



Wayne State University
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TECHNICAL BULLETIN

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ATTACHMENT: WSU/DALNET NOTIS Regular Batch Schedule

edited by: Louise Bugg, Charlene Wecker

NEW NOTIS BATCH SCHEDULE

The WSU Computing Center has added computer operators to expand their schedule to 24 hours every day, except for the 12:00 a.m. to 8:30 a.m. Sunday morning shift. Consequently, we have been able to make these changes to our NOTIS batch schedule, effective the first week of October.

1. Monthly Full File Backup

This job, which previously ran on the first Sunday night of the month, has been rescheduled to the first Friday night of the month.

2. Weekly Full Disk Pack Backup

This job, which previously ran on Sunday mornings, has been rescheduled to Saturday nights.

3. Patron Charge ("Has") Index

This job can now be run 7 times a week, Sunday morning before 10:30 a.m. and nightly Sunday through Friday.

See revised Batch Schedule attached to this Technical Bulletin.

INFORMATION PLEASE

We would be interested in knowing if any libraries are using the L1, L2, and L3/4 codes in their OPR records. If so, please inform C. Wecker so that this information can be put in a future TB, allowing interested DALNET libraries to call and discuss your use of them.

A NOTE OF URSINE INTEREST

Beaumont Hospital, Royal Oak, has now implemented the OPAC and Circulation modules of NOTIS. The public relations aspect of this activity was greatly assisted by the excellent work of one staff member, W. Beaumont Bear. WBB is a large (41 inches from tip of ear to tip of hind paw) brown bear. He is sometimes an MLS, and sometimes when he feels like wearing his scrubs or a lab coat, he is an MD. He joined the Library staff in December 1986 as part of the Christmas decorations. Since that time, he has worked in the Reading Room on Fridays, holding various signs such as "I can't BEAR overdues," "HAPPY VALENTINE'S DAY," "TGIF," etc.

When OPAC was about to be implemented, he alerted the populace with such warnings as "LUIS IS COMING," "HAVE YOU SEEN LUIS?," and, finally, "LUIS IS HERE." During Patron Registration, he urged patrons to register early, and when Circulation came up, he turned mean with a "NO CARD - NO BOOK" message. WBB has heard that some libraries are automating without a resident bear. "I suppose it is possible," he growled, "but I wouldn't like to try it."

-- Joan Smith
Wm. Beaumont Hospital Library

DALNET BIBLIOGRAPHIC RECORD COUNT

The DALNET database statistics for each processing unit as of September 20th are:

• Beaumont Hospital, Royal Oak	10,569
• Botsford Hospital	2,974
• Children's Hospital	3,849
• Detroit Public Library	700,284
• Harper Hospital	10,686
• Macomb Community College	101,226
• Oakland County Library--Law Division	3,975
• Oakland University	237,346
• University of Detroit	253,500
• Wayne County Community College	35,695
• Wayne State University	966,252
••Center for Research Libraries	142,844
TOTAL	2,469,200

Last October, the database included records for eight DALNET Libraries and totaled 1,959,500 records. It grew 26% in one year.

DALNET TECHNICAL BULLETIN

WAYNE STATE UNIVERSITY'S APPROVAL TAPE PROGRAM

Wayne State University Libraries have a very large approval plan with Blackwell North America, which also includes British imprints from B. H. Blackwell. We receive from 200 to 400 titles per week on this combined plan, not including titles for which we receive forms. Our return rate is low, between 5 and 10 percent, so we are adding between 180 and 380 approval titles per week to our collections.

When we became aware that MARC records matching approval books could be supplied via tape from Blackwell and loaded directly onto our NOTIS system, we decided to explore this possibility.

We decided on the following options and workflow as the best for us.

- 1) We receive full MARC and CIP records with LC, NAL, NLM, and CoMarc cataloging for American imprints. For British imprints, we receive only MARC records for LC-cataloged books.
- 2) We put up and take down approval books needing review once a week--on Wednesday mornings. Each week, either on Friday afternoon or on Monday morning, the tapes arrive from Blackwell with printed copies of the invoices matching the records being loaded. We check Acquisitions' invoice copies to make sure that the records being loaded match the books. If they match, our programmers go ahead and load the tapes directly into our production file.
- 3) The bibliographic record, as loaded, needs no editing. A Copy Holdings Record is automatically created for each bibliographic record. "BNA" appears in the Title-level Note field so that we can identify them as tape-loaded records. Catalog status is "a" (in process), and Copy Status and Classification Type are set as OA. The call number appears in a b subfield, but does not display in the OPAC until the book is officially received, after the book selector approves keeping it. The message in the OPAC at this point is "In the Pre-Order Process."

WAYNE STATE UNIVERSITY'S APPROVAL TAPE PROGRAM (continued)

- 4) After the books are accepted by book selectors, receiving staff in Acquisitions find the Blackwell record. The OPRs are created and the receipt information is keyed in. The Copy Holdings codes are changed so that the message displaying in the OPAC now reads: "In Process. To have cataloged for your use, ask at circulation desk" (our normal in-process message). Records for books that are being returned are deleted, a process which takes less than a minute per record.

At this point, there is no need to go to an OCLC terminal and no need to transfer records in, a change in workflow which saves a lot of time and means that OCLC terminals don't have to be so tightly scheduled.

- 5) Since not all titles are tape-loaded, some approval books still have to be searched on OCLC and their records "manually" transferred.
- 6) When the books reach Cataloging, catalogers use the NOTIS record that Acquisitions has used, either the tape-loaded record or the one transferred from OCLC. In cases where they feel the cataloging is definitely wrong, they may go back to OCLC, find a better record, and overlay it onto the existing record. This doesn't happen very often. Their last step is to add Wayne State's holder code to the OCLC database.

Tape-loaded records for American imprints run from 79% to 85% of the total titles in a shipment. Tape-loaded records for British imprints are a much smaller percentage of the total, somewhere around 20% to 25%. But, as should be clear from the brief workflow outlined above, we save a great deal of time using tape-loaded records. Primarily, of course, the time is saved from not having to search OCLC to transfer the records into NOTIS one by one. One effect of this new procedure is that we have been absolutely current on all monographic receipts for a number of months now. Staff time that used to be needed for approvals was reallocated to other tasks, including gift processing, firm order receiving, and receiving of other types of materials. We are pleased with Blackwell's tape service and would recommend it to libraries whose approval procedure will accommodate it.

-- Barbara Heath
Wayne State University Libraries

DALNET TECHNICAL BULLETIN

WHEN TO CREATE A NAME OR SUBJECT AUTHORITY RECORD

For the DALNET authority file, it is only necessary to create a NOTIS authority record for names and/or subjects when they need "see" or "see also" references and informational notes. You will find authority records in the database without notes or references. These are authority records purchased from Blackwell North America.

When authority records are purchased from Blackwell, bibliographic headings are run against the LC Name/Series and Subject Authority Files and the resulting authority records are sent to libraries. [Authority records are first matched against those previously sent to DALNET and only unique authority records are sent.] Since LC creates authority records even when there are no references or notes, some of the authority records in the DALNET authority file will lack references and notes. When you encounter these, just leave them there. However, there is certainly no need to transfer/create new authority records for names and/or subjects when no references or notes are needed.

NOTE: It is **ALWAYS** necessary to transfer/create a series authority record if one does not exist in the DALNET authority file. There must be authority records for all series held by DALNET libraries to record their series treatment, and analysis and classification practices.

UNIVERSAL MESSAGE ON COPY HOLDINGS RECORD

A universal message (um) is a note on a copy holdings record that displays in LUIS. A universal message can only be entered in the copy level note field, **not** in the title level note field. The note must be preceded by: um=

(e.g., um=Building Use Only)

The "um" **must not** be capitalized. The universal message can be placed anywhere in the copy level note field. If it is not the first element of the note field, it must be preceded by a subfield a.

RENUMBERING LINES ON VOLUME HOLDINGS RECORD

Lines on volume holdings records can be renumbered. Renumbering may be needed to rearrange the notes or to reorder lines when volumes are received out of order. The procedure for renumbering lines on a volume holdings record is identical to that for renumbering fields on a bibliographic record and items on an "Item Summary Screen." Type the desired line number over the existing line number (e.g., 002 over 001 and 001 over 002) and press ENTER. The volume holdings record will be updated with the new numbering.

TITLES WITH PUNCTUATION BEFORE THE FIRST WORD

For titles that begin with punctuation, when assigning a value to the second indicator (non-filing) in the 245 (title proper) field, the value differs depending on whether the first word following the punctuation is an article.

1. If the first word is an article:

Count all the spaces (including those containing punctuation) up to the first letter of the word following the article to determine the second indicator value.

2. If the first word is not an article:

Do not count any spaces for the punctuation, i.e., the filing character will always be 0.

NOTE: Although the punctuation can be used in the search key when searching LUIS, use of punctuation in a staff mode search will often cause "no hits" even when there are titles under the search key. It is always best to leave out punctuation in ALL staff mode searches (other than the dashes/hyphens used in searching a hyphenated subject heading or a subject heading with subdivisions).

NUC SYMBOLS FOR DALNET LIBRARIES

Following is a list of National Union Catalog (NUC) symbols for DALNET libraries with bibliographic records in the DALNET database. Staff will find these codes on NOTIS authority records in the 040 field and in various 6xx fields.

Beaumont Hospital--Royal Oak:	MIROWB
Botsford Hospital:	MiFarmB
Children's Hospital:	MIDCH
Detroit Public Library:	MiD
Harper Hospital:	MIDHH
Macomb Community College:	MiWarM
Oakland County Library--Law Division:	MiPonO
Oakland University:	MiRochOU
University of Detroit:	MiDU
Wayne County Community College:	MiDWcc
Wayne State University:	MiDW

PATRON'S NAME IN CAPS

It is a requirement that the patron's name be keyed in capital letters on the DALNET patron record, to ensure proper updates of the patron file via tapeload.

If you have a circulation terminal that can select upper or upper/lower case character display, make sure you have selected the upper/lower case option. With the upper/lower case option, the characters will display as they are keyed. With the upper case option, all characters will display in upper case, regardless of how they are keyed.

PATRON NOTE CODES

Now that DALNET Libraries must share a shortened 40 character patron note field with Release 4.5, notes used must be coded using a maximum of 6 characters each. The code must begin with two characters identifying the library, e.g., WP-NCA. Each DALNET library is responsible for developing its own coded notes. Only the library inputting a coded note may change or delete that note.

Wayne State University Libraries have developed the following list of coded notes to use on patron records:

LIBRARY CODES

WC - Science & Engineering	WL - Law
WD - Media	WM - Medicine
WF - Federal Mogul	WP - Purdy/Kresge
WH - Pharmacy & Allied Health	WR - PRR
WI - Technical Services	WS - "Generic" Wayne State

MESSAGE CODES

ADP - Advanced placement	LYH - Library hold
APL - Needs appointment letter	L2V - Limited to 2 volumes (used with Infopass designation)
BCH - Blocked for bad check	MSU - MSU faculty
BVH - Blocked for overdue--hold placed	NCA - Needs correct address
CCG - Account sent to collection agency	NCM - Needs current alumni card
FDP - Faculty patron ID	PC1 (or 2) - Needs patron code information
FSS - Faculty social security number	PRS - Patron registered as staff
GST - Graduate assistant	RSL - Research loan
HRB - Holding recalled books--must return	STF - Patron given staff card
IFP - Infopass (will be retired with 4.5)	UPW - Upward Bound Saturday classes
K__ - Contact (followed by initials of person to be contacted, e.g., KGS means "contact Gloria Sniderman")	VRV - Overdue reserve fine
LST - ID card lost or stolen	WIP - Walk-in patron
	350 - Project 350

DALNET TECHNICAL BULLETIN

TIME BOOKS ARE OVERDUE

With NOTIS Release 4.5.1 (and maybe even with previous releases), the "item overdue time" does not work as described in the NOTIS Implementation Manual (IMP C7.9). This time, entered into each library's NOTIS calendar table, is supposed to identify when items with the previous day's due date become overdue. If the item overdue time is 9:00 a.m., then items due August 15th and returned after closing time on the 15th but before 9:00 a.m. on August 16th, are not supposed to be treated as overdue. Libraries usually select an item overdue time based on how long it takes them to discharge books returned in their book drops overnight.

In fact, items charged on daily loans become overdue at 12:01 a.m. the day after they are due, regardless of the item overdue time in the NOTIS calendar table. If you do not want items returned overnight to incur an overdue fine for one day, you must backdate the NOTIS discharge screen to the previous day while discharging them.

Items charged on hourly loans (actually calculated in minutes by NOTIS) **ARE** affected by the item overdue time. When an hourly loan would be due later than closing, NOTIS extends the loan overnight to be due the next day at the overdue time specified in the calendar table.

PSEUDO-PATRON RECORDS

With the installation of NOTIS Release 4.5.1, all DALNET pseudo-patron categories that do **NOT** have a system-supplied LUIS circulation status message **MUST** have a LUIS Message keyed into each patron record. If the records have no LUIS messages, there will be no LUIS circ status information for items charged to these pseudo-patrons.

Pseudo-patron categories that always have system-supplied messages include MISSING and LOST. Pseudo-patron categories that usually need a LUIS message field on each patron record include bindery, interloan, and library department.

THE USE OF APOSTROPHES IN SEARCHES

Apostrophes in LUIS and staff mode searching must be handled differently from other punctuation in NOTIS searches. The apostrophe must be deleted from the search key and the word "closed up" so that there is not a blank space where the apostrophe was. Usually in NOTIS searches, the punctuation can be either typed in or replaced by a blank space, and the search will be executed properly. This is not the case with the apostrophe.

LUIS MESSAGE--NUMBER OF RECALLS

With NOTIS Release 4.5.1, there is a LUIS circulation status message indicating the number of recalls currently placed on an item. This message only counts the recalls, not the holds placed. There is no LUIS circulation status message indicating the number of holds currently on an item.

WSU/DALNET NOTIS REGULAR BATCH SCHEDULE

This is the regular schedule of NOTIS batch jobs. It will be updated when it changes. Exceptions and special schedules for maintenance and holiday periods will be announced in advance. Site administrators are notified when scheduled jobs could not be run.

	Backups			Indexes				Products					
	Full disk pack	File backup (incremental)	Item Patron charge	Patron number	Call number	Course Reserve	Auth- ority Title	Author Subject number	CIRC PO's	EXP. Report (WSU)	EXP. Rep. (OU)	EXP. Rep. (BH)	EXP. Rep. (EARL) (CIRC)
Sunday morning (before 11 am)			X										
Sunday night	X		X	X	X	X		X	X				
Monday night	X		X	X	X		X		X				
Tuesday night	X		X	X	X	X		X	X			X	
Wednesday night	X		X	X	X		X		X	X	X		
Thursday night	X		X	X	X	X		X	X	X			
Friday night	X		X	X					X				
Saturday night	X		X						X				X

Batch jobs scheduled less frequently are:

Vendor list run for WS, OU, BH once a month; expired action request list (EARL) for acq. is twice a month for WS, OL, BH, and weekly for OU; BH catalog cards every Friday; Monthly full file backup 1st Friday of the month.

Effective
Oct, 1989

L. Buggs