PURCCVM

Be sure to include the following information:
1. Name, institution, position, and duties
2. NOTIS LMS modules and other products installed (with version numbers), and length of time in production
3. Years of experience with LMS and other NOTIS products
4. Other qualifications (experience with other automation products, committees served on, etc.)
5. SIGs of which you are or have been a member, and SIG offices held
6. Reasons for wishing to serve

This information will help the SIG chairs decide which individuals to recommend for service on the advisory group.

NOTIS users at ALA were excited about forming this group and believe it will make a difference in future interactions between NOTIS and its customers. We hope you will respond enthusiastically to this opportunity to work more closely with NOTIS.

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 60201-3655
Attn: Professional Services Secretary

Your cancelled check is your receipt.

SUPPORT SCORECARD

NOTIS
SYSTEMS, INC.
CUSTOMER SUPPORT SERVICES

"Professional, Consistent and Timely 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.

February, 1993

Key Service Area	Goal	Actual
Response Time		
Immediate - 95% of all incoming calls	95%	100%
Hold Time - Average is less than 2 minutes	2 minutes	0.20 min.
Resolve Time		
Initial Call - 50% resolved on initial call	50%	47.6%
Level 2 - 80% resolved or passed within 5 business days	80%	77.9%
Status		
Written - provide Customer Service Review Committee status within 2 business days of review	100%	100%
Monthly - provide 70% of customers with monthly status of open problems	70%	60%
Expertise		
Training - 120 student hours in training, consulting, and research per month.	120 hours	177.5 hours
Professionalism		
Staff - customer feedback of staff professionalism of 4.5 on a 1 to 7 scale.	4.5	

NOTIS PROBLEM LOG

PROBLEM TRACKING NUMBER_____
(assigned by NOTIS)
Date Reported_____ Date Resolved_____

This form may be used for both local tracking of problems at NOTIS sites and for reporting problems to NOTIS by fax. To fax: Fill out the information below and fax to 708-866-4908. Be sure to complete "INFORMATION FOR NOTIS" for all faxed problems.

COMMUNICATION LOG

Date:	Your Name:	NOTIS Contact:
Problem Status:		

Date:	Your Name:	NOTIS Contact:
Problem Status:		

Date:	Your Name:	NOTIS Contact:
Problem Status:		

Date:	Your Name:	NOTIS Contact:
Problem Status:		

Date:	Your Name:	NOTIS Contact:
Problem Status:		

Date:	Your Name:	NOTIS Contact:
Problem Status:		

Date:	Your Name:	NOTIS Contact:
Problem Status:		