Reference Guide

Integrated Library System

InfoStation®

Acquisitions Reports

VIRTUA ILS – INTEGRATED LIBRARY SYSTEM

InfoStation®

Acquisitions Reports Reference Guide

Version 16.1

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1. Introduction

InfoStation®, the Web-reporting product for the Virtua™ ILS – Integrated Library System, offers predefined, configurable reports, which you can use to automate and manage common library tasks. This reference guide provides information about the reports related to the Acquisitions subsystem. All the reports discussed in this guide belong by default to the Acquisitions Report Group.

Note: From this point on, we will refer to the Virtua ILS – Integrated Library System as simply Virtua or the Virtua system in this guide.

This guide provides details on the following reports:

- Account Summaries Report
- Acquisitions Audit Trail Report
- Acquisitions Transaction Counts by User
- Canceled Orders Summary Report
- Cost Export Report
- Credits Report
- Gifts Received by Month Report
- Items Received by Month Report
- New Books List Report
- Order Status Report
- Purchase Requests Report
- Received Gifts List Report
- Received Items List Report
- Titles on Order Report
- Vendor List Report
- Vendor Performance Report
- Vouchers Report

In this reference guide, we limit our discussion to features that are specific to Acquisitions reports. We do NOT provide information on features that are common to ALL reports. Rather, we leave the discussion of common report characteristics to the *InfoStation User's Guide* or the *InfoStation General Reference Guide*.

The *InfoStation/Acquisitions Reports Reference Guide* is one guide in a collection of InfoStation documentation. The other InfoStation guides are the . . .

- *InfoStation User's Guide* - Provides step-by-step instructions for logging in to InfoStation, creating report configurations, running reports, scheduling reports, and customizing reports.
- *InfoStation Reference Guide* - Provides detailed descriptions of report-specific parameters and details on the InfoStation directory structure.
- *InfoStation/Circulation Reports Reference Guide* - Provides details on the reports that belong by default to the Circulation Report Group.
- *InfoStation/Serials Reports Reference Guide* - Provides details on InfoStation reports related to the Serials subsystem.
- *InfoStation/Cataloging Reports Reference Guide* - Provides details on InfoStation reports related to the Cataloging subsystem.
- *InfoStation/OPAC Reports Reference Guide* - Provides details on InfoStation reports related to the OPAC subsystem.

Important: Throughout this reference guide, we assume that you have read the *InfoStation User's Guide*, which provides an overview of the concepts discussed here and details on how you can apply this information to your report configurations.

For each report discussed in this guide, some or all of the following information is included, depending on the complexity of the report:

- A description of the report and its default HTML output.

- A description of all the parameters that appear in the report-specific parameters area on the report's Configuration screen. Each parameter is denoted as being either required or optional.

- A description of the Virtua settings that the report uses to generate results.

- Descriptions of the data elements that a report retrieves by default. In this guide, data elements are identified by their default labels and listed in alphabetical order.

  Note: The default data elements listed for each report are NOT necessarily returned by default in ALL output formats. By editing a report's output templates, however, you can add to or remove from the output *any* data element available to be returned by that report. For details on editing output templates, see the *InfoStation User's Guide.*

- A list of the variables that you can use to edit output templates. Where appropriate, we include variables for data elements included by default in the MARC Tag List.

- Descriptions of the output templates that are available for the report, including each template's . . .

- Name as it appears on the Configuration screen.
- Location in the /**usr/vtls/virtua/webrpt_XX_x** directory.
- Contribution to the report output.

Note: This reference guide describes the default characteristics of each report.

- If you customize your reports (e.g., edit output templates or modify MARC Tag Lists), your report configurations may deviate from the descriptions provided here.
- If you assign a report to a different Report Group, our default Report Group classification will NOT apply.

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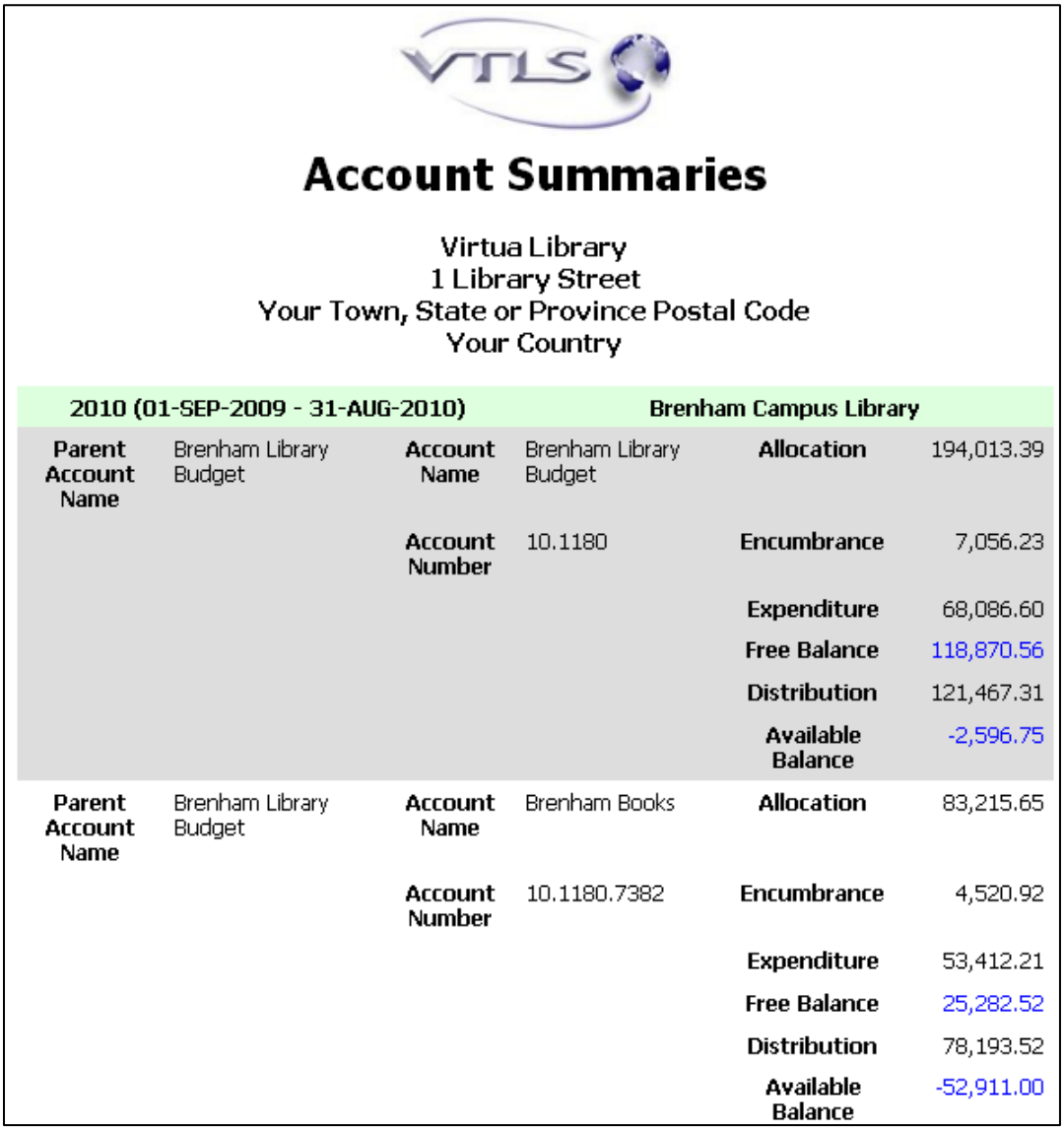
2. Account Summaries Report

The Account Summaries report generates a summary of any active or inactive Acquisitions account that matches the account, fiscal year, and location criteria specified in the report configuration. Figure 2-1 shows a portion of the default HTML output from the Account Summaries report.



Account Summaries

Virtua Library
1 Library Street
Your Town, State or Province Postal Code
Your Country

2010 (01-SEP-2009 - 31-AUG-2010)			Brenham Campus Library		
Parent Account Name	Brenham Library Budget	**Account Name**	Brenham Library Budget	**Allocation**	194,013.39
		Account Number	10.1180	**Encumbrance**	7,056.23
				Expenditure	68,086.60
				Free Balance	118,870.56
				Distribution	121,467.31
				Available Balance	-2,596.75
Parent Account Name	Brenham Library Budget	**Account Name**	Brenham Books	**Allocation**	83,215.65
		Account Number	10.1180.7382	**Encumbrance**	4,520.92
				Expenditure	53,412.21
				Free Balance	25,282.52
				Distribution	78,193.52
				Available Balance	-52,911.00

Figure 2-1. Account Summaries HTML Output

In the Account Summaries output, account summaries are grouped and sorted in ascending order by fiscal year. For each Acquisitions account, the Account Summaries report returns the following information:

- Allocation
- Distribution
- Encumbrance
- Expenditure
- Free Balance

In addition, for each fiscal year, the report generates a summary, which consists of the following calculations:

- Encumbrance Total
- Expenditure Total
- Free Balance Total

2.1 Parameters Available for the Account Summaries Report

The Account Summaries report offers the following report-specific parameters:

- **Accounts** (*required*) - Lets you limit the results to one or more Acquisitions accounts. Your output will include only the account(s) that you select for the report configuration.

- **Fiscal Years** (*required*) - Lets you limit your results to one or more fiscal years. To appear in the output, an account must be associated with one of the fiscal years that you select for the report configuration.

- **Log-in Locations** (*required*) - Lets you limit your results to accounts associated with one or more log-in locations. To appear in the output, an account must have been created at one of the log-in locations that you select for the report configuration.

- **Sort Parameters** (*required*) - Let you sort your output on the following values:

  - Account Name
  - Account Number
  - Allocation

- Distribution
- Encumbrance
- Expenditure
- Fiscal Year Description
- Free Balance
- Log-in Location

Note: In the output, account summaries are grouped by Fiscal Year. The Sort Parameters let you determine how accounts are sorted *within* each Fiscal Year grouping.

For additional information about these and other parameters, see the *InfoStation Reference Guide* or view the InfoStation online help.

2.2 Data Elements and Variables for the Account Summaries Report

The following table lists the name, variable, and description of each data element that is retrieved by default by the Account Summaries report. You can edit the output templates to include or exclude any data element listed below.

Hint: To identify its corresponding field label variable, add u_to the beginning and **_label** to the end of each variable. For more information on variables and field label variables, see the *InfoStation User's Guide*.

Data Element	Variable	Description
Account Name (*See also* Parent Account Name)	account_name	The account name of a given account. This can be either a parent or child account. **Note:** If the account is a parent account, the Account Name will be the same as the Parent Account Name.
Account Number	account_number	The account number of a given account.
Allocation	allocation	The amount of funds allocated given account.

Data Element	Variable	Description
Distribution	distribution	The amount of money distributed from a parent account to one or more child accounts. The distribution for a Spending Account is always zero.
Encumbrance	encumbrance	The encumbrance associated with a given account.
Encumbrance Total	encumbrance_sum	For given fiscal year, the total encumbrance for all accounts.
Expenditure	expenditure	The amount of money expended against a Spending Account.
Expenditure Total	expenditure_sum	For a given fiscal year, the total expenditure for all Spending Accounts.
Fiscal Year	fiscal_year	The fiscal year to which a group of account information belongs.
Fiscal Year Description	fiscal_year_description	The date range covered by a particular fiscal year.
Free Balance	free_balance	For each parent or child account, the sum of the distributions, encumbrances, and expenditures subtracted from the account allocation.
Free Balance Total	free_balance_sum	For a given fiscal year, the total free balance for all accounts.
Log- in Location	logon_location	The log-in location at which an account was created.
Parent Account Name	parent_account_name	The name of an account's parent account. If a given account *is* a parent account (i.e., it has child accounts), this field will display the account's own name.

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2.3 Output Templates for the Account Summaries Report

Location: /usr/vtls/virtua/webrpt_XX_x/Acq/Acq_3/[filename].tem

Template	Contribution to Output
html_page	Provides the overall framework of the HTML output.
html_header	In the output, account summaries are grouped according to fiscal year. This template labels each group with the appropriate fiscal year.
html_row	Generates the information associated with a single Acquisitions account.
html_summary	Returns summary data for a particular fiscal year.
email_page	Provides the overall framework of the e-mail output.
email_header	In the output, account summaries are grouped according to fiscal year. This template labels each group with the appropriate fiscal year.
email_row	Generates the information associated with a particular Acquisitions account.
email_summary	Returns the summary data for a given fiscal year.

3. Acquisitions Audit Trail Report

The Acquisitions Audit Trail report generates a list of Acquisitions transactions that meet the fund account and date range criteria specified for the report configuration. Figure 3-1 shows a portion of the default HTML output from the Acquisitions Audit Trail report.

Acquisitions Audit Trail

Virtua Library
1 Library Street
Your Town, State or Province Postal Code
Your Country

Log-in Location	Date	User ID	Username	Transaction Type	Amount	Account
Brenham Campus Library	06-DEC-2011 09:28:13	9	staff	Account Encumbered	USD 5.00	PCard (2010)
Brenham Campus Library	06-DEC-2011 09:28:13	9	staff	Account Encumbered	USD 4.00	PCard (2010)
Brenham Campus Library	06-DEC-2011 09:28:13	9	staff	Account Encumbered	USD 5.00	PCard (2010)
Brenham Campus Library	06-DEC-2011 09:28:50	9	staff	Account Disencumbered	USD 5.00	PCard (2010)
Brenham Campus Library	06-DEC-2011 09:50:07	9	staff	Account Encumbered	USD 5.00	PCard (2010)
Brenham Campus Library	06-DEC-2011 09:52:18	9	staff	Account Encumbered	USD 5.00	PCard (2010)
Brenham Campus Library	06-DEC-2011 09:52:18	9	staff	Account Disencumbered	USD 5.00	PCard (2010)
Brenham Campus Library	06-DEC-2011 09:52:27	9	staff	Account Encumbered	USD 5.00	PCard (2010)

Figure 3-1. Acquisitions Audit Trail HTML Output

In the Acquisitions Audit Trail report, Log-in Locations, Accounts, and Date Range are required parameters. In this way, the output lists any Acquisitions transaction that…

- Was performed at a log-in locations selected for the report configuration.
  -AND-
- Is associated with an account selected for the report configuration.
  -AND-
- Occurred within the date range specified in the report configuration.

The Acquisitions Audit Trail report can generate output for the following transactions:

- Account Created
- Account Credited
- Account Encumbered
- Account Disencumbered
- Account Expended
- Deposit Account Created
- Account Allocation Modified
- Fund Transfer

3.1 Parameters Available for the Acquisitions Audit Trail Report

The Acquisitions Audit Trail report contains the following report-specific parameters:

- **Log-in Locations** (*required*) - Lets you limit your results to transactions associated with one or more log-in locations. To appear in the output, a transaction must have been performed at one of the locations that you specify for the report configuration.

- **Accounts** (*required*) - Lets you limit the results to transactions associated with one or more fund accounts. To appear in the output, a transaction must be associated with an account selected for the report configuration.

- **Date Range** (*required*) - Lets you limit the results to transactions performed within a particular date range. To be included in the output, a transaction must have occurred within the date range that you specify for the report configuration.

- **Sort Parameters** (*required*) - Let you sort report output on the following values:

  - Account
  - Amount (number)
  - Date
  - Transaction Type
  - User ID
  - Username

For additional information about these and other parameters, see the *InfoStation Reference Guide* or view the InfoStation online help.

3.2 Data Elements and Variables for the Acquisitions Audit Trail Report

The following table lists the name, variable, and description of each data element that is retrieved by default by the Acquisitions Audit Trail report. You can edit the output templates to include or exclude any data element listed below.

Hint: To identify its corresponding field label variable, add u_to the beginning and **_label** to the end of each variable. For more information on variables and field label variables, see the *InfoStation User's Guide*.

Data Element	Variable	Description
Account	account	The account number of the acquisitions account associated with a given transaction.
Amount	fee_amount	The amount of money associated with a given transaction.
Date	primary_date	The on which date the transaction was performed.
Log-in Location	location	The log-in location at which the transaction was performed.
Transaction Type	transaction_type	The type of transaction associated with the account on a particular date. You can specify labels for the transaction types using the following Field Labels: • Account Created (account_created) • Account Credited (account_credited) • Account Encumbered (account_encumbered) • Account Disencumbered (account_disencumbered) • Account Expended (account_expended) • Account Allocation Modified (account_allocation_modified) • Deposit Account Created (deposit_account_created) • Fund Transfer (fund_transfer)

Data Element	Variable	Description
User ID	user_id	The Virtua user ID of the user responsible for a given Acquisitions transaction.
Username	user_name	The Virtua username of the user responsible for a given Acquisitions transaction.

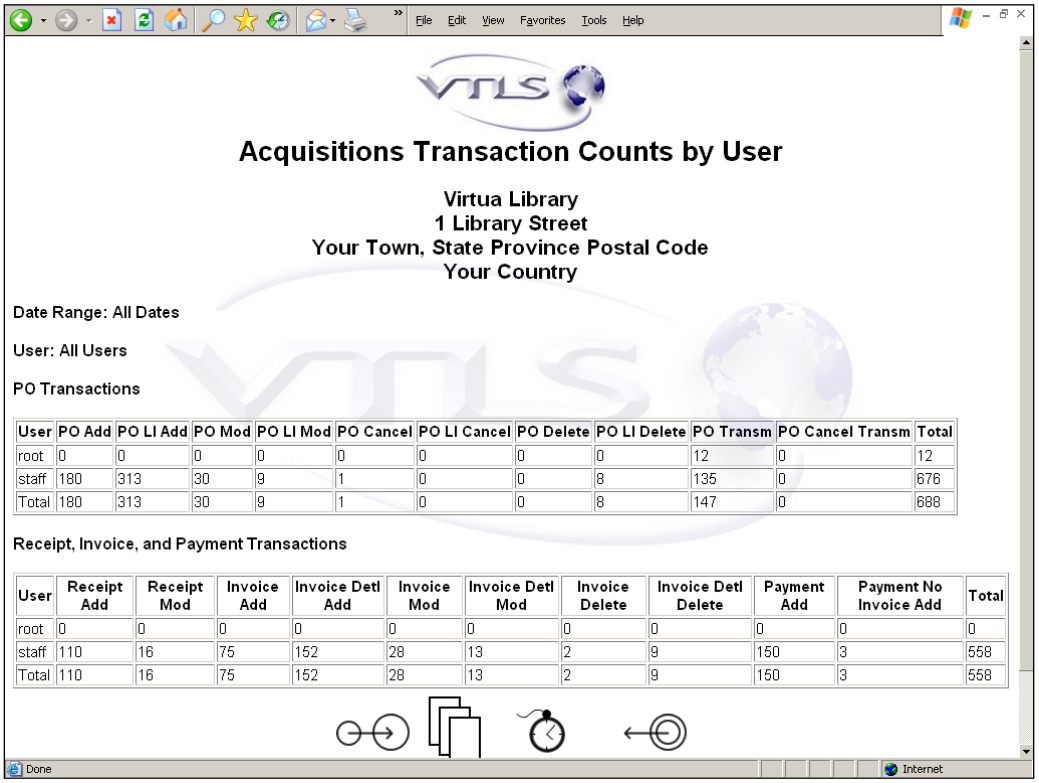
3.3 Output Templates for the Acquisitions Audit Trail Report

Location: /usr/vtls/virtua/webrpt_XX_x/Acq/Acq_4/[filename].tem

Template	Contribution to Output
html_page	Provides the overall framework of the HTML output, including library name and address information and the labels for each column of data in the output table.
html_row	Returns information related to a single account transaction. By default, this template contains only variables. The **html_page** template provides labels for the information returned by the **html_row** template, which is formatted into columns.
email_page	Provides the overall framework of the e-mail output.
email_row	Returns information related to a single account transaction, including data elements and their corresponding labels.

4. Acquisitions Transaction Counts by User

The Acquisitions Transaction Counts by User report lets you generate counts of all Acquisitions transactions that meet the Virtua user and date range criteria specified in the report configuration. Figure 4-1 shows a portion of the default HTML output from the Acquisitions Transaction Counts by User report.



Acquisitions Transaction Counts by User

Virtua Library
1 Library Street
Your Town, State Province Postal Code
Your Country

Date Range: All Dates

User: All Users

PO Transactions

User	PO Add	PO LI Add	PO Mod	PO LI Mod	PO Cancel	PO LI Cancel	PO Delete	PO LI Delete	PO Transm	PO Cancel Transm	Total
root	0	0	0	0	0	0	0	0	12	0	12
staff	180	313	30	9	1	0	0	8	135	0	676
Total	180	313	30	9	1	0	0	8	147	0	688

Receipt, Invoice, and Payment Transactions

User	Receipt Add	Receipt Mod	Invoice Add	Invoice Detl Add	Invoice Mod	Invoice Detl Mod	Invoice Delete	Invoice Detl Delete	Payment Add	Payment No Invoice Add	Total
root	0	0	0	0	0	0	0	0	0	0	0
staff	110	16	75	152	28	13	2	9	150	3	558
Total	110	16	75	152	28	13	2	9	150	3	558

Figure 4-1. Acquisitions Transaction Counts by User

The Acquisitions Transaction Counts by User report produces two tables:

- One containing counts of purchase order transactions by user.
  -AND-
- One containing counts of receipt, invoice, and payment transactions by user.

4.1 Parameters Available for the Acquisitions Transaction Counts by User Report

The Acquisitions Transaction Counts by User report offers the following report-specific parameters:

- **Date Range** (*optional*) - Lets you limit your results to a particular date range. To be counted by the report, a transaction must have been performed within the date range specified for the report configuration.

- **Virtua Users** (*required*) - Lets you limit your results to one or more Virtua users as defined in the Virtua Profiler. The report generates counts of Acquisitions transactions performed *only* by the Virtua user(s) you select in this parameter.

For additional information about these and other parameters, see the *InfoStation Reference Guide* or view the InfoStation online help.

4.2 Data Elements and Variables for the Acquisitions Transaction Counts by User Report

The following table lists the name, variable, description, and source of each data element that is retrieved by default by the Acquisitions Transaction Counts by User report. You can edit the output templates to include or exclude any data element listed below.

Data Element	Variable	Description and Source
User	user	The Virtua user specified in the report configuration for which the various counts are generated.

Data Element	Variable	Description and Source
PO Add	po_add_count	For each user, the number of purchase orders added, taken from Action 200 in the acq_transaction_log.
PO LI Add	po_li_add_count	For each user, the number of purchase order line items added, taken from Action 210 in the acq_transaction_log.
PO Mod	po_mod_count	For each user, the number of purchase orders modified, taken from Action 201 in the acq_transaction_log.
PO LI Mod	po_li_mod_count	For each user, the number of purchase order line items modified, taken from Action 211 in the acq_transaction_log.
PO Cancel	po_cancel_count	For each user, the number of purchase orders canceled, taken from Action 203 in the acq_transaction_log.
PO LI Cancel	po_li_cancel_count	For each user, the number of purchase order line items canceled, taken from Action 213 in the acq_transaction_log.
PO Transm	po_transm_count	For each user, the number of purchase orders transmitted, taken from Action 204 in the acq_transaction_log.
PO Cancel Transm	po_cancel_transm_count	For each user, the number of canceled purchase orders transmitted, taken from Action 205 in the acq_transaction_log.
PO Delete	po_delete_count	For each user, the number of purchase orders deleted, taken from Action 202 in the acq_transaction_log.

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Data Element	Variable	Description and Source
PO LI Delete	po_li_delete_count	For each user, the number of purchase order line items deleted, taken from Action 212 in the acq_transaction_log.
Total	user_po_total po_total	The total number of purchase order transactions per user. The total number of purchase order transactions for ALL users.
Receipt Add	receipt_add_count	For each user, the number of receipts added, taken from Action 300 in the acq_transaction_log.
Receipt Mod	receipt_mod_count	For each user, the number of receipts modified, taken from Action 301 in the acq_transaction_log.
Invoice Add	invoice_add_count	For each user, the number of invoices added, taken from Action 400 in the acq_transaction_log.
Invoice Detl Add	invoice_detl_add_count	For each user, the number of invoice lines added, taken from Action 410 in the acq_transaction_log.
Invoice Mod	invoice_mod_count	For each user, the number of invoices modified, taken from Action 401 in the acq_transaction_log.
Invoice Detl Mod	invoice_detl_mod_count	For each user, the number of invoice lines modified, taken from Action 411 in the acq_transaction_log.
Invoice Delete	invoice_del_count	For each user, the number of invoices deleted, taken from Action 402 in the acq_transaction_log.

Data Element	Variable	Description and Source
Invoice Detl Delete	invoice_detl_del_count	For each user, the number of invoice lines deleted, taken from Action 412 in the acq_transaction_log.
Payment Add	payment_add_count	For each user, the number of payment vouchers added, taken from Action 500 in the acq_transaction_log.
Payment No Invoice Add	payment_no_invoice_count	For each user, the number of payment vouchers without invoices added, taken from Action 501 in the acq_transaction_log.
Total	user_rip_total rip_total	The total number of receipt/invoice/payment transactions per user. The total number of receipt/invoice/payment transactions for ALL users.

4.3 Output Templates for the Acquisitions Transaction Counts by User Report

Location: /usr/vtls/virtua/webrpt_XX_x/Acq/Acq_14/[filename].tem

Template	Contribution to Output
html_page	Provides the overall framework of the HTML output and the placement of the html_row templates.
html_header	In HTML output, provides the header information that appears.
html_po_row	Provides the counts of transactions related to a single user in the PO Transaction table.
html_rip_row	Provides the counts of transactions related to a single user in the Receipt, Invoice, and Payment Transaction table.

email_page	Provides the overall framework of the e-mail output and the placement of the email_row templates.
email_header	In e-mail output, provides the header information that appears.
email_po_row	Provides the counts of transactions related to a single user in the PO Transaction table.
email_rip_row	Provides the counts of transactions related to a single user in the Receipt, Invoice, and Payment Transaction table.

5. Canceled Orders Summary Report

The Canceled Orders Summary report (/usr/vtls/virtua/webrpt_XX_x/Acq/Acq_15) generates a 1) list of purchase order lines that were successfully canceled, 2) list of purchase order lines that were unsuccessfully canceled, and 3) summary count of orders and order lines canceled and not canceled. You can filter the report by date range, vendor, and log-in location where the order was created. In addition, you can sort the report's output using three sorting levels.

Figure 5-1, Figure 5-2, and Figure 5-3 each show a portion of the default HTML output from the Canceled Orders Summary report.

Successfully Canceled Order Lines

Report Date : 30-JUN-2011 10:42
Cancel Order Location : all
Cancel Date Range : all

Purchase Order Number	4	**Purchase Order Line Number**	1	**Cancel Date**	17-JUN-2011 07:09:37	**Canceled Quantity**	1
Cancel Order Location	Wilson Library	**Vendor**	AAA Bookstore	**Bib Requester**		**Bib Requester Barcode**	
Purchase Requester		**Purchase Requester Barcode**					
Purchase Order Number	5	**Purchase Order Line Number**	3	**Cancel Date**	05-JAN-2010 18:01:04	**Canceled Quantity**	1
Cancel Order Location	Wilson Library	**Vendor**	Baker & Taylor	**Bib Requester**	Lutz, Rosemary	**Bib Requester Barcode**	2000002079
Purchase Requester	Olinger Don	**Purchase Requester Barcode**	don01				
Purchase Order Number	7	**Purchase Order Line Number**	1	**Cancel Date**	17-JUN-2011 08:09:00	**Canceled Quantity**	1
Cancel Order Location	Wilson Library	**Vendor**	Baker & Taylor	**Bib Requester**	Griffin Chris	**Bib Requester Barcode**	asdf1234
Purchase Requester		**Purchase Requester Barcode**					

Account Number	Account Name	Amount Disencumbered
7	GRL - General Collection	3 USD

Figure 5-1. Canceled Orders Summary Report – Successfully Canceled Order Lines

Unsuccessfully Canceled Order Lines					
PO Number	PO Line Number	Cancel Date	Location	Vendor	Error
4	1	17-JUN-2011 07:30:48	Wilson Library	AAA Bookstore	Unknown
4	1	17-JUN-2011 07:12:49	Wilson Library	AAA Bookstore	Unknown
5	2	17-JUN-2011 13:59:38	Wilson Library	Baker & Taylor	Unknown
7	1	17-JUN-2011 09:34:41	Wilson Library	Baker & Taylor	Not transmitted
26	1	17-JUN-2011 08:22:27	Wilson Library	AAA Bookstore	Unknown
26	1	17-JUN-2011 08:21:57	Wilson Library	AAA Bookstore	Unknown
26	1	17-JUN-2011 08:21:08	Wilson Library	AAA Bookstore	Unknown
26	1	17-JUN-2011 09:55:36	Wilson Library	AAA Bookstore	Unknown
26	1	17-JUN-2011 13:51:37	Wilson Library	AAA Bookstore	Unknown
29	1	17-JUN-2011 07:53:23	Wilson Library	AAA Bookstore	Unknown
29	1	17-JUN-2011 08:29:47	Wilson Library	AAA Bookstore	Unknown
30	1	17-JUN-2011 07:53:23	Wilson Library	AAA Bookstore	Unknown
30	1	17-JUN-2011 07:09:37	Wilson Library	AAA Bookstore	Unknown
30	1	17-JUN-2011 07:12:49	Wilson Library	AAA Bookstore	Unknown

Figure 5-2. Canceled Orders Summary Report – Unsuccessfully Canceled Order Lines

Summary

Orders Canceled:	87
Order Lines Canceled:	112
Orders Not Canceled:	47
Order Lines Not Canceled:	98
Total Quantity Canceled:	232

Figure 5-3. Canceled Orders Summary Report – Summary

5.1 Parameters Available for the Canceled Orders Summary Report

The Canceled Orders Summary report offers the following report-specific parameters:

- **Cancel Order Date Range** (*optional*) - Lets you limit the output to cancellations made within a date range. The start date and end date can be used together, separately, or not at all

- **Location** (*optional*) - Lets you limit your report of canceled orders by log-in location where the canceled orders were created.

- **Vendors** (*optional*) - Lets you limit your report of canceled orders by vendor. The output will include only those canceled orders associated with vendors that you select in the Vendors list box.

- **Sort** parameters (*optional*) – Let you set the first, second, and third levels of sorting of the reported data. The Secondary Sort parameter specifies how results will be sorted within the groups established by the Primary Sort. The Tertiary Sort parameter specifies how results will be sorted within the groups established by the Primary Sort and Secondary Sort.

5.2 Output Fields

For each canceled order that meets the filter criteria, the Canceled Orders Summary report can display numerous fields in the report output. The report offers the following categories of field labels for the output:

- **Labels for Successful Order Lines** - Display the data elements and labels for the list returned by the Canceled Orders Summary report of order lines that were successfully canceled. The list will be sorted in the order specified by the sort options in the report configuration.
- **Labels for Unsuccessful Order Lines** - Display the data elements and labels for the list returned by the Canceled Orders Summary report of order lines that were NOT successfully canceled. The list will be sorted in the order specified by the sort options in the report configuration.
- **Summary Labels** - Display the data elements and labels for the summary section of the output generated by the Canceled Orders Summary report.

6. Cost Export Report

The Cost Export report (/usr/vtls/virtua/webrpt_XX_x/Acq/Acq_16) generates a report of cost data from purchase orders, invoices, and payments which can then be uploaded to Electronic Resource Management (ERM) systems, such as 360 Resource Manager from Serials Solutions®. The Cost Export report supports the following output modes: HTML, Email, and Email with Delimited File Attachment. To export the data into the 360 Resource Manager, you need to select Email with Delimited File Attachment as the output format.

Note: The Cost Export report was designed to meet the specific requirements of the 360 Resource Manager from Serials Solutions®.

You can filter the report by collection codes, fiscal years, vendors, and date range. In addition, you can sort the output of the report using three sorting levels.

6.1 Parameters Available for the Cost Export Report

The Cost Export report offers the following report-specific parameters by which to filter the report output:

- **Collection Codes** – Lets you limit your results to order lines that have been assigned a particular collection code. To be included in the report output, an order line must have been assigned the collection code that you select in the Collection Codes list box.

- **Fiscal Years** – Lets you limit your results to order lines associated with one or more fiscal years. To be included in the report output, an acquisitions account must be set up for one of the fiscal years that you select in the Fiscal Years list box.

- **Vendors** - Lets you limit your report to orders for one or more vendors. To be included in the report output, an item must belong to a purchase order that was created for one of the vendors that you select in the Vendors list box.

- **Date Range** - Lets you limit the output to order lines with an order date within a particular range. To be counted by the report, an order line must have an order date within the date range that you specify for the report configuration.

- **Sort** (primary, secondary, and tertiary) - Let you set the first, second, and third levels of sorting of the reported data. The Secondary Sort parameter specifies how results will be sorted within the groups established by the Primary Sort. The Tertiary Sort parameter specifies how results will be sorted within the groups established by the Primary Sort and Secondary Sort. By default, output for the Cost Export report is sorted first by Vendor, then by Vendor Title ID, and finally by Purchase Order ID.

6.2 Output Fields

For each cost/order line that meets the filter criteria, the Cost Export report can display numerous fields in the report output. The report offers the following categories of field labels for the output:

- **Labels for Exported Fields** - Display the data elements and labels for fields from the Serials Solutions' 360 Resource Manager template that may contain data.
- **Labels for Fields Not Exported** - Display the data elements and labels for fields that are not in the Serials Solutions' 360 Resource Manager template.
- **Labels for Placeholder Fields** - Display the data elements and labels for fields that will always be empty but are required as placeholder fields in the Serials Solutions' 360 Resource Manager template.

7. Credits Report

The Credits report (/usr/vtls/virtua/webrpt_XX_x/Acq/Acq_18) generates a list of all types of credits that are in the system that meet the criteria set in the report configuration. You can filter the report by vendors, currencies, date range, fiscal years, and accounts. In addition, you can sort the output of the report using three sorting levels.

Figure 6-1 shows the default HTML output from the Credits report.

Credits

Virtua Library
1 Library Street
Your Town, State or Province Postal Code
Your Country

Credit ID	HK/30	**Creation Date**	27-JUL-2011 00:00:00	**Credit Type**	Specific	**Vendor Name**	AAA Bookstore	**Vendor ID**	23
Credit Amount	1.0	**Currency Code**	HKD	**Fiscal Year**	2012	**Account Name**	Periodicals	**Account ID**	PER-2012
Order Number		**Order Line Number**		**Title**					
Status	Valid for Use	**Last Modified Date**	27-JUL-2011 10:00:08	**Expiration Date**					

Modification History

Modification Date	Action	Modified By
27-JUL-2011 10:00:08	Added	staff
10-NOV-2011 07:53:51	Rolled Over	root

Credit ID	626	**Creation Date**	06-OCT-2011 00:00:00	**Credit Type**	Specific	**Vendor Name**	AAA Bookstore	**Vendor ID**	23
Credit Amount	2.0	**Currency Code**	HKD	**Fiscal Year**	2012	**Account Name**	Fund Depletion Encumbrance	**Account ID**	FDE-2011
Order Number		**Order Line Number**		**Title**					

Figure 7-1. Credits Report HTML Output

7.1 Parameters Available for the Credits Report

The Credits report offers the following report-specific parameters by which to filter the report output:

- **Vendors** - Lets you limit your report of credits by one or more vendors. For Internal Order credits, this field filters the vendor of the *order* that the credit is linked to. For all other credits, this field filters the vendor assigned to the credit itself. The output will include only those credits associated with vendors that you select in the Vendors list box.

- **Currencies** - Lets you limit your results to credits in one or more currencies. To be included in the report output, a credit must be in one of the currencies that you select in the Currencies list box.

- **Fiscal Years** – Lets you limit your results to credits associated with one or more fiscal years. To be included in the report output, a credit must be in one of the fiscal years that you select in the Fiscal Years list box.

- **Accounts** - Lets you limit your results to credits linked to one or more fund accounts. To be included in the report output, a credit must be associated with one of the fund accounts that you select in the Accounts list box.

- **Date Range** - Lets you limit the output to credits with a creation date within a particular range. To be counted by the report, a credit must have a creation date within the date range that you specify for the report configuration.

- **Sort** (primary, secondary, and tertiary) – Let you set the first, second, and third levels of sorting of the reported data. The Secondary Sort parameter specifies how results will be sorted within the groups established by the Primary Sort. The Tertiary Sort parameter specifies how results will be sorted within the groups established by the Primary Sort and Secondary Sort. By default, output for the Credits report is sorted first by vendor, then by creation date, and finally by credit ID.

7.2 Data Elements for the Credits Report

For each credit that meets the filter criteria in the report configuration, the Credits report will display the following in the output:

- **Creation Date** – The date the credit was created.
- **Credit ID** – The credit number that the credit creator assigned to the credit.
- **Credit Type** – The type of credit (internal, specific, etc.)
- **Currency Code** – The three-character code of the currency the credit is in.
- **Credit Amount** – The amount of the credit in the credit currency.
- **Fiscal Year** – The fiscal year that was assigned to the credit.
- **Account Name** – The name of the fund account assigned to the credit.
- **Account ID** – The user-assigned account number of the fund account assigned to the credit.
- **Vendor Name** – The name of the vendor linked to the credit. For Internal credits, this will be the name of the vendor of the order (if any) that the credit is linked to. For all other credits, this will be the name of the vendor that was assigned to the credit from the Credits window.
- **Vendor ID** – The system-assigned ID of the vendor linked to the credit.
- **Order Number** – The order number(s) (if any) that the credit was linked to from the Credits window.
- **Order Line Number** – Line number(s) (if any) of the order line that the credit was linked to from the Credits window.
- **Title** – The title(s) of the bibliographic record associated with the order line (if any) that the credit is linked to.
- **Credit Status** – The status of the credit.
- **Last Modified Date** – The date the credit was last modified.
- **Expiration Date** – The date the credit expires.
- **Payment Date** – The date the payment transaction took place.
- **Voucher ID** – The user-assigned voucher ID.
- **Invoice ID** – Invoice number of the payment detail that the credit was applied to.

- **Payment Type** – Type of payment (i.e., header fee, line fee, line price) that the credit was applied to.
- **Payment Order Number** – Order number of the payment detail that the credit was applied to.
- **Payment Order Line Number** – Order line number of the payment detail that the credit was applied to.
- **Modification Date** – The date the modification took place.
- **Modification Action** – The action that was performed on the credit (i.e., add, modify, deleted, applied, etc.).
- **Modified By** – The user name of the user who performed the modification.

8. Gifts Received by Month Report

The Gifts Received by Month report generates a count and calculation of all gifts received by *all institutions* in the specified date range sorted by month. You cannot run this report at the institutional level.

Note:

- Items listed in this report must have data (a date in the yyyymmdd date format) in subfield $d of the 541 tag of the bibliographic record in order for the report to generate results.
- Items must have data in subfield $o (which is the Subject data in the report) and subfield $n (which is the Total Received data in the report) of the 541 tag of the bibliographic record in order for the report to generate results other than blank or 0. If the data in the subfields $o and $n are blank, the data in the Subject column of the output will be blank, and the data in the Total Received column will be 0. If this occurs, it might appear as if the report is not returning any results, which is not the case.
- Items listed in this report do NOT have to be received through the Acquisitions subsystem.

Figure 8-1 shows a portion of the default HTML output from the Gifts Received by Month report.

Gifts Received By Month

Virtua Library
1 Library Street
Your Town, State or Province Postal Code
Your Country

Month	Subject	Total received
January	Economics	3
	Geology	2
	Literature	2
	Mathematics	2
Total		9
February	Geology	2
	Literature	1
	Mathematics	1
Total		4
Total		**13**

Summary

Total per Subject	
Economics	3
Geology	4
Literature	3
Mathematics	3
Total	**13**

Figure 8-1. Gifts Received by Month HTML Output

In the Gifts Received by Month report output, received items are grouped by month and listed in alphabetical order by subject.

8.1 Parameters Available for the Gifts Received by Month Report

The Gifts Received by Month report offers the following report-specific parameters:

- **Date Range** (*required*) - Lets you limit the output to gifts received within a particular date range. To be included in the output, the date entered in subfield $d of the 541 tag of the bibliographic record must fall within the date range that you specify for the report configuration.

  Note: Subfield $d MUST be in the 541 tag for the item to appear on the report.

- **Subject** (*required*) - Lets you include in the report output the subject of the gift item. The subject list is populated from subfield $o of the 541 tag of the bibliographic record.

8.2 Data Elements and Variables for the Gifts Received by Month Report

The following table lists the name, variable, and description of each data element that is retrieved by default by the Gifts Received by Month report. You can edit the output templates to include or exclude any data element listed below.

Hint: To identify its corresponding field label variable, add u_to the beginning and **_label** to the end of each variable. For more information on variables and field label variables, see the *InfoStation User's Guide*.

Data Element	Variable	Description
Subject	subject	The subject code associated with the gift, taken from the 541 tag subfield $o of the bibliographic record.
Month	month	The month in which the gift was received. This information is taken from the 541 tag subfield $d of the bibliographic record. If subfield $d is not in the record, the item will not display on the report.
Total Received	total	The total number of copies associated with the gift, taken from the 541 tag subfield $n of the bibliographic record. If subfield $n is not in the bibliographic record, the item will display on the report, but the quantity received will be listed as 0 (zero).
Summary Total	report_total	The total number of gifts received for the date range specified in the report.

8.3 Output Templates for the Gifts Received by Month Report

Location: /usr/vtls/virtua/webrpt_XX_x/Acq/Acq_12/[filename].tem

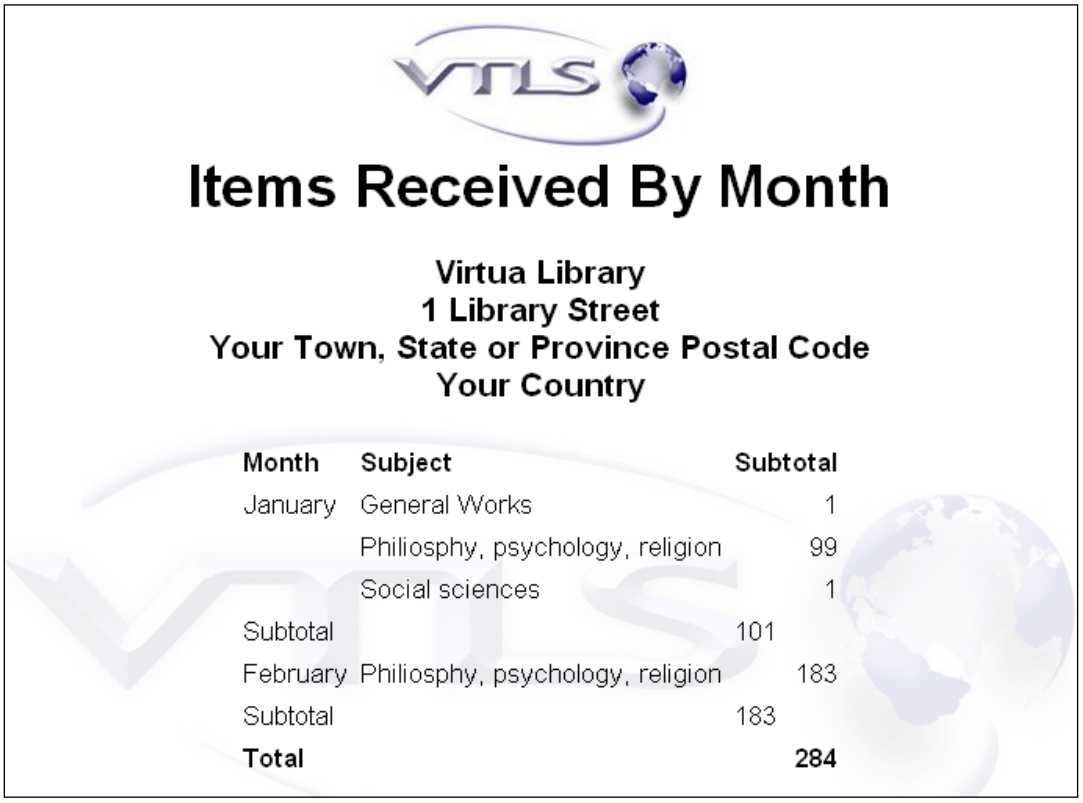
Template	Contribution to Output
html_page	Provides the overall framework of the HTML output.
html_row	Generates the information associated with a single gift.
email_page	Provides the overall framework of the e-mail output.
email_row	Generates the information associated with a single gift.

9. Items Received by Month Report

The Items Received by Month report generates a count and calculation of all items received through the Acquisitions subsystem in the date range specified in the report.

Note: Items listed in this report MUST have been received through the Acquisitions subsystem.

Figure 9-1 shows a portion of the default HTML output from the Items Received by Month report.



Items Received By Month

Virtua Library
1 Library Street
Your Town, State or Province Postal Code
Your Country

Month	Subject	Subtotal	
January	General Works		1
	Philiosphy, psychology, religion		99
	Social sciences		1
Subtotal		101	
February	Philiosphy, psychology, religion		183
Subtotal		183	
Total			**284**

Figure 9-1. Items Received by Month HTML Output

In the Items Received by Month report output, received items are grouped by month and listed in alphabetical order by subject. The subject is the subject code assigned to a purchase order line item. A count of items that have no subject code will be shown at the top of the subject list for that month.

9.1 Parameters Available for the Items Received by Month Report

The Items Received by Month report offers the following report-specific parameters:

- **Date Range** (*required*) - Lets you limit the output to items received within a particular date range. To be included in the output, the date the item was received through the Acquisitions subsystem must fall within the date range that you specify for the report configuration.

- **Subjects** (*optional*) – Lets you limit the output to the subject of the gift item. The subjects are the subject codes defined in the Virtua Profiler. If you do not choose a subject, all subjects will be included in the report output.

9.2 Data Elements and Variables for the Items Received by Month Report

The following table lists the name, variable, and description of each data element that is retrieved by default by the Items Received by Month report. You can edit the output templates to include or exclude any data element listed below.

Hint: To identify its corresponding field label variable, add u_to the beginning and **_label** to the end of each variable. For more information on variables and field label variables, see the *InfoStation User's Guide*.

Data Element	Variable	Description
Subject	subject	An Acquisitions subject code assigned from the list of subject codes that appears in the PO Subjects list box.
Month	month	The month in which the item was received. This information is taken from the receipt date assigned when the item is received through the Acquisitions subsystem.
Total Received	total	The number of copies of the item that were received through the Acquisitions subsystem.
Summary Total	report_total	The total number of items for the date range specified in the report.

9.3 Output Templates for the Items Received by Month Report

Location: /usr/vtls/virtua/webrpt_XX_x/Acq/Acq_10/[filename].tem

Template	Contribution to Output
html_page	Provides the overall framework of the HTML output.
html_row	Generates the information associated with a single item
email_page	Provides the overall framework of the e-mail output.
email_row	Generates the information associated with a single item.

10. New Books List Report

The New Books List report generates a list of titles on the New Books List that were…

- Received within the specified date range.
  -OR-
- If no date range is specified, received anytime and are on the New Books List at the time you run the report.

Figure 10-1 shows a portion of the default HTML output from the New Books List report.

New Books List

Virtua Library
1 Library Street
Your Town, State or Province Postal Code
Your Country

Author	Title	Publication	Shelf Location/Call Number	Subject	Item Class	Shipped To
	Promoting social communication : children with developmental disabilities from birth to adolescence / edited by Howard Goldstein, Louise A. Kaczmarek and Kristina M. English.	Baltimore, Md. : Paul H. Brookes Pub. Co., c2002.		Adult Fiction		Aberdeen
Gates, Arthur Irving, 1890-1972.	The improvement of reading; a program of diagnostic and remedial methods.	New York, Macmillan Co., 1949, c1947.		Adult Non-Fiction		Aberdeen

Figure 10-1. New Books List HTML Output

Note: The New Books List report returns information associated with valid receipts only. It does not include titles associated with deleted receipts.

The New Books List report offers two parameters that let you limit your results according to item information: Shelf Locations and Item Classes. If you choose to limit your results by these factors, InfoStation will omit from the output any title on the New Books List whose bibliographic record has NO items attached.

10.1 Parameters Available for the New Books List Report

The New Books List report offers the following report-specific parameters:

- **Update Database** (*optional*) - Lets you choose whether the database will be updated when you run the report configuration.

  - If you select the Update Database check box, when you run the report configuration, records that appear in the output are *removed* from the New Books List if they have been on the list for *more than* the number of days specified in the Age to Update (Days) text box.

    Note: Titles that are deleted from the New Books List appear in the output of the report that removes them from the New Books List. They will not appear in the output New Books List report configurations that you run in the future.

  - If you do NOT select the Update Database check box, when you run the report configuration, records that appear in the output are not removed from the New Books List.

- **Age to Update (Days)** (*required for Update Database mode only*) - Lets you specify which records qualify for removal from the New Books List. When you run a report configuration in Update Database mode, records are removed from the New Books List if they have been on the list for *more than* the number of days specified in the Age to Update (Days) text box.

  Note: If you select the Update Database check box, you *must* also specify an Age to Update (Days).

- **Display Range/Date Range** (*optional*) - Lets you limit the output to titles that were either *received* within the specified Date Range or for which items were *created* within the specified Date Range.

  - If you set the Display Range parameter, the output contains a list of all materials added to the New Books List within the specified Date Range.
  - If you do NOT set the Display Range parameter, the output contains a list of all materials that are on the New Books List at the time you run the report, regardless of when they were added to the list.

Note: The Display Range parameter lets you limit your results according to the receipt date associated with an Acquisitions line item.

- **Shelf Locations** (*optional*) - Lets you limit your results to new books that are shelved at one or more locations. To be included in the output, an item must be shelved at one of the locations that you select for the report configuration.

Note: If you choose to limit your results by shelving location, InfoStation will omit from the output all bibliographic records that have no items attached. If you do NOT want to limit your results by shelving location, do NOT select a value from the Shelf Locations list box.

- **Item Classes** (*required*) - Lets you limit the report output to new books belonging to one or more specific item classes. To be included in the output, a new book must be assigned one of the item classes that you select for the report configuration.

- **Subjects** (*required*) - Lets you limit the report output to new books associated with one or more subject codes as defined in the Virtua Profiler. To be included in the output, a purchase order line item must be assigned one of the subjects that you select for the report configuration.

- **Sort Parameters** (*required*) - Let you sort report output on the following values:

  - Author
  - Call Number
  - Item Class
  - Publication Date
  - Subject
  - Title

- **MARC Tag List** (*optional*) - Lets you configure the report to return specific bibliographic information for each record in the output. By default, the MARC Tag List is configured to retrieve Edition (250 tag), Publication (260 tag), and Subject (650 tag) information.

For additional information about these and other parameters, see the *InfoStation Reference Guide* or view the InfoStation online help.

10.2 Virtua Settings Related to the New Books List Report

When you receive an item from a purchase order, if you select the On New Books List check box on the Line Item Receipt Information window (*Figure 10-2*), the record is added to the New Books List.

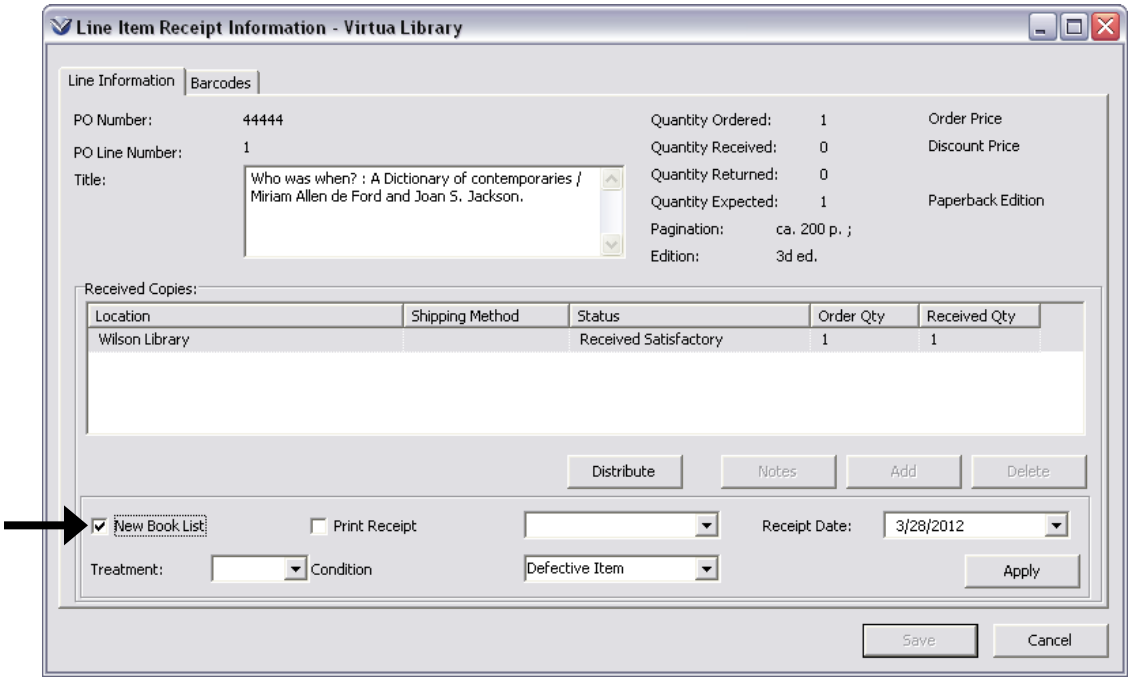


Figure 10-2. Line Item Receipt Information Window

The item is eligible to appear in the New Books List report output until you remove it from the list.

The Acquisitions List Flag, which appears on the Acquisitions tab in the Virtua Profiler, determines whether, upon receipt, an item is added to the New Books List *automatically*. If the Acquisitions List Flag is set to ON . . .

- When you Express Receive a line item, the item is added to the New Books List automatically.
- When you Receive a line item, the On New Books List check box is selected automatically on the Edit Receipt Information window. The line item is added to the New Books List, unless you de-select the check box.

For details on receiving line items from purchase orders, see the *Virtua Acquisitions User's Guide*.

10.3 Data Elements and Variables for the New Books List Report

The following table lists the name, variable, description, and source of each data element that is retrieved by default by the New Books List report. You can edit the output templates to include or exclude any data element listed below. Some of the following data elements are defined in the default MARC Tag List. For details on editing the MARC Tag List, see the *InfoStation User's Guide*.

Hint: To identify its corresponding field label variable, add u_ to the beginning and **_label** to the end of each variable. For more information on variables and field label variables, see the *InfoStation User's Guide*.

Data Element	Variable	Description and Source
Author	author	The author of the new material, taken from the . . . • 100 $a of bibliographic record -OR- • 110 $a of bibliographic record
Call Number	call_number	The bibliographic-level call number of the new material.
Edition	tag_250	The edition of the new material, taken from the 250 tag of bibliographic record.
Item Class	item_class	The item class of the new material, taken from the item record.
Publication	tag_260	The publication information associated with the new material, taken from the 260 tag of bibliographic record.
Subject	tag_650	The subject of the new material, taken from the 650 tag of bibliographic record.
Title	title	The title of the new material, taken from the 245 tag, subfield $a of bibliographic record.
Shipped To	ship_to	The location to which the item was shipped.

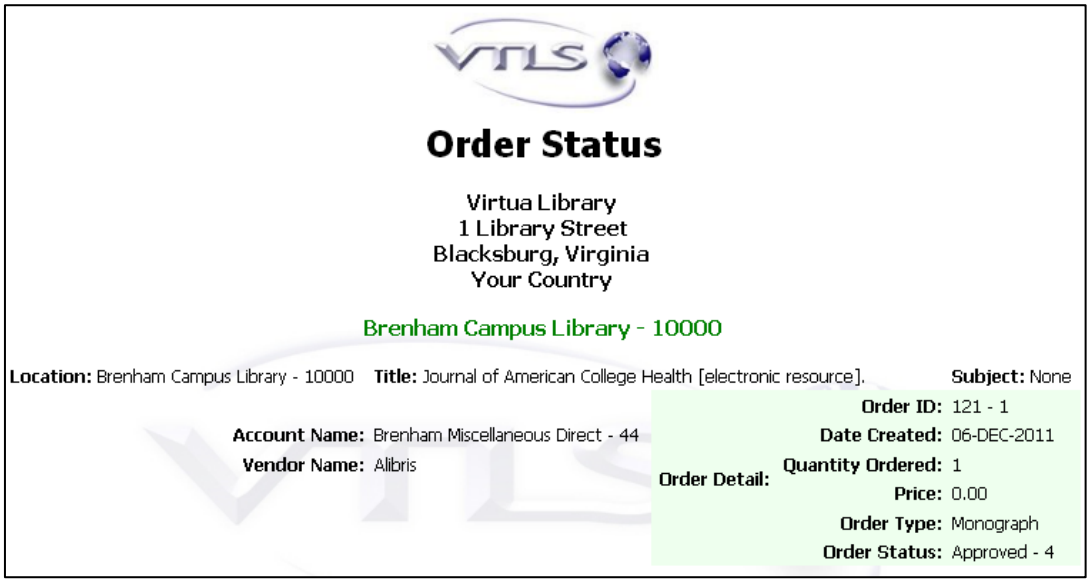
10.4 Output Templates for the New Books List Report

Location: /usr/vtls/virtua/webrpt_XX_x/Acq/Acq_2/[filename].tem

Template	Contribution to Output
html_page	Provides the overall framework of the HTML output, including library name and address information and labels for each column of data in the output.
html_row	In the output, this template generates a single row of information related to a particular record. By default, this template contains only variables. The **html_page** template provides labels for the columns of information.
email_page	Provides the overall framework of the e-mail output.
email_row	Returns information related to a single record, including both data elements and labels.

11. Order Status Report

The Order Status report produces a list of purchase order line items that meet the location, vendor, order status, order type, and date range criteria that you set in the report configuration. Figure 11-1 shows an example of HTML output from the Order Status report.



Order Status

Virtua Library
1 Library Street
Blacksburg, Virginia
Your Country

Brenham Campus Library - 10000

Location: Brenham Campus Library - 10000 **Title:** Journal of American College Health [electronic resource]. **Subject:** None

Account Name: Brenham Miscellaneous Direct - 44
Vendor Name: Alibris

Order Detail:
Order ID: 121 - 1
Date Created: 06-DEC-2011
Quantity Ordered: 1
Price: 0.00
Order Type: Monograph
Order Status: Approved - 4

Figure 11-1. Order Status HTML Output

For each line item included in the output, the report returns information about the purchase order to which the title belongs. Each unique line item appears only once in the output. However, a single purchase order can appear multiple times, depending on the number of qualifying line items attached to the order.

Note: The Order Status report does not report on deleted orders.

11.1 Parameters Available for the Order Status Report

The Order Status report offers the following report-specific parameters:

- **Log-in Locations** (*required*) - Lets you limit your results to line items associated with or more locations. To appear in the output, a line item must belong to a purchase order that was created at one of the log-in locations that you select for the report configuration.

- **Vendors** (*required*) - Lets you limit your results to orders associated with one or more vendors. To be included in the output, line items must have been ordered from one of the vendors you select for the report configuration.

- **Order Statuses** (*required*) - Lets you choose one or more order statuses to include in your results. To appear in the output, a line item must be at one of the order statuses selected for the report configuration.

  Note: The Order Statuses list box contains the Purchase Order Statuses that you define in the Virtua Profiler. For details, see the *Virtua Profiler/Acquisitions Parameters User's Guide*.

- **Order Types** (*required*) - Lets you filter your results by purchase order type. To appear in the output, a line item must be associated with one of the purchase order types specified for the report configuration.

- **Date Range** (*required*) - Lets you limit the output to line items ordered within a particular date range. To appear in the output, a line item must belong to a purchase order that was created during the date range that you specify for the report configuration.

- **Group By Column** (*required*) - Lets you determine how line items will be grouped in the output. Note that the Sort parameters determine how line items will be sorted within the groups established by the Group By Column parameter. You can group your results by . . .

  - Account Name
  - Account Number
  - Log-in Location
  - Order Status
  - Subject
  - Vendor Name

- **Sort Parameters** (*required*) - Let you sort report output within the groups created by the Group by Column parameter (*see above*). You can sort on the following values:

  - Account Name
  - Account Number
  - Date Created
  - Log-in Location
  - Order ID
  - Order Status
  - Price
  - Quantity Ordered
  - Subject
  - Title
  - Vendor Name

For additional information about these and other parameters, see the *InfoStation Reference Guide* or view the InfoStation online help.

11.2 Data Elements and Variables for the Order Status Report

The following lists the name, variable, and description of each data element that is retrieved by default by the Order Status report. You can edit the output templates to include or exclude any data element listed below.

Hint: To identify its corresponding field label variable, add u_ to the beginning and **_label** to the end of each variable. For more information on variables and field label variables, see the *InfoStation User's Guide*.

Data Element	Variable	Description
Account Name	account_name	The name of the Acquisitions account from which funds are distributed to pay for the line item. If funds are distributed between two or more accounts, the line item will appear in the output multiple times, once for each associated account.
Account Number	account_number	The account number of the Acquisitions account from which funds are distributed to pay for the line item. If funds are distributed between two or more accounts, the line item will appear in the output multiple times, once for each associated account.
Date Created	create_date	The date the purchase order was created.
Log-in Location	location	The log-in location at which the purchase order was created.
Order Detail	order_detail	A group of information related to a particular order, including the Order ID, the date the order was created, the quantity ordered, and the order status (i.e., the details of a particular order). **Note:** Order Detail is merely a *label* for a group of data elements. Order Detail does not itself represent a data element.
Order ID	order_id	The Acquisitions purchase order number of a given order. For renewed serials orders, this is the *original* purchase order number.
Order Status	order_status	The Purchase Order Status assigned to a given line item.
Order Type	order_type	The order type assigned to the purchase order (e.g., monograph, serial, or standing order).
Price	price	The unit price of a line item.
Quantity Ordered	quantity_ordered	For a given line item, the number of copies ordered.
Subject	subject	The name of the Acquisitions subject assigned to the order.
Title	title	The title of a line item within a given order, taken from the purchase order. **Note:** If no Bib-ID is associated with an order, InfoStation will return the text *No Title Available* in

Data Element	Variable	Description
		place of the title.
Vendor Name	vendor_name	The name of the vendor from which the line item was ordered, taken from the purchase order.

11.3 Output Templates for the Order Status Report

Location: /usr/vtls/virtua/webrpt_XX_x/Acq/Acq_5/[filename].tem

Template	Contribution to Output
html_page	Provides the overall framework of the HTML output.
html_header	Provides a heading for each set of order information, which is grouped according to the Group by Column value you select for the report configuration.
html_row	Generates the information associated with a single purchase order line item.
email_page	Provides the overall framework of the e-mail output.
email_header	Provides a heading for each set of order information, which is grouped according to the Group by Column value you select for the report configuration.
email_row	Generates the information related to a single line item.

12. Purchase Requests Report

The Purchase Requests report (/usr/vtls/virtua/webrpt_XX_x/Acq/Acq_17) generates a list of all purchase requests for new titles whether submitted by patrons or library users via Chamo or by library staff via the Virtua client. By default, the output is sorted first by date, secondly by category, and thirdly by purchase request group.

12.1 Parameters Available for the Purchase Requests Report

You can limit the report output by the following criteria (report-specific parameters) and customize the labels for each of these filters:

- Date Range
- Categories
- Purchase Request Groups
- Locations
- Sources of Selection
- Requestor ID
- Requestor Name
- Purchase Request Statuses
- Reader Suggestion Statuses

For details about each of these report-specific parameters, see the context-sensitive help on the Configuration screen of the Purchase Requests report.

12.2 Virtua Profiler Settings Related to the Purchase Requests Report

Four report-specific parameters for the Purchase Requests report rely on parameter values defined on the Acquisitions tab of the Virtua Profiler:

- Purchase Request Categories
- Purchase Request Groups
- Reader Suggestion Status
- Source of Selection

12.3 Data Elements for the Purchase Requests Report

The following data elements, which you can customize on the Configuration page of the Purchase Requests report, are included in the report output:

- Date
- Category
- Purchase Request Group
- Location
- Purchase Request Status
- Source of Selection
- Material (type)
- Name of Requestor
- Requestor ID
- Title
- Order ID
- Reader Suggestion Status
- Number of Purchase Requests Selected [for purchase]
- Total Number of Purchase Requests [submitted]

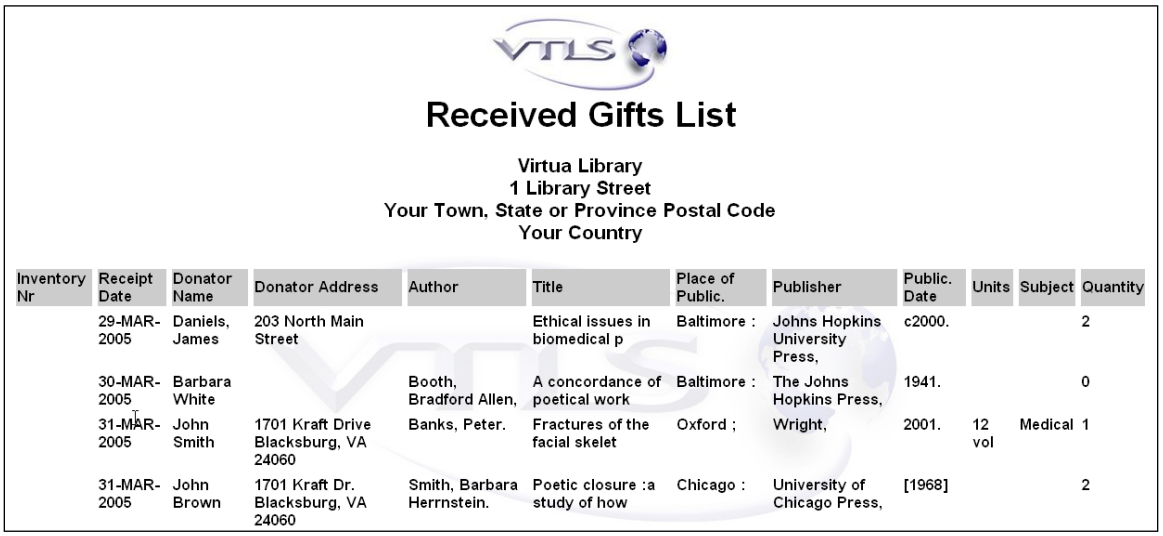
- Percentage of Selected Purchase Requests [versus the total number submitted]

13. Received Gifts List Report

The Received Gifts List report generates a list of all gifts received by *all institutions* in the date range specified in the report. You cannot run this report at the institutional level.

Note: Items listed in this report MUST have data in subfields $a and $d of the 541 tag of the bibliographic record. Items listed in this report are not received through the Acquisitions subsystem.

Figure 13-1 shows a portion of the default HTML output from the Received Gifts List report.



Received Gifts List

Virtua Library
1 Library Street
Your Town, State or Province Postal Code
Your Country

Inventory Nr	Receipt Date	Donator Name	Donator Address	Author	Title	Place of Public.	Publisher	Public. Date	Units	Subject	Quantity
	29-MAR-2005	Daniels, James	203 North Main Street		Ethical issues in biomedical p	Baltimore :	Johns Hopkins University Press,	c2000.			2
	30-MAR-2005	Barbara White		Booth, Bradford Allen,	A concordance of poetical work	Baltimore :	The Johns Hopkins Press,	1941.			0
	31-MAR-2005	John Smith	1701 Kraft Drive Blacksburg, VA 24060	Banks, Peter.	Fractures of the facial skelet	Oxford ;	Wright,	2001.	12 vol	Medical	1
	31-MAR-2005	John Brown	1701 Kraft Dr. Blacksburg, VA 24060	Smith, Barbara Herrnstein.	Poetic closure :a study of how	Chicago :	University of Chicago Press,	[1968]			2

Figure 13-1. Received Gifts List HTML Output

In the Received Gifts List report output, received items are sorted by receipt date in ascending order. For each gift received, the report returns the following information:

- Inventory Number
- Receipt Date
- Donator Name
- Donator Address
- Author
- Title

- Place of Publication
- Publisher
- Publication Date
- Units
- Subject
- Quantity

13.1 Parameters Available for the Received Gifts List Report

The Received Gifts List report offers the following report-specific parameters:

- **Date Range** (*required*) - Lets you limit the output to gifts received within a particular date range. To be included in the output, the date entered in subfield $d of the 541 tag of the bibliographic record must fall within the date range that you specify for the report configuration.

  Note: Subfield $d MUST be in the 541 tag for the item to appear on the report.

- **Donators** (*optional*) - Name of the person donating the item populated from subfield $a of the 541 tag of the bibliographic record.

  Note: Subfield $a MUST be in the 541 tag for the item to appear on the report.

- **Subject** (*optional*) – Free-text field populated from data in subfield $o of the 541 tag of the bibliographic record.

13.2 Data Elements and Variables for the Received Gifts List Report

The following table lists the name, variable, and description of each data element that is retrieved by default by the Received Gifts List report. You can edit the output templates to include or exclude any data element listed below.

Hint: To identify its corresponding field label variable, add u_ to the beginning and **_label** to the end of each variable. For more information on variables and field label variables, see the *InfoStation User's Guide*.

Data Element	Variable	Description
Inventory Number	inventory_nr	The accession number associated with the gift, taken from the 541 tag subfield $e of the bibliographic record. **Note:** This data element is not related to the Accession Number field found on the Item Information window, or the Item Accession Number control number search.
Receipt Date	receipt_date	The date the gift was received, taken from the 541 tag subfield $d of the bibliographic record. **IMPORTANT**: If subfield $d is not present in the bibliographic record, the item will not appear in the output of this report. The date must conform to the following format yyyymmdd.
Donator's Name	donator_name	The name of the donor associated with the gift, taken from the 541 tag subfield $a of the bibliographic record. **IMPORTANT**: If subfield $a is not present in the bibliographic record, the item will not appear in the output of this report.
Donator's Address	donator_address	The name of the donor associated with the gift, taken from the 541 tag subfield $b of the bibliographic record.

Data Element	Variable	Description
Author	author	The author associated with the gift, taken from the… • 100 $a of the bibliographic record. -OR- • 110 $a of the bibliographic record. -OR- • 110 $a of the bibliographic record.
Title	title	The title associated with the gift, taken from the 245 tag, subfields $a and $b of the bibliographic record. Only the first 30 characters will display.
Place of Publication	place_of_publication	The place of publication associated with the gift, taken from the subfield $a of the 264 tag (second indicator "1") when present or the 260 tag in the bibliographic_fields table.
Publisher	publisher	The publisher's name associated with the gift, taken from the subfield $b of the 264 tag (second indicator "1") when present or the 260 tag in the bibliographic_fields table.
Publication Date	publication_date	The publication date associated with the gift, taken from the subfield $c of the 264 tag (second indicator "1") when present or the 260 tag in the bibliographic_fields table.
Units	units	The number of units associated with the gift, taken from the 541 tag subfield $3 of the bibliographic record.
Subject	subject	The subject code associated with the gift, taken from the 541 tag subfield $o of the bibliographic record.
Quantity Received	quantity_received	The number of copies associated with the gift, taken from the 541 tag subfield $n of the bibliographic record. If subfield $n is not in the bibliographic record, the item will display on the report but the quantity received will be listed as zero.

13.3 Output Templates for the Received Gifts List Report

Location: /usr/vtls/virtua/webrpt_XX_x/Acq/Acq_13/[filename].tem

Template	Contribution to Output
html_page	Provides the overall framework of the HTML output.
html_row	Generates the information associated with a single gift.
email_page	Provides the overall framework of the e-mail output.
email_row	Generates the information associated with a single gift.

14. Received Items List Report

The Received Items List report generates a list of all items received through the Acquisitions subsystem that have been invoiced and paid and fall within the specified date range. In the report output, ALL of the receipts for each invoice line are combined into a single line.

Note: Items listed in this report MUST have been received, invoiced, and paid through the Acquisitions subsystem. Items that have been received but not invoiced or paid will NOT appear on this report.

Figure 14-1 shows a portion of the default HTML output from the Received Items List report.

Received Items List

Virtua Library
1 Library Street
Your Town, State or Province Postal Code
Your Country

Receipt Date	Invoice Date	PO Nr	Invoice Nr	Voucher Nr	Vendor	Title	Subject	Receipt Quantity	Invoice Quantity	Item Price	Invoice Fees	Total	Invoice Notes	Voucher Notes
25-AUG-2011	25-AUG-2011	2077	2077	2077	Readmore 71	Medical knowledge : doubt and certainty / edited by Clive Seale, Stephen Pattison, and Basiro Davey ; written and produced by the Open University.	Geography, anthropology, recreation	3	2	USD 2.40	USD 3.00	USD 5.52		
25-AUG-2011	25-AUG-2011	2077	2077r1	2077r1	Readmore 71	Medical knowledge : doubt and certainty / edited by Clive Seale, Stephen Pattison, and Basiro Davey ; written and produced by the Open University.	Geography, anthropology, recreation	3	3	USD 4.46	USD 0.00	USD 4.46		
31-AUG-2011	31-AUG-2011	2135	2135	2135	Readmore 71	Medical knowledge : doubt and certainty / edited by Clive Seale, Stephen Pattison, and Basiro Davey ; written and produced by the Open University.	Geography, anthropology, recreation	5	12	USD 30.60	USD 0.00	USD 30.60		

Figure 14-1. Received Items List HTML Output

In the Received Items List report output, received items are sorted in descending date order. For each item received, the Received Items List report can return the following information as long as a label is defined on the Configuration screen:

- Amount
- Receipt Date
- Invoice Date
- Invoice Fees

- Invoice Number
- Invoice Notes
- P.O. Number
- Invoice Quantity
- Receipt Quantity
- Subject
- Title
- Total
- Vendor
- Voucher Number
- Voucher Notes

14.1 Parameters Available for the Received Items List Report

The Received Items List report offers the following report-specific parameters:

- **Date Range** (*required*) - Lets you limit the output to items received within a particular date range. To be included in the output, the date the item was received must fall within the date range that you specify for the report configuration.

- **Vendors** (*optional*) - Lets you limit your results to orders associated with one or more vendors. To be included in the output, line items must have been ordered from one of the vendors you select for the report configuration.

- **Subject** (*optional*) - Lets you limit your results to purchase order line items associated with one or more Acquisitions subject codes. To be included in the output, a title must be assigned one of the subject codes that you select in the PO Subjects list box.

14.2 Data Elements and Variables for the Received Items List Report

The following table lists the name, variable, and description of each data element that is retrieved by default by the Received Items List report. You can edit the output templates to include or exclude any data element listed below.

Hint: To identify its corresponding field label variable, add u_to the beginning and **_label** to the end of each variable. For more information on variables and field label variables, see the *InfoStation User's Guide*.

Data Element	Variable	Description
Receipt Date	date_received	The date the order line was last received.
Invoice Date	vendor_invoice_date	The date on which the order was invoiced.
P.O. Number	po_id	The purchase order ID of the order associated with the item.
Invoice Number	invoice_id	The invoice ID of the invoice associated with the item.
Voucher Number	voucher_id	The voucher ID of the payment voucher associated with the item.
Vendor	vendor_name	The name of the vendor from which the line item was ordered, taken from the purchase order.
Title	title	The title of the item, taken from the 245 tag, subfield $a of bibliographic record.
Subject	subject	The Acquisitions subject code assigned to the item.
Receipt Quantity	quantity_received	The total quantity received of the item.
Invoice Quantity	quantity_invoiced	The quantity of the item that was invoiced.

Data Element	Variable	Description
Amount	amount	The price of the item, taken from the voucher.
Invoice Fees	invoice_detail_fees	The invoice line fees associated with the item.
Total	total_price	The total price of the item, including invoice line fees.
Invoice Notes	invoice_notes	Invoice Line Notes added in the Acquisitions subsystem that are checked Priority.
Voucher Notes	voucher_notes	Voucher Notes added in the Acquisitions subsystem that are checked Priority.

14.3 Output Templates for the Received Items List Report

Location: /usr/vtls/virtua/webrpt_XX_x/Acq/Acq_11/[filename].tem

Template	Contribution to Output
html_page	Provides the overall framework of the HTML output.
html_row	Generates the information associated with a single item.
email_page	Provides the overall framework of the e-mail output.
email_row	Generates the information associated with a single item.

15. Titles on Order Report

The Titles on Order report reviews all transmitted purchase orders (except Canceled orders) and returns a list of all line items with the status Ordered. Figure 15-1 shows an example of HTML output from the Titles on Order report.

Titles on Order

Virtua Library
1 Library Street
Your Town, State or Province Postal Code
Your Country

Alibris 121

Account Name: Brenham Miscellaneous Direct
Galveston / P.G. Nagle.
PO Subject: None **Cost:** USD 72.10 **Date Due:** 21-JUL-2010
Account Number: PCard
PO/Line: 6212010/1
Quantity Ordered/Quantity Received: 2/1

Amazon.com 102

Account Name: Brenham Baker & Taylor A/V
Health Hazards of Not Going Nuclear
PO Subject: Faculty request **Cost:** USD 10.00 **Date Due:** 19-MAR-2010
Account Number: 44684
PO/Line: 11111/1
Quantity Ordered/Quantity Received: 1/0

Account Name: Brenham Miscellaneous Direct
Tiberius : the memoirs of the emperor / Allan Massie.
PO Subject: None **Cost:** USD 9.97 **Date Due:** 29-MAY-2010
Account Number: PCard
PO/Line: 4292010/3
Quantity Ordered/Quantity Received: 1/0

Figure 15-1. Titles on Order HTML Output

15.1 Parameters Available for the Titles on Order Report

The Titles on Order report offers the following report-specific parameters:

- **Log-in Locations** (*required*) - Lets you limit your results to titles ordered at one or more log-in locations. To be included in the output, a title must have been ordered at one of the locations that you specify for the report configuration.

- **Vendors** (*required*) - Lets you limit your results to titles ordered from one or more vendors. To be included in the output, a title must be on order from one of the vendors that you select for the report configuration.

- **Order Types** (*required*) - Lets you limit your results to purchase order line items associated with one or more order types. To be included in the output, a title must belong to an order that is assigned one of the Order Types that you select for the report configuration.

- **Accounts** (*required*) - Lets you limit your results to purchase order line items associated with one or more Acquisitions fund accounts. To be included in the output, a title must belong to a purchase order that will be paid for from one one of the accounts that you select in the Accounts list box.

- **PO Subjects** (*required*) - Lets you limit your results to purchase order line items associated with one or more Acquisitions subject codes. To be included in the output, a title must be assigned one of the subject codes that you select in the PO Subjects list box.

- **Date Range** (*optional*) - Lets you limit your results to purchase order line items ordered within a particular date range. To be included in the output, a title must have been ordered during that date range that you specify for the report configuration.

- **Sort Parameters** (*required*) - Let you sort your output on the following values:

  - Account Name
  - Account Number
  - Vendor
  - Vendor ID
  - Title
  - PO

- Cost
- Date Due

For additional information about these and other parameters, see the *InfoStation Reference Guide* or view the InfoStation online help.

15.2 Data Elements and Variables for the Titles on Order Report

The following table lists the name, variable, and description of each data element that is retrieved by default by the Titles on Order report. You can edit the output templates to include or exclude any data element listed below.

Hint: To identify its corresponding field label variable, add u_ to the beginning and **_label** to the end of each variable. For more information on variables and field label variables, see the *InfoStation User's Guide*.

Data Element	Variable	Description
Account Name	account_name	The name of the Acquisitions account from which funds are distributed to pay for the line item. If funds are distributed between two or more accounts, the line item will appear in the output multiple times, once for each associated account.
Account Number	account_number	The account number of the Acquisitions account from which funds are distributed to pay for the line item. If funds are distributed between two or more accounts, the line item will appear in the output multiple times, once for each associated account.
Cost	cost	The price of the line item.
Currency Code	currency_code	The currency code associated with the currency used in the price of the line item.
Date Due	date_due	The date the line item is expected to arrive.
Line	po_line	The title's line item number, taken from the purchase order.
PO	po_id	The purchase order ID associated with the title.

Data Element	Variable	Description
		For renewed serials orders, this is the *original* purchase order ID.
PO Subject	po_subject	The Acquisitions subject code associated with a given line item.
Quantity Ordered	quan_ordered	The quantity ordered for a single line item.
Quantity Received	quan_received	The quantity received for a given line item.
Title	title	The title of a given line item, taken from the purchase order. **Note:** If no Bib-ID is associated with an order, InfoStation will return the text *No Title Available* in place of the title.
Vendor	vendor_name	The name of the vendor from which the title was ordered, taken from the purchase order.
Vendor ID	vendor_id	The vendor ID of the vendor associated with the purchase order, taken from the vendor record.

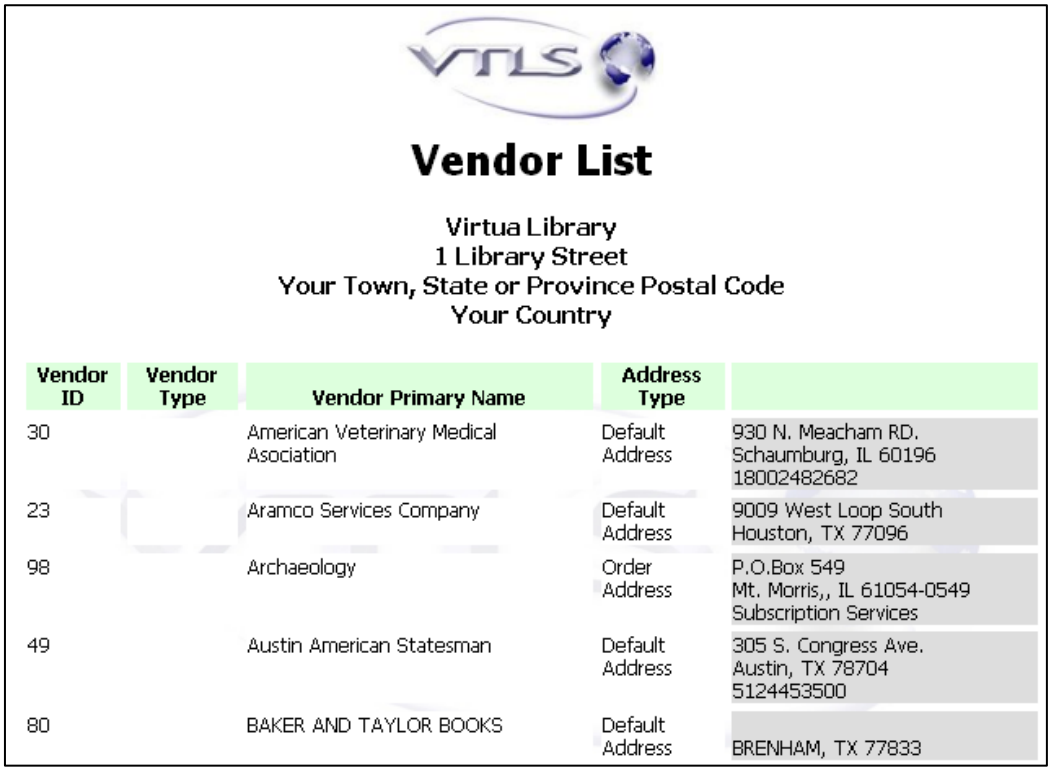
15.3 Output Templates for the Titles on Order Report

Location: /usr/vtls/virtua/webrpt_XX_x/Acq/Acq_1/[filename].tem

Template	Contribution to Output
html_page	Provides the overall framework of the HTML output.
html_header	Provides a heading for each set of line items, which are grouped according to vendor by default.
html_row	Generates the order information for a single line item.
email_page	Provides the overall framework of the e-mail output.
email_header	Provides a heading for each set of line items, which are grouped according to vendor by default.
email_row	Generates the order information for a single line item.

16. Vendor List Report

The Vendor List report generates a list of vendors in the database that have one or more addresses stored in their vendor records. For each vendor included in the output, the report returns a variety of data, such as the vendor name and address. Figure 16-1 shows an example of HTML output from the Vendor List report.



Vendor List

Virtua Library
1 Library Street
Your Town, State or Province Postal Code
Your Country

Vendor ID	Vendor Type	Vendor Primary Name	Address Type	
30		American Veterinary Medical Asociation	Default Address	930 N. Meacham RD. Schaumburg, IL 60196 18002482682
23		Aramco Services Company	Default Address	9009 West Loop South Houston, TX 77096
98		Archaeology	Order Address	P.O.Box 549 Mt. Morris,, IL 61054-0549 Subscription Services
49		Austin American Statesman	Default Address	305 S. Congress Ave. Austin, TX 78704 5124453500
80		BAKER AND TAYLOR BOOKS	Default Address	BRENHAM, TX 77833

Figure 16-1. Vendor List HTML Output

16.1 Parameters Available for the Vendor List Report

The Vendor List report offers the following report-specific parameters:

- **Address Type** (*required*) - Lets you specify which vendors and which address(es) to include in the output. You can choose from the following options:

  - **Show All** - The report generates a list of ALL the vendors who have at least one address defined in their vendor record and displays in the output ALL the addresses that exist.
  - **Order Address** - The report generates a list of vendors who have an Order Address defined in their vendor record and displays in the output only that address.
  - **Returns Address** - The report generates a list of vendors who have a Returns Address defined in their vendor record and displays in the output only that address.
  - **Claims Address** - The report generates a list of vendors who have a Claims Address defined in their vendor record and displays in the output only that address.
  - **Payment Address** - The report generates a list of vendors who have a Payment Address defined in their vendor record and displays in the output only that address.
  - **Other Address** - The report generates a list of vendors who have an Other Address defined in their vendor record and displays in the output only that address.
  - **Default Address** - The report generates a list of vendors who have a Default Address defined in their vendor record and displays in the output only that address.

- **Sort Parameters** (*required*) - Let you sort your report output on the following values:

  - Vendor Primary Name
  - Vendor Type
  - City
  - State or Province
  - Postal Code
  - Country Code

Note: You can sort the list of vendors *only* when you choose to return only one address type. If you set the Address Type parameter to Show All, you cannot sort your output. Rather, when all addresses are returned, the vendors are sorted in alphabetical order by name.

For additional information about these and other parameters, see the *InfoStation Reference Guide* or view the InfoStation online help.

16.2 Data Elements and Variables for the Vendor List Report

The following table lists the name, variable, and description of each data element that is retrieved by default by the Vendor List report. You can edit the output templates to include or exclude any data element listed below.

Hint: To identify its corresponding field label variable, add u_ to the beginning and **_label** to the end of each variable. For more information on variables and field label variables, see the *InfoStation User's Guide*.

Data Element	Variable	Description
Address 1	address_1	The first line of a given vendor address.
Address 2	address_2	The second line of a given vendor address.
Address 3	address_3	The third line of a given vendor address.
Address Type	address_type	The classification assigned to a given address (e.g., Payment Address).
Alternate Names	vendor_alternate_names	Any alternate names assigned to the vendor.
City	city	The city associated with a given address.
Contact	contact	The contact name associated with a given address.
County or Parish	country	The county associated with a given address.
Country	county	The country associated with a given

Data Element	Variable	Description
Code		address.
E-mail Address	email_address	The e-mail address associated with a given address.
FAX	fax	The FAX number associated with a given address.
Postal Code	postal_code	The postal code associated with a given address.
State or Province	state	The state associated with a given address.
Telephone	telephone	The telephone number associated with a given address.
Vendor ID	vendor_id	The vendor ID associated with a given vendor.
Vendor Primary Name	vendor_primary_name	The vendor name designated in the vendor record as the primary name.
Vendor Type*	vendor_type	The vendor type description associated with a given vendor.

***A Note About Vendor Type:**

Prior to Virtua version 42, vendor records were stored in the Innovative-defined 2709 Vendor Format. In this format, the Vendor Type was stored in the 245 tag, subfield $a of the vendor record.

Virtua's new field-based vendor records do NOT explicitly support a Vendor Type. For migrated vendor records, all vendor MARC tags that are not specifically supported by the new vendor format are stored in the Additional Fields area on the Notes tab of the View/Edit Vendor window in the Virtua client.

When vendor information is migrated to the Additional Fields area, the Label column is populated with the tag number, and the Field column is populated with the contents of the tag, including all subfields. This means that for the Vendor List report InfoStation reads as the Vendor Type any additional field that has a label of 245 and a prefix of $a.

16.3 Output Templates for the Vendor List Report

Location: /usr/vtls/virtua/webrpt_XX_x/Acq/Acq_8/[filename].tem

Template	Contribution to Output
html_page	Provides the overall framework of the HTML output, including the labels for each column of data in the output. The column headings generated by the **html_page** template label the values returned by the **html_row** template.
html_row	Generates a single row of information related to a particular vendor. The values returned by the **html_row** template are labeled with the column headings generated by the **html_page** template.
email_page	Provides the overall framework of the e-mail output.
email_row	In the output, generates all the information for a particular vendor, including data elements and labels.

17. Vendor Performance Report

The Vendor Performance report generates various counts and calculations that represent the performance of the vendors in the database. Figure 17-1 shows an example of HTML output from the Vendor Performance report.

Vendor Performance

Virtua Library
1 Library Street
Your Town, State or Province Postal Code
Your Country

	EBSCO	Library of Congress	TEXAS HISTORICAL COMMISSION	Independent Bankers Assn. of America	City Home Publishing Inc.	University of North Texas Press	Texas Committee for the Humanities	Texas Water Resources Institute	South Africa Foundation
Total Orders (PO)	0	0	4	0	0	0	0	0	0
Open Orders (Items)	0	0	0	0	0	0	0	0	0
Received Items	0	0	8	0	1	0	0	0	0
Fill Rate (%)	0.0	0.0	200.0	0.0	100.0	0.0	0.0	0.0	0.0
Total Canceled Orders	0	0	0	0	0	0	0	0	0
Canceled Items	0	0	0	0	0	0	0	0	0
Canceled Rate (%)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Claimed Items	0	0	0	0	0	0	0	0	0

Figure 17-1. Vendor Performance HTML Output

The report generates statistics for the vendors you select in the report configuration. You can configure the report to gather statistics for one or more log-in locations, and you can limit the output to a particular date range and/or fiscal year.

The Vendor Performance report output appears in the form of a table. The vendors that you select for the configuration appear as the columns in the table, which are labeled across the top. For example, the following vendors were selected for the configuration that produced the table in Figure 17-1:

- Potters Books
- The Book House
- Books Express
- Baker & Taylor

The rows in the table, which are labeled on the left, display various statistics for each vendor. Each statistic is described in the section "Data Elements and Variables for the Vendor Performance Report" in this chapter.

The table also contains an Average column, which reports statistical averages across all vendors selected for the report configuration.

Note: In delimited output, each row is for a particular vendor and each column represents a performance statistic. The Average calculation for each column appears in the last row in the output.

17.1 Parameters Available for the Vendor Performance Report

The Vendor Performance report offers the following report-specific parameters:

- **Log-in Locations** (*required*) - Lets you limit the output to performance counts and statistics associated with one or more specific locations. For example, in the output, the Total Orders count represents only the purchase orders created for a given vendor at the log-in location(s) that you select for the report configuration.

- **Vendors** (*required*) - Lets you choose the vendor(s) whose performance you want to include in the output. The report generates statistics *only* for the vendors you select in the Vendors list box.

- **Fiscal Years** (*optional*) - Lets you limit the output to performance counts and statistics associated with one or more fiscal years. The report generates statistics *only* for the fiscal year(s) you select in the Fiscal Years list box.

- **Date Range** (*optional*) - Let you limit the output to transactions performed within a particular date range. If you set this parameter, the output will include a summary of each vendor's performance during the date range that you specify for the report configuration.

For additional information about these and other parameters, see the *InfoStation Reference Guide* or view the InfoStation online help.

17.2 Data Elements and Variables for the Vendor Performance Report

The following table lists the name, variable, and description of each data element that is retrieved by default by the Vendor Performance report. You can edit the output templates to include or exclude any data element listed below.

Hint: To identify its corresponding field label variable, add u_ to the beginning and **_label** to the end of each variable. For more information on variables and field label variables, see the *InfoStation User's Guide*.

Data Element	Variable	Description
Average	average	For each count or calculation, the average across all vendors. The average is calculated for the vendors selected for the configuration—NOT for the total number of vendors in the database.
Average Delivery (Days)	average_delivery	For each vendor, the average number of days required to deliver an order (i.e., the average time elapsed between the date an order was transmitted and the date the items were received).
Average Price	average_price	For each vendor, the average line item price for all open orders.
Canceled Items	canceled_count	The number of canceled line items associated with each vendor.
Canceled Rate (%)	canceled_rate	For each vendor, the number of Canceled Items divided by the number of Open Orders (Items).
Claimed Items	claimed_count	The number of claimed items associated with each vendor.

Data Element	Variable	Description
Claimed Rate (%)	claimed_rate	For each vendor, the number of Claimed Items divided by the number of Open Orders (Items).
Fill Rate (%)	fill_rate	For each vendor, the number of Received Items divided by the number of Open Orders (Items).
Maximum Price	maximum_price	For each vendor, the maximum price per line item for all open orders, according to the invoice.
Minimum Price	minimum_price	For each vendor, the minimum price per line item for all open orders, according to the invoice.
Open Orders (Items)	open_orders	The number of line items associated with outstanding (i.e., not received) orders.
Received Items	received_count	The number of ordered items received from each vendor.
Total Canceled Orders (PO)	total_canceled	For each vendor, the total number of canceled orders.
Total Encumbered	total_encumbered	The total encumbrance associated with each vendor.
Total Expenditure	total_expenditure	The total expenditure associated with each vendor.
Total Orders (PO)	total_orders	The total number of orders associated with each vendor.
Total Payments	total_payments	The total of all payments associated with each vendor.
Vendor Name	vendor_name	The name of each vendor selected for the report configuration. Vendor names provide labels for columns in the output table.

17.3 Output Templates for the Vendor Performance Report

Location: /usr/vtls/virtua/webrpt_XX_x/Acq/Acq_9/[filename].tem

Template	Contribution to Output
html_page	Provides the overall framework of the HTML output.
email_page	Provides the overall framework of the e-mail output, including all fields returned by the report.

18. Vouchers Report

The Vouchers report generates a summary of all vouchers that meet the account, location, vendor, and date range criteria set in the report configuration. Figure 18-1 shows an example of HTML output from the Vouchers report.

Vouchers

Virtua Library
1 Library Street
Your Town, State or Province Postal Code
Your Country

Vendor Name: AAA Bookstore - 1

Voucher ID: p135 **16-MAY-2003**

Type	Invoice ID	Invoice Date	PO ID	PO Line No.	Account	Invoice Amount	Payment Amount
Payment	f135	16-MAY-2003	135	1	400	USD 0.80	0.80

Voucher Total: 0.80

Voucher ID: p137 **19-MAY-2003**

Type	Invoice ID	Invoice Date	PO ID	PO Line No.	Account	Invoice Amount	Payment Amount
Payment	f137	19-MAY-2003	139	1	400	USD 1.60	1.60

Voucher Total: 1.60

Total: 2.40

Figure 18-1. Vouchers HTML Output

For each voucher included in the output, the report returns a list of associated invoices and payments. For each payment, the report returns the related invoice and order information. Additionally, at the end of the list of vouchers contained in the output, the report returns the total amount of all vouchers included in the output.

18.1 Parameters Available for the Vouchers Report

The Vouchers report offers the following report-specific parameters:

- **Accounts** (*required*) - Lets you limit the output to vouchers associated with one or more Acquisitions accounts. To be included in the output, a voucher must contain at least one invoice that is associated with one of the accounts that you select for the report configuration.

- **Log-in Locations** (*required*) - Lets you limit your results to vouchers associated with one or more log-in locations. To appear in the output, a voucher must have been created at a location selected for the report configuration.

- **Vendors** (*required*) - Lets you limit the output to vouchers associated with one or more particular vendors. To be included in the output, a voucher must have been created to pay invoices belonging to one of the vendors that you select for the report configuration.

- **Date Range** (*required*) - Lets you specify a date range for the result set. For a voucher to appear in the output, its payment date must fall within the date range specified for the report configuration.

For additional information about these and other parameters, see the *InfoStation Reference Guide* or view the InfoStation online help.

18.2 Data Elements and Variables for the Vouchers Report

The following table lists the name, variable, and description of each data element that is retrieved by default by the Vouchers report. You can edit the output templates to include or exclude any data element listed below.

Hint: To identify its corresponding field label variable, add u_ to the beginning and **_label** to the end of each variable. For more information on variables and field label variables, see the *InfoStation User's Guide*.

Data Element	Variable	Description
Account	amount	The account number associated with a payment or credit.
Converted Amount	credit	The Invoice Amount converted to the database's Home Currency. InfoStation calculates this value using the conversion factor set in the Currencies parameter in the Virtua Profiler. For details, see the *Virtua Profiler/Global Settings User's Guide*.
Date Paid	date_paid	The payment date associated with the voucher.
Invoice Amount	invoice_amount	The amount of money associated with each invoice paid by a given voucher. In the output, the Invoice Amount is displayed in the currency selected for the invoice, taken from the invoice header.
Invoice Date	invoice_date	The date the invoice was created.
Invoice ID	invoice_id	The invoice ID associated with a given payment or credit.
Payment Amount	payment_amount	The amount of a given payment, taken from the payment voucher. The Payment Amount is displayed in the database's Home Currency. InfoStation calculates this value using the conversion factor set in the Currencies parameter in the Virtua Profiler. For details, see the *Virtua Profiler/Global Settings User's Guide*.
PO ID	payment	The purchase order ID of the order associated with a payment or credit.
PO Line No.	po_id	The purchase order line item number associated with a payment or credit.
Type	type	The type of transaction associated with a given invoice (i.e., payment or credit).
Voucher ID	voucher_id	The voucher ID of a particular voucher.
Vendor ID	vendor_id	The vendor ID of the vendor associated with the voucher, taken from the vendor record.
Vendor Name	voucher_name	The name of the vendor associated with the voucher, taken directly from the voucher.
Voucher	voucher_total	The sum of Converted Amounts for each

Data Element	Variable	Description
Total		transaction associated with a given voucher.

18.3 Output Templates for the Vouchers Report

Location: /usr/vtls/virtua/webrpt_XX_x/Acq/Acq_7/[filename].tem

Template	Contribution to Output
html_page	Provides the overall framework of the HTML output.
html_header	Generates a heading that groups vouchers vendor.
html_header_2	Generates a heading for each voucher and provides labels for information related to that voucher. The labels generated by the **html_header_2** template provide headings for the data returned by the **html_row** template.
html_row	For a given voucher, generates the information related to a single voucher transaction (i.e., a payment or a credit). Information that appears in this row is identified with labels generated by the **html_header_2** template.
html_summary_row	Returns a single row of data that summarizes the activity related to a given voucher (i.e., the voucher total).
email_page	Provides the overall framework of the e-mail output.
email_header	Generates a heading that groups a set of vouchers according to vendor.
email_header_2	Generates a heading for a single voucher.
email_row	Returns a single row of information related to a single transaction for the voucher (i.e., a payment or a credit).
email_summary_row	Returns a single row of data that summarizes the activity related to a given voucher (i.e., the voucher total).

19. Appendix A - Changes in this Guide

19.1 Changes for Version 16.1

No changes were made.

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