

Guest Editor: Stuart W. Miller

**SUCCESSFUL 4.5 BETA TESTS AT KENT STATE, LONG BEACH**

Beta tests of the Release 4.5 features of bill and fine and course reserve at Long Beach (CA) Public Library and Kent State University have been successful. Bruce Miller, NOTIS Systems Analyst, reports that the beta tests revealed no major problems.

Long Beach Public Library performed testing on bill and fine during the week of June 13th. Beta testing of course reserve was carried out at Kent State during the week of July 11th. The two sites (both operating under MVS) installed all of the Release 4.5 software as part of the beta test.

Beta testing at DOS/VSE sites begins July 19 with Tulsa City-County Public Library testing bill and fine. No major problems are anticipated at Tulsa or the other DOS/VSE beta site for course reserve, St. Louis Community College. Testing at St. Louis starts later in July.

Other features of Release 4.5 have already been tested. Brigham Young University tested the DOS/VSE version of the keyword/Boolean feature. VITLS is still in test at Clemson University; no major problems have been found to date. Release 4.5 remains on schedule for general release in late summer.

## 1988 NUGM ATTRACTS OVER 450 USERS

Hundreds of NOTIS users came to Evanston, IL June 29-30 to attend the 1988 NOTIS Users Group Meeting (NUGM). Registrants attended tens of sessions, organized into tracks for new users; those interested in the basics of Release 4.5; and computer operators and programmers.

President Jane Burke presided over the Opening Session which included a review of the accomplishments in the past year and a look at development in the next. The latter was presented by the new Manager of Systems Development, John Kolman.

Although the weather proved unexpectedly obliging, the room reservation efforts of the host hotels were less than ideal. NOTIS is considering other Chicago-area hotels for next year's meeting to accommodate better our growing number of users.

Elsewhere in this issue is an article on the 1989 NUGM, planning for which has already begun.

## NOTIS USERS HONORED DURING 1988 NUGM

NOTIS President Jane Burke recognized eleven NOTIS institutions for their contributions to NOTIS development in the past year. The user awards were announced at the Opening Session of the 1988 NOTIS Users Group Meeting (NUGM).

NOTIS libraries receiving awards this year include:

**Northwestern University Library** for its development of the Merged Headings Index program, now being integrated into the NOTIS general distribution software for testing;

**McGill University** for development of a CANMARC version of the tag table and related modifications for the online public catalog;

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**Vanderbilt University** for cooperative development with NOTIS of multiple database access;

**University of Utah** for work on the 7171 and IBM 3164/OCLC M300 interface;

**Florida Center for Library Automation (FCLA)** for "taking NOTIS to the limit" through its support of the NOTIS library management system in a state-wide network;

**Kent State University, Long Beach Public Library, St. Louis Community College, and Tulsa City-County Public Library** for their service as beta test sites for bill & fine and course reserve, two major new features of Release 4.5; and

**Clemson University and Indiana State University** for their service as beta test sites for the VITLS feature of Release 4.5.

We would like to take this opportunity to recognize one more NOTIS site for its contribution in the past year, **Brigham Young University**, the beta test site for the DOS/VSE version of the NOTIS keyword/Boolean software. Due to an unfortunate error, we omitted to include BYU in the awards announcements at NUGM. We extend our sincere apologies.

NOTIS greatly appreciates the contributions of the staff at all of the above libraries. Their long hours of hard work have contributed not only to NOTIS development efforts, but also to a better quality product that ultimately benefits all NOTIS users.

## RESOURCE REQUIREMENTS FOR RELEASE 4.5

Attachment #1 reproduces a handout prepared by Jerry Specht of NOTIS Systems Engineering for a NUGM session on Release 4.5. The handout itemizes disk and processor resource requirements for the new release.

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Users should note that many of the figures represent only rough estimates.

#### WOULD YOU BELIEVE NUGM 1989?

The 1989 NUGM Planning Committee has already begun its work for next year. The committee sponsored a session at the 1988 NUGM to discuss program suggestions, planning, possible sites other than Evanston, etc. for next year's meeting.

The committee has issued a call for papers and session presenters/moderators. Attachment #2 contains two forms for interested persons to return to the NUGM 1989 Planning Committee at NOTIS Systems, Inc.

If you would like to discuss ideas, contact your User Services Librarian.

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#### AUTHORITIES WORKSHOP ATTRACTS 157

A total of 157 NOTIS users and staff attended the Authorities Workshop in New Orleans on July 8, sponsored by the NOTIS Authorities Interest Group.

The all-day workshop featured sessions on the purpose and use of NOTIS authority records (Alice Permenter, Loyola University of Chicago); architecture of the NOTIS authority record (Roberta Kirby, NOTIS Systems, Inc.); creating a NOTIS authority file (Christina Meyer, University of Minnesota); a demonstration of the Merged Headings Index (Bill Garrison, Stanford University); staffing and workflow for an authorities section using NOTIS (Nancy Hunn, Vanderbilt University); and techniques for the NOTIS global change feature (Grace Agnew, DeKalb-Rockdale-Newton Regional Library; Jean Caswell, Rice University; and Elaine Henjum, Florida Center for Library Automation).

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Mike Kreyche of Kent State University arranged for videotaping of the workshop. Procedures for obtaining a videocassette will be announced in a forthcoming issue of NOTISes.

#### DIAL-UP INSTRUCTIONS FOR MINNESOTA, NORTHEAST MISSOURI

Attachment #3 reproduces dial-up instructions to access the NOTIS online public catalogs at the University of Minnesota (which has named its catalog LUMINA) and at Northeast Missouri State University.

If your library provides remote access to your NOTIS OPAC, please send the instructions to Tom McGinn, User Services Librarian at NOTIS Systems, Inc. if you have not already done so.

#### MODIFIED HELP SCREEN FOR MCGILL'S OPAC

McGill University has taken the option of modifying the help screens provided by NOTIS for its online public catalog. Attachment #4 shows the help screens developed for McGill's catalog called MUSE.

McGill has also developed some local documentation: a staff mode searching manual and a staff mode reference manual. These can be obtained from Jane Aitkens, Systems Office, McGill University, The Libraries, Montreal, Quebec H3A 1Y1, CANADA.

#### CTW CONSORTIUM DISCOVERS PRINTER STAND FOR HP THINKJET PRINTERS

Michaelle Biddle at Wesleyan University Library reports that users there have found an unorthodox but practical table top printer stand for HP Thinkjet printers.

Michaelle writes: "Available from Haworth (is an item) described as a paper organizer, 2 1/2" high, 11" deep, and 12 3/8" wide. If turned upside down, (it makes a) sleek table top Thinkjet printer stand. A box of 8 costs \$85 list. Our Haworth dealer gives us a 45% discount so each stand ends up costing us \$6."

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**CORRECTION:**

Bytes 25-34 of the above-mentioned statements contain the FUND RECORD KEY, not the FUND CODE.

**PLANNED DOCUMENTATION UPDATE NUMBER:**

August 1988 Technical Update

\*\*\*\*\*  
\*\*\*\*\*

DATE: 7/15/88

**PROBLEM:**

Chapter K11 of the NOTIS Terminal Operator's Manual, Vol. 2: Circulation omits two system messages: PAYMENT ALREADY ENTERED FOR PATRON TOTAL and FUNCTION NOT FOUND.

**CORRECTION:**

Pencil in both messages with the following explanations. For FUNCTION NOT FOUND--You typed a bill and fine function code not known to the system; Correction: Type in a valid function code. For PAYMENT ALREADY ENTERED FOR PATRON TOTAL--You entered a payment code of "p" and/or typed a partial amount on the TOTAL line of a PBIL screen and then typed a payment code on a line for a specific bill and fine record. The system accepts multiple payment codes on a PBIL screen only when you type the codes on lines for specific bill and fine records. Correction: Enter any payment applied to the total first by using the DONE command and then type payment codes on lines for specific bill and fine records as needed.

**PLANNED DOCUMENTATION UPDATE NUMBER:**

November 1988 User Update

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**DOCUMENTATION REVIEWERS**

Attachment #6 lists all of the NOTIS users who will start to receive draft documentation for review beginning in August 1988. These users have agreed to provide comments on content, style, format, etc. of draft documentation sent out by NOTIS Documentation Services.

From time to time, Documentation Services will ask for new reviewers. Watch NOTISes for announcements.

**AD HOC DOCUMENTATION ADVISORY GROUP MEETS AT NUGM**

NOTIS Documentation Services staff met with the Ad Hoc Documentation Advisory Group for the first time on June 28th. Members of the group include Joan Butler, University of Michigan; Kay Flowers, Rice University; David Gregory, University of Iowa; and Susan Markowitz, Cornell University.

Formed at the suggestion of NOTIS users, this ad hoc group acts as an informal panel to offer advice to NOTIS Documentation Services about the content, format, etc. of NOTIS documentation and to react to or suggest new projects.

Discussions focused on the proposed reorganization of the user documentation and how users actually use the NOTIS technical documentation. The group will meet once or twice a year; the members have agreed to serve for two years.

**TECHNICAL DOCUMENTATION DISCUSSION AT 1988 NUGM**

About twenty people, including members of the Ad Hoc Documentation Advisory Group, turned out for the session on technical documentation held during the 1988 NUGM.

Michael West, Senior Technical Documentation Specialist, presented proposals for new approaches to the technical documentation, summarized in Attachment #7. Users at the meeting generally approved the proposals and made additional suggestions.

Anyone with further thoughts on the technical documentation should contact Michael at 312/866-0130.

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#### KOLMAN MOVES TO SYSTEMS DEVELOPMENT

John Kolman, formerly Manager of Systems Engineering, assumed the responsibilities of Manager, Systems Development on July 1. Kolman succeeds Colin Smith who has left to form his own software firm.

NOTIS President Jane Burke stated: "While I am sorry to see Colin step down, John brings excellent credentials to this critical position. I am very happy that NOTIS had an internal candidate so well-suited to the job."

Colin Smith during his tenure made significant contributions to NOTIS development efforts and played a major role in determining pricing schedules for new product offerings. He also helped to develop a local area network (LAN) using MacIntosh microcomputers, an innovation much appreciated by NOTIS staff. Colin continues to work for NOTIS as an independent consultant on individual projects.

Bill Easton, formerly Senior MVS Engineer, will be Acting Manager of Systems Engineering until a new manager is hired. A job announcement appears in this issue as Attachment #8.

#### JOB OPENINGS AT NOTIS

NOTIS Systems presently has four job openings available as described in Attachment #8. Annmarie Utroska, NOTIS Personnel Manager, is accepting resumes for all four positions until further notice.

The openings include two managerial positions, one for systems engineering and one for marketing, as well as jobs for a BAL/CICS programmer and a technical control engineer.

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Interested persons should send resumes to Annmarie at NOTIS as soon as possible. Please, no telephone calls.

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#### NOFA AUDIT PROGRAM (LD525) SHIPPED

As previously announced, NOTIS Systems Development has written an audit program to provide you with data from the various NOTIS records used for the online fund accounting feature. Attachment #9 explains LD525.

Many NOTIS users expressed a need for a program that could pull together various statistics as a check on the accuracy of final figures in fund records at the end of a fiscal year.

NOTIS Systems Engineering shipped the audit program on July 13-14 to all MVS sites who had requested Release 4.4.4 (NOFA fixes and enhancements). A selected number of DOS/VSE test sites also received the audit program. Contact your NOTIS Systems Engineer if you have not yet received the program.

LD525 will also be part of Release 4.5 and will eventually be covered in the NOTIS technical documentation.

#### PROGRESS ON THE MERGED HEADINGS INDEX

Work on the Merged Headings Index (MHI) proceeds on schedule. This new index is up and running at NOTIS and is presently being integrated into the 4.5 version of the NOTIS software. (However, MHI is still scheduled for general distribution after Release 4.5.) Systems Development will soon load a test database of bibliographic and authority records "loaned" to NOTIS by the National Geographic Society.

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Current rough estimates indicate that an installation's MHI will be approximately one and a half (1 1/2) times the current size of the installation's author/title index, subject heading index, and name authority index combined.

NOTIS has scheduled MHI for release in late fall 1988 if beta testing in August/September is successful. Available in this first release of the MHI will be:

- (1) online updates in real time of all bibliographic and authority records' headings access points;
- (2) search and display of the MHI in staff mode;
- (3) batch programs to produce conflict detection reports on name headings, series, and subject headings in bibliographic and authority records; and
- (4) batch load/merge programs for using resource files such as LCSH-MARC.

Depending upon testing at Northwestern University Library (whose Information Systems Development Office has developed MHI), the MHI versions of the New and Dropped Headings Lists may also be ready for release.

Northwestern University Library currently has the MHI in production and has already run the conflict detection programs on its files.

NOTIS needs to locate suitable beta test sites for MHI, two each for MVS and DOS/VSE. Ideally, we would like to test MHI in two types of environments: one with a large file of (to quote Roberta Kirby) "fabulous" authority records and one with a not-so-large file of "not-so-fabulous" authority records. We need both situations in order to test the MHI's conflict detection programs thoroughly.

If you are interested in being considered as a test site for MHI, contact Roberta Kirby, the MHI Project Leader at 312/866-0143.

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NOTIS will continue to support the author/title index, subject headings index, and authority record index in the pre-MHI configuration and functionality until the MHI has been integrated into the online public catalog programs. Eventually, MHI with its improved features will supersede the three indexes.

The MHI project does not affect any NOTIS indexes other than the author/title index, name authority index, and subject headings index.

#### SHORTER NOTES FIELD FOR 4.5 PATRON RECORD

Users should know that Release 4.5 adds the OWES field to the patron record. OWES will appear on the same line as the NOTES field. This results in a shortening of the NOTES field to 41 characters.

The OWES field needed to be prominently displayed on the patron record. The amount shown in the field is an immediate alert as to why a patron record ID might be blocked, i.e., an excessive amount of unpaid charges.

When you install Release 4.5, the OWES field will overlay any text in the NOTES field that goes beyond 41 characters. Any existing text after the 41st character will still exist in machine-readable form but will not display on the patron record screen.

Systems Development intends to deliver a program that will allow you to produce a printed report showing the patron record number and the text in the NOTES field for any patron record with text greater than 41 characters in the NOTES field. You should run this program before installing Release 4.5 if any of your patron records contain vital information in the NOTES field. You will then need to edit any vital message down to 41 characters or less.

If your library has never used the NOTES field of patron records or typically has text of less than 41 characters in the NOTES field, you may not feel a need to run this program before installing Release 4.5. However, we recommend that you do so as a precautionary measure.

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## LIBRARY USER TRAINING: A NEW LOOK

We've listened to your suggestions; we've compiled your evaluations; we've pooled our own knowledge and experience, and now we're acting on all of this input. As part of our continuing commitment to delivering high quality and equitable levels of service, we in User Services are revamping and enhancing the training program. Be assured that this restructuring does not alter the number of days that NOTIS provides according to your contract.

Some aspects of the training program were described in the NOTIS Customer Services Basic Support Plan in the May issue of NOTISEs. This article takes a closer look at the details and is one of a series you can expect to see in upcoming issues of NOTISEs.

We recognize that effective training is an integral part of successfully implementing NOTIS. We also recognize that training is not just a one or two day event that happens when we visit your site, but rather it is an ongoing process you and NOTIS continue as a team effort.

Since training doesn't and shouldn't stop when we walk out the door, we want to provide you with materials to make it easier for you to train your own staff. You can expect to receive the actual training materials for Fundamentals, including master copies of the lesson plan and handouts. We also have made an effort to give you more information up front so that you have more confidence and mastery right from the start. This will facilitate implementation and allow you to come into production more quickly.

We are integrating our training to support our integrated system. The building blocks are the Pre-Installation visit; followed by the Implementation Support visit; and module-specific training.

## Pre-Installation

The purpose of the Pre-Installation visit is to prepare your library and technical staff for the installation of the NOTIS software, and to discuss your implementation plan in general terms.

## Implementation Support

Building on the general discussion at Pre-Installation, the Implementation Support visit focuses on activities involved in bringing the the first module into production. It includes a presentation designed to give a sound conceptual understanding of the library management software. The intended audience includes decision makers and trainers involved in bringing the system into production.

We've revised this meeting to include "hands-on" training in the Fundamentals of Using NOTIS, covering such topics as signing on and off the system, using the indexes to locate records, and creating bibliographic and item records. This session is conducted for trainers and the staff involved in data conversion. It enables your library staff to start working with the software right from the beginning, to begin developing a sense of independence, to start in-house staff training, and to maintain a sense of momentum.

With the revision of our training program we are shifting instruction in Fundamentals to your own training/implementation team. We will be supporting you by providing master copies of the lesson plan and handouts. The information covered in Fundamentals will be reviewed only briefly in module-specific training. This will streamline training and improve continuity.

The material covered during the Implementation Support Meeting (particularly the "hands-on" training) provides the information and materials to prepare the trainers for subsequent training sessions in specific modules. Our intent is that attendees at the topical training sessions will be proficient in these fundamental skills before coming to the training sessions for cataloging, acquisitions, etc.



### Module-Specific

By conducting the Fundamentals training in conjunction with the Implementation Support Meeting, and eliminating it from the module-specific training, we have been able to combine the module-specific training for cataloging, acquisitions and serials into single-visit training sessions, rather than requiring two visits for each of these modules. We have also been able to incorporate new material without significantly increasing the number of training support days required for the full training program. Training in all modules requires 9 days. Specifics, including agendas and timeframes, will be in the next issue of NOTISEs.

### Transition

We are putting a transition procedure in place to help you take advantage of the new training program as soon as possible.

1. If you had the original Implementation visit and have had the "Introductory" training for any module, you may schedule the "Advanced" training for only that module(s). You have until November 1, 1988 to schedule the "Advanced" training; after January 1, 1989 the new training program will be fully in place.
2. If you had the original Implementation visit and have not had any training, you should schedule a half-day Fundamentals session in conjunction with your first module-specific training.
3. If you are one of the libraries who has had the new Implementation Support visit, you are already on our new program.

Your User Services Librarian will be working with you to assure a smooth transition.

In addition to the training provided as part of the basic support package, NOTIS User Services Group is committed to offering workshops on specialty topics. The first of these will be the Release 4.5 Orientation sessions being offered during the fall

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(see Attachment #10). Watch NOTISEs for announcements of other workshops.

### MICHAEL MIFFLIN NEWEST USL

Michael Mifflin joined NOTIS as a User Services Librarian beginning June 27th, just in time for the 1988 NUGM. Michael comes from BRS Information Technologies where he served as Regional Representative, responsible for training and marketing in the Midwest and part of Canada.

Prior to working at BRS, Michael held the position of Reference Librarian/Information Specialist for the Suburban Library System Information Service, part of a regional, multitype library network in the Chicago area. Michael is a graduate of the University of Illinois, Champaign and received his MLS from the University of Pittsburgh.

Michael can be reached at 312/866-0185.

### ON THE ROAD

As you know, the summer months are among the busiest for the User Services Librarians. This year is no exception.

Ben Schapiro just returned from **Kent State University** where he trained and assisted in the testing of the course reserve feature of Release 4.5 during the week of July 11th. He traveled to **Western Kentucky University** for cataloging training on July 19 followed by course reserve training at St. Louis Community College, July 25-27 as part of the beta test for Release 4.5. August 3rd will find Ben at **CUNY** for circulation training followed by another circulation training session at **Texas A & M** and acquisitions training at the **Oklahoma Dept. of Libraries** later in the next week.

Dale Hood visited **Southeastern Louisiana University** July 13 for advanced acquisitions training and went to **Tulsa City-County Public Library** on July 19 to train for the testing of the bill and fine function of Release 4.5. Tulsa is a beta test site for the DOS/VSE version of the new release.

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Sandy Schmidt goes off to a cataloging training session at the University of Texas (San Antonio) July 26-27. She then observes at an implementation visit with Jim Miesse at the Ohio Supreme Court. Sandy then travels to Grand Valley State University on August 16-17 for an implementation visit.

Kathy Cunningham visits Bibliographic Association of the Red River for a cataloging training session on August 4.

All USL schedules are subject to change.

#### RELEASE 4.5 ORIENTATION SEMINARS

NOTIS User Services will offer special training seminars on Release 4.5 beginning September 15-16 and repeated on four other dates September-November 1988. All seminars will be held at NOTIS Systems, Inc. in Evanston, Illinois.

See Attachment #10 for further details.

#### NEW ELECTRONIC MAIL ADDRESSES

Mary Alice Ball has issued a revised list of BITNET addresses for NOTIS users and staff.

If you have additions or corrections to the list (see Attachment #11), contact Mary Alice at MABBIE@NUACC.

#### TROUBLESHOOTING

This column is a regular feature of NOTISES. As we encounter problems which we plan to include in the Troubleshooting Guide (Appendix E to the I&O) we list them here in NOTISES so you won't have to wait until a new release in order to be aware of them. If you have suggestions, send them to Jerry Specht.

Note: it is our intention that you should take these troubleshooting pages and append them to the Troubleshooting Guide which you received in February, 1988. The problems have been, and will continue to be, assigned "temporary" numbers from V001-V999, so that they will be in sequence. We will periodically send out an updated index which will encompass both these problems and the ones already in the guide. Once per year we will send you an entirely new guide in which all of the problems which have appeared in NOTISES since the last publication of the guide will be integrated and assigned permanent numbers.

**Problem:** V074 When a recall is placed on an item, it no longer shows as charged in the patron charge index

**Possible Causes:** In LD005BAL insert a statement two lines after the label ACTBL so that it looks like the following:

```
ACTBL DS    OCL2
      DC    C'FC'
      DC    C'FD'
      DC    C'FE'      insert
```

This change will be included in the 4.5 version of LD005BAL.

**Problem:** V075 You get a DFH0601 message "PROGRAM INTERRUPT OCCURRED WITH SYSTEM TASK IN CONTROL" (abend U0601) when you try to bring up CICS. This occurs after the journals are opened and seems to involve the PLT program DFLCA495. It is followed by an abend U0602.

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Resource Requirements for Release 4.5

June 28, 1988

Disk

1. (4.4.4 change) Five bytes are added to the order scope statement (A, X or Z) for each division in each order record. For a library with 100,000 such divisions this would be an additional 500K.
2. New format of item record causes a 20-30% increase in the size of the item file (14 bytes per item record). For a million-record item file this would be 14 meg (+ 4 meg overhead = 18 meg).
3. If the Course Reserve feature is used, then roughly 450 bytes for each item on Reserve is required (132 bytes in the item record and 320 bytes of index entries). Assuming a Reserve collection which is 1% the size of the regular collection, a million-volume library might have 10,000 Reserve items requiring an additional 5 meg.
4. For the bill and fine feature, a bill and fine record (average: 100 bytes) is created upon discharge for each item for which a fine is due. (At Northwestern (with 1.5 million+ items) there are 50,000-200,000 such discharges per year.) Using a figure of 100,000 this would be 10 meg (+ 3 meg overhead = 13 meg).

A program to physically purge these is recognized as being very important and is planned.

The size of the b&f record is variable and the number of fine discharges is highly variable from one library to another. Precise data from actual production situations is not yet available.

Processor

There are 23 additional phases/load modules as part of 4.5 and there will no doubt be some increased processor utilization, increased use of GETVIS/OSCOR, etc., which will accompany the use of Course Reserve and the creation, searching, and updating of bill & fine records. These are difficult to quantify at this point. In relation to the total processing requirements for NOTIS it seems likely that the increase will be less than 5%.

The use of Dynamic Transaction Backout (DTB) will also have a certain impact which, once again, is hard to quantify at this time.

# NUGM 1989 CALL FOR PAPERS

We are now accepting proposals for papers to deliver at NUGM 1989. If there is a topic that interests you, please complete this form and return it to NOTIS by October 3, 1988. Please note that we are especially interested in any topics on networking.

NAME: \_\_\_\_\_

INSTITUTION: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

PHONE NUMBER: \_\_\_\_\_

TOPIC/TITLE: \_\_\_\_\_

INTENDED AUDIENCE: \_\_\_\_\_

ABSTRACT(BRIEF SUMMARY OF SUBJECT): \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Return by October 3, 1988 to : NUGM 1989 Planning Committee  
NOTIS Systems, Inc.  
2nd Floor  
1007 Church Street  
Evanston, IL 60201

**NUGM 1989**

Plans are already underway for the NUGM 1989. We'd like to encourage as much input in the planning and participation in the meeting as possible from the users. If you are interested in participating in NUGM 1989 or helping in the planning please complete this form and return it to NOTIS by September 1, 1988.

Please indicate if you want to participate as:

\_\_\_\_\_ Session Moderator - Responsible for preparing the agenda of the session, obtaining any necessary users to be presenters at the session, submitting all materials to be printed, and moderating the event. Each session will have a NOTIS person assigned to it to help the moderator in any way.

\_\_\_\_\_ Session Presenter - Responsible for preparing a presentation as per the instructions of that session's moderator and submitting all materials to the moderator for approval and printing.

\_\_\_\_\_ Discussion Leader - Responsible for planning the agenda of the session and moderating the actual discussion: includes gathering users to participate (i.e. panel discussion members).

NAME: \_\_\_\_\_

INSTITUTION: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

PHONE NUMBER: \_\_\_\_\_

Please indicate any suggested topics or issues you would like to see addressed, and if possible, include a suggested moderator.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Return by September 1, 1988 to:

NUGM 1989 Planning Committee  
NOTIS Systems, Inc.  
1007 Church St., 2nd Floor  
Evanston, IL 60201

**REMOTE ACCESS TO [LUMINA]**

Hours of Service: Monday - Friday 7 a.m. - 1 a.m.  
Saturday 9 a.m. - 1 a.m.  
Sunday noon - 1 a.m.

Telephone Number: 626-2206

Cost: There is no charge for using LUMINA and no password is required.

LUMINA is a catalog of most of the books and periodicals held by the libraries of the University of Minnesota, Twin Cities. It contains few government publications and no individual articles within periodicals. You can access LUMINA using nearly any microcomputer with a modem and appropriate software. The main requirement is that the software be able to emulate a VT 100 terminal. Software packages with this feature include Crosstalk, SmartCom, ProComm, TinCan, MacTerminal, and many others. Additional parameters include:

baud rate: the system will match your modem's baud rate  
data bits: 7  
parity: even  
stop bits: 1  
duplex: full  
handshaking/flow control: xon/xoff  
terminal emulation: VT 100

Check your software manual for instructions on setting these parameters and dialing the LUMINA phone number. Once you are connected to the LUMINA computer, the log-on procedure is as follows:

[RETURN] Press [return] key  
ENTER TERMINAL TYPE: vt100 Type vt100 [return]  
TYPE IN LUMINA AND PRESS  
ENTER: lumina Type lumina [return]  
ENTER SUBSYSTEM SELECTION  
CODE (SEL): a Type a [return]

You are now connected to LUMINA. You can search by:

author a=shakespeare  
title t=new england journal of medicine  
subject s=educational psychology  
medical subj. sm=brain chemistry

There is extensive online help available in LUMINA. If you need further assistance in using or interpreting LUMINA, please call one of the Libraries reference desks. For assistance with software or hardware, call 626-2272.

## UNION LIST SERIALS LOADER

### LBC60

Libraries wishing to offload their OCLC Union List Serials records and add them to their NOTIS database can now do so with the Union List Serials Loader available from Conversion Services. Through an arrangement with NOTIS, BNA will merge the LDR's into 852 fields of the corresponding bibliographic records. These preprocessed MARC records are then ready for the LBC60 program.

Each 852 field generates one copy statement and one volume record. The holdings code is translated into locations designated by the library. The call number is put into the call number field of the copy record if it is actually a call number (i.e., it has a numeric in its first 9 characters). Otherwise, it is put into the first volume statement with the caption 'SHELVED AS:'. The contents of subfield v also goes into the volume record with the data being wrapped to the next line and indented to show continuation if it is longer than the screen width. Subfield y information is bracketed and added after subfield v information. Notes are added at the end.

The serials loader package includes the serials overlay programs to facilitate the updating of the database. Serials overlay separates the incoming records into matching the database and non-matching the database records (see Serials Overlay document). The overlay can be purchased separately.

Generally, the Union List Serials Loader does not need customization. For those libraries with special data problems, Conversion Services does offer customization of the program. A questionnaire is available upon request.

## SERIALS OVERLAY

Serials overlay works similarly to the generic overlay (see Generic Overlay document) with one major difference - incoming records matching the database are separated from incoming records which have no matching record in the database. This provides more flexibility for a library during the updating process. Some libraries consider matching records to be errors and others consider nonmatching to be errors. For either type, separating the matches from nonmatches provides control options in updating.

When an incoming record has processed through the conversion program and turned into a NOTIS formatted record, it is then matched against the database using the standard number index (typically the OCLC number). If a match occurs, the bibliographic portion of the record is written to the BIBMOD file. The holdings can be ignored or merged with the holdings already existing in the database to create a new holdings record written to HLDMOD (the library chooses which option when it runs the program). Nonmatching bibliographic records are written to the BIBNEW file and their holdings are written to the HLDNEW file.

At this point, the database has still not been updated. The last part of the job stream is where the library makes the decision which of the 4 files containing the matching or nonmatching records they want to use in updating the database. All 4 can be used or any combination of them. Thus the flexibility of the program.

The Serials Overlay program also writes out all records in the database which match a record coming in through this job stream. The library can, if it wishes, archive this file.

If you would like more information about Serials Overlay or if you would like to order it, please call Conversion Services at NOTIS Systems, Inc.

## LINKED ITEM RECORD CREATION

### LD08X

LD08X is a specialized program designed to create linked item records from specific information in copy and/or volume records in the NOTIS database. Because LD08X is such a specialized program, extra care is necessary when building copy and volume information to prepare for linked item record creation. Typically, this is done during the customized conversion process.

LD08X operates off a trigger (id=) found in subfield a's of copy notes or volume holdings statements. Other information can be in the subfield but ONLY if it meets the strict conventions of the program.

Typically, a bar code follows the trigger. When this is the case, the bar code will be transferred to the linked item record and it will also be removed from the copy or volume record. In cases where the library does not have bar codes, the trigger can be followed by a dummy bar code (9999). LD08X will still create a linked item record but will not put anything in the bar code field. LD016 can be used later to assign a bar code to the item record. LD08X will remove the trigger and dummy from the copy or volume record.

If you wish more information about LD08X or if you wish to place an order for it, please contact Conversion Services at NOTIS Systems, Inc.

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**POSITION: MANAGER - MARKETING**

**RESPONSIBILITIES:** Participation in setting the marketing strategy of the organization; recommending pricing for the products and services; promoting NOTIS in the marketplace through literature and press releases; supervise the marketing staff; developing the sales techniques of the staff; coordinating demonstrations of NOTIS at prospective customer sites; planning, budgeting and forecasting revenue for the marketing activities; and coordinating production of RFP's and FRI's.

**REQUIREMENTS:** MLS degree or equivalent experience in an information science setting; minimum 2 years in marketing/market research capacity, preferably marketing automated systems; minimum 2 years demonstrated managerial experience; excellent verbal and written communication skills; and ability to travel 40% required. MBA or half the course work towards MBA in marketing, is highly preferred.

**POSITION OPEN:** Until filled.

**CONTACT:** Annmarie Utroska, Personnel Manager (no phone calls, please)

**POSITION: BAL/CICS MACRO PROGRAMMER**

**RESPONSIBILITIES:** To handle the production and debugging of S/370 BAL code working in an on-line CICS environment. Program from specifications in CICS macro and command systems.

**REQUIREMENTS:** 3 or more years proven success in development of new software in a CICS/BAL environment using 370 BAL and CICS languages, be a self-starter, a quick learner and have a track record of successful development through the full project cycle.

**POSITION OPEN:** Until filled.

**CONTACT:** Annmarie Utroska, Personnel Manager (no phone calls, please)

**POSITION: TECHNICAL CONTROL ENGINEER**

**RESPONSIBILITIES:** Is responsible for high quality technical control of NOTIS software development environment; writes and administers technical standards for software design and engineering; publishes guidelines for external NOTIS software developers; administers source code control system; administers disk backup and utilization procedures; does capacity planning for mainframe systems; has in-depth knowledge of hardware and software and shares it via support and training for others in the department; interfaces directly with systems programmers and/or does systems programming tasks such as generation of new system software releases, hardware and systems software troubleshooting; hardware and software configuration and installation; security administration, etc.; and reviews and approves code implementation for quality of backup/restore processing, performance and data integrity.

**REQUIREMENTS:** B.S. in computer science or equivalent work experience; 3 or more years of systems software support experience; attention to detail and organization; knowledge and experience of IBM mainframe software control systems; in-depth knowledge of IBM assembler language and CICS; systems programming experience, especially capacity planning, data center operations and IBM operating system generation, required. Experience with structured programming and design methodologies, microcomputer systems and high level languages are highly desired.

**POSITION OPEN:** Until filled.

**CONTACT:** Annmarie Utroska, Personnel Manager (no phone calls, please)

**POSITION: MANAGER - SYSTEMS ENGINEERING**

**RESPONSIBILITIES:** Supervise a staff of Systems Engineers responsible for software installation and customer technical support; provide planning and budgeting for the department; provide new product service and development; develop new service standards; and conduct pre-installation meetings with new clients.

**REQUIREMENTS:** BA/BS degree or equivalent and 6 years of data processing experience including 2 years of managerial experience and 2 years of experience in an IBM mainframe environment; experience with CICS, VSAM and Assembler; and excellent written and verbal communication skills, required. Knowledge of libraries and customer service experience are highly desirable. Position requires approximately 15-20% travel.

**POSITION OPEN:** Until filled.

**CONTACT:** Annmarie Utroska, Personnel Manager (no phone calls, please)

**LD525: FUND AUDIT REPORT****1. PROCESSING SUMMARY**

LD525JOB produces reports of (1) commitments matched to fund records, (2) expenditures matched to fund records, (3) order commitments with no matching fund record, (4) invoice payments with no matching fund record, (5) invoice expenditures with a matching fund record but no matching expenditure-by-class code, and (6) a report of errors other than those covered in reports 1 through 5. Most errors which result in termination of processing are noted in report 6. The job may be run whether or not order records have been converted (through LD840JOB) to contain fund fiscal year information -- a local variable &NTORTYP in program LD525BAL must be set before assembly to determine whether fund audit processing is to expect that the fund fiscal year will be stored in the order record.

**2. FUNCTIONAL DESCRIPTION**

LD525 is a multi-step job. Fixed-file extract records for fund, order and invoice records from desired processing units are obtained through a run of program LD500. Fixed-file records are then pared down to the minimum number of useful records in an E15 exit (program LD520BAL), encoded by type of record (again in E15), sorted, and the encoding byte deleted in an E35 exit (LD521BAL). The selected and sorted fixed-file records are input to program LD525, which produces fund audit report records of 133 bytes, followed by a single byte to identify report type. A second sort orders the report lines by type of report and deletes the report identifier byte. In MVS, the sort output is routed directly to a print queue. In DOS, the sort output is written to disk, and a final utility program (LD523BAL) reads the disk report file and writes it to a print file.

**3. JCL DESCRIPTION**

The job stream consists of the following steps.

- (1) A run of LD500 to extract fund, invoice, and order records from those processing units for which a fund audit report is desired. Refer to LD500JOB for parameters necessary to choose appropriate processing

units for fund, invoice, and order extract files. Depending on DOS assembly or MVS JCL DD information, the output for this step may be tape or disk. In a production environment of reasonable size, tape may be preferable, since many extract records will be created from one invoice or order. (MVS JCL is set for disk, DOS for tape, at distribution from NOTIS.).

- (2) A sort of the fixed-file extract records. LD520BAL, an E15 exit, will delete record types not needed for processing by program LD525BAL, and will code records as fund, invoice, or order. Sort will arrange records by processing unit, and within processing unit by record type (first fund, then order, then invoice), and within record type by record key. LD521BAL, an E35 exit, deletes the byte added by LD520BAL to identify record type. By JCL and sort options, input and/or output may be tape or disk. Again, tape may be preferable in a large environment or if disk space is very tight. The input file will, however, be deleted upon successful completion of the step.
- (3) A run of LD525 to produce fund audit report lines of 133 bytes, plus a 134th byte to identify type of report. Input and output may be tape or disk, as preferred locally. The output to LD525 will not typically be large and should not be a problem on disk even for a site which is tight on space. The input file will be deleted upon successful completion of the job step.
- (4) A sort of fund audit report records created by LD525 to produce the 6 different reports and to delete the 134th byte (report identifier). MVS output is routed directly to print (job ends here in MVS). DOS output is a disk file. Input in both cases is deleted upon successful completion of the step.
- (5) (DOS only) LD523BAL writes the sorted report on disk to SYSLST. The file will remain until deleted by the local site.

#### 4. OPERATIONS

General instructions: LD525JOB may be run at any time upon request from library staff for fund audit information.

Interactive Program/Job Details: Step 1 of LD525JOB reads online fund, invoice, and order files, but no updates are performed, so CICS need not be affected.

#### 5. RESTART PROCEDURES

LD525JOB may be restarted in whichever step an abend occurs. Be sure to read report 6, however, for conditions which may prevent further processing.

## NOTIS USER SERVICES GROUP RELEASE 4.5 ORIENTATION SEMINARS

The User Services Group will offer special 4.5 implementation support and training sessions at NOTIS Systems, Inc. The group will offer these special orientation sessions from September through November 1988.

4.5 training at NOTIS will include:

### Implementation Planning

- \* Review of new features and functions available with 4.5
- \* Discussion of tables changes
- \* Discussion of implementation issues
- \* Review of documentation

### Hands-on Training

- \* Brief review of current functions, features and procedures affected by the release.
- \* Basic level training in the 4.5 functions and features.

### Schedule

Day 1: Course Reserve; Bill & Fine

Day 2: Keyword/Boolean; VITLS; FY/ORCODS;  
OCLC/IBM; Block Renewal; Overlay Programs

These special support programs are designed to make your implementation of 4.5 go smoothly and efficiently. They are aimed at meeting the needs of decision-makers and trainers responsible for NOTIS. We encourage you to take advantage of these new programs.

Attendance for each class is limited to 6 trainees, so register early to ensure a space. Please use the form on the bottom of the seminar description when registering. Registration will be on a first come first served basis. No telephone registrations will be accepted.

**RELEASE 4.5 ORIENTATION SEMINARS**

**TOPICS:** Bill & Fine  
Course Reserve  
DITLS  
Keyword/Boolean

**LOCATION:** NOTIS Systems  
Training Facility  
Evanston, IL

**DURATION:** 2 day course

**COST:** \$600 until August 31  
\$750 if postmarked September 1 or later

**WHEN:** September 15 - 16, 1988  
September 29 - 30, 1988  
October 13 - 14, 1988  
October 27 - 28, 1988  
November 10 - 11, 1988

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**RELEASE 4.5 ORIENTATION SEMINARS**

Name \_\_\_\_\_ Title \_\_\_\_\_  
Organization \_\_\_\_\_  
Mailing Address \_\_\_\_\_

Dates: 1st Choice \_\_\_\_\_  
2nd Choice \_\_\_\_\_

Please copy and complete one form for each attendee. Mail with payment to Ms. Cassandra Gibson, NOTIS Systems, Inc., 1007 Church St., Evanston, IL 60201-3662. Registrations will not be accepted without payment.

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June 1988

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 Carolyn Kacena (Director) VB7R1001  
 Clare Lattimore (Serials) VB7R0012  
 Kris Murphy (Acquisitions) VB7R0013  
 Wilson Snodgrass (Cataloging) VB7R0002  
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Scott Fones (Computing)	ALA0808
David Hoffman (Director)	ALA0808
Doug Ilgenfritz (Computing)	ALA0808
Alice Lubrecht (Reference)	ALA0808

**SUNY---Binghamton (MVS) @BINGVMB**

Andy Perry (Systems)	APERRY
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**SUNY---Stonybrook (MVS) @SBCCMAIL**

Joe Cavanagh (Systems)	JCAVANAG
Donald Cook (Systems)	DCOOK
Charles Simpson (Technical Services)	CSIMPSON

**Texas A & M (MVS) @TAMVM1**

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Stuart Glogoff (Systems)	EP027855
Carol Hert (Systems)	EP024908
Madlaine Masso (Computing)	EP005847
Sue Ulrich (Technical Serv. & Systems)	ALA1637 (ALANET)

**University of Florida, Gainesville (MVS) @NERVM**

Tom Kinney (Systems)	CYZEU32
Suzy Shaw (Systems)	CYZEU31

**University of Illinois at Chicago (MVS) @UICVM**

Ray Deutsch (Systems)	U43644
Harriet Gorny (Computing)	U35049
Nancy John (Systems)	U31452
William Jones	U11218
Jay Lambrecht (Cataloging)	U16854
Beverly Lynch (Director)	U19592
James Mouw (Acquisitions)	U40028
Louis Schultheiss (Systems)	U31220
Michael Sperberg-McQueen (Computing)	U18189
Stephen Van Houten (Medical, Cataloging)	U13436
Ann Weller (Medical, Serials)	U50534
George Yanos (Computing)	U08208

**University of Iowa (MVS) @UIAMVS**

Donna Hirst (Systems)	CADHIRPG
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**University of Louisville (MVS) @ULKYVM**

Martha Bowman (Director)	MABOWMO1
David Carlson (Systems)	DHCARLO1
John Loran (Computing)	JALORA01
John Miles (Computing)	JHMILE01
Calvin Miracle (Systems)	CBMIRA01
Judith Niles (Technical Services)	JFNILE01
Joyce McDonough (Acquisitions)	JGMCDO01

**University of Michigan (VSE) @um.cc.umich.edu**

Kathleen Bergen (NOTIS Implementation)	Kathleen Bergen
Joan Butler (NOTIS Implementation)	Joan Butler
Rebecca Dunkle (NOTIS Implementation)	Rebecca Dunkle
Brenda Johnson (Systems)	Brenda Johnson
Robert MacDonald (NOTIS Implementation)	Robert MacDonald
David McDonald (Systems)	David McDonald
Don Plantinga (Systems)	Don Plantinga
Phyllis Valentine (Systems)	Phyllis Valentine
Jack Weigel (NOTIS Implementation)	Jack Weigel

**University of Minnesota (MVS) @UMNADMIN**

Charlene Mason (Systems)	TCKMO
Chris Meyer (Cataloging)	TCPMO
Paul Vitko (Computing)	TPAVO

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 Tim Deliyannides (Systems) TSD  
 Barbara Hieber (Systems) BAH  
 Cathy Lynch (Computing) LYNCH  
 Jo-Ann Michalak (Systems) JAM2  
 Gary Ray (Computing) GMR  
 Anne Woodsworth (Director) ALW

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 Charles Lowry (Director) ALA1410 (ALANET)  
 Bob Samson (Systems) B366RCS

**University of Texas at Dallas (VSE) @UTDALVM1**  
 David Lippke (Computing) LIPPKE  
 Terry Parker TERRY  
 Louis Wadel (Computing) ZLBW

**University of Utah (VSE) @UTAHCCA**  
 Ken Luker (Systems) KLUKER

**University of Vermont (VSE) @UVMVM**  
 Jerry Caswell (Systems) JCASWELL  
 Amy Cooper (Medical, T.S.) ACOOPER  
 Nancy Crane (Reference) NCRANE  
 Milton Crouch (Public Services) MCROUCH  
 Nancy Eaton (Director) NEATON  
 Barbara Gay (Cataloging) BGAY  
 Keith Kennedy (Computing) KDK  
 Warren Van Wyck (Computing) WVW  
 Joanna Weinstock (Medical, P.S.) JWEINSTO

**University of Virginia (MVS) @VIRGINIA**  
 John Sleeman (Systems) JKS6N

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 Ana Fidler (Systems) AFIDLER  
 Dody Fox (Systems) DFOX  
 Peter Spyers-Duran (Director) PSPYERS  
 Charlene Wecker (User Services) CWECKER

**West Chester University (VSE) @WCUCU**  
 Randy Schirmer (Computing) RSCHIRME

**Yale University (MVS) @YALEVM**  
 Peter Furmonavicius (Computing) PETER  
 David Gewirtz (Computing) REDOAK  
 Fred Martz (Systems) FMARTZ

**York University (MVS) @YORKVM2**  
 Bob Thompson (Computing) RTHOMPSON

## Distribution Lists for NOTIS

A few NOTIS installations have set up distribution lists on Bitnet to discuss issues related to implementing an integrated library system. Brigham Young University has the longest running list; Tulane University has a list that discusses both NOTIS and DOBIS; Yale has two lists dealing with ALA support for PCs (YTerm) and Apple Macintoshes (TinCan); SUNY Buffalo has a list for music librarians.

If you have difficulty subscribing to any of the lists, send a message to MABBIE@NUACC for assistance.

### **Brigham Young University**

Send a request to Kal Larsen (KAL@BYULIB) to be put on the distribution list for NOTIS.

### **SUNY Buffalo**

- 1) Send a Bitnet message to LISTSERV@UBVM
- 2) Your message should be:  
SUBSCRIBE NOTMUS-L YOUR FULL NAME
- 3) Type SEND at the command level
- 4) Hit the ENTER key

### **Tulane University**

- 1) Send a Bitnet message to LISTSERV@TCSVM
- 2) Your message should be:  
SUBSCRIBE NOTIS-L YOUR FULL NAME
- 3) Type SEND at the command level
- 4) Hit the ENTER key

### **Yale University**

- 1) Send a Bitnet message to LISTSERV@YALEVM
- 2) Your message should be:  
SUBSCRIBE YTERM-L YOUR FULL NAME (or)  
SUBSCRIBE TINCAN-L YOUR FULL NAME
- 3) Type SEND at the command level
- 4) Hit the ENTER key