

**Reference
Guide**



Integrated Library System

**InfoStation[®]
Cataloging Reports**

VIRTUA ILS – INTEGRATED LIBRARY SYSTEM

InfoStation®
Cataloging Reports Reference Guide
Version 16.1
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1. Using This Guide

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. In this reference guide, we provide information about the reports related to the Cataloging subsystem.

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.

Specifically, in this guide, we discuss the following reports:

- [Authorities List Report](#)
- [Bibliographic Record List Report](#)
- [Bibliographic Record Load and Extract Report](#)
- [Broad Cataloging Statistics Report](#)
- [Cataloger Productivity Report](#)
- [Cataloging Errors Report](#)
- [Change Item Location by Call Number Range Report](#)
- [Indexed Words Report](#)
- [Item Barcode List Report](#)
- [Item Data Integrity Report](#)
- [Items Created List Report](#)
- [Items Received List Report](#)
- [Legal Deposit Statistics Report](#)
- [New Title List Report](#)
- [Number of Records in Database Report](#)
- [Patron Record Load and Extract Report](#)
- [Production of Records by User Report](#)
- [Record Extraction Utility Report](#)
- [Record Modification Utility Report](#)
- [Records By State Report](#)
- [Subject Bibliography Report](#)
- [URL Checker Report](#)

Except for the Patron Record Load and Extract report and the Bibliographic Record Load and Extract reports, which belong by default to the Administrative Report Group, each of these reports belongs by default to the Cataloging Report Group.

2 InfoStation/Cataloging Reports (v. 16.1)

In this reference guide, we limit our discussion to features that are specific to Cataloging reports. In this reference guide, 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 *InfoStation Reference Guide*.

The *InfoStation/Cataloging 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/Acquisitions Reports Reference Guide* - Provides details on InfoStation reports related to the Acquisitions subsystem.
- *InfoStation/Serials Reports Reference Guide* - Provides details on InfoStation reports related to the Serials 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.

Each chapter in this guide contains details about a specific Cataloging report. For each report, we include some or all of the following information, 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.
 - ◆ Where appropriate, we describe each parameter's impact on the database.
- Information on the report's parameter requirements, if any. A *required* parameter is one that you *must* set before you can successfully save and run a report configuration.
- 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.

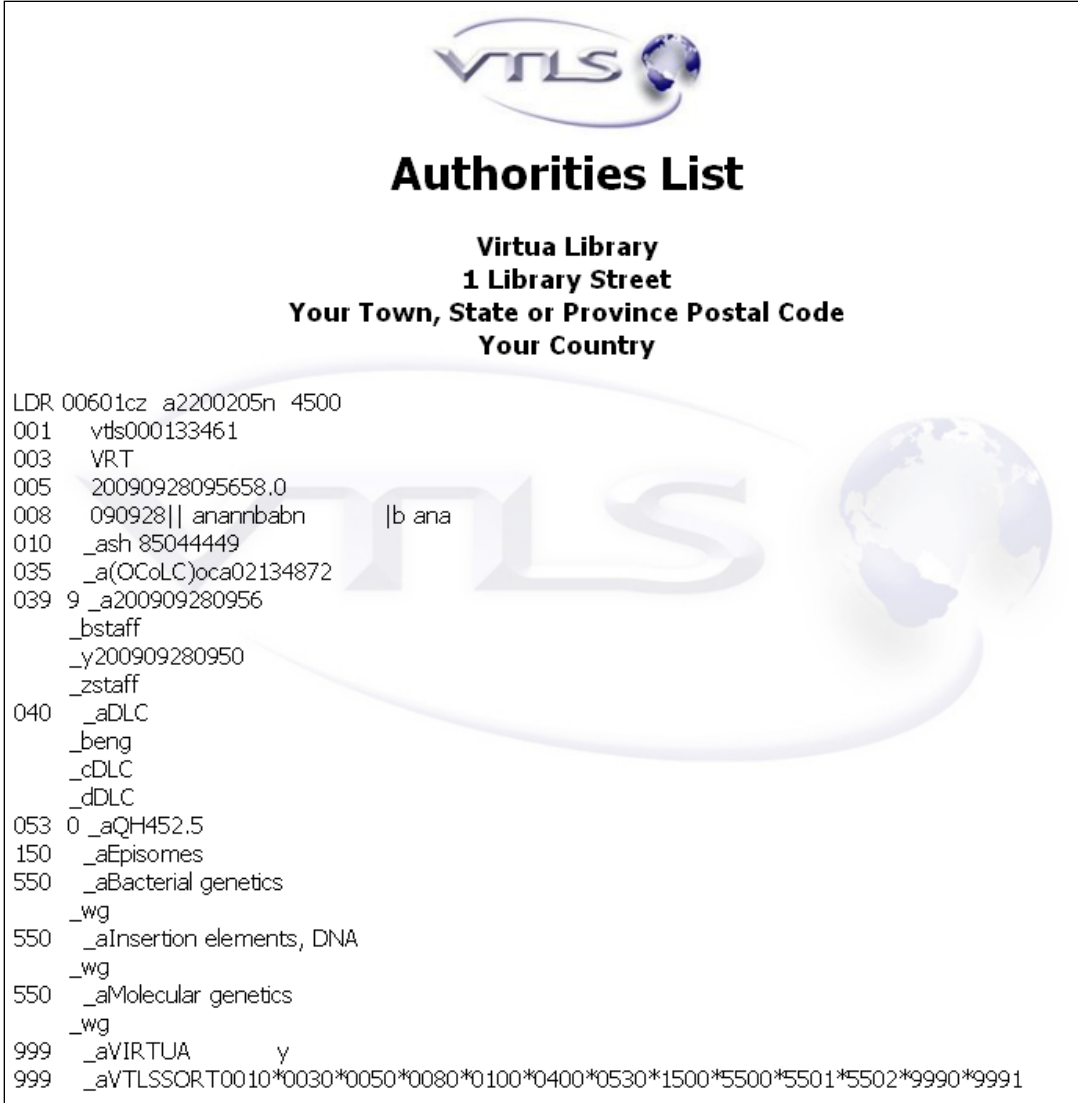
Note: In this reference guide, we describe the default characteristics of each report.


- 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.

2. Authorities List Report

The Authorities List report generates a list of permanent OR provisional authority records that meet the authority type, Cataloging Source Code (optional), and date range criteria specified in the report configuration. [Figure 2-1](#) is an example of HTML output from the Authorities List report.

Note: By default, the Authorities List Report is designed to return results for MARC 21 authority records. If you are working on a UNIMARC database, please see the section “[A Note for UNIMARC Users](#)” in this chapter.




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

```

LDR 00601cz a2200205n 4500
001 vtls000133461
003 VRT
005 20090928095658.0
008 090928|| anannbabn |b ana
010 _ash 85044449
035 _a(OCoLC)oca02134872
039 9 _a200909280956
    _bstaff
    _y200909280950
    _zstaff
040 _aDLC
    _beng
    _cDLC
    _dDLC
053 0 _aQH452.5
150 _aEpisomes
550 _aBacterial genetics
    _wg
550 _aInsertion elements, DNA
    _wg
550 _aMolecular genetics
    _wg
999 _aVIRTUA y
999 _aVTLSSORT0010*0030*0050*0080*0100*0400*0530*1500*5500*5501*5502*9990*9991
  
```

Figure 2-1. Authorities List HTML Output

Additionally, for the selected Output Format of HTML or E-mail, you can choose whether the output displays the contents of the MARC record (as shown in [Figure 2-1](#)) or a formatted summary of the authority headings ([Figure 2-2](#)).

Authorities List	
Virtua Library	
1 Library Street	
Your Town, State or Province Postal Code	
Your Country	
Auth ID	133470
Bibliographic Level	x
Personal Name	Zouali, Moncef, 1952-
Auth ID	133471
Bibliographic Level	x
Corporate Name	Wiley InterScience (Online service)
Auth ID	133298
Bibliographic Level	x
Personal Name	Wang, Jun zhe
Auth ID	133126
Bibliographic Level	x
See--Geographic Name	Éfiopii፣a፣ Abyssinia Abisynja Etiopie Etiopia Et'ovpia Federazione etiopica Avēssynia Ḥābshah Äthiopien Provisional Military Government of Socialist Ethiopia Abissinii፣a፣ Etyopiyah Etyopyah Etiyopiyah Etiyopyah Ḥābsh People's Democratic Republic of Ethiopia ፣Ityopyā Ya፣Ityopyā ne. na. mangeśt Ya፣Ityopyā neguśa nagaśt mangeśt Imperial Ethiopian Government YaḤebratasab፣āwit ፣Ityopyā gizéyāwi watādarāwi mangeśt Provisional Military Government of Ethiopia Empire of Ethiopia Ya፣Ityopyā ḥezbāwi dimokrāsiyāwi

Figure 2-2. Authorities List Summary HTML Output

2.1 Parameters Available for the Authorities List Report

The Authorities list report offers the following report-specific parameters:

- **Authority Type** (*required*) - Lets you specify which type(s) of authority to include in the output. You can choose . . .
 - ◆ **Name Authorities** - The configuration will generate a list of authority records that have a bib level of **x**.
 - ◆ **Subject Authorities** - The configuration will generate a list of authority records that have a bib level of **y**.
 - ◆ **Name and Subject Authorities** - The configuration will generate a list of authority records that have a bib level of either **x** or **y**.
 - ◆ **Name Authorities and Names as Subject** - The configuration will generate a list of authority records that have a bib level of **x** AND authority records that have a bib level of **y** and also have a 100, 110, or 111 tag.

Note: Authority bib level is an Innovative-defined classification stored in the 999 VIRTUA tag. For details, see the *Virtua Cataloging User's Guide*.

- **Provisional Authorities only** - Lets you limit your results to ONLY provisional authority records. If this check box is not selected, the output of the report will NOT contain provisional authority records. For information on provisional authority records vs. permanent authority records, see the *Virtua Cataloging Reference Guide*.
- **Cataloging Source Code** (*optional*) - Lets you limit your results according to cataloging source code. To be included in the output, an authority record must contain the code you type in this text box in subfield \$a of its 040 tag. You can view the *MARC Code List for Organizations*, which is maintained by the Library of Congress at <http://lcweb.loc.gov/marc/organizations/>.

Note:

- InfoStation does not check to verify that you have entered a valid code.
- The Cataloging Source Code parameter cannot be applied when running the Authorities List report for Provisional Authority records.

- **Date Range** - Lets you limit the output by entered date, which is stored in subfield \$y of the 039 tag. To appear in the output, an authority record must have been entered into the database during the date range that you specify for the report configuration.

Note: The Date Range parameter is required when running the Authorities List report for permanent authority records, but the Date Range parameter cannot be applied when the Authorities List report is run for provisional authority records.

- **MARC Output** (*optional*) - Lets you determine the format of the MARC authority record in the output when the Output Format is HTML or E-mail.

- ◆ If you select the MARC Output check box, the contents of the MARC authority record will be included in the output (*Figure 2-1*).
- ◆ If you do NOT select the MARC Output check box, only summary information from the authority record will be displayed in the output (*Figure 2-2*).

Note: When the Output Format is E-mail with Delimited File Attachment, the contents of the MARC authority record will always be available.

- **MARC Tag List** (*optional*) - Lets you configure the report to return specific information from specific tags of the authority record. By default, the MARC Tag List is configured to retrieve the following information:
 - ◆ Personal Name (100 tag)
 - ◆ Corporate Name (110 tag)
 - ◆ Meeting Name (111 tag)
 - ◆ Topical Term (150 tag)
 - ◆ Geographic Name (151 tag)
 - ◆ Complex See Reference (260tag)
 - ◆ Complex See Also Reference (360 tag)
 - ◆ See--Personal Name (400 tag)
 - ◆ See--Corporate Name (410 tag)
 - ◆ See--Meeting Name (411 tag)
 - ◆ See--Topical Term (450 tag)
 - ◆ See--Geographic Name (451 tag)
 - ◆ See Also--Personal Name (500 tag)
 - ◆ See Also--Corporate Name (510 tag)
 - ◆ See Also--Meeting Name (511 tag)
 - ◆ See Also--Topical Term (550 tag)
 - ◆ See Also--Geographic Name (551 tag)

For additional information about these Report-specific Parameters, see the *InfoStation Reference Guide* or view the InfoStation online help.

2.2 Data Elements and Variables for the Authorities List Report

In the following table, we list the name, variable, description, and source of each data element that is retrieved by default by the Authorities 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
Auth ID	auth_id	The authority-ID in the 001 tag of the authority record.
Bib Level	bib_level	The bib level in position 21 of the 999 VIRTUA tag in the authority record.
Complex See Also Reference	tag_360	The complex <i>see also</i> reference in the 360 tag of the authority record.
Complex See Reference	tag_260	The complex <i>see</i> reference in the 260 tag of the authority record.
Corporate Name	tag_110	The corporate name in the 110 tag of the authority record.
Geographic Name	tag_151	The geographic in the 151 tag of the authority record.
Meeting Name	tag_111	The meeting name in the 111 tag of the authority record.
Personal Name	tag_100	The personal name in the 100 tag of the authority record.
See Also--Corporate Name	tag_510	The <i>see also</i> corporate name reference in the 510 tag of the authority record.
See Also--Geographic Name	tag_551	The <i>see also</i> geographic name reference in the 551 tag of the authority record.
See Also--Meeting Name	tag_511	The <i>see also</i> meeting name reference in the 511 tag of the authority record.
See Also--Personal Name	tag_500	The <i>see also</i> personal name reference in the 500 tag of the authority record.
See Also--Topical Term	tag_550	The <i>see also</i> topical term reference in the 550 tag of the authority record.

Data Element	Variable	Description and Source
See--Corporate Name	tag_410	The <i>see</i> corporate name reference in the 410 tag of the authority record.
See--Geographic Name	tag_451	The <i>see</i> geographic name reference in the 451 tag of the authority record.
See--Meeting Name	tag_411	The <i>see</i> meeting name reference in the 411 tag of the authority record.
See--Personal Name	tag_400	The <i>see</i> personal name reference in the 400 tag of the authority record.
See--Topical Term	tag_450	The <i>see</i> topical term reference in the 450 tag of the authority record.
Topical Term	tag_150	The topical term in the 150 tag of the authority record.

2.3 Output Templates for the Authorities List Report

Location: /usr/vtls/virtua/webprt_XX_x/Cat/Cat_6/[filename]

Filename	Contribution to Output
html_page.tem	Provides the overall framework of the HTML output.
html_row.tem	Provides information for a single authority record, including both data elements and labels.
email_page.tem	Provides the overall framework of the e-mail output.
email_row.tem	Provides information for a single authority record, including both data elements and labels.

2.4 A Note for UNIMARC Users

By default, the Authorities List Report returns results for MARC 21 authority records. If you are working on a UNIMARC database you will need to replace the default template files with a set of template files that use the appropriate tags for UNIMARC.

To replace your default template files with UNIMARC template files,

1. Log in to your server as **dbadmin**.
2. Navigate to the **/usr/vtls/virtua/webrpt_XX_x/Cat/Cat_6** directory.
3. Execute the following three commands:

```
cp tag_list_uni.en tag_list.en
```

```
cp html_row_uni.en html_row.en
```

```
cp email_row_uni.en email_row.en
```

The default template files are overwritten with template files that have been customized for UNIMARC users.

3. Bibliographic Record List Report

The Bibliographic Record List report generates a list of bibliographic records that meet the criteria specified in the report configuration. Figure 3-1 is an example of HTML output from the Bibliographic Record List report.

Bibliographic Record List						
Virtua Library 1 Library Street Your Town, State or Province Postal Code Your Country						
Selection Criteria						
Call Number Ranges	A - AZ	Item Conditions	0. All Bibliographic Records, 3. Sum of All Circulation Counts			
Minimum Circulation		Maximum Circulation				
Location Conditions	All or Any	Creation Date Range				
Publication Date Range		Type				
Bibliographic Level		Language Code				
Bib ID	12325	Bibliographic Call Number	A23 1993 SH154.	Fixed Length Data	020319s1993 ua a b 000 0 ara d	
Author		Title				
Physical Description	بم 4 ص 123 : ب : ص 4		Edition			
Item Barcode	Item Class	Location	Item Call Number	Copy	Circulation Count	
23717	Books	Memorial Archives		0	0	
23716	Books	Memorial Archives		0	0	
Bib ID	14728	Bibliographic Call Number	A	Fixed Length Data	020319s2001 nyua b 101 0 eng c	
Author		Title	Adult attention deficit disorder : brain mechanisms and life outcomes / edited by Jeanette Wasserstein, Lorraine E. Wolf, and F. Frank LeFever.			
Physical Description	x, 409 p. : ill. ; 24 cm.		Edition			
Item Barcode	Item Class	Location	Item Call Number	Copy	Circulation Count	
27725	Books	Garcia Research Library		0	0	
27724	Books	Garcia Research Library		0	0	

Figure 3-1. Bibliographic Record List HTML Output

In addition to the output shown in Figure 3-1, at the bottom of the list, a summary appears (Figure 3-2).

Summary		
Bibliographic Records Found	744	
Item Records Found	1427	
Call Number Ranges	Count	Percentage
a - b	103	13.8
b - c	571	76.7
c - d	70	9.4

Figure 3-2. Bibliographic Record List HTML Summary

The summary includes the following counts:

- Total number of bibliographic records found.
- Total number of item records found.
- For each call number range . . .
 - ◆ The total number of bibliographic records that meet the call number range criteria.
 - ◆ The bibliographic records found that meet the call number range criteria as a percentage of the total number of bibliographic records.

For the Bibliographic Record List report, four parameters are *always* required: Call Number Ranges, Call Number Level, Item Conditions, and Shelving Locations. In this way, the output always contains a list of bibliographic records that fall—or have attached item records that fall—within the specified call number range, are associated with the specified locations, and meet your item conditions.

You can further limit the output by setting the following optional parameters:

- Minimum Circulation
- Maximum Circulation
- Creation Date Range
- Publication Date Range
- Bibliographic Type
- Bibliographic Level
- Language Code

In addition, for each configuration, you can specify whether the output includes . . .

- ALL bibliographic records.
-OR-
- Only bibliographic records that have items attached.
-OR-
- Only bibliographic records that have NO items attached.
-OR-
- Only bibliographic records whose items have circulated.

Note: If you choose to gather information only for bibliographic records that have NO items attached, the item information that appears in [Figure 3-1](#) is omitted from the output.

3.1 Parameters Available for the Bibliographic Record List Report

The Bibliographic Record list report offers the following Report-specific Parameters:

- **Call Number Ranges** (*required*) - Lets you configure the report to retrieve records from one or more specific call number ranges. To appear in your results, and depending on the Call Number Level parameter, a bibliographic record must have a call number or an attached item with an item-level call number that falls within one of the ranges that you specify for the report configuration. For each report configuration, you must define at least one call number range. You can define up to five ranges.
- **Call Number Level** (*required*) - Lets you specify whether the InfoStation will generate a report based on the bib-level call number of bibliographic records or the item-level call number of items attached to bibliographic records.
 - ◆ If you choose Bib Level, InfoStation will interpret the Call Number Ranges parameter as a “bibliographic” Call Number Ranges parameter.
 - ◆ If you choose Item Level, InfoStation will interpret the Call Number Ranges parameter as an “item-level” Call Number Ranges parameter.

Note: Items whose item-level call numbers do not meet the criteria will be omitted from the output, even if they are attached to a bibliographic record that has other items that do meet the criteria.

- **Item Conditions** - Lets you specify item conditions and circulation limits for the report configuration.

Note: When the Call Number Level parameter is set to Item Level, to be included in the output, items must meet the criteria of both the call number range and item conditions. For example, if the report is configured for item-level call numbers a1-a5 and for items that have been circulated, the report will return only bibliographic records with attached items that have a call number between a1 and a5 and that have been circulated.

- ◆ **Pull-down list box** (*required*) - Using this pull-down list box, you can determine whether the report retrieves results for . . .
 - 0. All Bibliographic Records (*default*)
 - 1. Bibliographic Records That Have Items Attached
 - 2. Bibliographic Records Without Items
 - 3. Bibliographic Records That Have Items That Have Circulated
- ◆ **Minimum Circulation** (*required only for item condition 3*) - The minimum number of times an item must have circulated to be included in the output.
- ◆ **Maximum Circulation** (*required only for item condition 3*) - The maximum number of times an item may have circulated to be included in the output.

Note: If you select Bibliographic Records That Have Items That Have Circulated (i.e., Item Condition 3), you must also specify a Minimum Circulation AND a Maximum Circulation. For all other Item Conditions, Minimum Circulation and Maximum Circulation are ignored.

- ◆ **Circulation Count Option** - Lets you specify which circulation count(s) to use when filtering by circulation count. You can choose . . .
 - **0. Regular Circulation Count** (*default*) - Filters results using only the number of regular check-outs associated with an item.
 - **1. In-house Circulation Count** - Filters results using only the number of in-house check-outs associated with an item.
 - **2. Reserve Circulation Count** - Filters results using only the number of reserve check-outs associated with an item.
 - **3. Sum of All Circulation Counts** - Filters results using the sum of all check-outs, regardless of check-out type.

For example, if you set the Minimum Circulation to 20, the Maximum Circulation to 50, and the Circulation Count Option to In-house Circulation Count, the report output would contain a list of bibliographic records with items that have circulated as in-house check-outs no fewer than 20 times and no more than 50 times.

- **Shelving Locations** (*required*) - Lets you limit the results to one or more shelving locations. To appear in the output, a record must have one or more items shelved at a location that you select for the report configuration.

Note: Because the Shelving Locations parameter lets you limit your results according to *shelving* location, if you set the Item Conditions parameter to All Bibliographic Records or Bibliographic Records Without Items (i.e., Item Condition 0 or 2), the Shelving Locations parameter is ignored.

- **Creation Date Range** (*optional*) - Lets you limit the output by creation date, which is stored in the 039 tag subfield \$y of the bibliographic record. To appear in the output, a bibliographic record's creation date must fall within the date range that you specify for the report configuration.
 - ◆ This parameter uses the date format DD-MON-YYYY.
 - ◆ If you set this parameter, you must specify both a Start date AND an End date.
- **Publication Date Range** (*optional*) - Lets you limit the output by publication year, which is stored in positions 07-10 of the 008 fixed fields in the bibliographic record. To appear in the output, a bibliographic record's publication year must fall within the range that you specify for the report configuration.
 - ◆ For the Start date and the End date, you can enter any four-digit year (e.g., 2001).
 - ◆ If you set this parameter, you must specify both a Start date AND an End date.
- **Type** (*optional*) - Lets you limit the output to a particular type of record, which is stored in position 06 of the Leader. For this parameter, you can enter any alphabetic character(s).
- **Bibliographic Level** (*optional*) - Lets you limit the output to records of a particular bibliographic level, which is stored in position 07 of the Leader. For this parameter, you can enter any alphabetic character(s).
- **Language Code** (*optional*) - Lets you specify the language of records retrieved by the report configuration (the MARC 21 language code is stored in positions 35-37 of the 008 fixed field). For this parameter, you can enter any alphabetic character(s).
- **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 the following information:
 - ◆ Bib-ID (001 tag)
 - ◆ Fixed Length Data (008 fixed fields)

- ◆ Author (100 tag)
 - ◆ Corporate Author (110 tag)
 - ◆ Title (245 tag)
 - ◆ Edition (250 tag)
 - ◆ Publication (260 tag)
 - ◆ Physical Description (300 tag)
- **Sort Parameters** (*required*) - Let you sort your output on the following values:
 - ◆ Author
 - ◆ Bib-ID
 - ◆ Bibliographic Call Number
 - ◆ Title

For additional information about these Report-specific Parameters, see the *InfoStation Reference Guide* or view the InfoStation online help.

3.2 Data Elements and Variables for the Bibliographic Record List Report

In the following table, we list the name, variable, description, and source of each data element that is retrieved by default by the Bibliographic Record 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 in the 100 tag of bibliographic record.
Bib-ID	bib_id	The system-assigned Bib-ID of the record, stored in the 001 tag of bibliographic record.
Bibliographic Call Number	bib_call_number	The bibliographic-level call number for a given record.

Data Element	Variable	Description and Source
Edition	tag_250	The edition stored in the 250 tag of bibliographic record.
Fixed Field Length Data	tag_008	Fixed field length data for the bibliographic record, stored in the 008 fixed fields.
Item Barcode	item_barcode	The library-assigned item barcode associated with a given item.
Item Call Number	item_call_number	The item-level call number of an item. Note: When the Call Number Level parameter is set to Bib Level, InfoStation will provide the item-level call number <i>only</i> if it is different from the bibliographic-level call number.
Item Circulation Count	item_circulation_count	The number of times an item has circulated. This is a running circulation total for the item. This count is incremented automatically by the system and cannot be changed.
Item Class	item_class_name	The item class of a given item.
Item Copy	item_copy	The copy number of an item.
Physical Description	tag_300	A physical description stored in the 300 tag of bibliographic record.
Publication	tag_260	The publication information stored in the 260 tag of bibliographic record.
Shelving Location	item_location_name	The shelving location of a given item.

3.3 Output Templates for the Bibliographic Record List Report

Location: /usr/vtls/virtua/webprt_XX_x/Cat/Cat_3/[filename]

Filename	Contribution to Output
html_page.tem	Provides the overall framework of the HTML output, including the configuration settings, which appear at the top of the record list, and the summary data, which appears at the bottom of the record list.
html_row.tem	Provides information for a single bibliographic record, including both data elements and labels.
html_item_header.tem	Provides the labels for a single row of item information, which is returned by the HTML Item Row template.
html_item_row.tem	Provides a single row of item information. The HTML Item Header template provides the labels for the data elements returned by the HTML Item Row template.
email_page.tem	Provides the overall framework of the e-mail output, including the configuration settings, which appear at the top of the output.
email_row.tem	Provides information for a single bibliographic record, including both data elements and labels.
email_item_header.tem	Provides the labels for a single row of item information, which is returned by the E-mail Item Row template.
email_item_row.tem	Provides the information for a single item attached to a given bibliographic record, including both data elements and labels.

4. Bibliographic Record Load and Extract Report

The Bibliographic Record Load and Extract report lets you . . .

- Upload to the database a fixed-format or delimited file of bibliographic information and specify options to process the file and save the data in the MARC bibliographic record format.
-OR-
- Download bibliographic records from the database and specify options to convert the data from the MARC record format to a fixed-format or delimited file.

In this way, the principal output of Bibliographic Record Load and Extract report is either . . .

- New or modified bibliographic records in the database, created from the file of bibliographic data that you uploaded from the server.
-OR-
- A file of bibliographic data on the server, created from the bibliographic records that you downloaded from database.

Additionally, the Bibliographic Record Load and Extract report generates HTML, e-mail, and delimited output, which consist of diagnostic information regarding the processes that were performed when you ran the configuration.

For an upload, the diagnostic output is generated by **vload.exe**, which the Bibliographic Record Load and Extract report uses to process data. For details on **vload.exe**, see the *Virtua Record Loading User's Guide*. For a download, the diagnostic output is generated by InfoStation and contains information regarding the download.

Important Note for Our Customers on Solaris: If you run Virtua on the Solaris platform and do not set the locale via the LC_ALL environment variable, you may have problems viewing the contents of files and other raw data on the server that contain non-Latin scripts such as Hebrew and Cyrillic. For details, see the *System Management Reference Guide*.

4.1 Parameters Available for the Bib Record Load and Extract Report

The Bibliographic Record Load and Extract report offers various parameters that you can set to specify how data will be handled when you run the report.

4.1.1 Upload to Database Parameters

The Upload to Database parameters let you specify options for a file of bibliographic data that you want to upload to the database to create or modify bibliographic records.

Important: You will set the Upload to Database parameters *only* when you are creating a report configuration to upload a file of bibliographic data from the sever to create and update bibliographic records in the database.

The Upload to Database parameters offer the following options:

- **Input File** (*required for uploads*) - Lets you specify the name of the data file that you want to upload and its location on the server (e.g., `/usr/vtls/virtua/webrpt_XX_X/bibs.txt`).
- **Input File Type** (*required for uploads*) - Lets you specify the type of file you are uploading, either . . .
 - ◆ **Delimited File** - The input file contains data on a line, separated by a delimiter, which you specify via the Field Delimiter parameter.
 - ◆ **Fixed-format file** - The input file contains data in fixed-length fields.
- **Incoming Character Set** (*required for upload*) - Lets you specify the character set of the data in the input file. You can select the appropriate character set from the pull-down list box.
- **Upload Type** (*required*) - Lets you specify the type of upload you want to perform. You can choose from the following options:
 - ◆ Create new records/default matching.
 - ◆ Create new records/discard any matches.
 - ◆ Create new records/merge with matching
- **Default Type of Record** (*required*) - Lets you define a default record type to be used in the Leader when the record type is not defined in the incoming record. Select a record type from the list box.

- **Default Bibliographic Level** (*require*) - Lets you define a default bibliographic level to be used in the Leader when the bibliographic level is not defined in the incoming record. Select a bibliographic level from the list box.
- **Name Processing** (*required for uploads*) - Lets you specify whether the name fields require special processing. You can set the Name Processing parameter to . . .
 - ◆ **Off** - Name fields will be loaded *exactly* as they appear in the input file.
 - ◆ **On** - Name fields will be loaded according to special processing rules specified in the text box.
- **Tags to Protect** (*optional*) - Lets you specify which bibliographic record tags should NOT be overwritten when the incoming file contains updated information for a bibliographic record that already exists in the database.

For example, if you type **007 500-599** in the Tags to Protect text box, the 007 fixed fields and all 5xx tags will be protected in existing bibliographic records.

- **Record State** (*optional*) - Lets you choose the record state that will be assigned to records loaded into the database. If you do not want to assign a record state to incoming records, select None.
- **Record Range** (*optional*) - Lets you define a range of records to upload. You can create separate configurations to upload different record ranges in case you have to interrupt and restart processing for any reason.
- **Additional vload.exe Options** (*optional*) - Lets you specify any additional load options that you want to use for loading records. Here you can specify any options that you would specify at the command line when running **vload.exe**.
- **Show Diagnostics** (*optional*) - Lets you specify whether to include diagnostic messages in the report output.

Note: This option affects the HTML, e-mail, and delimited output of the report. It does NOT affect the bibliographic records that are created as a result of the processing. The diagnostic information is generated by **vload.exe**.

- **Level of Diagnostic Logging** (*required if you choose to show diagnostics*) - If you choose to show diagnostic information in the output, lets you specify the level of diagnostic logging. You can specify any number one (1) through five (5), where one is the level that generates the most diagnostic logging.
- **Subfield Delimiter** (*optional*) - Lets you specify the delimiter used to separate subfield data from an input delimited file only. Any data presented after the first

subfield data in a tag needs a subfield delimiter, followed by the subfield character, a space, and then the subfield data itself.

- ◆ Any Subfield Delimiter value you enter must be different from the Field Delimiter value specified in the report configuration.
- ◆ The Subfield Delimiter you enter must NOT be present in the input delimited file data that is to be assigned to any subfield.

Note: By default, the Subfield Delimiter parameter is empty, which causes ALL subfield data to be assigned solely to the one subfield configured in the report.

4.1.2 Download to File Parameters

The Download to File parameters let you specify options for the output file when you are downloading bibliographic data from database to a file on the server.

Important: You will set the Download to File parameters *only* when you are creating a report configuration to download bibliographic records from the database to create a fixed-format or delimited file of bibliographic data.

The Download to File parameters offer the following options:

- **Output File** (*required for downloads*) - Lets you specify the name and location of the output file (e.g., `/usr/vtls/virtua/webrrpt_XX_X/bibs.out`). The only valid characters to be used in the output file are listed below in red:
 - a-z** (lower case letter)
 - A-Z** (upper case letter)
 - 0-9** (number 0 to 9)
 - [** (left bracket)
 -]** (right bracket)
 - _** (underscore)
 - .** (period)
 - (hyphen)
- **Output File Type** (*required for downloads*) - Lets you specify the output file type, either . . .
 - ◆ **Delimited File** - The output file will contain data on a line, separated by a delimiter, which you specify via the Field Delimiter parameter.
 - ◆ **Fixed-format file** - The output file will contain data in fixed-length fields.
- **Repeating Tags or Subfields** (*required for downloads*) - Lets you specify how to handle repeated tags and subfields. You can choose . . .

- ◆ **Use First** - If tags or subfields are repeated, only the first occurrence is saved to the output file.
- ◆ **Concatenate** - If tags or subfields are repeated, ALL occurrences are saved to the output file, strung together in the same field of the output file and separated by the delimiter specified in the Delimiter text box. The default, /s, indicates a space.
- **Date Range** (*required for downloads*) - Lets you limit the download to bibliographic records added or modified during particular date range, according to the date in the 039 tag of the bibliographic record. To be downloaded to the output file, a bibliographic record must have been created (039 \$y) or modified (039 \$a) during the date range that you specify for the report configuration.

4.1.3 Global Parameters

The Bibliographic Record Load and Extract report offers two global Report-specific Parameters, which are used by ALL configurations, regardless of whether you are performing an upload or a download.

- **Field Delimiter** (*required*) - Lets you specify the delimiter used to separate data in a delimited file only.
 - ◆ If you are uploading data, this is the delimiter used to separate data in the *input* file.
 - ◆ If you are downloading bibliographic data, this is the delimiter used to separate data in the *output* file.

Note: The default setting, \t, specifies a TAB character.

- **Save Intermediate MARC File** (*optional*) - Lets you choose whether you want to save an intermediate file of MARC data. The intermediate file will contain a list of records that were uploaded or downloaded in a simplified MARC format. This options lets you create a record of your record processing. If you want to save records to an intermediate file, type the name and location of the file in the text box (/usr/vtls/virtua/webrpt_XX_X/marc.txt).

4.2 Working with Field Definitions

Field Definitions appear at the bottom of the Configuration - Bibliographic Record Load and Extract screen (*Figure 4-1*).

Field Name	Length	Tag	Indicator 1	Indicator 2	Subfield Code	Special Flag	Error Handling	Decode Table
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	None	<input type="radio"/> Log <input type="radio"/> Skip <input type="radio"/> Stop	

Figure 4-1. Empty List of Field Definitions

Depending on whether you are uploading a data file to create or update bibliographic records or downloading bibliographic records to a data file, Field Definitions let you specify . . .

- How the data file should be processed to create or modify bibliographic records.
-OR-
- How bibliographic records should be processed to create the data file.

For additional information Field Definitions, see the appendix "[Special Features of Load/Extract Reports](#)" in this guide.

4.3 Output Templates for the Bib Record Load and Extract Report

Location: /usr/vtls/virtua/webprt_XX_x/Adm/Adm_3/[filename]

Template	Contribution to Output
html_page.tem	Generates all the diagnostic information that appears in HTML output.
email_page.tem	Generates all the diagnostic information that appears in e-mail output.

5. Broad Cataloging Statistics Report

The Broad Cataloging Statistics report uses the location, Virtua user, and date range criteria that you set in the report configuration to generate a summary of cataloging statistics for . . .

- Bibliographic records
- Authority records
- Community Information records
- Item records
- Holdings records
- Patron records
- Vendor records
- Union Catalog records

Important: Before you use the Broad Cataloging Statistics report, you must configure Virtua to gather statistics about cataloging activities. To do this, select the *Gather cataloging statistics* option in the Virtua Profiler. For details, see the *Virtua Profiler/Cataloging Parameters User's Guide*.

Figure 5-1 displays a portion of the default HTML output from the Broad Cataloging Statistics report.

Broad Cataloging Statistics		
Virtua Library 1 Library Street Your Town, State Province Postal Code Your Country		
Bibliographic Records		
Table Data		
Total	12,102	
Added	250	01-JAN-2000 - 01-JAN-2001, All Users
Modified	247	01-JAN-2000 - 01-JAN-2001, All Users
Log Data		
Saved	0	01-JAN-2000 - 01-JAN-2001, Selected Users and Locations
Deleted	0	01-JAN-2000 - 01-JAN-2001, Selected Users and Locations

Figure 5-1. Broad Cataloging Statistics HTML Output

For details on the statistics returned for each record, see the section “[Data Elements and Variables for the Broad Cataloging Statistics Report](#)” in this chapter.

For each configuration of the Broad Cataloging Statistics report, you must set the following required parameters:

- Log-in Locations
- Virtua Users
- Date Range

In this way, your results always contain a list of cataloging statistics performed at the locations, by the Virtua users, and within the date range you specify.

Each required parameter, however, does not apply to all statistics returned by the report. In the output, parameters appear alongside the statistics they affect. For example, in [Figure 5-1](#), you can see that NO parameters apply to the Total statistic (i.e., the third column is blank) but that the Date Range, Log-in Locations, and Virtua Users parameters apply to the Saved and Deleted statistics (i.e., the third column displays 01-JAN-2000-01-JAN-2001, Selected Users and Log-in Locations).

5.1 Parameters Available for the Broad Cataloging Statistics Report

The Broad Cataloging Statistics report offers the following Report-specific Parameters:

- **Log-in Locations** (*required*) - Lets you limit the output to statistics associated with one or more log-in locations. To be included in the output, functions must have occurred at a log-in location you select for the report configuration.
- **Virtua Users** (*required*) - Lets you limit the output to cataloging functions associated with one or more Virtua users. To be included in the output, functions must have been performed by a user you select for the report configuration.
- **Date Range** (*required*) - Lets you limit the output to a particular date range. The report generates statistics for cataloging functions performed during the date range that you specify for the report configuration.

For additional information about these Report-specific Parameters, see the *InfoStation Reference Guide* or view the InfoStation online help.

5.2 Data Elements & Variables for the Broad Cataloging Statistics Report

The output of the Broad Cataloging Statistics report contains a table of statistics for the following types of records:

- Bibliographic
- Authority
- Community Information
- Item
- Holdings
- Patron
- Vendor

- Union Catalog

By editing the Field Labels on the Configuration screen, you can specify a label for each table of data. Below we describe the data elements that appear in each table.

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(s)	Description
For Bibliographic, Authority, Community Information, Item, Holdings, Patron, and Vendor Records		
Added	bib_added cif_added hold_added item_added patron_added vendor_added	The number of records added by ALL users during the specified date range. Note: This statistic is not provided for authority records.
Deleted	cat_delete_bib cat_delete_auth cat_delete_item cat_delete_holding cat_delete_patron cat_delete_vendor	The number records deleted during the specified date range and limited by the Log-in Locations and Virtua Users parameters.
Modified	bib_modified cif_modified hold_modified item_modified patron_added vendor_added	The number of records modified by ALL users during the specified date range. Note: This statistic is not provided for authority records.
Saved	cat_save_bib cat_save_auth cat_save_item cat_save_holding cat_save_patron cat_save_vendor	The number of records saved during the specified date range and limited by the Log-in Locations and Virtua Users parameters.

Data Element	Variable(s)	Description
Total	bib_total cif_total auth_total hold_total item_total patron_added vendor_added	The total number of records that exist in the database at the time you run the report (i.e., NOT the total for the specified date range). Note: The Total does NOT include records in error state.
Union Catalog Records		
Union Merge	cat_union_merge	The number of authority headings merged during the specified date range, limited by the Log-in Locations and Virtua Users parameters.
Union Add Library	cat_union_al	The number of Add Library Symbol functions performed during the specified date range, limited by the Log-in Locations and Virtua Users parameters.
Union Delete Library	cat_union_dl	The number of Delete Library Symbol functions performed during the specified date range, limited by the Log-in Locations and Virtua Users parameters.

5.3 Output Templates for the Broad Cataloging Statistics Report

Location: /usr/vtls/virtua/webprt_XX_x/Cat/Cat_1/[filename]

Filename	Contribution to Output
html_page.tem	Creates the framework of HTML output by providing the header, footer, library name, and library address. Additionally, this template contains a function which inserts the html_table template.
html_table.tem	Generates the table of results, which contains cataloging statistics for each record type.
email_page.tem	Creates the framework of e-mail output by providing the header, footer, library name, and library address. Additionally, this template contains a function which inserts the email_table template.
email_table.tem	Generates the table of results, which contains cataloging statistics for each record type.

5.4 Troubleshooting: When the Report Produces No Results

The Broad Cataloging Statistics report requires that cataloging data is recorded in the `operation_log` table in the database. For cataloging data to be recorded in the table, statistics gathering must be enabled for the Cataloging subsystem. If statistics gathering is NOT enabled on the server, the Broad Cataloging Statistics report will not produce results.

To enable statistics gathering for the Cataloging subsystem,

- In the Cataloging Basic Options parameter of the Virtua Profiler, select the *Gather cataloging statistics* check box.

6. Cataloger Productivity Report

The Cataloger Productivity report generates a count of the bibliographic records cataloged by each Virtua user during the date range that you specify for the report configuration. Figure 6-1 displays a portion of the default HTML output from the Cataloger Productivity report.

Cataloger Productivity				
Virtua Library 1 Library Street Your Town, State or Province Postal Code Your Country				
VLOAD: 01-JAN-2002 00:00:00 - 31-DEC-2002 23:59:59				
	DLC	DNLM	Other	Total
Computer File			2 (100.0%)	2 (100.0%)
Kit				
Manuscript Cartographic Material				
Manuscript Language Material				
Manuscript Music				
Mixed Material				
Monograph	46 (0.5%)		8754 (99.5%)	8800 (100.0%)
Nonmusical Sound Recording			8 (100.0%)	8 (100.0%)
Printed Cartographic Materials			1 (100.0%)	1 (100.0%)
Printed Music			49 (100.0%)	49 (100.0%)
Projected Medium			15 (100.0%)	15 (100.0%)
Three-dimensional Artifact				

Figure 6-1. Cataloger Productivity HTML Output

The report output contains a productivity table for each user who has cataloged records during the date range specified in the report configuration. Above each table, a label appears, indicating the user whose statistics appear in the table below and the date range over which the counts were collected. For example, Figure 6-1 shows the productivity for the VLOAD user (i.e., records loaded via vload.exe) between January 1, 2002 and December 31, 2002.

Additionally, the output includes a summary table, which contains the total productivity for all Virtua users over the specified date range.

In each table, the user's total productivity is broken down into subtotals for each type of bibliographic record cataloged, which are represented by the rows of the table. A Total row appears at the bottom of the table and displays the user's total productivity for all record types.

Additionally, the table is divided into productivity counts based on cataloging source (040 tag, subfield \$a), which are represented by the columns of the table.

- The column labeled DLC shows the counts of records that contain the Library of Congress source code in the 040 tag, subfield \$a.
- The column to the right of the DLC column displays counts of records that contain the code that you specify via the optional Cataloging Source Code parameter. This column is labeled with the text that you type in the Cataloging Source Code text box on the Configuration screen.
- The column labeled Other displays counts of records not counted in the first two columns.
- The column labeled Total displays the user's total productivity for all cataloging sources.

6.1 Parameters Available for the Cataloger Productivity Report

The Cataloger Productivity report offers the following Report-specific Parameters:

- **E-mail Column Width** (*required*) - For e-mail output, lets you specify the character width of each column in the data table. Within the table, all data elements and labels are allowed the number characters specified by this parameters. Data elements and labels that exceed this width will be truncated to allow for proper formatting of the table. In this text box, you can enter any two-digit number.

Note: While this parameter is required for all report configurations, it is used *only* when you generate plain text e-mail output. Other output formats ignore this parameter and use other formatting methods.

- **Date Range** (*required*) - Lets you limit the output by creation date, which is stored in the 039 tag, subfield \$y. To appear in the output, a record must have been entered into the database during the date range that you specify for the report configuration.
- **Virtua Users** (*required*) - Lets you limit the output according to user. To be included in the output, a record must have been *entered* by one of the users that you select for the report configuration, according to the value stored in subfield \$z of the 039 tag.
- **Cataloging Source Code** (*optional*) - Lets you specify a cataloging source code for which to generate results. The code that you type in this text box will appear as a column in the table of output and return, for each record type, the number of records that have this code in the 040 tag, subfield \$a (or the 801 or 802 tag, subfield \$b for UNIMARC).

Note: InfoStation does not check to verify that you have entered a *valid* code.

For additional information about these Report-specific Parameters, see the *InfoStation Reference Guide* or view the InfoStation online help, which is available for each parameter.

6.2 Data Elements and Variables for the Cataloger Productivity Report

The Cataloger Productivity report returns productivity information for various record formats. In the following table, we list the name, variable, description of each record format for which the report returns results. For each record type listed below, InfoStation reports productivity statistics per cataloger and cataloging source.

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
Computer File	computer_file	Records that contain an m in position 06 of the Leader.
Kit	kit	Records that contain an o in position 06 of the Leader.
Manuscript Cartographic Material	manuscript_cartographic_material	Records that contain an f in position 06 of the Leader.
Manuscript Language Material	manuscript_language_material	Records that contain a t in position 06 of the Leader.
Manuscript Notated Music	manuscript_music	Records that contain a d in position 06 of the Leader.
Mixed Material	mixed_material	Records that contain a p in position 06 of the Leader.
Monograph	monograph	Records that contain an m in position 07 of the Leader.
Nonmusical Sound Recording	nonmusical_sound_recording	Records that contain an i in position 06 of the Leader.
Other	other	Records whose type is something other than the types explicitly listed here.
Printed Cartographic Materials	printed_cartographic_material	Records that contain an e in position 06 of the Leader.
Manuscript Notated Music	printed_music	Records that contain a c in position 06 of the Leader.
Projected Medium	projected_medium	Records that contain a g in position 06 of the Leader.
Serial	serial	Records that contain an s in position 07 of the Leader.
Three-dimensional Artifact Or Naturally Occurring Object	three_dimensional_artifact_or_naturally_occurring_object	Records that contain a r in position 06 of the Leader.
Two-dimensional Nonprojectable Graphic	two_dimensional_nonprojectable_graphic	Records that contain a k in position 06 of the Leader.
Unknown	unknown	Records in which the format is undefined.

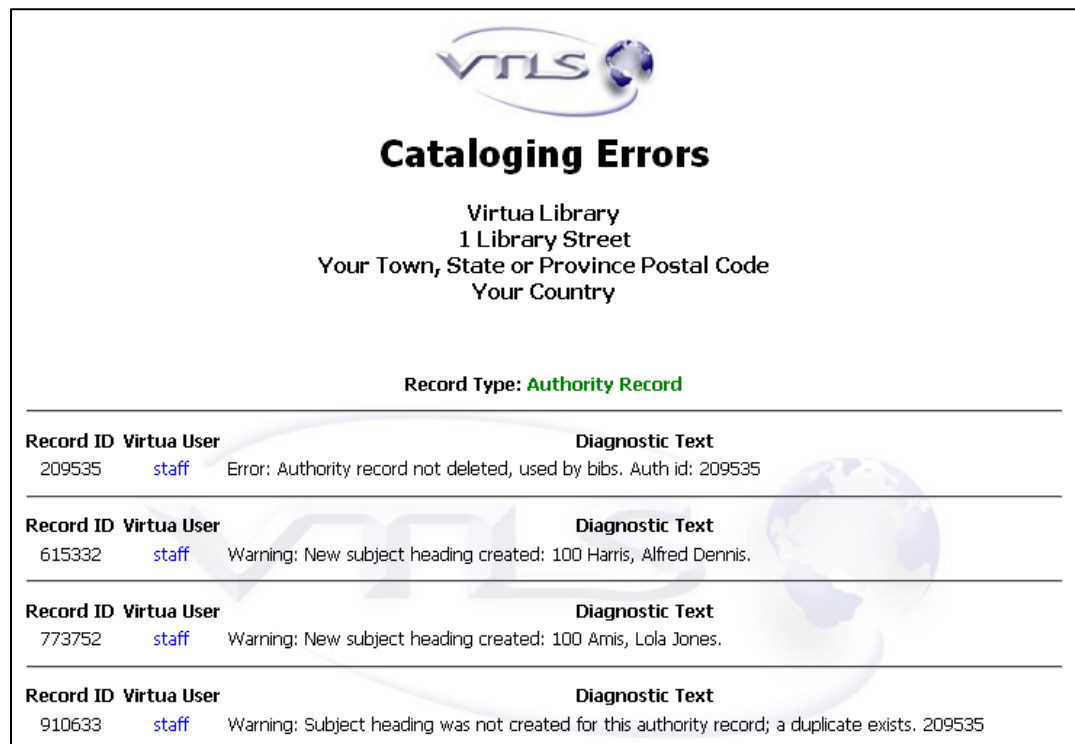
6.3 Output Templates for the Cataloger Productivity Report

Location: /usr/vtls/virtua/webrpt_XX_x/Cat/Cat_5/[filename]

Filename	Contribution to Output
html_page.tem	Generates all the information that appears in HTML output.
email_page.tem	Generates all the information that appears in e-mail output.

7. Cataloging Errors Report

The Cataloging Errors report generates a list of cataloging errors that meet the date range and Virtua user criteria set in the report configuration. Figure 7-1 displays a portion of the default HTML output from the Cataloging Errors report.




 Cataloging Errors Virtua Library 1 Library Street Your Town, State or Province Postal Code Your Country		
Record Type: Authority Record		
Record ID	Virtua User	Diagnostic Text
209535	staff	Error: Authority record not deleted, used by bibs. Auth id: 209535
615332	staff	Warning: New subject heading created: 100 Harris, Alfred Dennis.
773752	staff	Warning: New subject heading created: 100 Amis, Lola Jones.
910633	staff	Warning: Subject heading was not created for this authority record; a duplicate exists. 209535

Figure 7-1. Cataloging Errors HTML Output

Note: The Cataloging Errors report includes ALL cataloging errors, including client load errors, **vload.exe** load errors, and interactive cataloging errors.

In the output, cataloging errors are divided into four groups, according to record type:

- Bibliographic Records
- Authority Records
- Patron Records
- Holdings Records

In the Cataloging Errors report, Virtua Users and Date Range are required parameters. In this way, the output always contains a list of errors performed by the selected users during the specified date range. Additionally, you can optionally limit your results to errors with a specific diagnostic ID or validation ID.

Note: When MARC records are cataloged with bad UTF-8 characters, the invalid UTF-8 characters are embedded in the records and stored in the diagnostics table in the database. When the Cataloging Errors report tries to read these invalid characters, the associated record IDs and record types are logged in the InfoStation error log. In this way, you can determine which records contain the bad data and reprocess them using one of the following scripts: **RepairUTF8InAuthorityRecords.sh** or **RepairUTF8InBibRecords.sh**

7.1 Parameters Available for the Cataloging Errors Report

The Cataloging Errors report offers the following Report-specific Parameters:

- **Virtua Users** (*required*) - Lets you limit your output to errors associated with one or more catalogers. To appear in the output, a cataloging error must have been performed by one of the Virtua users you select for the report configuration.

Hint: To include in the output cataloging errors associated with **vload.exe**, select the **root** user.

- **Record Type** - Lets you limit your output to errors associated with a particular record type, either bibliographic or authority. The output will include only the cataloging errors that are associated with records of the type(s) that you select for the report configuration.
- **Date Range** (*required*) - Lets you limit the output to cataloging errors logged during a particular date range. To appear in the output, a cataloging error must have occurred during the date range that you specify for the report configuration.
- **ID Filter** (*optional*) - Lets you filter your results on one or more diagnostic IDs or validation IDs. To appear in the output, a cataloging error must contain either the validation ID(s) or diagnostic ID(s) you type in this text box. You can filter on a single ID, or enter a list of IDs with each separated by a comma.

- **Filter Mode** (*required if you specify an ID Filter*) - Specifies whether a cataloging error must be associated with a validation ID or a diagnostic ID to appear in the results. You can choose . . .
 - ◆ **Diagnostic_Id** - The report will generate a list of cataloging errors that contain the diagnostic ID(s) specified in the ID Filter text box.
 - ◆ **Validation_Id** - The report will generate a list of cataloging errors that contain the validation ID(s) specified in the ID Filter text box.

For additional information about these Report-specific Parameters, see the *InfoStation Reference Guide* or view the InfoStation online help.

7.2 Data Elements Returned by the Cataloging Errors Report

In the following table, we list the name, variable, and description of each data element that is retrieved by the Cataloging Errors 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
Diagnostic Text	text	A brief description of the cataloging error, if available.
Record ID	record_id	The Auth-ID or the Bib-ID of the record in which a cataloging error occurs.
Record Type	record_type	The type of record, either bibliographic or authority.
Record Type Code	record_type_code	The code used to distinguish between authority records (102) and bibliographic records (101). Note: This data element does NOT appear in the output by default. You can add it to the output by adding the record_type_code variable to the appropriate output template.
Virtua User	user_name	The Virtua User associated with the error.
Records Found	records_found	The total number of records returned in the report output.

7.3 Output Templates for the Cataloging Errors Report

Location: /usr/vtls/virtua/webprt_XX_x/Cat/Cat_2/[filename]

Filename	Contribution to Output
html_page.tem	Provides the overall framework of the HTML output.
html_header.tem	Provides headings for the two groups of results: authority record errors and bibliographic record errors.
html_row.tem	Provides the diagnostic text associated with a cataloging error.
html_labeled_row.tem	Provides information related to a single cataloging error, including both data elements and labels.
email_page.tem	Provides the overall framework of the e-mail output.
email_header.tem	Provides headings for the two groups of results: authority record errors and bibliographic record errors.
email_row.tem	Provides the diagnostic text associated with a cataloging error.

Filename	Contribution to Output
email_labeled_row.tem	Provides information related to a single cataloging error including both data elements and labels.

8. Change Item Location by Call Number Range

The Change Item Location by Call Number Range report lets you change the location and shelf location in item records identified by the item-level call number range specified in the report configuration.

- If you select the Update Database parameter, InfoStation will update the location and shelf location for every item record that qualifies and generate a count of the updated records.
- If you do not select the Update Database parameter, InfoStation returns only the count of the number of item records that qualify per the report configuration.

Figure 8-1 is an example of HTML output from the Change Item Location by Call Number Range report.

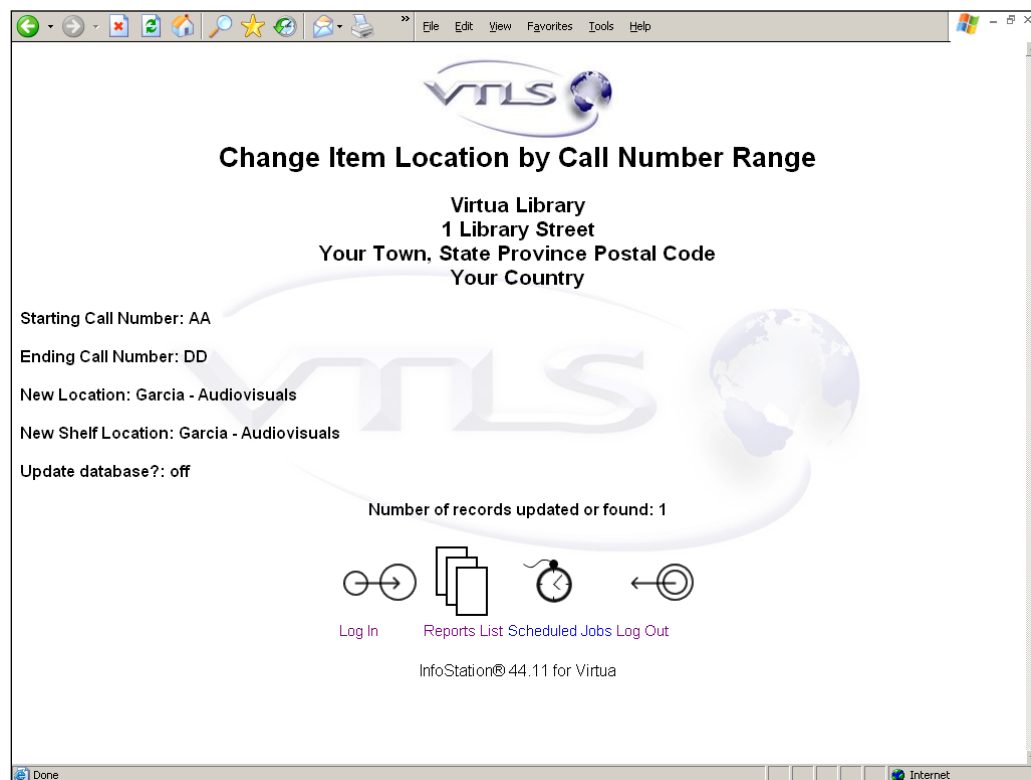


Figure 8-1. Change Item Location by Call Number Range HTML Output

8.1 Parameters Available for the Change Item Location by Call Number Range Report

The Change Item Location by Call Number Range report offers the following Report-specific Parameters:

- **New Location** (*required*) - Lets you select a new location for each item record in the call number range specified in the report configuration.
- **New Shelf Location** (*required*) - Lets you select a new shelf location for each item record in the call number range specified in the report configuration.
- **Call Number Range Start** (*required*) - Lets you specify the starting value of the item-level call number range that InfoStation will use to select the item records for a count or update. Wildcard characters are not permitted in this field. All characters including non-alphanumeric symbols will be treated as literal values.
- **Call Number Range End** (*required*) - Lets you specify the ending value of the item-level call number range that InfoStation will use to select the item records for a count or update. Wildcard characters are not permitted in this field. All characters including non-alphanumeric symbols will be treated as literal values.
- **Update Database** (*optional*) - Lets you choose whether InfoStation will update the database when you run the report configuration. If you select the Update Database check box, when you run the report configuration, InfoStation will update the item records in the database with the specified location and shelf location.

For additional information about these Report-specific Parameters, see the *InfoStation Reference Guide* or view the InfoStation online help.

8.2 Data Elements Returned by the Change Item Location by Call Number Range Report

In the following table, we list the name, variable, and description of each data element that is retrieved by the Change Item Location by Call Number Range report. You can edit the output templates to include or exclude any data element listed below.

Data Element	Variable	Description
Starting Call Number	u_call_number_range_start	The starting value of the item-level barcode range.
Ending Call Number	u_call_number_range_end	The ending value of the item-level barcode range.
New Location	u_new_location	The new location for the item records identified by the item-level call number range.
New Shelf Location	u_new_shelf_location	The new shelf location for the item records identified by the item-level call number range.
Update Database	u_update_database_flag	Indicates by ON or OFF whether the item records in the database were updated per the specifications in the report configuration.
Number of Records Updated	u_number_records_updated	The number of item records <i>updated</i> (if the Update Database option is selected) or <i>found</i> (if the Update Database option is not selected).

8.3 Output Templates for the Change Item Location by Call Number Range Report

Location: /usr/vtls/virtua/webrpt_XX_x/Cat/Cat_16/[filename]

Filename	Contribution to Output
html_page.tem	Provides the overall framework of the HTML output and determines the placement of the html_header template.
html_header.tem	Provides the header information that appears in HTML output.
email_page.tem	Provides the overall framework of the e-mail output and determines the placement of the e-mail_header template.
email_header.tem	Provides the header information that appears in e-mail output.

9. Indexed Words Report

The Indexed Words report generates a list of indexed words in the bibliographic records in the database. Figure 9-1 displays a portion of the default HTML output from the Indexed Words report.

Important: This report is for use only by customers whose Virtua system uses a non-normalized index.

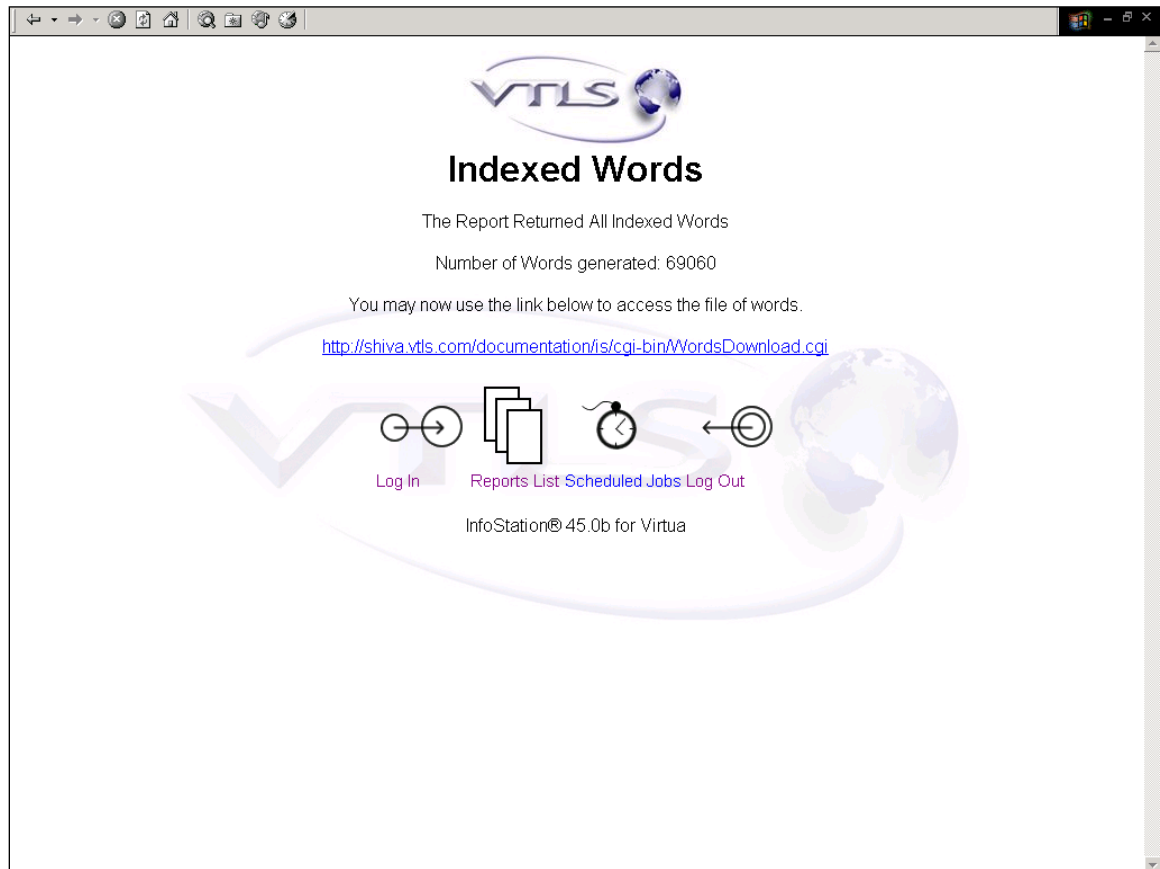


Figure 9-1. Indexed Words HTML Output (1)

Note: The list of indexed words that the report generates is not displayed in the report output. Instead, the list of words is saved to a file in the `/usr/vtls/virtua/web rpt_XX_x/words` directory of your InfoStation installation.

The report output contains . . .

- A count of the number of indexed words returned by the report.
- A link to the URL where the **WordsDownload.cgi** script will allow you to view the list of indexed words returned by the report.

Clicking the link provided in the report output opens an intermediate screen (*Figure 9-2*) that displays information about your Indexed Word report results.

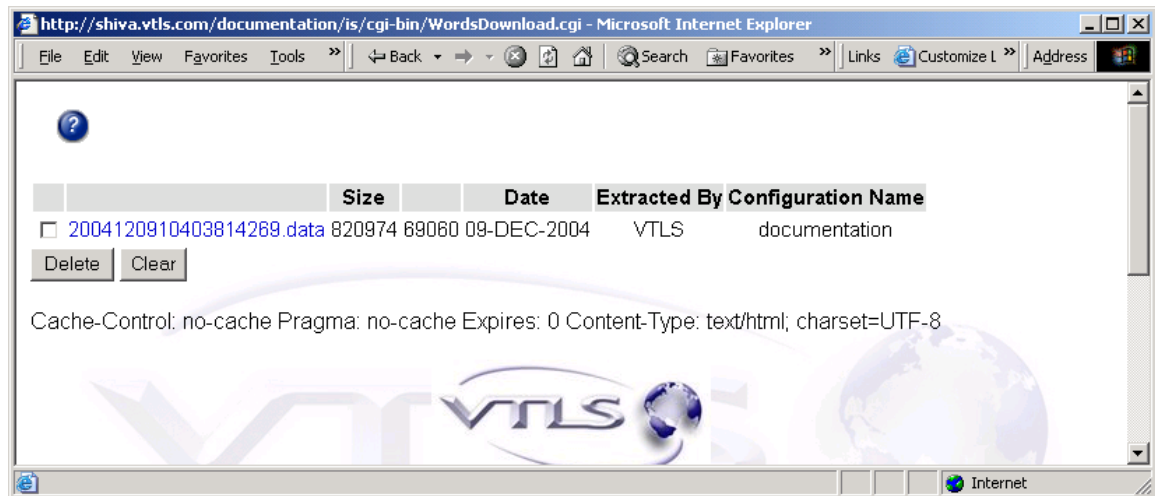


Figure 9-2. Indexed Words HTML Output (2)

The intermediate screen displays the following information:

- A link to the ***.data** file of indexed words returned by the report.
- The file size (in bytes) of the ***.data** file.
- The number of indexed words listed in the file.
- The date the Indexed Words report was run to generate the file.
- The name given in the Configuration Author field of the report configuration.
- The name given in the Configuration Name field of the report configuration.

From this intermediate screen, you can . . .

- View the ***.data** file of indexed words returned by the report.
- Delete a ***.data** file of indexed words by selecting the check box next to the file and clicking the Delete button.

Note: Deleting a ***.data** file from this screen permanently deletes the file of indexed words from the `/usr/vtls/virtua/webprt_XX_x/words` directory of your InfoStation installation.

To view the ***.data** file of indexed words returned by the report,

- Click the link to the desired ***.data** file.

The list of indexed words generated by the report is displayed (*Figure 9-3*).

A	1772
A332	1
A339	1
A381	1
A518	1
A881	1
AA	9
AACCLA	1
AACHEN	1
AACI	1
AACO	1
AALAM	1
AALB	2
AALBORG	7
AALIL	1
AALT	1
AALTOPITUUS	1
AAM	1
AAMA	1
AAMUN	1
AAMUNKOI	1
AAN	22
AANBOD	1
AANDAIIKAI	1
AANGEPASTE	1
AANII	1
AANNEMERSVERENIGING	1
AANPAK	1
AANWINSTEN	2
AANWINSTENLIJST	1
AAPNEWS	1
AARACHCHI	2
AARAU	3
AARB	1
AARBOG	2
AARDAPPELEN	1
AARDE	1
AARDMAGNETISME	1
AARET	1
AARGAU	2
AARHUS	10
AARIF	1
AAROGRAM	1
AARSBERETNING	1
AARSMÅTE	1
AARSMÅTET	1

Figure 9-3. Indexed Words HTML Output (3)

The list of indexed words is displayed in alphabetical order and contains the following information:

- One word per line.
- Number of records in the database in which the word appears.

9.1 Parameters Available for the Indexed Words Report

The Indexed Words report offers the following Report-specific Parameters:

- **Update New Words History** - This check box lets you specify whether InfoStation updates the New Words History List to reflect any additions or deletions of words from indexed fields in the database. Updating the New Words History List allows you, when you run the report again at a later date, to generate a list of the indexed words that have been added since the New Words History List was last updated.
- **Generate Words** (*required*) - These radio buttons let you specify whether InfoStation generates a list of all indexed words or a list of all words added to the New Words History List during a specified date range. You can select one of two radio button options:
 - ◆ **All Words** - Specifies that running the report will generate a list of all indexed words in the database.
 - ◆ **Words Added Within Date Range** - Specifies that running the report will generate a list of indexed words added to the New Words History List within the date range specified in the report configuration.
- **Date Range** (*optional*) - When used in conjunction with the Words Added Within Date Range setting, lets you limit the output to indexed words that were added to the New Words History List within the specified date range.

Note: The Date Range setting is used only when the Words Added Within Date Range radio button option is selected. If you have selected the Words Added Within Date Range radio button option, you **MUST** also specify a date range for the report configuration to be valid. If you specify a date range but select the All Words radio button option, the date range is ignored by the report.

9.2 Data Elements Returned by the Indexed Words Report

In the following table, we list the name, variable, and description of each data element that is retrieved by the Indexed Words 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
Complete	complete	A text description of the report output generated by running the Indexed Words report (i.e., "The report has completed and returned all indexed words").
Update Flag	update_flag	A text string indicating whether the report updated the New Words History List. If the Update New Words History check box is NOT selected in the report configuration, no data is displayed for this data element.
Word Count	word_count	The number of indexed words generated by the report.
Words Link	words_link	A text-based link to the WordsDownload.cgi script, which generates the file of words.

9.3 Output Templates for the Indexed Words Report

Location: /usr/vtls/virtua/webprt_XX_x/Cat/Cat_11/[filename]

Filename	Contribution to Output
html_page.tem	Provides the overall framework of the HTML output.
html_summary.tem	Defines the display of the summary data for the list of words.

Filename	Contribution to Output
email_page.tem	Provides the overall framework of the e-mail output.
email_summary.tem	Defines the display of the summary data for the list of words.

10. Item Barcode List Report

The Item Barcode List report lets you generate a list of items identified by barcodes that fall within a barcode range specified in the report configuration. InfoStation returns the list of item barcodes along with their corresponding titles. Figure 10-1 displays a portion of the default HTML output from the Item Barcode List report.

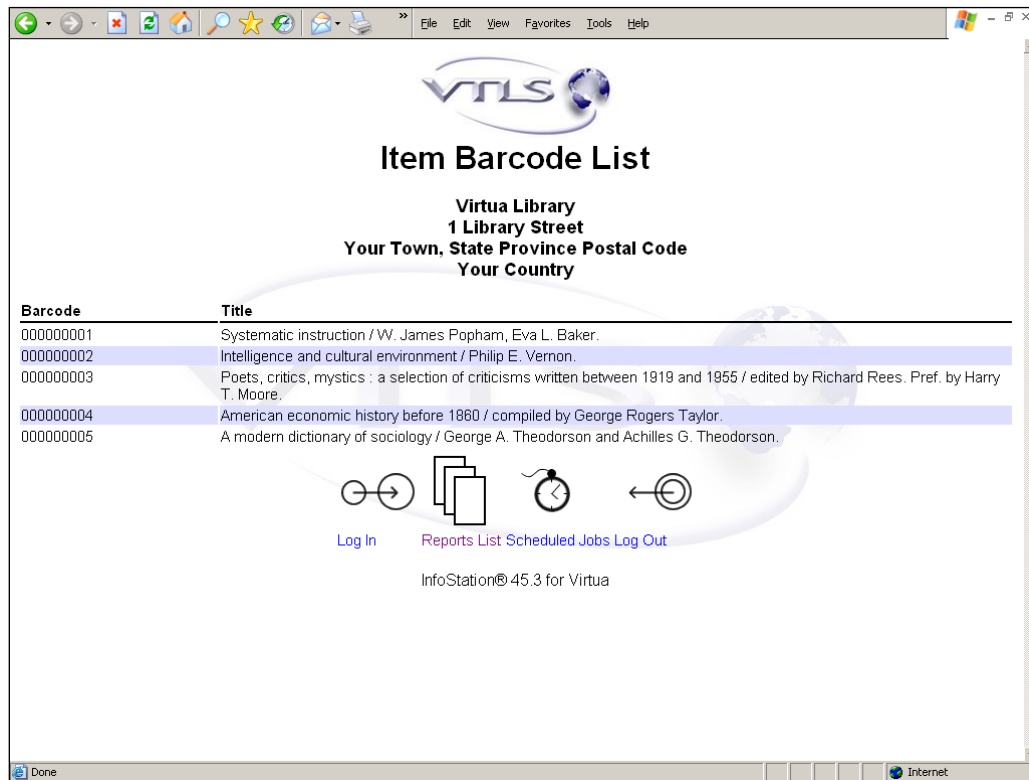


Figure 10-1. Item Barcode List HTML Output

10.1 Parameters Available for the Item Barcode List Report

The Item Barcode List report offers the following Report-specific Parameters:

- **Barcode Prefix** (*optional*) - Lets you specify an alphanumeric prefix for all item barcodes that will appear in the report output. When this parameter is set,
 - ◆ In order for the barcode to appear in the output, the prefix of the barcode must match the value specified in this field.

- **Item Barcode Range** (*required*) - Limits the report output to item barcodes within the barcode range specified by the Starting Barcode and the Ending Barcode.
 - ◆ When the Barcode Prefix parameter is used, in order for the barcode to appear in the output, the prefix of the barcode as well as the trailing characters in the range specified must match. The barcode may contain zeros (0) as padding characters to create a fixed-length barcode.

For additional information about these Report-specific Parameters, see the *InfoStation Reference Guide* or view the InfoStation online help.

10.2 Data Elements Returned by the Item Barcode List Report

In the following table, we list the name, variable, and description of each data element that is retrieved by the Item Barcode List report. You can edit the output templates to include or exclude any data element listed below.

Data Element	Variable	Description
Prefix	u_barcode_prefix	The alphanumeric prefix used in the report configuration.
Starting Barcode	u_barcode_range_start	The starting value of the barcode range.
Ending Barcode	u_barcode_range_end	The ending value of the barcode range.
Barcode	item_barcode	The barcode number of the item. Barcodes may be of varying length but still match the leading prefix and trailing alphanumeric range.
Title	item_title	The title associated with the item. If a title is not in the database, this field will be blank.

10.3 Output Templates for the Item Barcode List Report

Location: /usr/vtls/virtua/webprt_XX_x/Cat/Cat_15/[filename]

Filename	Contribution to Output
html_page.tem	Provides the overall framework of the HTML output.
html_row.tem	Provides the barcode and title (if appropriate) of every item in the output.
email_page.tem	Provides the overall framework of the e-mail output.
email_row.tem	Provides the barcode and title (if appropriate) of every item in the output.

11. Item Data Integrity Report

The Item Data Integrity report (/usr/vtls/virtua/webrpt_XX/Cat/Cat_19) generates a list of items that do not validate against the Item Data Elements as configured by location in the Virtua Profiler. By using the valid combinations of data that have been saved to the database for a given location, InfoStation can report on which combinations of Item Class codes, Collection codes, and Shelving Locations are not valid for a given set of item records.

A Date Range parameter gives you the option to restrict the output of the report to items updated on a specified date or within a specified date range. For an item that has been created but never updated, the Last Modified Date is considered to be the Item Creation Date.

The output of the report can include the following data elements for the items:

- Last Modified Date
- Item Creation Date
- Item Barcode
- Item Class
- Shelf Location
- Collection Code Description
- Item Call Number
- Author
- Title
- Result Message

12. Items Created List Report

The Items Created List report generates a list of items that were created within a specified date range OR that have a barcode that falls within a specified barcode range. Figure 12-1 is an example of HTML output from the Items Created List report.

Items Created List

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

Number of Records Found 8409

Item Barcode 438 Date of Item Creation 03-JAN-2012 10:42:18
Author Sparks, Nicholas.
Title The last song /
Vols., Edition, Pages 1st ed.
Call Number
Owning Location Bryan Campus Library
Shelf Location Bryan Campus Library
Item Class Textbook
Publisher Grand Central Pub., New York :
Year of Publication 2009.
Price (Cost) 0

Withdrawal No./Date	Remarks
<p>Item Barcode 15468794512345 Date of Item Creation 05-JAN-2012 15:39:05 Author Roberts, Andy Title Disarmed Vols., Edition, Pages Call Number A1(4) Owning Location Brenham Campus Library Shelf Location Brenham Campus Library Item Class Regular 3 Day Publisher</p>	

Figure 12-1. Items Created List HTML Output

12.1 Parameters Available for the Items Created List Report

The Items Created List report offers the following Report-specific Parameters:

- **Owning Location** (*optional*) - Lets you limit the output by owning location. When this parameter is set, an item must belong to one of the selected owning locations to appear in the report output.
- **Shelf Location** (*optional*) - Lets you limit the output by shelving location. When this parameter is set, an item must be shelved to one of the selected shelving locations to appear in the report output.
- **Date Range** (*optional if an item range is set*) - Lets you limit the output by item creation date. If this parameter is set, then to appear in the output, an item record must have been created during the date range that you specify for the report configuration.
- **Item Range** (*optional if a date range is set*) - Lets you limit the output by barcode range. If this parameter is set, then to appear in the output, an item record must have a barcode that falls within the range that you specify for the report configuration.

Note: The report configuration allows you to specify either the Date Range or the Item Range, but not both.

For additional information about these Report-specific Parameters, see the *InfoStation Reference Guide* or view the InfoStation online help.

12.2 Data Elements and Variables for the Items Created List Report

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

Data Element	Variable	Description and Source
Date Range	date_range	The date range associated with the report.
Item Range	item_range_start item_range_end	The barcode range associated with the report.
Number of Records Found	total	The total number of records returned by the report.
Item Barcode	item_barcode	The barcode of the item.
Date of Item Creation	item_creation_date	The date the item was created.
Author	item_author	The author associated with the record, by default taken from the 100\$a / 110\$a / 111\$a tags of the bibliographic record.
Title	item_title	The title of the record, by default taken from the 245\$a, 245\$n, and 245\$p tag of the bibliographic record.
Edition	item_edition	The bibliographic edition, by default taken from the 250\$a and 250\$b tags.
Place of Publication and Publisher	item_publisher	The bibliographic publisher information, taken from the subfields \$a and \$b of the 264 tag (second indicator "1") when present or the 260 tag in the bibliographic_fields table
Year of Publication	item_pub_year	The bibliographic publication year, taken from the subfield \$c of the 264 tag (second indicator "1") when present or the 260 tag in the bibliographic_fields table.
Pages	item_pages	The bibliographic page information, by default taken from the 300\$b tag.
Vols.	item_vols	The bibliographic volume information, by default taken from the 440\$v and 830\$v tags.
Price (Cost)	item_price	The item price saved in the item record.
Call Number	item_call_number	The bibliographic call number, by default taken from the 050\$b and 050\$a tags.
Item Class	item_class_name	The item class of a given item.

Data Element	Variable	Description and Source
Withdrawal No./Date	u_withdrawal_date_label	Label only. Results are always blank. Information can be written in by hand.
Remarks	u_remarks_label	Label only. Results are always blank. Information can be written in by hand.

12.3 Output Templates for the Items Created List Report

Location: /usr/vtls/virtua/web rpt_XX_x/Cat/Cat_14/[filename]

Filename	Contribution to Output
html_page.tem	Provides the overall framework of the HTML output and the placement of the html_row template.
html_row.tem	Provides information for a single item record, including both data elements and labels.
email_page.tem	Provides the overall framework of the e-mail output and the placement of the email_row template.
email_row.tem	Provides information for a single item record, including both data elements and labels.

13. Items Received List Report

The Items Received List report returns a list of received items that meet the item barcode date range and item owning location criteria set in the report configuration. For each item returned, the report output provides information about the purchase orders and invoices associated with that item. [Figure 13-1](#) displays a portion of the default HTML output from the Items Received List report.

Items Received List		
Virtua Library 1 Library Street Your Town, State Province Postal Code Your Country		
Item's Owning Location Wilson Public Library Item Barcode Date Range 01-JAN-2009 00:00:00 - 31-DEC-2009 23:59:59 Primary Sort Item Barcode Date Secondary Sort Item Barcode		
Item Barcode: 342501 Author: Elman, Robert. Title: The hiker's bible, by Robert Elman with Clair Rees. Edition: Rev. edition. Place of Publication: Garden City, New York, Date of Withdrawal:	Item Barcode Date: 11-JUN-2009 10:58:48 Number of Pages: 148 p. Publisher: Doubleday, Remarks:	Item's Owning Location: Wilson Public Library Year of Publication: 1982.
Item Barcode: 342508 Author: Elman, Robert. Title: The hiker's bible, by Robert Elman with Clair Rees. Edition: Rev. edition. Place of Publication: Garden City, New York, Date of Withdrawal:	Item Barcode Date: 11-JUN-2009 12:36:35 Number of Pages: 148 p. Publisher: Doubleday, Remarks:	Item's Owning Location: Wilson Public Library Year of Publication: 1982.

Figure 13-1. Items Received List HTML Output

13.1 Parameters Available for the Items Received List Report

The Items Received List report offers the following Report-specific Parameters:

- **Item's Owning Location** (*required*) - Lets you limit report output by the item's owning location. The parameter lists all locations that are configured in the database, plus an Any or All option.

- **Date Range** (*optional*) - Lets you limit report output to received items that have an item barcode date that falls within the specified date range. You can choose a Relative Date Range or a Fixed Date Range.
- **Primary Sort** (*required*) - Lets you specify the primary sort that is used to order the report output.

Note: For more information about Sort parameters, see the *InfoStation Reference Guide*.

- **Secondary Sort** (*required*) - Lets you specify the secondary sort that is used to order the report output.

13.2 Data Elements and Variables for the Items Received List Report

In the following table, we list the name, variable, description, and source of each data element that is retrieved by default by the Items Received 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 and Source
Item Barcode	item_barcode	The barcode of the item record.
Item Barcode Date	item_barcode_date	The date on which the item barcode was added (or was last modified).
Item Owning Location	item_owning_location	The item's owning location.
Author	author	The author (from the bibliographic record 100 tag).

Data Element	Variable	Description and Source
Title	title	The title (from the bibliographic record 245 tag).
Edition	edition	The edition (from the bibliographic record 250 tag).
Number of Pages	number_of_pages	The number of pages (from the bibliographic record 300 tag).
Place of Publication	place_of_publication	The bibliographic place of publication, 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 bibliographic publisher, taken from the subfield \$b of the 264 tag (second indicator "1") when present or the 260 tag in the bibliographic_fields table.
Year of Publication	year_of_publication	The bibliographic year of publication, taken from the subfield \$c of the 264 tag (second indicator "1") when present or the 260 tag in the bibliographic_fields table.
Purchase Order Number	purchase_order	The purchase order number of the order associated with the item.
Purchase Order Line Number	purchase_order_line_number	The purchase order line number associated with the item.
Purchase Order Date	purchase_order_date	The purchase order date.
Vendor Name	vendor_name	The vendor name associated with the purchase order.
Invoice ID	invoice_ID	The invoice ID of the invoice associated with the item.
Invoice Date	invoice_date	The invoice date.
Invoice Price	invoice_price	The invoice price.

13.3 Output Templates for the Items Received List Report

Location: /usr/vtls/virtua/webrpt_XX/Cat/Cat_18/[filename]

Name	Description of Default Template
html_page_header.tem	Report header (library address, summary of configuration parameter settings) for HTML output reports.
html_header.tem	Generates the labels for the columns in the main table of item information.
html_order_header.tem	Generates the column labels for the sub-table of purchase order information.
html_invoice_header.tem	Generates the column labels for the sub-table of invoice information.
html_row.tem	Data elements displayed in the table of detailed item information.
html_order_row.tem	Data elements displayed in the sub-table of purchase order information.
html_invoice_row.tem	Data elements displayed in the sub-table of invoice information.
html_order_footer.tem	Section footer.
html_invoice_footer.tem	Section footer.
html_page_footer.tem	Report footer.
email_page_header.tem	Report header (library address, summary of configuration parameter settings) for E-mail output reports.
email_header.tem	Generates the labels for the columns in the main table of item information.
email_order_header.tem	Generates the column labels for the sub-table of purchase order information.
email_invoice_header.tem	Generates the column labels for the sub-table of invoice information.
email_row.tem	Data elements displayed in the table of detailed item information.
email_order_row.tem	Data elements displayed in the sub-table of purchase order information.
email_invoice_row.tem	Data elements displayed in the sub-table of invoice information.
email_order_footer.tem	Section footer.
email_invoice_footer.tem	Section footer.
email_page_footer.tem	Report footer.

14. Legal Deposit Statistics Report

The Legal Deposit Statistics report generates a table of information about each holdings record in the database that is a legal deposit and that meets the report's filter criteria. [Figure 14-1](#) displays a portion of the default HTML output from the Legal Deposit Statistics report.

Start Date: 080101					
End Date: 090708					
Type of Record: all					
Category of Material: all					
Specific Material Designation: all					
Acquisition Status: all					
Method of Acquisition: all					
Locations: all					
Holdings Id	Bib Id	Title	Item Id	Item Creation Date	
619	14887	Kluwer online journals			
620	16945	Invalid chronology caption times			
615	14503	Journal of the Chemical Society. A, Inorganic, physical, theoretical			
617	16926	ANC news briefing.			
618	16513	Sheep dips and dipping.			
616	16926	ANC news briefing.			
621	17051	De geboren renner / Christopher McDougall ; [vert. uit het Engels door Amy Bais].			
614	14503	Journal of the Chemical Society. A, Inorganic, physical, theoretical			
613	16921	Journal of the Clan Campbell Society (North America).			
Holdings Count : 9					
Item Count :					

Figure 14-1. Legal Deposit Statistics HTML Output

The configuration settings selected on the Configuration screen are summarized at the top of the report output. In Figure 14-1, for instance, the summary information indicates that for this report configuration, the Start Date is January 1, 2008, the End Date is July 8, 2009, the Type of Record parameter is set to “All,” the Category of Material parameter is set to “All,” and so forth.

The remainder of the report output displays the following:

- **Table of information** about the legal deposit holdings records returned by the report. For each holdings record, the table will contain:
 - ◆ Holdings ID
 - ◆ Bib ID (Optional)
 - ◆ Title (Optional)
 - ◆ Item ID
 - ◆ Item Creation Date
- **Holdings Count** - The total number of legal deposit holdings records returned by the report.
- **Item Count** - The total number of item records associated with the holdings records returned by the report.

Note: The display of the table and the count totals will depend on how the Data Display parameter is set.

14.1 Parameters Available for the Legal Deposit Statistics Report

The Legal Deposit Statistics report offers the following report-specific parameters:

- **Date Entered** (*optional*) - This standard date filter lets you limit the report output by the date the legal deposit was entered (holdings record 008 tag positions 00-05 values). Specify a Start Date and an End Date in the date format YYMMDD.
- **Item Creation Date** (*optional*) - This standard date filter lets you limit the report output by the item creation date of those items attached to the legal deposit holdings record. You can choose a Relative Date Range or a Fixed Date Range.
- **Type of Record** (*required*) - Lets you limit the report output by record type (holdings record Leader 06 value). You can choose to limit the report output to one or more of the following types of records:
 - ◆ **All or Any** - The report returns statistics on all legal deposits, regardless of record type.

- ◆ **Unknown** - The report returns statistics on legal deposits with the Leader 06 value 'u.'
- ◆ **Multipart Item Holdings** - The report returns statistics on legal deposits with the Leader 06 value 'v.'
- ◆ **Single-part Item Holdings** - The report returns statistics on legal deposits with the Leader 06 value 'x.'
- ◆ **Serial Item Holdings** - The report returns statistics on legal deposits with the Leader 06 value 'y.'

- **Category of Material** (*required*) - Lets you limit the report output by category of material (holdings record 007 tag position 00 value). Select the All or Any option or choose to limit the report output to one or more category. See the MARC standard for a complete list of categories.

- **Specific Material Designation** (*required*) - Lets you limit the report output by specific material designation (holdings record 007 tag position 01 value). Select the All or Any option or choose to limit the report output to one or more specific material designation. See the MARC standard for a complete list of specific material designations.

- **Acquisition Status** (*required*) - Lets you limit the report output by the acquisition status (holdings record 008 tag position 06). You can choose to limit the report output to one or more of the following types of statuses:
 - ◆ **All or Any** - The report returns statistics on all legal deposits, regardless of acquisition status.
 - ◆ **Unknown** - The report returns statistics on legal deposits with the 008 tag position 06 value '0.'
 - ◆ **Other** - The report returns statistics on legal deposits with the 008 tag position 06 value '1.'
 - ◆ **Received** - The report returns statistics on legal deposits with the 008 tag position 06 value '2.'
 - ◆ **On Order** - The report returns statistics on legal deposits with the 008 tag position 06 value '3.'
 - ◆ **Currently Received** - The report returns statistics on legal deposits with the 008 tag position 06 value '4.'
 - ◆ **Not Currently Received** - The report returns statistics on legal deposits with the 008 tag position 06 value '5.'
 - ◆ **No Attempt to Code**

- **Method of Acquisition** (*required*) - Lets you limit the report output by method of acquisition (holdings record 008 tag position 07 value). Select the All or Any option or choose to limit the report output to one or more methods of acquisition. See the MARC standard for a complete list of methods of acquisition.

- **Include Bib Information?** (*optional*) - Lets you specify whether or not the report output shows the Bib-IDs and titles for bibliographic records associated with the holdings records returned by the report. Select the check box if you want bibliographic information to be shown in the report output.
- **Locations** (*required*) - Lets you limit the report output by location. Select the All or Any option or choose to limit the report output to one or more valid Virtua locations.
- **Data Display** (*required*) - Lets you determine how much record data to display in the report out. You can select one of three options: Display Record Details Only, Display Record Counts Only, Display All.

14.2 Data Elements and Variables for the Legal Deposit Statistics Report

In the following table, we list the name, variable, description, and source of each data element that is retrieved by default by the Legal Deposit Statistics 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 and Source
Holdings ID	holding_id	The holdings ID of the holdings record.
Bib-ID	bib_id	The Bib-ID of the bibliographic record associated with this holdings record.
Title	title	The title associated with the bibliographic record.
Item Creation Date	item_creation_date	The creation date of the item record associated with this holdings record.

Data Element	Variable	Description and Source
Item ID	item_id	The Item-ID of the item record associated with this holdings record.
Holdings Count	holdings_count	The total number of legal deposit holdings records returned by the report.
Item Count	item_count	The total number of item records associated with the holdings records returned by the report.
Type of Record	type_of_record	The type of record.
Date Entered	date_entered	The date the legal deposit was entered.
Category of Material	category_of_material	The category of material of the legal deposit.
Specific Material Designation	specific_material_designation	The specific material designation of the legal deposit.
Acquisition Status	acquisition_status	The acquisitions status of the legal deposit.
Method of Acquisition	method_of_acquisition	The method of acquisition of the legal deposit.
Locations	locations	Selected valid Virtua location(s) associated with the legal deposit.

14.3 Output Templates for the Legal Deposit Statistics Report

Location: /usr/vtls/virtua/webprt_XX/Cat/Cat_17/[filename]

Name	Description of Default Template
html_page_header.tem	Report header (library address, summary of configuration parameter settings) for HTML output reports.
html_header.tem	Generates the labels for all the columns in the output.
html_item_row.tem	Information displayed for optionally shown item records.

Name	Description of Default Template
html_row.tem	Information displayed from the holdings record, plus optionally shown bibliographic record information.
html_count.tem	Information displayed for optionally shown Holdings Count value.
html_page_footer.tem	Report footer.
email_page_header.tem	Report header (library address, summary of configuration parameter settings) for E-mail output reports.
email_header.tem	Generates the labels for all the columns in the output.
email_item_row.tem	Information displayed for optionally shown item records.
email_row.tem	Information displayed from the holdings record, plus optionally shown bibliographic record information.
email_count.tem	Information displayed for optionally shown Holdings Count value.
email_page_footer.tem	Report footer.

15. New Title List Report

The New Title List report (/usr/vtls/virtua/webrpt_XX/Cat/Cat_20) generates a list of titles that are on the New Books List at the time you run the report. The New Title List report returns bibliographic information rather than item information. This means that if your library orders and receives more than one copy of an item, the title will be listed in the output only once.

Figure 15-1 shows a portion of the default HTML output from the New Title List report.

New Title List		
Virtua Library 1 Library Street Your Town, State or Province Postal Code Your Country		
Shelving Locations	Sha Tin (303000000)	
Item Classes	Any	
Item Statuses	Any	
Collection Code Groups	Any	
Update Database	off	
Ignore New Title List Flag	on	
Author	Title	Publication
	Studying the event film : The lord of the rings / edited by Harriet Margolis ... [et al.].	Manchester, UK ; New York : Manchester University Press ; New York : Distributed exclusively in the USA by Palgrave Macmillan, 2008.
Chatterji, Jagadish Chandra.	The wisdom of the Vedas / Jagadish Chandra Chatterji.	Wheaton, Ill. : Theosophical Pub. House, 1980, c1973.
Fitzsimmons, Thomas, 1926-	With the water : an Aquarian round / Thomas Fitzsimmons.	Detroit : New Voices Press, [1971].

Figure 15-1. New Title List Report HTML Output

15.1 Parameters Available for the New Title List Report

You can limit the item information used for the report output according to shelving location, item class, item status, and collection code group. If you choose to limit your results by any of these factors, InfoStation will omit from the output any title on the New Books List whose bibliographic record has NO items attached.

In addition to using item-specific filters, you can specify in the report configuration whether to update the database and whether InfoStation should ignore the New Title List flag (*Figure 12-2*).

The screenshot shows a configuration window for the 'New Title List Report'. It contains the following parameters:

- Update Database:** A checkbox that is currently unchecked.
- Shelving Locations:** A list box with the following items: 'To be deleted (3)', 'Kowloon - bookdrop (302000002)', 'To be deleted (4)', and 'Sha Tin (303000000)'. The 'Sha Tin' item is highlighted.
- Item Classes:** A list box with the following items: 'All or Any', 'Adult Lending Accompanying Cassettes', 'Adult Lending Accompanying Materials', and 'Adult Lending Books'. The 'All or Any' item is highlighted.
- Item Statuses:** A list box with the following items: 'All or Any', 'Available', 'Action Required!', and 'Action req'd by TPU'. The 'All or Any' item is highlighted.
- Collection Code Groups:** A list box with the following items: 'All or Any', 'Andy CC Group', 'Andy CC Group 2', and 'Dewey'. The 'All or Any' item is highlighted.
- Ignore New Title List Flag:** A checkbox that is currently unchecked.

Figure 15-2. New Title List Report - Report-specific Parameters

- **Shelving Locations** - Lets you limit report output by the item's shelving location. The parameter lists all locations that are configured in the database, plus an Any or All option. Note that selecting one or more shelving locations means that the report output will NOT include bibliographic records without attached items.
- **Item Classes** - Lets you limit your results to items of a particular item class. To be included in the report output, an item must belong to one of the item classes that

you select. Note that selecting one or more item classes means that the report output will NOT include bibliographic records without attached items.

- **Item Statuses** - Lets you limit your results to items at a particular status. To be included in the report output, an item must belong to one of the item statuses that you select. Note that selecting one or more item statuses means that the report output will NOT include bibliographic records without attached items.
- **Collection Code Groups** - Lets you limit your results to items that belong to a collection code group. To be included in the report output, an item must belong to one of the collection code groups that you select. Note that selecting one or more shelving locations means that the report output will NOT include bibliographic records without attached items.
- **Ignore New Title List Flag** - When selected, does NOT limits results to those that have not previously appeared on the New Title List.

If you select the Update Database check box, when you run the report configuration, titles that appear in the output will be flagged automatically as *removed* from the New Titles List for future runs of the report.

15.2 Data Elements and Variables for the New Title List Report

The following table lists the name, variable, description, and source of each data element that is retrieved by default by the New Item 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 and Source
Author	author	The author (from the bibliographic record 100 tag).
Title	title	The title (from the bibliographic record 245 tag).

Data Element	Variable	Description and Source
Publication Information	tag_260	The publisher and year of publication (from the bibliographic record 260 tag).

15.3 Output Templates for the New Title List Report

Location: /usr/vtls/virtua/webprt_XX/Cat/Cat_20/[filename]

Name	Description of Default Template
html_page.tem	Provides the overall framework of the HTML output.
html_row.tem	Provides information for a single item record, including both data elements and labels.
email_page.tem	Provides the overall framework of the e-mail output.
email_row.tem	Provides information for a single item record, including both data elements and labels.

16. Number of Records in Database Report

The Number of Records in Database report generates counts of bibliographic, item, holdings, and authority records in the database based on the criteria that you set in the report configuration. Figure 16-1 and Figure 16-2 display the default HTML output from the Number of Records in Database report.

Note: Opening the report template for Number of Records in Database can take several minutes on databases that contain a large number of defined locations, catalogers, and other parameters.

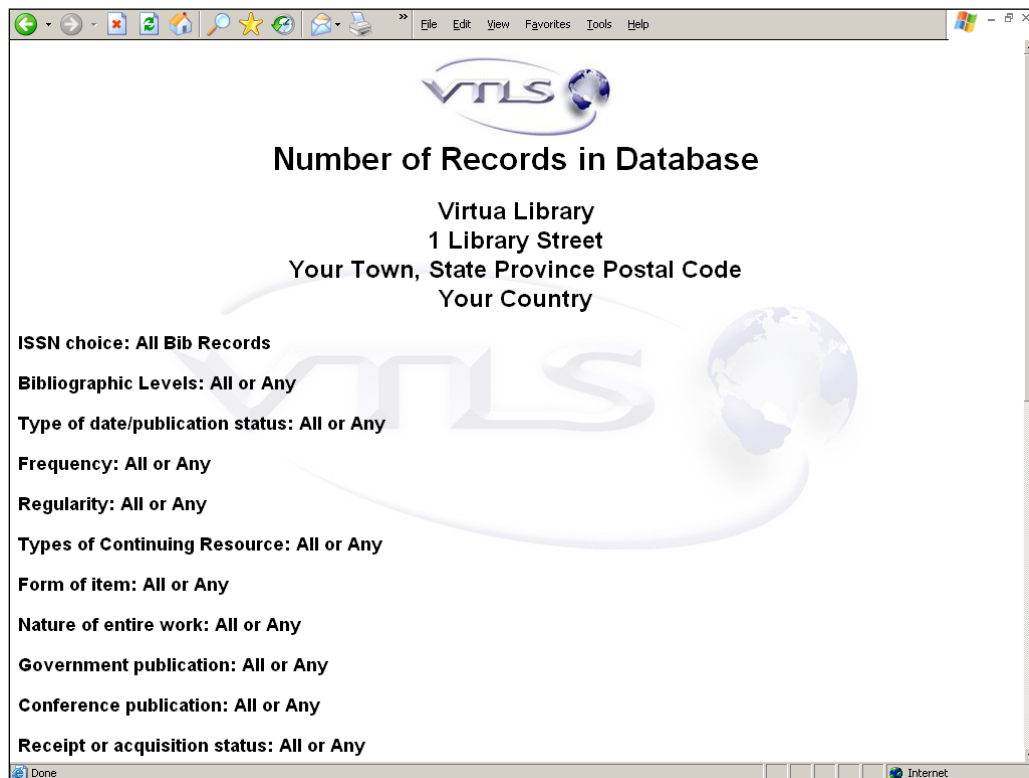


Figure 16-1. Number of Records in Database HTML Output

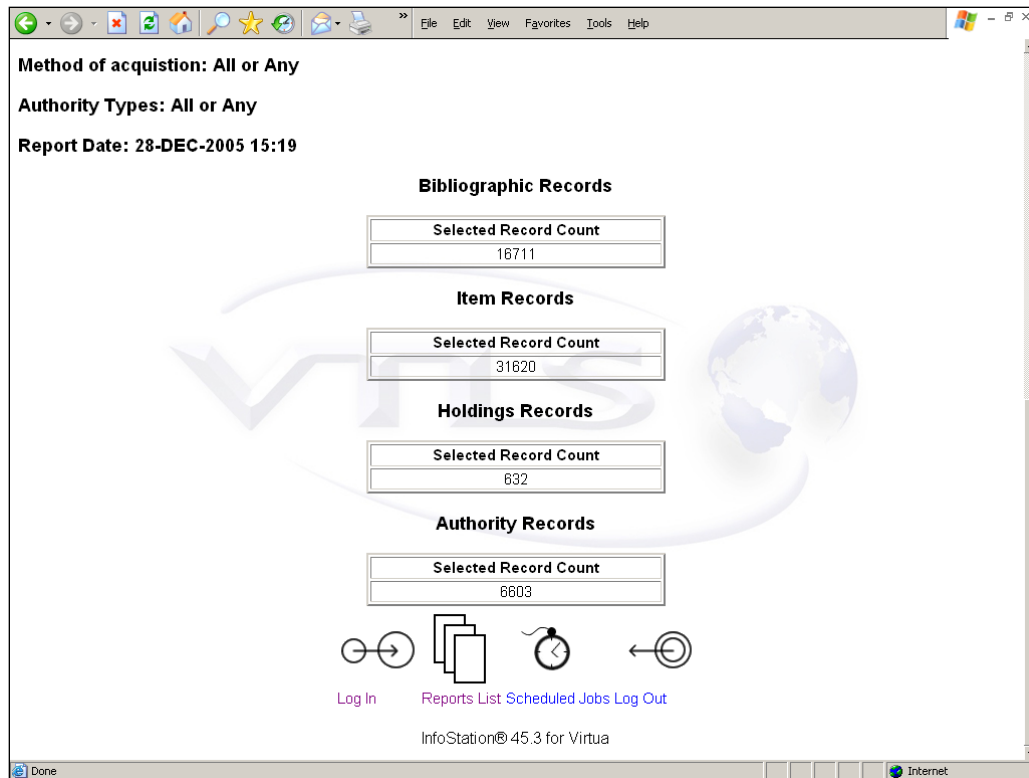


Figure 16-2. Number of Records in Database HTML Output

16.1 Parameters Available for the Number of Records in Database Report

The Number of Records in Database report offers the following Report-specific Parameters:

- **ISSN Choice** (*required*) - Lets you choose one of the following values: All Bib Records, Only Bib Records with ISSN (022 tag), Only Bib Records with ISSN with Swiss Centre Code (i.e., tag 022 subfield \$2 "40"). To be counted in the output, a bibliographic record must match the value you select for the report configuration.
- **Bibliographic Levels** (*required*) - Lets you choose one or more codes representing the bibliographic level to include in your results. To be counted in the output, position 07 of a record's Leader must contain one of the values you select for the

report configuration. This parameter affects bibliographic, items, and holdings records only.

- **Type of Date/Publication Status** (*required*) - Lets you specify one or more codes representing the type of date/publication status to include in your results. To be counted in the output, position 06 of a bibliographic record's 008 tag must contain one of the values you select for the report configuration.
- **Frequency** (*required*) - Lets you choose one or more codes representing frequency to include in your results. To be counted in the output, position 18 of a bibliographic record's 008 tag must contain one of the values you select for the report configuration.
- **Regularity** (*required*) - Lets you choose one or more codes representing regularity to include in your results. To be counted in the output, position 19 of a bibliographic record's 008 tag must contain one of the values you select for the report configuration.
- **Types of Continuing Resource** (*required*) - Lets you specify one or more codes representing the type of continuing resource to include in your results. To be counted in the output, position 21 of a bibliographic record's 008 tag must contain one of the values you select for the report configuration.
- **Form of Item** (*required*) - Lets you specify one or more codes representing the form of item to include in your results. To be counted in the output, position 23 of a bibliographic record's 008 tag must contain one of the values you select for the report configuration.
- **Nature of Entire Work** (*required*) - Lets you specify one or more codes representing the nature of entire work to include in your results. To be counted in the output, position 24 of a bibliographic record's 008 tag must contain one of the values you select for the report configuration.
- **Government Publication** (*required*) - Lets you specify one or more codes indicating the government publication status to include in your results. To be counted in the output, position 28 of a bibliographic record's 008 tag must contain one of the values you select for the report configuration.
- **Conference Publication** (*required*) - Lets you specify one or more codes indicating the conference publication status to include in your results. To be counted in the output, position 29 of a bibliographic record's 008 tag must contain one of the values you select for the report configuration.

- **Receipt or Acquisition Status** (*required*) - Lets you specify one or more codes representing the receipt or acquisition status to include in your results. To be counted in the output, position 06 of a holdings record's 008 tag must contain one of the values you select for the report configuration.
- **Method of Acquisition** (*required*) - Lets you specify one or more codes representing the method of acquisition to include in your results. To be counted in the output, position 07 of a holdings record's 008 tag must contain one of the values you select for the report configuration.
- **Authority Types** (*required*) - Lets you specify one or more codes representing the kind of authority data. To be counted in the output, an authority record's 999 VIRTUA tag subfield \$a, position 18, must contain one of the values you select for the report configuration.

For additional information about these Report-specific Parameters, see the *InfoStation Reference Guide* or view the InfoStation online help.

16.2 Data Elements and Variables for the Number of Records in Database Report

In the following table, we list the name, variable, and description of each data element that is retrieved by default by the Number of Records in Database report. You can edit the output templates to include or exclude any data element listed below.

Data Element	Variable	Description
Bibliographic Records	bib_total	The count of bibliographic records returned by the report and displayed in the Bibliographic Records table.
Item Records	item_total	The count of item records returned by the report and displayed in the Item Records table.
Holdings Records	hold_total	The count of holdings records returned by the report and displayed in the Holdings Records table.
Authority Records	auth_total	The count of authority records returned by the report and displayed in the Authority Records table.

16.3 Output Templates for the Number of Records in Database Report

Location: /usr/vtls/virtua/webprt_XX_x/Cat/Cat_13/[filename]

Filename	Contribution to Output
html_page.tem	Defines the overall framework of the HTML output and the placement of the tables containing the record counts.
html_header.tem	Provides the header information for the output, including the labels and values for the parameters in the report configuration.
email_page.tem	Defines the overall framework of the e-mail output and the placement of the tables containing the record counts.
email_header.tem	Provides the header information for the output, including the labels and values for the parameters in the report configuration.

17. Patron Record Load and Extract Report

The Patron Record Load and Extract report lets you . . .

- Upload to the database a fixed-format or delimited file of patron information and specify options to process the file and save the data in the Innovative-defined 2709 patron record format.
-OR-
- Download patron records from the database and specify options to convert the data from the 2709 patron record format to a fixed-format or delimited file.

In this way, the principal output of Patron Record Load and Extract report is either . . .

- New or modified patron records in the database created from the file of patron data that you uploaded from the server.
-OR-
- A file of patron data on the server, created from the patron records that you downloaded from database.

Additionally, the Patron Record Load and Extract report generates HTML, e-mail, and delimited output, which consist of diagnostic information regarding the processes that were performed when you ran the configuration. [Figure 17-1](#) is an example of HTML diagnostic output from an upload.

Patron Record Load and Extract

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

```

Creating MARC record 1
Creating MARC record 2
Creating MARC record 3
Creating MARC record 4
Creating MARC record 5
Creating MARC record 6
Creating MARC record 7
Creating MARC record 8
Creating MARC record 9
Creating MARC record 10
Oct 23 16:55:47 [9586]:
vload.exe at start
Oct 23 16:55:47 [9586]: after IdentifyHelpOption: err = 0
Oct 23 16:55:47 [9586]: IdentifyStartOption: argStr = -/home/jch/webrpt/r_42_0/src/vload.exe-
Oct 23 16:55:47 [9586]: after IdentifyStartOption: err = 5
Oct 23 16:55:47 [9586]: after IdentifyHelpOption: err = 0
Oct 23 16:55:47 [9586]: IdentifyStartOption: argStr = --c1-
Oct 23 16:55:47 [9586]: after IdentifyStartOption: err = 5
Oct 23 16:55:47 [9586]: after IdentifyHelpOption: err = 0
Oct 23 16:55:47 [9586]: IdentifyStartOption: argStr = --x015(Patron)-
Oct 23 16:55:47 [9586]: after IdentifyStartOption: err = 5
Oct 23 16:55:47 [9586]: after IdentifyHelpOption: err = 0
Oct 23 16:55:47 [9586]: IdentifyStartOption: argStr = --rPatron(T500/bEI//I)-
Oct 23 16:55:47 [9586]: after IdentifyStartOption: err = 5
Oct 23 16:55:47 [9586]: after IdentifyHelpOption: err = 0
Oct 23 16:55:47 [9586]: IdentifyStartOption: argStr = --s1-
Oct 23 16:55:47 [9586]: after IdentifyStartOption: err = 5

```

Figure 17-1. Patron Record Load and Extract HTML Output from Upload

For an upload, the diagnostic output is generated by **vload.exe**, which the Patron Record Load and Extract report uses to process data. For details on **vload.exe**, see the *Virtua Record Loading User's Guide*.

For a download, the diagnostic output is generated by InfoStation using **write 2709.exe** and contains information regarding the download (*Figure 17-2*).



Figure 17-2. Patron Record Load and Extract HTML Output from Download

17.1 Parameters Available for the Patron Record Load and Extract Report

The Patron Record Load and Extract report offers various parameters that you can set to specify how data will be handled when you run the report. You can choose to set the Upload to Database parameters or the Download to File parameters. We discuss both sets of parameters below.

17.1.1 Upload to Database Parameters

The Upload to Database parameters ([Figure 17-3](#)) let you specify options for a file of patron data that you wish to upload to the database to create or modify patron records.

Figure 17-3. Upload To Database Parameters

Important: Set the Upload to Database parameters *only* when you are creating a report configuration to upload a file of patron data from the server to create and update patron records in the database.

The Upload to Database parameters offer the following options:

- **Input File** (*required for uploads*) - Lets you specify the name of the data file that you want to upload and its location on the server (e.g., `/usr/vtls/virtua/webprt_XX_X/patrons.txt`).
- **Input File Type** (*required for uploads*) - Lets you specify the type of file you are uploading, either . . .
 - ◆ **Delimited File** - The input file contains data on a line, separated by a delimiter, which you specify via the Field Delimiter parameter.
 - ◆ **Fixed-format file** - The input file contains data in fixed-length fields.

- **Name Processing** (*required for uploads*) - Lets you specify whether the patron name fields require special processing. You can set the Name Processing parameter to . . .
 - ◆ **Off** - Name fields will be loaded *exactly* as they appear in the input file.
 - ◆ **On** - Name fields will be loaded according to special processing rules specified in the text box.

For details on name processing, see the section “[About Processing Names](#)” in Appendix A.

- **Matching Tag** (*required for uploads*) - Lets you specify which tag to match on for the duplicate test when loading records. You can set the matching tag parameter to one of the following:
 - ◆ **001** – InfoStation will match on the 001 Patron ID tag.
-OR-
 - ◆ **015** – InfoStation will match on the patron barcode tag (015 \$a).
-OR-
 - ◆ **016** – InfoStation will match on the alternate patron barcode tag (016 \$a).
-OR-
 - ◆ **035** – InfoStation will match on the 035 tag.
- **Address Preference Set to Email** - Lets you specify for the current patron records which of the primary patron addresses (paper or e-mail) is to be used for the production of notices.
 - ◆ If you select the check box and the patron has a valid e-mail address, the address preference will be set to “e-mail” (i.e., 008 position 10 will be set to 1).
 - ◆ If you do not select the check box or if the patron does not have a valid e-mail address, the address preference will be set to paper (i.e., 008 position 10 will be set to 0).
- **Allow Duplicate Checkouts** - (*Affects both Chamo and Virtua.*) Here is how it works:
 - ◆ When the Allow Duplicate Checkouts check box is unchecked, patron history is stored in Virtua, and items in the history are not allowed to be checked out again. The History page is present on the Activity tab of the Patron Information window in the Virtua client.
 - ◆ When the Allow Duplicate Checkouts parameter is checked, patron history is NOT stored in Virtua, and items in the history are allowed to be checked out again.
- **Display Checkout History** - (*Affects Chamo only.*) When this parameter is checked, patrons can view their check-out history in Chamo. Patrons can change the flag within the Chamo interface as well.

- **Tags to Protect** (*optional*) - Lets you specify which patron record tags should NOT be overwritten when the incoming file contains updated information for a patron record that already exists in the database.

For example, if you type **007 500-599** in the Tags to Protect text box, the 007 fixed fields and all 5xx tags will be protected in existing patron records.

Note: InfoStation checks for existing records via the patron record 015 or 016 tag. If the 015 or 016 tag of a patron record matches the patron barcode field of the incoming data, the Patron Record Load and Extract report will overwrite the existing data with the new data by default. You can protect existing tags via the Tags to Protect parameter and via Special Flags in the Field Definitions. For details, see the section “[Setting Special Flags for Uploads and Downloads](#)” in this chapter.

- **Add Default Password** (*optional*) - Lets you specify whether a default password is added to uploaded patron records that do not already have a password stored in the 015 tag subfield \$b. If you want a default password to be added, select the Add Default Password check box.

Note: Virtua uses the date of birth specified in the patron record 100 tag subfield \$d for the value of the default password. If no date of birth is specified in the patron record, the Virtua will use the patron barcode from the 015 tag subfield \$a.

- **Show Diagnostics** (*optional*) - Lets you specify whether to include diagnostic messages in the report output.

Note: This option affects the HTML, e-mail, and delimited output of the report. It does NOT affect the patron records that are created as a result of the processing. The diagnostic information is generated by **vload.exe**.

- **Level of Diagnostic Logging** (*required if you choose to show diagnostics*) - If you choose to show diagnostic information in the output, lets you specify the level of diagnostic logging. You can specify any number one (1) through five (5), where one is the level that generates the most diagnostic logging.

17.1.2 Download to File Parameters

The Download to File parameters ([Figure 17-4](#)) let you specify options for the output file when you are downloading patron data from database to a file on the server.

Figure 17-4. Download To File Parameters

Important: Set the Download to File parameters *only* when you are creating a report configuration to download patron records from the database to create a fixed-format or delimited file of patron data.

The Download to File parameters offer the following options:

- **Output File** (*required for downloads*) - Lets you specify the name and location of the output file (e.g., `/usr/vtls/virtua/web rpt_XX_X/patrons.out`).
- **Output File Type** (*required for downloads*) - Lets you specify the output file type, either . . .
 - ◆ **Delimited File** - The output file will contain data on a line, separated by a delimiter, which you specify via the Field Delimiter parameter.
 - ◆ **Fixed-format file** - The output file will contain data in fixed-length fields.
- **Repeating Tags or Subfields** (*required for downloads*) - Lets you specify how to handle repeated tags and subfields. You can choose . . .
 - ◆ **Use First** - If tags or subfields are repeated, only the first occurrence is saved to the output file.
 - ◆ **Concatenate** - If tags or subfields are repeated, ALL occurrences are saved to the output file, strung together in the same field of the output file and separated by the delimiter specified in the Delimiter text box. The default, `/s`, indicates a space.
- **Date Range** (*required for downloads*) - Lets you limit the download to patron records added or modified during particular date range, according to the date in the 039 tag of the patron record. To be downloaded to the output file, a patron record must have been created (039 \$y) or modified (039 \$a) during the date range that you specify for the report configuration. You can choose to limit report output by...

- ◆ **Relative Date Range** - Lets you specify a current or previous period and select a unit of time.
- OR-
- ◆ **Fixed Date Range** - Lets you specify a range of dates.

17.1.3 Global Parameters

The Patron Record Load and Extract report offers two global Report-specific Parameters (*Figure 17-5*), which are used by ALL configurations, regardless of whether you are performing an upload or a download.

The image shows a screenshot of a web form titled 'Global Parameters'. It contains two main sections. The first section is labeled 'Field Delimiter' and has a text input field containing the backslash-tab character '\t'. The second section is labeled 'Save Intermediate MARC File' and has a large empty text input field. To the right of this field is a small button or checkbox labeled 'Optional'.

Figure 17-5. Global Parameters

- **Field Delimiter** (*required*) - Lets you specify the delimiter used to separate data in a delimited file.
 - ◆ If you are uploading data, this is the delimiter used to separate data in the *input* file.
 - ◆ If you are downloading patron data, this is the delimiter that will be used to separate data in the *output* file.

Note:

- This parameter is used *only* for delimited files. It is not used for fixed-field files.
 - The default setting, \t, specifies a TAB character.
- **Save Intermediate MARC File** (*optional*) - Lets you choose whether you want to save an intermediate file of MARC data. The intermediate file will contain a list of records that were uploaded or downloaded in a simplified MARC format. This options lets you create a record of your record processing. If you want to save records to an intermediate file, type the name and location of the file in the text box (`/usr/vtls/virtua/webbrpt_42_5/marc.txt`).

17.2 Working with Field Definitions

Field Definitions appear at the bottom of the Configuration - Patron Record Load and Extract screen (*Figure 17-6*).

Field Name	Length	Tag	Indicator 1	Indicator 2	Subfield Code	Special Flag	Error Handling	Decode Table
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	None	<input type="radio"/> Log <input type="radio"/> Skip <input type="radio"/> Stop	

Figure 17-6. Empty List of Field Definitions

Depending on whether you are uploading a data file to create or update patron records or downloading patron records to a data file, Field Definitions let you specify . . .

- How the data file should be processed to create or modify patron records.
-OR-
- How patron records should be processed to create the data file.

For additional information on working with Field Definitions, see the appendix "[Special Features of Load/Extract Reports](#)" in this guide.

17.3 Output Templates for the Patron Record Load and Extract Report

Location: /usr/vtls/virtua/webprt_XX_x/Adm/Adm_1/[filename]

Filename	Contribution to Output
html_page.tem	Generates all the diagnostic information that appears in HTML output.
email_page.tem	Generates all the diagnostic information that appears in e-mail output.

18. Production of Records by User Report

The Production of Records by User report generates, for each user specified, counts of bibliographic, item, holdings, and authority records in the database that have been created, modified, and deleted and that meet the criteria that you set in the report configuration. Keep in mind that for all types of records the delete counts will take into account *only* the user and date parameters since no other parameter-related data will be available to query.

For the Production of Records by User report to generate output, data must be available in the `operation_log` table in the database. To ensure that cataloging data is recorded in the table, select the *Gather cataloging statistics* check box in the Cataloging Basic Options parameter in the Virtua Profiler.

[Figure 18-1](#) and [Figure 18-2](#) display the default HTML output from the Production of Records by User report.

Note: Opening the report template for Production of Records by User can take several minutes on databases that contain a large number of defined locations, catalogers, and other parameters.

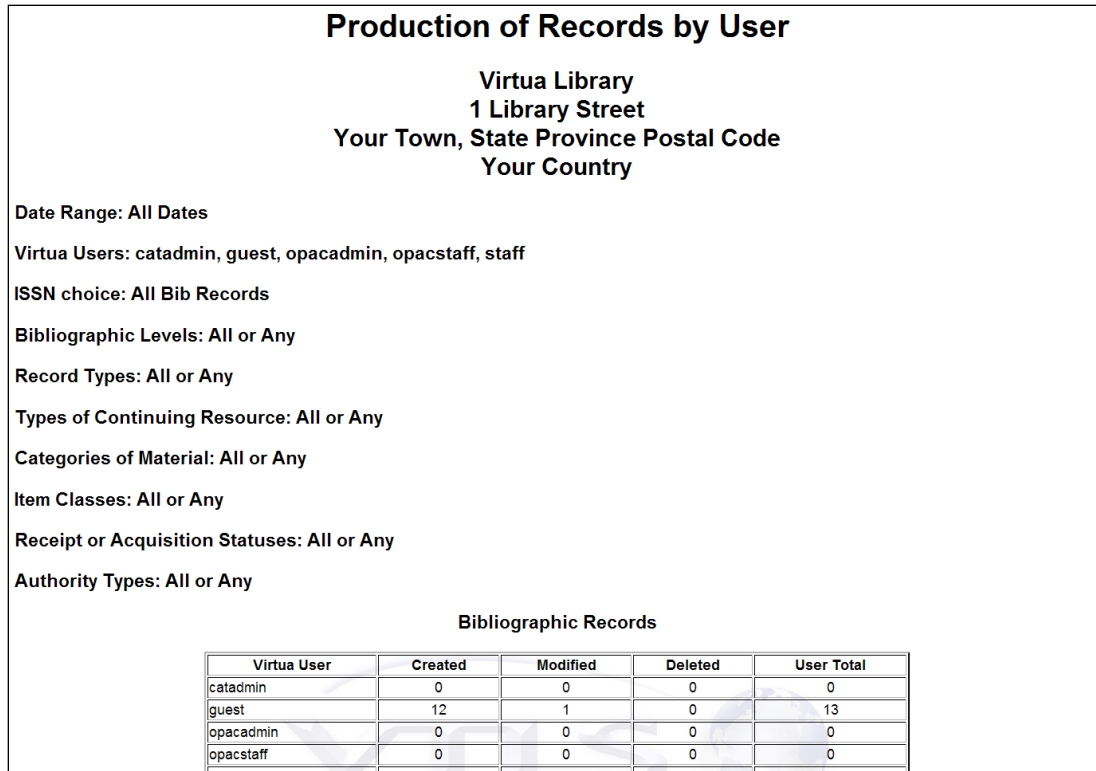


Figure 18-1. Production of Records by User HTML Output (1)

Item Records				
Virtua User	Created	Modified	Deleted	User Total
catadmin	0	0	0	0
guest	0	1	0	1
opacadmin	0	0	0	0
opacstaff	0	0	0	0
staff	385	130	134	649
Total	385	131	134	650

Holdings Records				
Virtua User	Created	Modified	Deleted	User Total
catadmin	0	0	0	0
guest	0	0	0	0
opacadmin	0	0	0	0
opacstaff	0	0	0	0
staff	40	96	24	160
Total	40	96	24	160

Authority Records				
Virtua User	Created	Modified	Deleted	User Total
catadmin	0	0	0	0
guest	0	0	0	0
opacadmin	0	0	0	0
opacstaff	0	0	0	0
staff	16	13	5	34
Total	16	13	5	34

Figure 18-2. Production of Records by User HTML Output (2)

For each user and date range included in the output, the Production of Records by User report returns the following information by default:

- Number of bibliographic records created, modified, and deleted
- Number of item records created, modified, and deleted
- Number of holdings records created, modified, and deleted
- Number of authority records created, modified, and deleted

For serial bibliographic record output, it is important to distinguish between records with and without the ISSN (see the ISSN Choice parameter). For authority record output, it is important to distinguish between different kinds of authority data (see the Authority Types parameter).

18.1 Parameters Available for the Production Records by User Report

The Production Records by User report offers the following Report-specific Parameters:

- **Virtua Users** (*required*) - Lets you limit your output by Virtua user (cataloger) as defined in the User Profiles in the Virtua Profiler. To appear in the output, a record must have been created, modified, or deleted (as indicated in the operation_log) by one of the users you select for the report configuration.
- **ISSN Choice** (*required*) - Lets you choose one of the following values: All Bibliographic Records, Only Bibliographic Records with ISSN (tag 022 subfield \$a), Only Bibliographic Records with ISSN with Swiss Centre Code (i.e., tag 022 subfield \$2 “40”). To be counted in the output, a bibliographic record must match the value you select for the report configuration. This parameter applies to bibliographic records only. (*Note that this parameter is not available for deleted records.*)
- **Bibliographic Levels** (*required*) - Lets you choose one or more codes representing the bibliographic level to include in your results. To be counted in the output, position 07 of a record’s Leader must contain one of the values you select for the report configuration. This parameter applies to bibliographic, item, and holdings records. (*Note that this parameter is not available for deleted records.*)
- **Record Types** (*required*) - Lets you specify one or more codes representing the type of record to include in your results. To be counted in the output, position 06 of a bibliographic record’s Leader must contain one of the values you select for the report configuration. This parameter applies to bibliographic records only. (*Note that this parameter is not available for deleted records.*)
- **Types of Continuing Resource** (*required*) - Lets you specify one or more codes representing the type of continuing resource to include in your results. To be counted in the output, position 21 of a record’s 008 tag must contain one of the values you select for the report configuration. This parameter applies to bibliographic, item, and holdings records. (*Note that this parameter is not available for deleted records.*)
- **Categories of Material** (*required*) - Lets you specify one or more codes representing the category of material to include in your results. To be counted in the output, position 00 of a record’s 007 tag must contain one of the values you select for the report configuration. This parameter applies to bibliographic, item, and holdings records. (*Note that this parameter is not available for deleted records.*)

- **Item Classes** (*required*) - Lets you choose one or more item classes to include in your results. To be counted in the output, the item class of the item record must be one of the values you select for the report configuration. This parameter applies to item records only. (*Note that this parameter is not available for deleted records.*)
- **Receipt or Acquisition Statuses** (*required*) - Lets you specify one or more receipt or acquisition statuses to include in your results. To be counted in the output, position 06 of a record's 008 tag must contain one of the values you select for the report configuration. This parameter applies to holdings records only. (*Note that this parameter is not available for deleted records.*)
- **Authority Types** (*required*) - Lets you specify one or more codes representing the kind of authority data. To be counted in the output, an authority record's 999 VIRTUA tag subfield \$a, position 18, must contain one of the values you select for the report configuration. This parameter applies to authority records only. (*Note that this parameter is not available for deleted records.*)
- **Date Range** (*required*) - Lets you specify a date range for the result set. To be counted in the output, a record must have been created, modified, or deleted during the Date Range specified for the configuration.

For additional information about these Report-specific Parameters, see the *InfoStation Reference Guide* or view the InfoStation online help.

18.2 Data Elements and Variables for the Production of Records by User Report

In the following table, we list the name, variable, and description of each data element that is retrieved by default by the Production of Records by User report. You can edit the output templates to include or exclude any data element listed below.

Data Element	Variable	Description
Virtua User	user	The name of the Virtua User for which statistics are displayed in each table of results.
Created	bib_created_count item_created_count hold_created_count auth_created_count	The statistics reported for records <i>created</i> per user for each table of results.
Modified	bib_modified_count item_modified_count hold_modified_count auth_modified_count	The statistics reported for records <i>modified</i> per user for each table of results.
Deleted	bib_deleted_count item_deleted_count hold_deleted_count auth_deleted_count	The statistics reported for records <i>deleted</i> per user for each table of results.
User Total	user_bib_total user_item_total user_hold_total user_auth_total	The total number of records created, modified, and deleted per user for each table of results.
Total	bib_created_total bib_modified_total bib_deleted_total	In the Bibliographic Records table, the totals of bibliographic records created, modified, and deleted for ALL users.
Total	item_created_total item_modified_total item_deleted_total	In the Item Records table, the totals of item records created, modified, and deleted for ALL users.

Data Element	Variable	Description
Total	hold_created_total hold_modified_total hold_deleted_total	In the Holdings Records table, the totals of holdings records created, modified, and deleted for ALL users.
Total	auth_created_total auth_modified_total auth_deleted_total	In the Authority Records table, the totals of authority records created, modified, and deleted for ALL users.
Total	bib_total item_total hold_total auth_total	In the appropriate table of results, the total number of ALL records for ALL users.

18.3 Output Templates for the Production of Records by User Report

Location: /usr/vtls/virtua/webprt_XX_x/Cat/Cat_12/[filename]

Filename	Contribution to Output
html_page.tem	Defines the overall framework of the HTML output and the placement of the html_header template and html_row templates.
html_header.tem	Provides the header information for the output, including the labels and values for the parameters in the report configuration.
html_bib_row.tem	Provides the counts of records related to a single user in the Bibliographic Records table.
html_item_row.tem	Provides the counts of records related to a single user in the Item Records table.
html_hold_row.tem	Provides the counts of records related to a single user in the Holdings Records table.
html_auth_row.tem	Provides the counts of records related to a single user in the Authority Records table.
email_page.tem	Defines the overall framework of the e-mail output and the placement of the email_header template and email_row templates.

Filename	Contribution to Output
email_header.tem	Provides the header information for the output, including the labels and values for the parameters in the report configuration.
email_bib_row.tem	Provides the counts of records related to a single user in the Bibliographic Records table.
email_item_row.tem	Provides the counts of records related to a single user in the Item Records table.
email_hold_row.tem	Provides the counts of records related to a single user in the Holdings Records table.
email_auth_row.tem	Provides the counts of records related to a single user in the Authority Records table.

19. Record Extraction Utility Report

The Record Extraction Utility report lets you extract bibliographic records in ISO-2709 format from a Virtua MARC 21 database. The utility lets you extract the entire database or a subset of the database based on specified filtering criteria. Once the records for extraction have been configured and selected, the extraction utility performs several processes to produce a final set of records:

- Sorts the records on a defined data element.
- Converts the records from MARC 21 to another type of MARC records as required.
- Changes the character encoding from UTF-8 to another encoding as required.

The Record Extraction Utility report works in conjunction with an administrative tool called **RecordDownload.cgi**, which is located in the InfoStation /**cgi-bin** directory. Once a set of extracted records has been generated, this tool makes the file available for downloading to your PC or for deleting from the /**extracted** directory on the server where it is stored.

The Record Extraction Utility report offers three Configuration screens:

- **Screen 1:** Contains General Parameters (available to all InfoStation reports) and Report-specific Parameters.
- **Screen 2:** Contains criteria for record selection. If on the first screen you select the Select All Records from Database check box, this screen will NOT be available.
- **Screen 3:** Displays a summary of your configurations.

In the following sections, we discuss the report-specific contents of the Configuration screens, the data elements generated in the report output, and the templates that are available for the Record Extraction Utility. In addition, we discuss the use of the administrative tool.

19.1 Parameters Available for the Record Extraction Utility Report

The Record Extraction Utility Report (*Figure 19-1*) offers a variety of Report-specific Parameters, which we discuss below.

Figure 19-1. Record Extraction Utility Configuration (1) Screen

- **Output Character Encoding** - Lets you specify the character encoding of the extracted records. By default, the character encoding of the output will be UTF-8, the character set of the Virtua database. If you choose any of the other character encodings (USMARC, Euro 3, or Windows Latin 1), the system will use mapping tables that exist in the database.
- **Extract Base Versions of State Records** (*optional*) - Lets you specify that the system should always extract the base record if any special state (e.g. Error state) record exists.
- **MARC 21 - Formatted** - Lets you specify that the report output will be in the “human-readable” form of whatever format has been selected in the Output Record Format parameter.
- **Output Record Format** - Lets you specify the MARC format in which the records will be output. You can choose MARC 21 or MARCXML only.

Note: If you are an ISSN Centre user, other options will be available to you. For details, see the *ISSN Centre User's Guide*.

- **Sort By** - Lets you specify whether you want the output sorted. You can choose to sort by ISSN (with a Title subsort) or Title (with an ISSN subsort).
- **Use Non-normalized String Comparison** - Lets you specify whether case should be considered in comparisons of strings in tags and subfields.
 - ◆ If you select this check box, the software will be case sensitive in its comparisons of strings.
 - ◆ If you do NOT select this check box, the software will not be case sensitive in its comparisons of strings.
- **Select All Records from Database** (*optional*) - Lets you specify whether ALL records in the database will be included in the output.
 - ◆ If you select this check box, your configuration for this report is complete. The rest of the Report-specific Parameters will be disabled.
 - ◆ If you do NOT select this check box, you will be able to configure the rest of the Report-specific Parameters.
- **XSL File** (*optional*) - Lets you select the XSL (eXtensible Stylesheet Language) file on the server that is to be applied to the MARCXML record output. The XSL file transforms the MARCXML into the format defined by the XSL file. The transformed output will be available for download using the **RecordDownload.cgi** program.

Note: For any XSL files to be listed in the drop-down, files must exist in the `/xsl` directory of the InfoStation installation.






- **Leader** (*optional*) - Lets you specify which Leader positions to include on the Configuration (2) screen.
- **Tag 006** (*optional*) - Lets you specify which 006 positions to include on the Configuration (2) screen.
- **Tag 007** (*optional*) - Lets you specify which 007 positions to include on the Configuration (2) screen.
- **Tag 008** (*optional*) - Lets you specify which 008 positions to include on the Configuration (2) screen.
- **Variable Fields** (*optional*) - Lets you define the number of variable fields to show initially on the Configuration (2) screen.

After completing the Report-specific Parameter fields on the Configuration (1) screen, click the **Save and Continue** button. Depending on whether you selected the **Select All Records from Database** check box, the next screen will be either the Configuration (2) screen (*Figure 19-2*) or the Configuration Summary screen (*Figure 19-3*).

19.2 Selection Criteria Available for the Record Extraction Utility Report

The Configuration (2) screen (*Figure 19-2*) displays elements based in part on the Report-specific Parameters that you set on the Configuration (1) screen. The Configuration (2) screen lets you specify selection criteria for the records to be extracted, and it is displayed only if the **Select All Records from Database** check box on the Configuration (1) screen is NOT checked.

For example, if on the Configuration (1) screen you specified the following:

Leader		<input type="text" value="06,07"/>
006		<input type="text" value="00,07-10"/>
007		<input type="text" value="00-02"/>
008		<input type="text" value="24-27"/>
Variable Fields		<input type="text" value="5"/> Add this many variable fields.

Note: Multiple positions are separated by commas; ranges are separated by hyphens. A range containing only an initial number will include all positions from the specified one to the end. A range containing only a final number will begin at position 00 and include all positions up to and including the one specified.

Then Configuration (2) screen will look like this:

The screenshot displays a web-based configuration interface for the Record Extraction Utility. It is titled 'Leader' and 'Variable Fields'. Under the 'Leader' section, there are four groups of fields: 06, 07, 006, 007, and 008. Each group includes a 'Does Not Match' checkbox and a text input field. The 'Variable Fields' section contains a table with columns for Tag, Ind 1, Ind 2, Subfield Code, Value, Match, and Does Not Match. The Match column has a dropdown menu with 'Substring' selected. The Does Not Match column has a checkbox.

Figure 19-2. Record Extraction Utility Configuration (2) Screen

On the Configuration (2) screen,

- Type the value for each Leader and fixed field position that you want to use as a selection criterion. If you want the value to be a space, type a caret (^) symbol. Then for each value, determine (via the **Does Not Match** check box) whether you want the report to match on it or not match on it.
- In the Variable Fields area, complete the elements for each variable field that you want to use as a selection criterion. Note that no value in an indicator field will be interpreted as a blank indicator. Then for each value *in the Value text field*, determine (via the **Does Not Match** check box) whether you want the report to match on it or not match on it.

Note: The Record Extraction Utility report supports date ranges. For this support to work, when entering a date as a Value, you must use special characters. Here is the formula:

1. Enter a percent sign (%) as the first character.
2. Enter the beginning of the date range in ISO format with no spaces, YYYYMMDD (e.g., March 17, 2004, would be 20040317). If you include the hour and minute in the date, the format will be YYYYMMDDHHMM.
3. Use a *greater than* symbol (>) to separate the first date value from the second date value.
4. Enter the second date value the same way as the first date value.

Additionally, in the Variable Fields area,

- ◆ To **add** variable fields, type a number in the “Add this many variable fields” text box, and then click the Add button.
- ◆ To **delete** variable fields, click the check box to the left of each tag field you want to delete, and then click the Delete Selected button.

After completing the fields on the Configuration (2) screen, click the **Save and Continue** button to display the Configuration Summary screen (*Figure 19-3*).

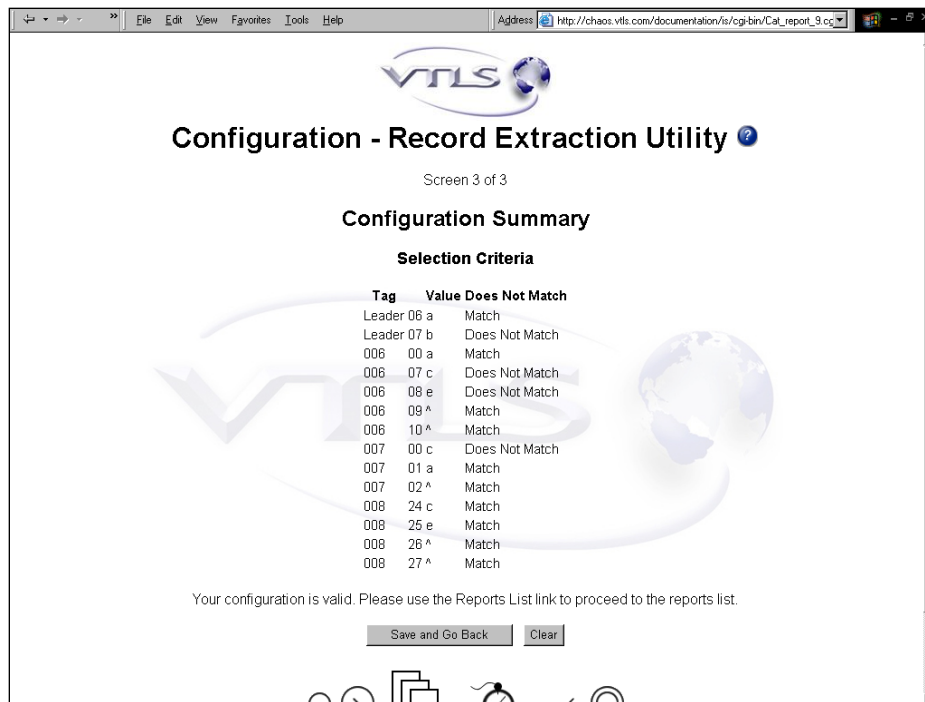


Figure 19-3. Record Extraction Utility Configuration (3) Screen

The Configuration Summary screen lists all your selection criteria for the Record Extraction Utility report. If you need to make any changes to the data on this screen, click the **Save and Go Back** button.

Note: Once you have saved a report configuration for the Record Extraction Utility and it appears in the Reports List, we recommend that you do NOT edit the configuration. If changes to the report configuration are necessary, we recommend that you create a new configuration.

19.3 Data Elements and Variables for the Record Extraction Utility Report

In the following table, we list the name, variable, and description of each data element that is retrieved by default by the Record Extraction Utility 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
Output Character Encoding	character_set	The character encoding of the extracted records.
Extracted Location Message	extracted_location_message	The message that is displayed to tell the user where to access the extracted records.
Ind	ind	Indicator value used as selection criteria for the extracted records.
Record Count	record_count	The number of records extracted.
Output Record Format	record_format	The format of the extracted records.
Subfield Code	subfield	The subfield code used as selection criteria for the extracted records.
Tag	tag	The tags used as selection criteria for the extracted records.

19.4 Output Templates for the Record Extraction Utility Report

Location: /usr/vtls/virtua/webprt_XX_x/Cat/Cat_9/[filename]

Filename	Contribution to Output
html_page.tem	Provides the overall framework of the HTML output.
html_header.tem	In HTML output, generates the header.
html_footer.tem	In HTML output, generates the footer.
email_page.tem	Provides the overall framework of the e-mail output.
email_header.tem	In e-mail output, generates the header.
email_footer.tem	In e-mail output, generates the footer.

19.5 Report Output and Use of the Administrative Tool

The Record Extraction Utility report produces a set of extracted records as output. You can access these records on the Web and download them to your machine. The report output will specify the URL:

http://web_reports_home/cgi-bin/RecordDownload.cgi

RecordDownload.cgi is the administrative tool that acts as a front end to the directory on the server containing the file(s) of extracted records. The information in the **/extracted** directory is displayed via the Extracted Record Sets screen (*Figure 19-4*). For each report configuration that is run, this tool generates the following information and displays it on the screen:

- **Download Gzipped Records** - Link to a gzipped version (i.e., a version compressed using GNU zip software) of the extracted records.
- **Download Records** - Filename of the extracted records, which is formulated from the date and time of the report. The filename extension will be either ***.rec** or ***.xml**, depending on the output format selected in the report-specific parameters.
- **Size** - Size of the file of extracted records.
- **Record Count** - Number of records extracted.

- **Date** - Date on which the report was run.
- **Extracted By** - Name of the user who ran the report.
- **Configuration Name** - Name of the report configuration used to generate this output.

In our sample Extracted Record Sets screen (*Figure 19-4*), the output information displayed is for four sets of files extracted per four different runs of one or more report configurations.

Extracted Record Sets ?							
Download Gzipped Records	Download Records	Size	Record Count	Date	Extracted By	Configuration Name	
<input type="checkbox"/>	2008040112594521392.xml.gz	2008040112594521392.xml	92388	29	01-APR-2008	Tony Miller	XXX HTML (XML 100 \$a King)
<input type="checkbox"/>	2008040115084010413.xml.gz	2008040115084010413.xml	59754	29	01-APR-2008	Tony Miller	XXX HTML (XML 100 \$a King XS
<input type="checkbox"/>	No Records Found	No Records Found	0	0	24-APR-2008	VTLS	Gail's Test
<input type="checkbox"/>	No Records Found	No Records Found	0	0	24-APR-2008	VTLS	Gail's Test

Delete Clear

Figure 19-4. Record Extraction Utility - Output

On the Extracted Record Sets screen, you can perform three tasks:

- Download a gzipped file of records to your PC.
- Download a file of records to your PC.
- Delete a file of records from the directory on the server.

To download a gzipped version of the extracted records,

1. Click the ***.rec.gz** link or the ***.xml.gz** link.
The **RecordDownload.cgi** script gzips the selected file and sends it to your browser.
2. In the File Download dialog box, click the Save button.
3. Navigate to the desired directory, and click the Save button.

Note: The gzipping process occurs on demand. Record Extraction Utility does not create un-gzipped versions of the data and make them available.

To download a file of extracted records to your PC,

1. Right click on the ***.rec** or ***.xml** file that you want to download.
2. Choose Save Target As...
3. Navigate to the desired directory, and click the Save button.

To delete a set of records from the /extracted directory on the server,

1. Select the check box to the left of the ***.rec** or ***.xml** file that you want to delete.
2. Click the Delete button.

20. Record Modification Utility Report

The Record Modification Utility report lets you make global changes to bibliographic records in a Virtua database. It lets you specify criteria for record selection and define the modifications that you want to make to the selected records.

The utility also gives you the opportunity to review your modifications and edit them as needed. You can redefine the selection criteria and the modification criteria as many times as necessary before committing them to the database. In addition, an administrative tool called **LoadModifications.cgi** lets you work with the set of modified records before committing them to the database. Once your changes have been committed, another administrative tool **GetBackups.cgi** will let you access the backup record set that was generated when the modification utility was run. This backup record set is stored on the server in the **/backup** directory.

The Record Modification Utility permits the following types of modifications:

- Adding and deleting tags and subfields
- Editing Leader and fixed field values
- Changing indicator values
- Changing tag numbers and subfield codes
- Changing the contents of subfields

The Record Modification Utility report works in conjunction with an administrative tool called **LoadModifications.cgi**, which is located in the InfoStation **/cgi-bin** directory. Once a set of modified records has been generated, this tool makes the file available for loading to the database, downloading to your PC, and/or deleting from the **/modified** directory on the server where it is stored.

The Record Modification Utility report offers seven Configuration screens:

- **Screen 1** (*Figure 20-1*): Contains General Parameters (available to all InfoStation reports) and Report-specific Parameters (for details, see the [Record Extraction Utility](#) report, the Configuration (1) screen for which is very similar).

Configuration - Record Modification Utility

Screen 1 of 7

Please supply the information requested in each required field

General Parameters

Output Format

Output E-mail

Configuration Name

Configuration Author

Report-Specific Parameters

Library Name

Library Address 1

Library Address 2

Library Address 3

Templates

Date Format Example: DD-MON-YYYY

E-mail Content-type

text/html

text/plain

Use Non-normalized String Comparison

Extract Base Versions of State Record

Leader

006

Figure 20-1. Record Modification Utility Configuration (1) Screen

- **Screen 2:** Contains criteria for record selection (for details, see the [Record Extraction Utility](#) report, the Configuration (2) screen for which is almost identical).
- **Screen 3:** Contains criteria for modifying Leader and fixed field data.
- **Screen 4:** Contains criteria for modifying variable field data.
- **Screen 5:** Contains criteria for adding variable fields.
- **Screen 6:** Contains criteria for adding subfield data.
- **Screen 7:** Displays a summary of your configurations.

In the following sections, we discuss the report-specific contents of the Configuration screens, the data elements generated in the report output, and the templates that are available for the Record Modification Utility report. In addition, we discuss the use of the administrative tools.

20.1 Parameters Available for the Record Modification Utility Report

The Configuration (1) screen of the Record Modification Utility report offers five Report-specific Parameters, which are the same as those offered by the [Record Extraction Utility report](#). The parameters are...

- **Extract Base Versions of State Records** (*optional*) - Lets you specify that the system should always extract the base record if any special state (e.g. Error state) record exists.
- **Leader** (*optional*) - Lets you specify which Leader positions to include on the Configuration (2) screen.
- **Tag 006** (*optional*) - Lets you specify which 006 positions to include on the Configuration (2) screen.
- **Tag 007** (*optional*) - Lets you specify which 007 positions to include on the Configuration (2) screen.
- **Tag 008** (*optional*) - Lets you specify which 008 positions to include on the Configuration (2) screen.
- **Variable Fields** (*optional*) - Lets you define the number of variable fields to show initially on the Configuration (2) screen.

After completing the Report-specific Parameter fields on the Configuration (1) screen, click the **Save and Continue** button to display the Configuration (2) screen where you can specify selection criteria.

20.2 Selection Criteria Available for the Record Modification Utility Report

The Configuration (2) screen of the Record Modification Utility report displays elements based in part on the Report-specific Parameters that you set on the Configuration (1) screen. This screen lets you specify the criteria that will be used to

select the records that are going to be modified. The Configuration (2) screen of the Record Modification Utility report is virtually identical to the Configuration (2) screen of the [Record Extraction Utility report](#) so we will not discuss it here.

Note: Once you have saved a report configuration for the Record Modification Utility and it appears in the Reports List, we recommend that you do NOT edit the configuration. If changes to the report configuration are necessary, we recommend that you create a new configuration.

20.3 Modification Criteria Available for the Record Modification Utility Report

Four Configuration screens (3-6) of the Record Modification Utility report let you specify criteria that will be used to modify the records you selected for modification. Each of these Configuration screens displays elements based on the selection criteria that you set on the Configuration (2) screen. In the following sections, we discuss each screen in detail.

20.3.1 Defining Leader and Fixed Field Modifications

The Configuration (3) screen ([Figure 20-2](#)) lets you define the modifications to the selected Leader and fixed field positions.

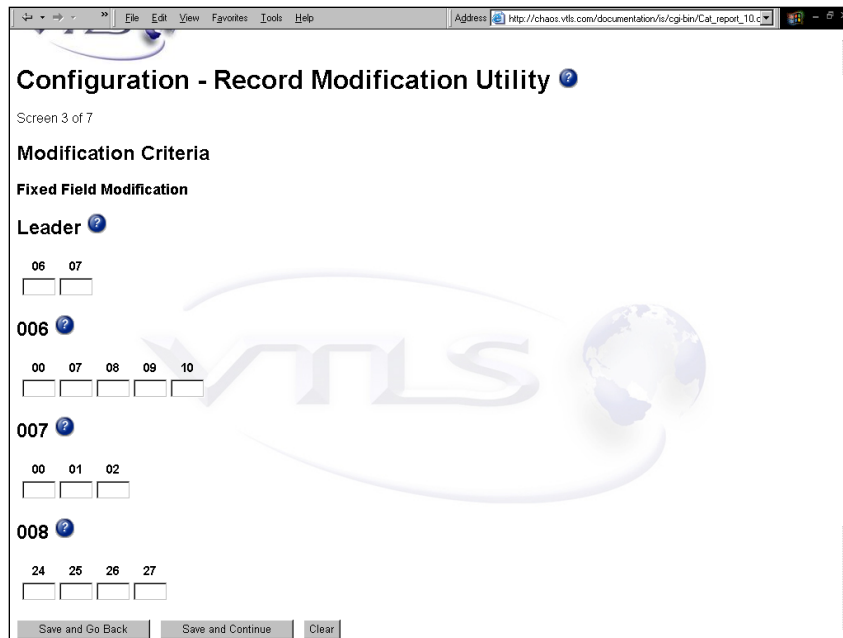


Figure 20-2. Record Modification Utility Configuration (3) Screen

On the Configuration (3) screen, all positions are eligible for modification. Type the new values in the fields provided:

- If you do not specify a value in a field, the current value is not modified.
- If you specify a space (by entering either a space or a caret (^), the value is replaced by a space.

20.3.2 Modifying and Deleting Variable Fields

The Configuration (4) screen ([Figure 20-3](#)) lets you define the modifications to the selected variable fields. In addition to defining modifications on this screen, you can also specify variable field deletions.

Configuration - Record Modification Utility

Screen 4 of 7

Modification Criteria

Variable Field Modification

Tag Ind 1	Ind 2	Action	New Tag	New Ind 1	New Ind 2	Subfield Code	Value	Action	New Subfield Code	New Value	Exact Match
856	*	None				u	http://image.vtls.com	None			No

Save and Go Back Save and Continue Clear

Log In Reports List Scheduled Jobs Log Out

InfoStation® 44.0.15 for Virtua

Figure 20-3. Record Modification Utility Configuration (4) Screen

To define a modification to a selected tag,

1. In the Action pull-down list on the tag row, choose Modify.
2. Complete the New Tag, New Ind 1, and New Ind 2 fields as appropriate.

Note: If you do not want to make any changes to the tag itself, in the Action pull-down list, choose None.

To specify that you want a selected tag deleted,

- In the Action pull-down list on the tag row, choose Delete.

The New Tag, New Ind 1, and New Ind 2 fields become disabled, as do the modification fields for the subfield, if there is one displayed.

To define a modification to a selected subfield,

1. In the Action pull-down list on the subfield row, choose Modify.
2. Complete the New Subfield Code and New Value fields as appropriate.

For your information, your selection of *Substring* or *Exact Match* from the Configuration (2) screen is reflected in the Exact Match? column to the right of the

New Value field. If you chose *Substring*, “No” will appear in the column; if you chose *Exact Match*, “Yes” will appear in the column.

Note: If you do not want to make any changes to the subfield, in the Action pull-down list, choose None.

To specify that you want a selected subfield deleted,

- In the Action pull-down list on the subfield row, choose Delete.

The New Subfield Code and New Value fields become disabled.

20.3.3 Adding Variable Fields

The Configuration (5) screen (*Figure 20-4*) lets you specify variable field additions.

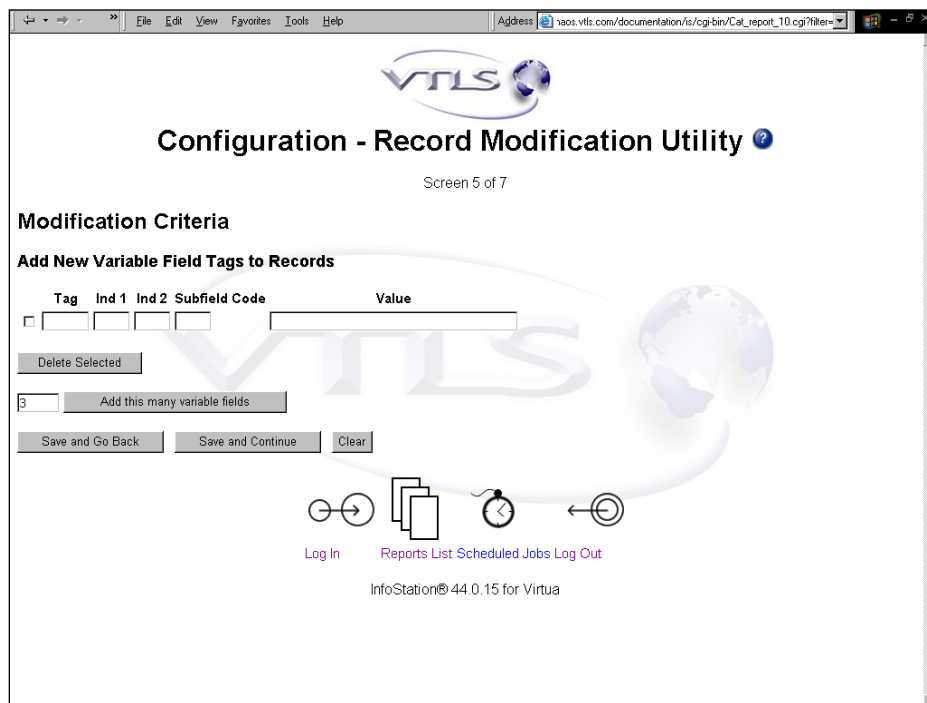


Figure 20-4. Record Modification Utility Configuration (5) Screen

To add a new variable field,

In the fields provided, type the new tag, 1st indicator, 2nd indicator, subfield code, and subfield value.

To add more than one new variable field,

1. In the **Add this many variable fields** text box, type the number of variable fields you want to add.
2. Click the **Add this many variable fields** button

The specified number of new variable fields is added to the screen.

3. Complete the fields as needed.

20.3.4 Adding Subfields to Existing Tags

The Configuration (6) screen (*Figure 20-5*) lets you add subfields to existing tags *that are part of your selection criteria*. The Configuration screen will display the selected tags along with their indicator values. You will not be able to edit them on this screen.

Figure 20-5. Record Modification Utility Configuration (6) Screen

To add a subfield code to a selected tag,

- On the row containing the tag, complete the Subfield Code and Value fields.

Note: If you do not type anything in the fields, nothing will be added to the records.

To add more than one subfield code to a selected tag,

1. In the **Add this many subfields** text box, type the number of subfields that you want to add.
2. Click the **Add this many subfields** button.

The specified number of new rows containing blank Subfield Code and Value fields is added to the screen.

3. Complete the new fields as needed.

20.4 Configuration Summary Screen

After completing all your modifications, on the last Configuration screen, click the **Save and Continue** button to display the Configuration Summary screen (*Figure 20-6*).

The screenshot shows a web browser window with the address `http://chaos.vtls.com/documentation/its/cgi-bin/Cat_report_10.c`. The page title is "Configuration Summary". Below the title, it states "Your configuration is valid. Please use the Reports List link to proceed to the reports list."

Selection Criteria

Tag	Ind 1	Ind 2	Subfield Code	Value	Match	Equal
856	*	*	u	http://image.vtls.com	Substring	Equal

Modification Criteria

Variable Field Modification

Tag	Ind 1	Ind 2	Action	New Tag	New Ind 1	New Ind 2
856	*	*	Delete			

Subfield Code	Value	Action	New Subfield Code	New Value	Exact Match
u	http://image.vtls.com	None			

Add New Subfield Data to Tags

Figure 20-6. Record Modification Utility Configuration Summary Screen

The Configuration Summary screen lists all your selection criteria and modification criteria for the Record Modification Utility report. If you need to make any changes to the data on this screen, click the **Save and Go Back** button.

20.5 Data Elements and Variables for the Record Modification Utility Report

In the following table, we list the name, variable, and description of each data element that is retrieved by default by the Record Modification Utility 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
Modified Location Message	modified_location_message	The message that is displayed to tell the user where to access the modified records.
Record Count	output_record_count	The number of records to be modified.
Selection Criteria	selection_text_summary	A list of the selection criteria for the records to be modified.
Modification Criteria	modification_text_summary	A list of the modification criteria for the selected records.

20.6 Output Templates for the Record Modification Utility Report

Location: /usr/vtls/virtua/webprt_XX_x/Cat/Cat_10/[filename]

Filename	Contribution to Output
html_page.tem	Provides the overall framework of the HTML output.
html_header.tem	In HTML output, generates the header.
html_footer.tem	In HTML output, generates the footer.
email_page.tem	Provides the overall framework of the e-mail output.
email_header.tem	In e-mail output, generates the header.
email_footer.tem	In e-mail output, generates the footer.

20.7 Report Output and Use of the Administrative Tools

The Record Modification Utility report produces a set of modified records as output. To facilitate the handling of the modified records, the report offers two administrative tools:

- LoadModifications.cgi
- GetBackups.cgi

20.7.1 LoadModifications.cgi

When you run the Record Modification Utility report, the report output will specify the URL where you can access the set of modified records:

http://web_reports_home/cgi-bin/LoadModifications.cgi

LoadModifications.cgi is the administrative tool that acts as a front end to the directory on the server containing the file(s) of modified records. The information in the directory is displayed via the Modified Record Sets screen (*Figure 20-7*). For each report configuration that is run, this tool generates the following information:

- Filename (formulated from the date and time of the report).
- Size of the file of modified records.
- Date on which the report was run.
- Name of the user who ran the report.
- Name of the report configuration used to generate this output.

In our sample Modified Record Sets screen (*Figure 20-7*), the output information represents data from each of three separate report configurations. Note that two record sets have not yet been loaded, and one set was not generated because no records were found. After a record set is loaded, the date and time of the load will be displayed instead of the load option link.



Figure 20-7. Modified Record Set Screen

On the Modified Record Sets screen, you can perform three tasks:

- Download a file of records to your PC.
- Delete a file of records from the directory on the server.
- Load a file of modified records to the database.

To download a file of modified records to your PC,

1. Right click on the *.rec file that you want to download.
2. Choose Save Target As...

To delete a set of records from the /modified directory on the server,

1. On the Modified Record Sets screen, select the check box to the left of the *.rec file that you want to delete.
2. Click the Delete button.

To load a set of modified records to the database,

- Click the Load Records link associated with the desired file.
 - ♦ If you have JavaScript enabled on your browser, a message will pop up, asking you to confirm the loading of the records to the database. Click the Yes (or OK) button to start the load process.
 - ♦ If you do NOT have JavaScript enabled, the load process will begin immediately.

20.7.2 GetBackups.cgi

The Record Modification Utility report offers a tool that lets you restore the backup record set that was created during an execution of the utility. Because making global modifications to records in the database can sometimes produce unintended results, this facility can come in handy.

GetBackups.cgi is the administrative tool that acts as a front end to the **/backup** directory on the server containing the file(s) of backup records. The information in the directory is displayed via the Backup Record Sets screen (*Figure 20-8*), which you can access at the following URL:

http://web_reports_home/cgi-bin/GetBackups.cgi

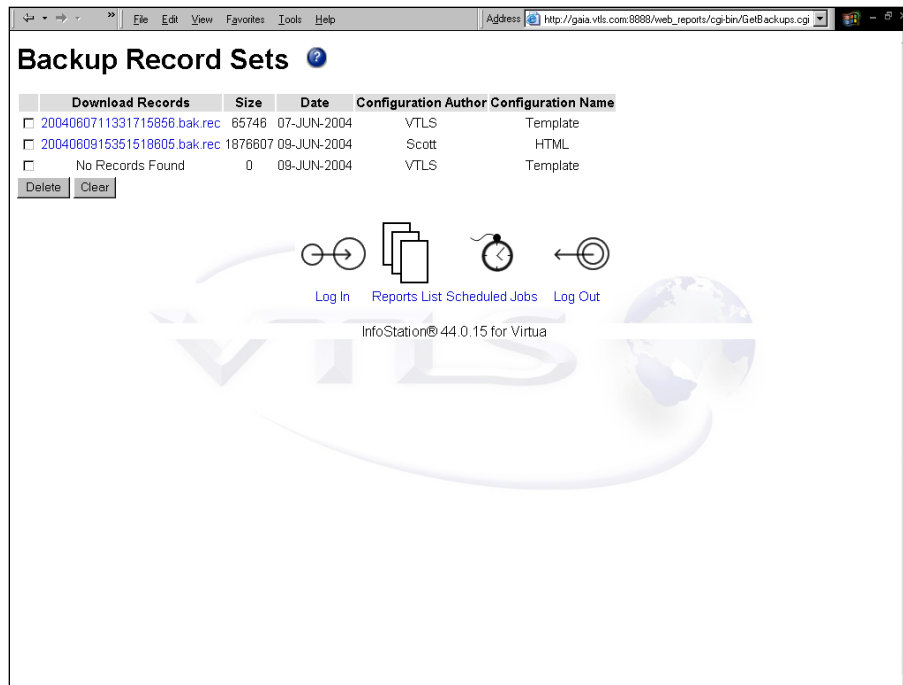


Figure 20-8. Backup Record Sets Screen

For each execution of the Record Modification Utility report, this tool generates the following information for the backup record set:

- Filename (formulated from the date and time that the file was created).
- Size of the file of backup records.
- Date that the file was created.
- Name of the user who ran the report.
- Name of the report configuration that was run.

To restore records to the database,

1. On the Backup Record Sets screen, download the file of backup records to your PC.
2. Upload the file to the server that is hosting the Virtua database.
3. Load the file into the database using **vload.exe**, Virtua's record-loading utility.

21. Records By State Report

The Records By State report returns a list of state records that meet the record state, record type, user, bibliographic level, and date range criteria that you set in the report configuration. Figure 21-1 displays a portion of the default HTML output from the Records By State report.

Records By State					
Virtua Library 1 Library Street Your Town, State or Province Postal Code Your Country					
2 Authority Records Found					
Record ID	Username	Timestamp	Bibliographic Level	Record Type	Record State
88731	staff	12-AUG-2002 11:55:21	y	z	Review 1
<pre> 00371nzy 2200145o 4500 001 vt1s000088731d 003 VRTd 005 2002081200000000d 008 020812 a a bab ana d 035 \$a (VRT)vt1s000088731d 039 9 \$y 200208121155 \$z staffd 100 3 \$a Bach family.d 999 \$a VIRTUA20 yd 999 \$a VTLSSORT0010*0030*0050*0080*1000*9990*9991d 999 \$a LOADOPT \$b 3d </pre>					
Record ID	Username	Timestamp	Bibliographic Level	Record Type	Record State
94085	staff	22-AUG-2002 09:31:24	y	z	Error

Figure 21-1. Records by State HTML Output

For each state record included in the output, the Records By State report returns the following information by default:

- Record ID
- Username
- Timestamp
- Bibliographic Level
- Record Type

Depending on the settings that you select for your configuration and the availability of the information, the output may contain . . .

- The complete contents of each state record.
- OR-
- Summary identifying information for each state record.

21.1 Parameters Available for the Records By State Report

The Records By State report offers the following Report-specific Parameters:

- **Record States** (*required*) - Lets you limit the output to one or more record states. To appear in the output, a record must be assigned one of the record states that you select for the report configuration. The Record States list box is populated with the record states that you have defined via the Record States parameter in the Virtua Profiler.
- **State Record Types** (*required*) - Lets you specify which type of state records you want to include in the output. You can choose one or more of the following:
 - ◆ Bibliographic
 - ◆ Holdings
 - ◆ Authority
 - ◆ Patron
- **Virtua Users** (*required*) - Lets you limit your output by cataloger. To appear in the output, a record must have been cataloged by one of the Virtua users you select for the configuration, according to the 039 tag, subfield \$b.
- **Bib Levels** (*required*) - Lets you choose one or more bibliographic levels to include in your results. To appear in the output, a record's bib level field must contain one of the values you select for the report configuration.
- **Record Types** (*required*) - Lets you specify one or more record types to include in your results. To appear in the output, position 06 of a record's Leader must contain one of the values you select for the report configuration.
- **Date Range** (*required*) - Lets you specify a date range for the result set. To appear in the output, a record must have entered into the specified record state during the Date Range specified for the configuration, according to the 039 tag, subfield \$a of the record.

- **Sort Parameters** (*required*) - Let you sort your results on the following values:
 - ◆ Username
 - ◆ Timestamp
 - ◆ Bibliographic Level
 - ◆ Record Type
- **Attempt to Display MARC Record** (*optional*) - Lets you specify whether you want InfoStation to try to display in the output the contents of each MARC record. If you de-select this check box, InfoStation does not display the contents of MARC records in the output.

Note: Selecting the Attempt to Display MARC Record check box does not necessarily mean that the contents of ALL records will appear in the output. If a record contains structural damage, InfoStation may not be able to display its contents.

For additional information about these Report-specific Parameters, see the *InfoStation Reference Guide* or view the InfoStation online help.

21.2 Data Elements and Variables for the Records By State Report

In the following table, we list the name, variable, description, and source of each data element that is retrieved by default by the Records by State 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 and Source
Bibliographic Level	bib_level	The bibliographic level of the state record, taken from... <ul style="list-style-type: none"> • Leader position 07 (bibliographic and patron records) -OR- • 999 VIRTUA tag (authority records)

Data Element	Variable	Description and Source
MARC Record	marc_record	The contents of the MARC record, if available.
Record ID	record_id	The system-assigned record ID of the state record, taken from the 001 tag of the MARC record.
Record Type	record_type	The type of state record, stored in Leader position 06.
Record State	record_state	The record state assigned to the record, stored in the Innovative-defined 999 LOADOPT tag.
Timestamp	timestamp	The date and time that the record was last saved to the database, taken from the 039 tag, subfield \$a of the MARC record.
Username	user_name	The username of the Virtua user who last saved the record to the database, taken from the 039 tag, subfield \$b of the MARC record

21.3 Output Templates for the Records By State Report

Location: /usr/vtls/virtua/webprpt_XX_x/Cat/Cat_4/[filename]

Filename	Contribution to Output
html_page.tem	Provides the overall framework of the HTML output.
html_header.tem	Provides headings for the groups of results, including record type labels, record counts, and labels for the columns of data.
html_row.tem	Displays the MARC record.
email_page.tem	Provides the overall framework of the e-mail output.
email_header.tem	Provides headings for the groups of results, including record type labels, record counts, and labels for the columns of data.
email_row.tem	Provides all the information related to a single state record, including both data elements and labels.

22. Subject Bibliography Report

The Subject Bibliography report lets you select a set of subject authorities and produce a set of related bibliography entries. The output of the Subject Bibliography report is intended to facilitate the creation of printed bibliographies. Figure 22-1 displays a portion of the default HTML output from the Subject Bibliography report.

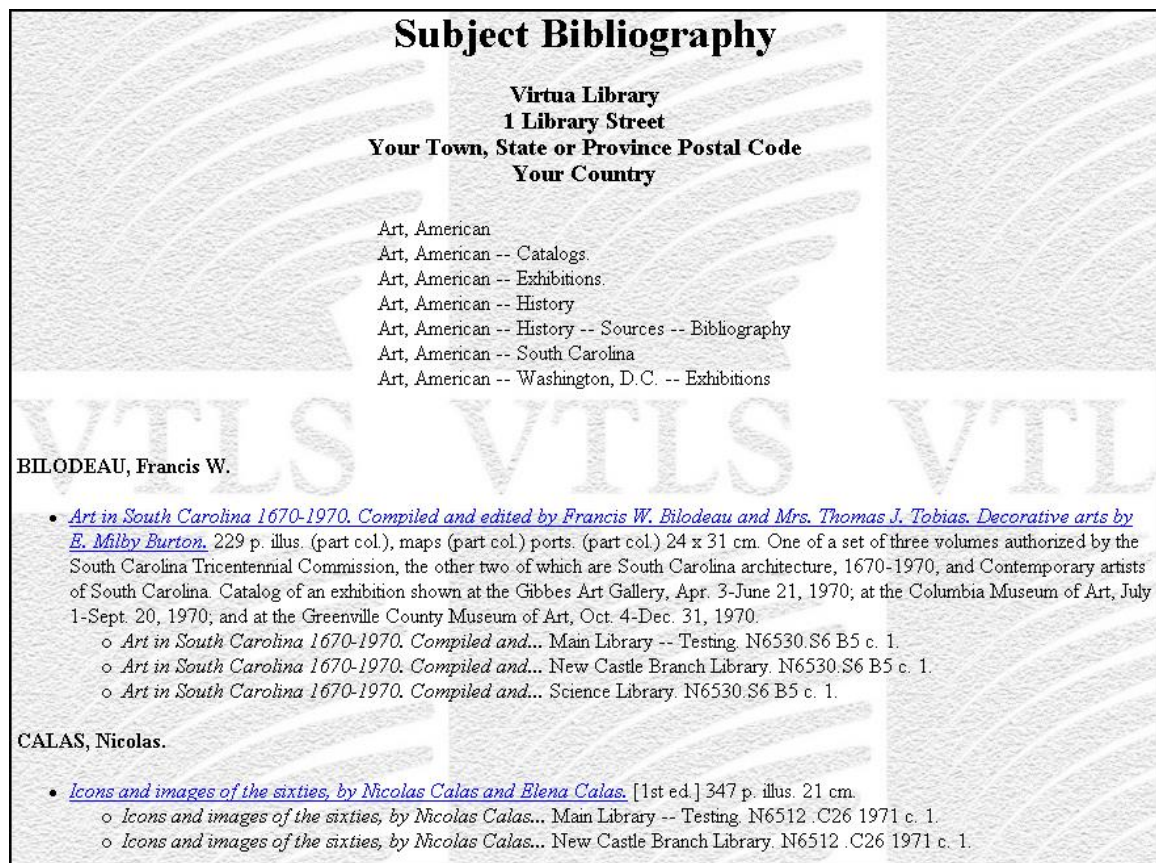


Figure 22-1. Subject Bibliography HTML Output

InfoStation uses the following rules to capitalize headings in the output:

- If a comma exists in the heading, words to the *left* of the comma are capitalized. In Figure 22-1, notice that BILODEAU (the author's last name, which appears to the left of the comma) is capitalized.
- If no comma exists, all words in the heading are capitalized.

22.1 Parameters Available for the Subject Bibliography Report

The Subject Bibliography report offers several unique General Parameters options:

- **Output Format** (*required*) - Lets you specify the format in which InfoStation will generate output for the report configuration. The Subject Bibliography report offers one unique Output Format option: **File On Server**. When you select this Output Format, InfoStation will generate delimited output and save it to the server in a location that you specify via the Output Filename parameter.

Note: When creating bibliographies, your delimited output files may be too large to send as an e-mail attachment. You can use this option to save the output to the server rather than sending it to an e-mail address.

For details on other Output Format options, see the *InfoStation User's Guide*.

- **Output Filename** (*required only if the Output Format is set to File On Server*)- Lets you specify the name and location of the delimited file that will be created when you set the Output Format to File On Server. To set this parameter, in the Output Filename text box, type the name and location of the output file, for example, `/usr/vtls/virtua/webprt_20XX_X/bibliography.txt`.

In addition, the Subject Bibliography report offers the following Report-specific Parameters:

- **Shelving Locations** (*required*) - Lets you limit your results to items associated with one or more shelving locations. To be included in the bibliography, an item must be shelved at one of the locations that you select for the report configuration.
- **Item Classes** (*required*) - Lets you limit your results to items of a particular item class. To be included in the bibliography, an item must belong to one of the item classes that you select for the report configuration.
- **Subject Search** (*required*) - Lets you search for subject to include in your output.

To perform a subject search,

1. In the Subject Search text box, type a word or phrase on which to search.

Hint: You can use an * (asterisk) to truncate your search term. For example, if you type...

- **dogs*** - InfoStation will find all subject headings in which *dogs* occurs at the beginning.
- ***dogs** - InfoStation will find all subject headings in which *dogs* occurs at the end.
- ***dogs*** - InfoStation will find all subject headings in which *dogs* occurs anywhere.

2. In the Maximum Subjects to Return text box, type the maximum number of subjects that you want InfoStation to return.
3. Click the Update Subjects button.

InfoStation performs your subject search. The Configuration screen will refresh, and the Subjects list box will appear, displaying all the subject headings that meet your search criteria.

Note: When you click the Update Subjects button, InfoStation performs the validation checks for your report configuration. This means that before you can perform a subject search, you must set all the required parameters in your report configuration, including the General Parameters, Shelving Locations, Item Classes, Subject Connector, and Maximum Length for Short Title.

- **Subjects** (*required*) - Lets you choose which subjects to include in the output. InfoStation will generate bibliographies for records associated with the subjects that you select in the Subjects list box.

Note: The Subjects list box appears only after you perform a subject search.

- **Subject Connector** (*required*) - Lets you define the relationship that must exist between the selected subjects in order for a record to be included in the output. The selected subjects appear in the Subjects list box, which is displayed on the screen after you perform a subject search. You can set the Subject Connector parameter to . . .
 - ◆ **AND** - To be included in the output, a record must contain ALL the subjects that are selected in the Subjects list box.
 - ◆ **OR** - To be included in the output, a record must contain at least ONE of the subjects that are selected in the Subjects list box.

- **Maximum Length for Short Title** (*required*) - Lets you specify how much of the title will be returned for each item when one or more items is attached to a bibliographic record. Each qualifying item will be listed in the bibliography after the bibliographic information.

Note: InfoStation will not shorten item titles in the middle of words. Rather, InfoStation will print each title up to the last full word that falls within the character limit that you specify.

- **Sort Parameters** (*required*) - Let you sort your results on the following values:
 - ◆ Author
 - ◆ Call Number
 - ◆ Item Class
 - ◆ Main Entry
 - ◆ Publication Date
 - ◆ Subject
 - ◆ Title

Note: The Main Entry sort option sorts main entries in alphabetical order, intermixing authors and titles.

- **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 the following information:
 - ◆ Edition (250 tag)
 - ◆ Uniform Title (240 tag)
 - ◆ Publication (260 tag)
 - ◆ Physical Description (300 tag)
 - ◆ Series, Added Title (440 tag)
 - ◆ Series (490 tag)
 - ◆ Series, Added Uniform Title (830 tag)
 - ◆ General Note (500 tag)
 - ◆ With Note (501 tag)
 - ◆ Contents Note (505 tag)

For additional information about these Report-specific Parameters, see the *InfoStation Reference Guide* or view the InfoStation online help.

22.2 Data Elements and Variables for the Subject Bibliography Report

In the following table, we list the name, variable, description, and source of each data element that is retrieved by default by the Subject Bibliography 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 and Source
Author	author	The author heading associated with a given record.
Author Start Flag	author_start_flag	A value that indicates the beginning of an author main entry and facilitates the loading of delimited output.
Call Number	call_number	The bibliographic call number with the highest priority, as determined by the Call Number Index and Priority parameter in the Virtua Profiler.
Initial Letter	initial_letter	A letter that groups results alphabetically.
Item Class	item_class_name	The item class associated with a given item record.
Item Copy	item_copy	The copy number of a given item.
Item Count	item_count	A count of the number of items attached to a record.
Item Units	item_units	The number of units associated with a given item.
Shelving Location	shelf_location	The shelving location of a given item.
Publication Date	publication_date	The publication date of a given title, taken from positions 07-11 of the bibliographic 008 fixed fields.
Short Title	short_title	The title of an item, shortened to the length allowed by the Maximum Length for Short Title parameter.
Subject	subject	The subject heading of a given title.
Title	title	The title of the record, taken from the 245 tag of the bibliographic record.
Title Start Flag	title_start_flag	A value that indicates the beginning of a title main entry and facilitates the loading of delimited output.

22.3 Output Templates for the Subject Bibliography Report

Location: /usr/vtls/virtua/webprt_XX_x/Cat/Cat_7/[filename]

Filename	Contribution to Output
html_author_row.tem	In HTML output, provides bibliographic information when an author exists in the record.
html_initial_letter.tem	In HTML output, provides the letter that alphabetizes the bibliography.
html_item_row.tem	In HTML output, provides the information for a single item.
html_page.tem	Provides the overall framework of the HTML output.
html_second_title_row.tem	In HTML output, when more than one title exists for a given author, provides the bibliographic information for all titles after the first title.
html_title_row.tem	In html output, when an author does not exist for a record, provides the title main entry.
email_author_row.tem	In e-mail output, provides bibliographic information when an author exists in the record.
email_initial_letter.tem	In e-mail output, provides the letter that alphabetizes the bibliography.
email_item_row.tem	In e-mail output, provides the information for a single item.
email_page.tem	Provides the overall framework of the e-mail output.
email_second_title_row.tem	In e-mail output, when more than one title exists for a given author, provides the bibliographic information for all titles after the first title.
email_title_row.tem	In e-mail output, when an author does not exist for a record, provides the title main entry.

23. URL Checker Report

Note: For ISSN Centre users, the URL Checker report functionality differs slightly from the functionality we describe here. For details, ISSN Centre users should see the *ISSN Centre User's Guide*.

The URL Checker report checks on the viability of URLs in bibliographic, item, and holdings records in your database. It does this by reading tables in the database (bibliographic_url for bibliographic records, itemdetl2 for item records, and iso_2709 for holdings records) and then trying to establish a connection to each URL in the records.

Any URL to which a connection cannot be successfully established is written to a file of failed connections. When a URL fails the specified number of times (as defined by the Minimum Failure Count parameter in the report configuration), the URL is reported in the output (*Figure 23-1*).

URL Checker	
Virtua Library 1 Library Street Your Town, State Province Postal Code Your Country	
www.url.org	
Result Code	400
Result Message	URL must be absolute
Translated Message	Bad Request (400)
Failure Count	3
Record ID	00000315
Call Number	RC455 .D64
Author	Dohrenwend, Bruce Philip, 1927-
Title	Social status and psychological disorder; a causal inquiry / Bruce P. Dohrenwend, Barbara Snell Dohrenwend.
www.testurl.com	
Result Code	400
Result Message	URL must be absolute
Translated Message	Bad Request (400)
Failure Count	3
Record ID	00000575
Call Number	BT21.2 .G6
Author	González, Justo L.
Title	A history of Christian thought / Justo L. González.

Figure 23-1. URL Checker Default HTML Output

To get results for all three types of records, you will need to create three separate configurations of the URL Checker report, one each for bibliographic record URLs, item record URLs, and holdings record URLs.

Note: You do not have to use the URL Checker report to check URLs in records. You have the option of running `getURLs.sh`, which extracts URLs to a file, and then using a tool of your choice to check the viability of URLs. For details about `getURLs.sh`, see the *Virtua System Management: Reporting User's Guide*.

23.1 Parameters Available for the URL Checker Report

The URL Checker report offers the following Report-specific Parameters:

- **History File Directory** (*required*) - Lets you specify the directory to which InfoStation should write the history file, which records bad URLs detected by the report and the number of times each URL has failed.

The first time a connection fails, the URL is written to the history file, and InfoStation records a failure count of 1 (one). Subsequent failures for the same URL increment the failure count. When a URL reaches the Minimum Failures Allowed, as specified by the report configuration, the URL is reported in the output.

Hint: The history file is named `uri_history_x.cfg`, where `x` is the number of the report configuration by which the file was generated.

- **Delete History File** (*optional*) - Lets you specify whether to delete the history file when you run the report configuration. Because the history file keeps a running total of the number of failures for each bad URL, you will want to delete this file periodically to reset the failure count for each URL.
- **Minimum Failure Count** (*required*) - Lets you specify the minimum number of times that a URL must exist in the history file to be included in the output. Each time a URL fails, its failure count is incremented in the history file. When a URL's failure count meets the minimum that you specify for a configuration, it is reported in the output. The Minimum Failure Count value must be greater than 0.

- **Timeout (Seconds)** (*required*) - Lets you specify the amount of time in seconds that the software will wait for a request to be returned (The reports sends 100 requests at a time). A setting of less than 5 is probably too low, and a setting greater than 10 is probably too high.
- **Record Type** (*required*) - Lets you specify the type of records for which you want to check URLs.
- **Result Codes** (*required*) - Lets you limit your results to “failed” connections associated with one or more result codes. For a failed URL to be reported in the output, it must have failed for one of the reasons that you select in the Result Codes list box.

Note: Some Result Codes such as **OK (200)** do not reflect a failure as such; nonetheless, you can choose to include these in your URL Checker output. But if you choose the **All or Any** option, the output will include all Result Codes *except* those in the 2xx range.

- **Include Call Number** (*optional*) - Lets you specify whether to include call number data in the output. If you select this check box, the output will include the call number associated with each failed URL.
- **Include Author** (*optional*) - Lets you specify whether to include author data in the output. If you select this check box, the output will include the author associated with each failed URL.
- **Include Title** (*optional*) - Lets you specify whether to include title data in the output. If you select this check box, the output will include the title associated with each failed URL.

For additional information about these Report-specific Parameters, see the *InfoStation Reference Guide* or view the InfoStation online help.

23.2 Data Elements and Variables for the URL Checker Report

In the following table, we list the name, variable, description, and source of each data element that is retrieved by default by the URL Checker 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 and Source
Author	author	The author associated with a given URL. Hint: To include author data in the output, you must select the Include Author check box in the Report-specific Parameters area.
Call Number	call_number	The call number associated with a given URL. Hint: To include call number data in the output, you must select the Include Call Number check box in the Report-specific Parameters area.
Failure Count	failure_count	The number of times a URL has failed, taken from the history file.
Record ID	record_id	The Bib-ID, Holdings-ID, or Item-ID associated with a failed URL, depending on the type of record in which the URL exists.
Result Code	result_code	The code associated with the connection result for the URL.
Title	title	The title associated with a given URL. Hint: To include title data in the output, you must select the Include Title check box in the Report-specific Parameters area.
Translated Message	translated_message	The result message associated with the connection failure.
URL	url	The URL from the bibliographic, holdings, or item record.

23.3 Result Messages for the URL Checker Report

In addition to editing data elements that appear in the output of the URL Checker report, you can also edit or translate the messages that the report outputs to describe the result of the URL check. The pre-set messages are displayed in the left-hand column in the Result Messages table on the configuration screen (*Figure 23-2*). To customize any message, edit the text of the message in the corresponding text box in the right-hand column.

Status Code	Message
Continue (100)	Continue (100)
Switching Protocols (101)	Switching Protocols (101)
Processing (102)	Processing (102)
OK (200)	OK (200)
Created (201)	Created (201)
Accepted (202)	Accepted (202)
Non-authoritative Information (203)	Non-authoritative Information (203)
No Content (204)	No Content (204)
Reset Content (205)	Reset Content (205)
Partial Content (206)	Partial Content (206)
Multi-Status (207)	Multi-Status (207)
Multiple Choices (300)	Multiple Choices (300)
Moved Permanently (301)	Moved Permanently (301)
Found (302)	Found (302)
See Other (303)	See Other (303)
Not Modified (304)	Not Modified (304)
Use Proxy (305)	Use Proxy (305)
Temporary Redirect (307)	Temporary Redirect (307)
Bad Request (400)	Bad Request (400)
Unauthorized (401)	Unauthorized (401)
Payment Required (402)	Payment Required (402)
Forbidden (403)	Forbidden (403)
Not Found (404)	Not Found (404)

Figure 23-2. URL Checker Report - Result Messages to Be Configured

23.4 Output Templates for the URL Checker Report

Location: /usr/vtls/virtua/webrpt_XX_x/Cat/Cat_8/[filename]

Filename	Contribution to Output
html_page.tem	Provides the overall framework of the HTML output.
html_row.tem	In HTML output, generates the information associated with a single URL.
email_page.tem	Provides the overall framework of the e-mail output.
email_row.tem	In e-mail output, generates the information associated with a single URL.

24. Appendix A - Special Features of Load/Extract Reports

The Configuration screens of the [Bibliographic Record Load and Extract report](#) and the [Patron Record Load and Extract report](#) display a special Field Definitions area, which lets provide information about the characteristics of the file that will be used in an upload or a download. In this appendix, we provide information that you can use to set up your Field Definitions.

Note: In this appendix, we provide general instructions for working with Field Definitions. You will need to customize these instructions and examples depending on the type of records you are loading or extracting (i.e., bibliographic or patron).

This chapter covers the following topics:

- ⇒ [Overview of Field Definitions](#)
- ⇒ [Setting Field Definitions for Uploads](#)
- ⇒ [Setting Field Definitions for Downloads](#)
- ⇒ [Setting Special Flags for Uploads and Downloads](#)
- ⇒ [Working with Decode Tables](#)
- ⇒ [About Processing Names](#)

24.1 Overview of Field Definitions

Field Definitions appear at the bottom of the Configuration screens in the [Bibliographic Record Load and Extract](#) and [Patron Record Load and Extract](#) reports ([Figure 24-1](#)).

Field Name	Length	Tag	Indicator 1	Indicator 2	Subfield Code	Special Flag	Error Handling	Decode Table
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	None	<input type="radio"/> Log <input type="radio"/> Skip <input type="radio"/> Stop	

Figure 24-1. Empty List of Field Definitions

Depending on whether you are uploading a data file to create or update records or downloading records to a data file, Field Definitions let you specify . . .

- How the data file should be processed to create or modify records in the database.
-OR-
- How records in the database should be processed to create the data file.

Field Definitions are organized into rows and columns. Each row in the list represents a field of data that you want to process, and each column lets you define various options for loading that field. Figure 24-1 shows how the Field Definitions area looks when NO options have been defined (e.g., when you add a new report configuration using the report template).

You can add rows to the list of Field Definitions to define processing rules for each field of data that you need to process during an upload or download.

To add a row to the list of Field Definitions,

1. In the empty row at the bottom of the list, use the fields provided to define the processing rules for a data field. For details, see the sections “[Setting Field Definitions for Uploads](#)” and “[Setting Field Definitions for Downloads](#)” in this appendix.
2. Click the Add button, which appears at the bottom of the Configuration screen.

The row is saved to the list of Field Definitions, and an empty row appears at the bottom of the list. For example, Figure 24-2 shows what the Field Definitions look like after Row 1, which contains the processing rules for the *first* field, has been added to the list.

	Field Name	Length	Tag	Indicator 1	Indicator 2	Subfield Code	Special Flag	Error Handling	Decode Table
C 1	New Account	9	015			a	None	<input checked="" type="radio"/> Log <input type="radio"/> Skip <input type="radio"/> Stop	
							None	<input checked="" type="radio"/> Log <input type="radio"/> Skip <input type="radio"/> Stop	

Figure 24-2. New Row Added to List of Field Definitions

You can use the empty row to define the processing rules for the *next* field in the data file. You can add to the list as many rows as necessary, one row for each field in the data file. For example, in Figure 24-3 we show how a completed list of Field Definitions might look for the Patron Record Load and Extract report.














	Field Name	Length	Tag	Indicator 1	Indicator 2	Subfield Code	Special Flag	Error Handling	Decode Table
<input type="radio"/> 1	New Account	9	015			a	Required	<input type="radio"/> Log <input type="radio"/> Skip <input checked="" type="radio"/> Stop	
<input type="radio"/> 2	Initials	4	999			a	Discard	<input checked="" type="radio"/> Log <input type="radio"/> Skip <input type="radio"/> Stop	
<input type="radio"/> 3	Membership Code	2	030			a	Required	<input checked="" type="radio"/> Log <input type="radio"/> Skip <input type="radio"/> Stop	
<input type="radio"/> 4	Last Name	18	100			a	Name Element 1	<input checked="" type="radio"/> Log <input type="radio"/> Skip <input type="radio"/> Stop	
<input type="radio"/> 5	First Name	14	100			a	Name Element 2	<input checked="" type="radio"/> Log <input type="radio"/> Skip <input type="radio"/> Stop	
<input type="radio"/> 6	Middle Name	14	100			a	Name Element 3	<input checked="" type="radio"/> Log <input type="radio"/> Skip <input type="radio"/> Stop	
<input type="radio"/> 7	Home Address Line 1	34	270	1		a	Required	<input checked="" type="radio"/> Log <input type="radio"/> Skip <input type="radio"/> Stop	
<input type="radio"/> 8	Home Address Line 2	26	270	1		a	None	<input checked="" type="radio"/> Log <input type="radio"/> Skip <input type="radio"/> Stop	
<input type="radio"/> 9	Department	4	301			d	None	<input checked="" type="radio"/> Log <input type="radio"/> Skip <input type="radio"/> Stop	
<input type="radio"/> 10	Home City	20	270	1		b	None	<input checked="" type="radio"/> Log <input type="radio"/> Skip <input type="radio"/> Stop	
<input type="radio"/> 11	Home Province	2	270	1		d	None	<input checked="" type="radio"/> Log <input type="radio"/> Skip <input type="radio"/> Stop	
<input type="radio"/> 12	Home Postal Code	10	270	1		e	None	<input checked="" type="radio"/> Log <input type="radio"/> Skip <input type="radio"/> Stop	
<input type="radio"/> 13	Home Phone	12	270	1		k	None	<input checked="" type="radio"/> Log <input type="radio"/> Skip <input type="radio"/> Stop	

Figure 24-3. Field Definitions - Long List Defined

At the beginning of each row (i.e., at the far left), a radio button appears. You can select the radio button and click the Delete button to delete the row.

To the right of the radio button, a number appears and specifies the number of a field in a data file.

- When you are uploading data, this is the number of the field in the input file.
- When you are downloading data, this is the number of the field in the output file.

To delete a field from the list of Field Definitions,

1. Select the radio button of the row that you want to delete.
2. Click the Delete button.

The row is deleted.

Important: When you delete a row from the list of Field Definitions, InfoStation shifts all remaining rows UP from the point of deletion, causing all fields below that point to be renumbered. Do NOT delete a field unless you want to change the field number for each subsequent row.

Each column to the right of the field number provides details on how to process each field. We describe these columns in detail in the sections “[Setting Field Definitions for Uploads](#)” and “[Setting Field Definitions for Downloads](#)” in this chapter.

24.2 Setting Field Definitions for Uploads

When you are uploading a file of data to create and update records in the database, the Field Definitions specify how the data fields should be entered into the record. As you define your Field Definitions for uploads, keep in mind that . . .

- All fields from the input file must be defined in the Field Definitions.
- Each field must be processed in the order in which it appears in the file. For example,
 - ◆ The *first* row of Field Definitions defines rules for the *first* field in the data file.
 - ◆ The *second* row of Field Definitions defines rules for the *second* field in the data file.

Note: While the order of the list must match the order of the fields in the input file, fields can be loaded into the record into non-sequential tags.

For each field in the input file, you can define the following options:

- **Field Name** (*required*) - A description of the field. This description does not appear in the data file or in the record. It is for display purposes only and provides you with an easy way of identifying data fields in the report configuration.
- **Length** (*required*) - The length of a given field.
 - ◆ For fixed-format files, the Length lets you specify the field length of each field in the input file. By specifying the length of each field, you are indicating to Virtua where one field ends and another begins. In this way, Virtua knows how much data to load into each record tag.
 - ◆ For delimited files, the Length lets you specify the maximum length of a given field. Fields that exceed this limit will be truncated to the specified Length and loaded into the record in their shortened form.

Hint: If you do not want InfoStation to truncate your data, specify a Length of **0** (zero).

- **Tag** (*required*) - The record tag into which the data in a given field will be loaded. Consider the following example:

Field Name	Length	Tag	Indicator 1	Indicator 2	Subfield Code	Special Flag	Error Handling	Decode Table
C 1 New Account	9	015			a	None	Log Skip Stop	

Figure 24-4. Example of Field Definitions for Upload

According to Figure 24-4, data found in the first field of the data file will be loaded into the 015 tag of the patron record.

- **Indicator 1** (*optional*) - The first indicator of the tag specified in the Tag column. If you do not specify an Indicator 1, the tag's first indicator will be blank.
- **Indicator 2** (*optional*) - The second indicator of the tag specified in the Tag column. If you do not specify an Indicator 2, the tag's second indicator will be blank.

Note: While both indicators are optional, if you define one indicator you must also define the other. If you want to specify a value for one indicator and a blank for another, use `\s` (space) to mean *blank*.

- **Subfield Code** (*required*) - The subfield of a given tag into which the data in a given field will be loaded.
- **Special Flag** (*required*) - A special condition that will be applied to a given field in the data load. For details on choosing a Special Flag setting, see the section “[Setting Special Flags for Uploads and Downloads](#)” in this appendix. While this option is required, a Special Flag of None means that no special condition will be applied to the field.
- **Error Handling** (*required*) - The action that InfoStation will take when a field has been flagged Required (see “[Setting Special Flags for Uploads and Downloads](#)”) but does not exist in the input file. While this setting is required, it is used only when the Special Flag is set to Required. You can choose . . .
 - ◆ **Log** - The error is logged, but the data load continues.
 - ◆ **Skip** - The current record is skipped, and the data load continues with the next record.
 - ◆ **Stop** - The data load stops.
- **Decode Table** (*optional*) - Special rules for how a given field should be processed before it can be loaded into the record. For details, see the section “[Working with Decode Tables](#)” in this appendix.

24.3 Setting Field Definitions for Downloads

When you configure a load/extract report to download records from the database into a data file, the Field Definitions let you specify how tags in a given record should be processed when they are saved to the data file.

As you define your Field Definitions for downloads, keep in mind that . . .

- You are NOT required to download all tags from a record to the data file; you need to set up Field Definitions *only* for the tags that you want to download.
- Tags in a record can be processed in any order, but fields will be loaded into the output file in order indicated by the list of Field Definitions. For example,
 - ◆ The *first* row of Field Definitions specifies which data will be inserted into the *first* field of the output file. The first field, however, can come from any tag.
 - ◆ The *second* row of Field Definitions specifies which data will be inserted into the *second* field of the output file. The second field, however, can come from any tag.

For each tag that you want to save from the record to the output file, you must define the following options:

- **Field Name** (*required*) - A description of the field. This description does not appear in the record or in the data file. It is for display purposes only and provides you with an easy way of identifying data fields in the report configuration.
- **Length** (*required*) - The length of a given field.
 - ◆ For fixed-format files, the Length setting lets you specify the field length of each field in the input file. By specifying the length of each field, you are indicating to Virtua where one field ends and another begins. In this way, Virtua knows how much data to load from a given tag into a given field of the output file.
 - ◆ For delimited files, the Length setting lets you specify the maximum length of a given field. Fields that exceed this limit will be truncated to the specified Length and downloaded to the output file in their shortened form.

Hint: If you do not want InfoStation to truncate your data, specify a Length of 0 (zero).

- **Tag** (*required*) - The tag from which data will be taken and loaded into the output file. Consider the following example:

Field Name	Length	Tag	Indicator 1	Indicator 2	Subfield Code	Special Flag	Error Handling	Decode Table
1 New Account	9	015			a	None	Log Skip Stop	

Figure 24-5. Example of Field Definitions for Download

According to Figure 24-5, the data found in the 015 tag of the patron record will be loaded into the first field of the output file.

- **Indicator 1** (*optional*) - The first indicator of the tag specified in the Tag column.
- **Indicator 2** (*optional*) - The second indicator of the tag specified in the Tag column.

Note: The Indicator 1 and Indicator 2 fields are optional.

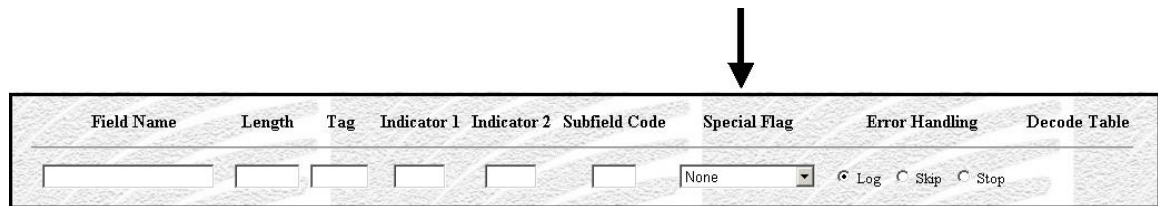
- If you specify *neither* indicator, Virtua downloads data from the tag defined in the Tag column, regardless of its indicators.
- If you specify *either* indicator, Virtua downloads data from the specified tag *only* if *both* indicators match.
- You can use **\s** (space) to specify a *blank*.

- **Subfield Code** (*required*) - The subfield of the tag specified in Tag column.
- **Special Flag** (*required*) - A special condition that will be applied to a given field in the data load. For details on choosing a Special Flag setting, see the section “[Setting Special Flags for Uploads and Downloads](#)” in this appendix. While this option is required, a Special Flag of None means that no special condition will be applied to the field.
- **Error Handling** (*required*) - The action that InfoStation should take when a tag has been flagged Required (see “[Setting Special Flags for Uploads and Downloads](#)”) but does not exist in the patron record. While this setting is required, it is used only when the Special Flag is set to Required. You can choose . . .
 - ◆ **Log** - The error is logged, but the data load continues.
 - ◆ **Skip** - The current record is skipped, and the data load continues with the next record.
 - ◆ **Stop** - The data load stops.

- **Decode Table** (*optional*) - Special rules for how a given field should be processed before it can be loaded into the output file. For details, see the section “[Working with Decode Tables](#)” in this appendix.

24.4 Setting Special Flags for Uploads and Downloads

Field Definitions offer Special Flags ([Figure 24-6](#)), which you can set to define a special, predefined condition for each field in the list of Field Definitions.



Field Name	Length	Tag	Indicator 1	Indicator 2	Subfield Code	Special Flag	Error Handling	Decode Table
						None	<input checked="" type="radio"/> Log <input type="radio"/> Skip <input type="radio"/> Stop	

Figure 24-6. Field Definitions - Special Flag

Note: Below we provide general descriptions of the Special Flags, which you can apply to any field in either an upload or a download. Keep in mind that the specific way in which InfoStation uses a Special Flag will depend upon whether you are performing an upload or a download.

You can choose from the following Special Flags:

- **None** - Specifies that NO special conditions should be applied to a given field. The Special Flag is set to None for each field by default.
- **Discard** - Specifies that when InfoStation is loading a record that already exists and a given incoming field matches the same field in the existing record, InfoStation will *overwrite* the existing data with the incoming data (i.e., the existing data is *discarded*). For an example, see the section “[Example of the Discard Flag](#)” in this chapter.
- **Match 1** - Specifies the first field on which to match incoming data with an existing record.
- **Match 2** - Specifies the second field on which to match incoming data with an existing record.
- **Match 3** - Specifies the third field on which to match incoming data with an existing record.

Note: The three Match flags are available only in the Bibliographic Record Load and Extract report.

- **Name Element 1** - Specifies that a given field is the first element of a name (e.g., author or patron).
- **Name Element 2** - Specifies that a given field is the second element of a name.
- **Name Element 3** - Specifies that a given field is the third element of a name.

Note: For uploads, the Name Element flags work in conjunction with the Name Processing settings that appear in the Upload to Database area. For details, see the section “[About Processing Names](#)” in this chapter.

- **Protect** - Specifies that when InfoStation is loading a record that already exists and a given incoming field matches the same field in the existing record, InfoStation should NOT overwrite the existing data with the incoming data (i.e., the existing field is *protected*). The incoming data will be discarded and will not be saved to the record. For an example, see the section “[Example of the Protect Flag](#)” in this chapter.

Note: InfoStation checks for existing records via the patron record 015 tag. If the 015 tag of a patron record matches the patron barcode field of the incoming data, the Patron Record Load and Extract report will overwrite the existing data with the new data by default. You can protect existing tags by using the Protect flag and Tags to Protect parameter.

- **Required** - Specifies that a given field is required and that if the field does not exist, InfoStation will generate a required field error and then check the Error Handling setting to determine how to proceed. For an example, see the section “[Example of the Required Flag](#)” in this guide.
- **Use Previous** - Specifies that the data found in the previous field should be loaded into the specified tag or field. For an example, see the section “[Example of the Use Previous Flag](#)” in this guide.

24.4.1 Example of the Discard Flag

In Figure 24-7, we show an example of how you might set the Discard flag for an upload.

	Field Name	Length	Tag	Indicator 1	Indicator 2	Subfield Code	Special Flag	Error Handling	Decode Table
<input type="radio"/> 1	New Account	9	015			a	Required	<input type="radio"/> Log <input type="radio"/> Skip <input checked="" type="radio"/> Stop	
<input type="radio"/> 2	Initials	4	999			a	Discard	<input checked="" type="radio"/> Log <input type="radio"/> Skip <input type="radio"/> Stop	

Figure 24-7. Field Definitions - Example of Discard Flag

According to the second row of Field Definitions in Figure 24-7, if the patron record already exists and contains data in the 999 tag, the data in the 999 tag will be *discarded* and replaced with the data found in Field 2 of the input file.

24.4.2 Example of the Protect Flag

In Figure 24-8, we show an example of how you might set the Protect flag for an upload.

	Field Name	Length	Tag	Indicator 1	Indicator 2	Subfield Code	Special Flag	Error Handling	Decode Table
<input type="radio"/> 1	New Account	9	015			a	Required	<input type="radio"/> Log <input type="radio"/> Skip <input checked="" type="radio"/> Stop	
<input type="radio"/> 2	Initials	4	999			a	Protect	<input checked="" type="radio"/> Log <input type="radio"/> Skip <input type="radio"/> Stop	

Figure 24-8. Field Definitions - Example of Protect Flag

According to the second row of Field Definitions in Figure 24-8, if the patron record already exists and contains a 999 tag, the data in the 999 tag will be *protected*, meaning that it will NOT be overwritten with the data found in Field 2 of the input file.

24.4.3 Example of the Required Flag

In Figure 24-9, we show an example of how you might set the Required flag for an upload.

	Field Name	Length	Tag	Indicator 1	Indicator 2	Subfield Code	Special Flag	Error Handling	Decode Table
<input type="radio"/> 1	New Account	9	015			a	Required	<input type="radio"/> Log <input checked="" type="radio"/> Skip <input type="radio"/> Stop	
<input type="radio"/> 2	Initials	4	999			a	Protect	<input checked="" type="radio"/> Log <input type="radio"/> Skip <input type="radio"/> Stop	

Figure 24-9. Field Definitions - Example of Required Flag

According to the first row of the Field Definitions in Figure 24-9, the Special Flag setting indicates that Field 1, which will be loaded into the patron record 015 tag, is required. For a given patron, if Field 1 does NOT exist in the input file, according to the Error Handling setting, Virtua will skip that patron and continue the data load using the next set of patron data.

For details on Error Handling, see the section “[Setting Field Definitions for Uploads](#)” or “[Setting Field Definitions for Downloads](#)” in this chapter.

24.4.4 Example of the Use Previous Flag

In Figure 24-10, we show an example of how you might set the Use Previous flag for an upload.



	Field Name	Length	Tag	Indicator 1	Indicator 2	Subfield Code	Special Flag	Error Handling	Decode Table
C 1	New Account	9	015			a	Required	<input type="radio"/> Log <input checked="" type="radio"/> Skip <input type="radio"/> Stop	
C 2	Initials	9	016			a	Use Previous	<input checked="" type="radio"/> Log <input type="radio"/> Skip <input type="radio"/> Stop	

Figure 24-10. Field Definitions - Example of Use Previous Flag

According to the first row of the Field Definitions in Figure 24-10, the data found in the first field of the data file will be loaded into the 015 tag of the patron record.

In the second row of the Field Definitions, the Use Previous flag is set, which means that the data from the first field of the data file (i.e., the “previous” field) will *also* be loaded into the patron record 016 tag.

Important: When you use the Use Previous flag with an upload, the numbers of the rows in the Field Definitions will NOT correspond directly with the number of the fields in the input file. For instance, based on the example above, the third row of Field Definitions would actually apply to the *second* field in the data file. Keep in mind that as long as the order and total number of Field Definitions matches the order and total number of the fields in the input file, Virtua will process the data correctly.

24.5 Working with Decode Tables

Decode tables let you create customized processing rules for each field in the list of Field Definitions. The Decode Table rules are applied to the aggregate subfields input data before the data get separated by the Subfield Delimiter value specified in the

report configuration. For this reason, the Subfield Delimiter value should be a value that does not conflict with the results of input decoding.

You can access decode tables via the icons that appear in the Decode Table column of the Field Definitions area (*Figure 24-11*) on the configuration screen.


	Field Name	Length	Tag	Indicator 1	Indicator 2	Subfield Code	Special Flag	Error Handling	Decode Table
C 1	New Account	9	015			a	None	<input checked="" type="radio"/> Log <input type="radio"/> Skip <input type="radio"/> Stop	

Figure 24-11. Field Definitions

A decode table icon appears in the last column of each row of the Field Definitions area. If a decode table has been defined for a given field, a box appears around the icon in that row. For example, in *Figure 24-12*, a decode table has been defined for the first field in the list of Field Definitions.



	Field Name	Length	Tag	Indicator 1	Indicator 2	Subfield Code	Special Flag	Error Handling	Decode Table
C 1	New Account	9	015			a	Required	<input type="radio"/> Log <input checked="" type="radio"/> Skip <input type="radio"/> Stop	
C 2	Initials	4	999			a	Protect	<input checked="" type="radio"/> Log <input type="radio"/> Skip <input type="radio"/> Stop	

Figure 24-12. Field Definitions - Decode Table Defined

In the following sections, we provide details on setting up decode tables. We also provide examples that you can use to configure your own decode tables.

24.5.1 Accessing Decode Tables

To access the decode table for a field,

- In the appropriate row, click the decode table icon.

The Edit Decode Table - Field X screen appears (*Figure 24-13*), where X is the number of the field to which the decode table applies.

Figure 24-13. Edit Decode Table Window

24.5.2 Aspects of the Edit Decode Table Screen

On the Edit Decode Table, you can define a decode table by supplying information in three columns:

- **Parameter 1** - Lets you specify the first parameter in a decode statement.
- **Parameter 2** - Lets you specify the second parameter in a decode statement.
- **Decode Type** - Lets you specify the type of decoding to perform for a given decode statement. You can choose from the following decode types:
 - ◆ **Replacement** - Specifies that whenever a field consists *entirely* of Parameter 1, it will be replaced with Parameter 2.
 - ◆ **Substitution** - Specifies that wherever Parameter 1 appears in a field, it will be substituted with Parameter 2.
 - ◆ **Split** - Specifies that data in the field will be split according to the rules specified by Parameter 1 and returned according to Parameter 2.
 - ◆ **Template** - Specifies that data will be modified according to the template specified in Parameter 1.
 - ◆ **Default** - Specifies that data will default to the value specified in Parameter 1.
 - ◆ **Date** - Specifies that wherever a date appears in the format specified in Parameter 1, it will be replaced with a date in the format specified in Parameter 2.

For additional details on the various decode types, see the following sections in this chapter, in which we provide an example of each type.

Additionally, the Edit Decode Table screen contains five buttons:

- **Add** - Adds a row to the decode table.
- **Delete** - Deletes the selected row from the decode table.
- **Save** - Saves your changes and closes the Edit Decode Table screen.
- **Close** - Closes the Edit Decode Table screen without saving your changes.
- **Clear** - Clears the information from the current row of the decode table.

24.5.3 Setting Up Decode Tables

To define a decode table for a given field,

1. On the Configuration screen, in the Field Definitions list, click the Decode Table icon for the field for which you want to define a decode table.

The Edit Decode Table screen appears in a new window.

2. On the Edit Decode Table screen, in the Parameter 1 text box, type the first parameter in your first decode statement.
3. In the Parameter 2 text box, type the second parameter in your first decode statement.
4. In the Decode Type list box, select the decode type for your first decode statement.
5. Click the Add button.

InfoStation saves your first decode statement and adds an empty row to the list.

6. If you want to define a second decode statement, set Parameter 1, Parameter 2, and the Decode Type in the empty row, and then click the Add button.
7. Repeat Step 6 until you have added all the desired rows.
8. When you are finished, click the Save button.

InfoStation saves the decode table. You can close the Edit Decode Table window and return to the Configuration screen.

24.5.4 Editing Decode Tables

To edit a decode table,

1. On the Configuration screen, in the Field Definitions list, click the Decode Table icon for the field whose decode table you want to edit.

The Edit Decode Table screen appears in a new window.

2. Edit the decode statements as needed.
3. When you are finished editing the decode statements, click the Save button.

InfoStation saves your changes.

24.5.5 Deleting Decode Tables

To delete a decode table,

1. On the Configuration screen, in the Field Definitions list, click the Decode Table icon for the field whose decode table you want to delete.

The Edit Decode Table screen appears in a new window.

2. Select the radio button that corresponds to the first decode statement.
3. Click the Delete button.

InfoStation deletes the decode statement.

4. Continue deleting the decode statements until you have deleted all the rows from the list.
5. When you have deleted ALL the decode statements, click the Save button.

InfoStation saves your changes.

24.5.6 Examples of Decode Tables

In the following sections, we provide examples of the different types of decode tables that you can configure for the Bibliographic Record and Extract and Patron Record Load and Extract reports. For our examples, we refer to patron records, but you can use these guidelines for bibliographic records as well.

Note: In our examples, we use the same decode type in each row of the decode table. Note that you can use a different decode type in each row to create a more complex decode table.

When working with decode tables, it is important to keep the following principles in mind:

- The output from one decode statement will be used by the *next* row of the decode statement. For example,
 - ◆ The second decode statement is applied to the output of the first decode statement.
 - ◆ The third decode statement is applied to the output of the second decode statement.
- The output from the *last processed* decode statement will be loaded in the record (for an upload) or the output file (for a download).
- If the data in a given field does NOT meet the requirements of a decode table, the data will NOT be decoded and will be loaded in its original form.

For details on setting up decode tables, see the section “[Setting Up Decode Tables](#)” in this chapter.

24.5.6.1 Example of a Replacement Decode Table

A Replacement decode statement lets you specify that when a field consists *entirely* of a particular value, it should be replaced with another specified value. In a given row of a Replacement decode statement . . .

- Parameter 1 specifies the value that a field must contain for the replacement to occur.
- Parameter 2 specifies the value that will be loaded when a field consists entirely of the value specified by Parameter 1.

Consider an example for a patron data upload where Field 24 of the input file contains *codes* (0-8) for patron name prefixes. Instead of loading these codes into the patron record, however, your library wants to convert each code to the appropriate prefix and load the *prefix* into subfield \$e of the patron record 100 tag. You can do this using a Replacement decode table.

In ([Figure 24-14](#)) we show a Replacement decode table which specifies how the codes in Field 24 should be replaced with the appropriate prefix.

Edit Decode Table - Field 24

Select a decode type and enter appropriate parameters in each box. In Split type decode parameters \s equals a Space character and \t equals a Tab character

	Parameter 1	Parameter 2	Decode Type
<input type="radio"/> 1	<input type="text" value="0"/>	<input type="text" value="Mr."/>	Replacement ▾
<input type="radio"/> 2	<input type="text" value="1"/>	<input type="text" value="Mrs."/>	Replacement ▾
<input type="radio"/> 3	<input type="text" value="2"/>	<input type="text" value="Ms."/>	Replacement ▾
<input type="radio"/> 4	<input type="text" value="3"/>	<input type="text" value="Miss"/>	Replacement ▾
<input type="radio"/> 5	<input type="text" value="4"/>	<input type="text" value="Dr."/>	Replacement ▾
<input type="radio"/> 6	<input type="text" value="5"/>	<input type="text" value="Rabbi"/>	Replacement ▾
<input type="radio"/> 7	<input type="text" value="6"/>	<input type="text" value="Justice"/>	Replacement ▾
<input type="radio"/> 8	<input type="text" value="7"/>	<input type="text" value="Honourable"/>	Replacement ▾
<input type="radio"/> 9	<input type="text" value="8"/>	<input type="text" value="Prof."/>	Replacement ▾
	<input type="text"/>	<input type="text"/>	Replacement ▾

Figure 24-14. Example of a Replacement Decode Table

Each statement in the decode table specifies how a particular code (0-8) will be replaced with a particular prefix. For example,

- The first decode statement specifies that . . .
 - ◆ When Field 24 in the input file consists entirely of the value **0** (zero) . . .
 - ◆ The value **Mr.** will be loaded into the appropriate field in the patron record.
- The second decode statement specifies that . . .
 - ◆ When Field 24 in the input file consists entirely of the value **1** (one) . . .
 - ◆ The value **Mrs.** will be loaded into the appropriate field in the patron record.

In this way, the codes stored in Field 24 of the input file will be replaced with the appropriate prefixes, which will then be loaded into the patron records.

24.5.6.2 Example of a Substitution Decode Statement

A Substitution decode statement lets you specify that when a particular value exists *anywhere* in a given field, it should be substituted by another specified value. In a given row of a Substitution decode statement . . .

- Parameter 1 specifies the value that must exist in a field for the substitution to occur.
- Parameter 2 specifies the value that will be substituted for the value specified in Parameter 1.

Important: A Substitution decode statement is different from a Replacement decode statement.

- For a Replacement to occur, a given field must consist *entirely* of the value specified in Parameter 1. InfoStation will then replace Parameter 1 with Parameter 2 so that the resulting field will consist *entirely* of Parameter 2.
- For a Substitution to occur, Parameter 1 can exist *anywhere* in a given field, making up either the entire field or just a *part* of it. InfoStation will then substitute Parameter 2 for Parameter 1, leaving the rest of the field intact.

Consider an example where your academic library is uploading patron data taken from your student registration system to create patron records in your library database and . . .

- Field 12 of the input file contains each patron's street address. Your patron registration allows abbreviations in street addresses.
-AND-
- Your library database does NOT use abbreviations in patron street addresses. So you will want to substitute entire words for any abbreviations that appear in the input file.

You can define a Substitution decode table to substitute words for abbreviations and load them into patron records, as shown in ([Figure 24-15](#)).

Edit Decode Table - Field 12

Select a decode type and enter appropriate parameters in each box. In Split type decode parameters \s equals a Space character and \t equals a Tab character

	Parameter 1	Parameter 2	Decode Type
<input type="radio"/> 1	<input type="text" value="St."/>	<input type="text" value="Street"/>	Substitution ▾
<input type="radio"/> 2	<input type="text" value="Rd."/>	<input type="text" value="Road"/>	Substitution ▾
<input type="radio"/> 3	<input type="text" value="Dr."/>	<input type="text" value="Drive"/>	Substitution ▾
<input type="radio"/> 4	<input type="text" value="Rt."/>	<input type="text" value="Route"/>	Substitution ▾
<input type="radio"/> 5	<input type="text" value="Cir."/>	<input type="text" value="Circle"/>	Substitution ▾
<input type="radio"/> 6	<input type="text" value="Ln."/>	<input type="text" value="Lane"/>	Substitution ▾
<input type="radio"/> 7	<input type="text" value="Pl."/>	<input type="text" value="Place"/>	Substitution ▾
<input type="radio"/> 8	<input type="text" value="Bld."/>	<input type="text" value="Boulevard"/>	Substitution ▾
<input type="radio"/> 9	<input type="text" value="Apt."/>	<input type="text" value="Apartment"/>	Substitution ▾
	<input type="text"/>	<input type="text"/>	Replacement ▾

Figure 24-15. Example of a Substitution Decode Table

Each statement in the decode table specifies how a particular abbreviation will be replaced with an entire word. For example,

- The first decode statement specifies that . . .
 - ◆ Where **St.** appears in Field 12 in the input file . . .
 - ◆ It will be replaced with the word **Street**, which will be loaded into the patron record.
- The second decode statement specifies that . . .
 - ◆ Where **Rd.** appears in Field 12 in the input file . . .
 - ◆ It will be replaced with the word **Road**, which will be loaded into the patron record.

Keep in mind that in a Substitution decode statement Parameter 2 substitutes Parameter 1 wherever it appears in the field, leaving the rest of the field intact. For example, if Field 12 contained the string . . .

123 Washington St.

InfoStation would substitute *Street only* for **St.** and load the following string into the patron record:

123 Washington Street

24.5.6.3 Example of a Split Decode Statement

A Split decode statement lets you split a string of data into two parts and return one of those parts. In a given row of a Split decode statement . . .

- Parameter 1 specifies the character(s) at which a string will be split.
- Parameter 2 specifies which part of the split string will be returned.

Consider an example for a patron data upload where . . .

- Field 1 of the input file contains the patron's nine-digit Social Security Number in the format **XXX-XX-XXXX**.
-AND-
- Your library wants to load only the last six digits of the Social Security Number (**XX-XXXX**) into the patron record 015 tag to be used as the patron barcode.

You can define a Split decode statement to split the Social Security Number and load only the last six digits into the patron record, as shown in ([Figure 24-16](#)).

Edit Decode Table - Field 1

Select a decode type and enter appropriate parameters in each box. In Split type decode parameters \s equals a Space character and \t equals a Tab character

	Parameter 1	Parameter 2	Decode Type
C 1	-	1	Split ▼
			Replacement ▼

Figure 24-16. Example of a Split decode table

According to the Split decode statement in (Figure 24-16) . . .

- Parameter 1 specifies that InfoStation will split the incoming string at the first hyphen. For our example this means that InfoStation will split the Social Security Number in the following way:

123-45-6789

After InfoStation splits the string, it numbers the two parts in the following way:

0
1
 123-45-6789

Important: A split results in an array of elements. Elements in an array are numbered starting with 0 (zero), so the two parts of the split result set are numbered **0** and **1**.

- Parameter 2 specifies that array element 1 from the first split will be returned. So, for our example, the output from this decode statement is . . .

45-6789

Hint: If you type **0** instead of **1** in the Parameter 2 text box, the output of the first decode statement would be **123-** .

For additional examples of Split decode tables, see the section “[Processing Patron Names for Downloads](#)” in this chapter.

24.5.6.4 Example of a Template Decode Statement

A Template decode statement lets you modify the data in a given field according to the template that you define in Parameter 1.

Note: In a Template decode statement, Parameter 2 is NOT used.

Consider an example where your academic library is uploading patron data from your student registration system to create patron records in your library database and . . .

- Field 1 of the input file contains each patron’s student ID number.
-AND-
- In your library, all patron barcodes begin with the number 2 (two), so you want to add a 2 to the beginning of each patron ID number and load the modified number into the patron record 015 tag.

You can define a Template decode table to add a 2 at the beginning of each student ID number and load the modified number into the patron record ([Figure 24-17](#)).

Edit Decode Table - Field 1

Select a decode type and enter appropriate parameters in each box. In Split type decode parameters \s equals a Space character and \t equals a Tab character

	Parameter 1	Parameter 2	Decode Type
C 1	<input type="text" value="2\$1"/>	<input type="text"/>	Template ▾
	<input type="text"/>	<input type="text"/>	Replacement ▾

Figure 24-17. Example of Template Decode Table

According to Parameter 1 in the decode statement shown above, the number 2 will be added to the beginning of the data found in Field 1.

Hint: The value **\$1** is a variable, which represents Field 1.

For example, if Field 1 contains the string **123456789**, InfoStation will add a 2 to the beginning of the string to create the patron barcode **2123456789**, which will be loaded into the patron record.

24.5.6.5 Example of a Default Decode Statement

A Default decode table lets you specify that data in a given field should default to the value specified in Parameter 1.

Note: In a Default decode statement, Parameter 2 is NOT used.

Consider an example where your academic library is uploading patron data taken from your student registration system to create patron records in your library database and . . .

- Field 13 of the input file contains a numeric code that designates each registrant as being of the type *Student*.
- AND-
- Your library uses the code **ST**, as defined in the Virtua Profiler, to designate patrons as being of the type *Student*. This code is stored in the patron record 030 tag.

You can define a Default decode table to specify that Field 13 should default to the code **ST**, which will be loaded into the patron record (*Figure 24-18*).

Edit Decode Table - Field 13

Select a decode type and enter appropriate parameters in each box. In Split type decode parameters \s equals a Space character and \t equals a Tab character

	Parameter 1	Parameter 2	Decode Type
1	<input type="text" value="ST"/>	<input type="text"/>	Default ▼
	<input type="text"/>	<input type="text"/>	Replacement ▼

Figure 24-18. Example of a Default Decode Table

According to the Default decode statement shown above, Parameter 1 specifies the default value for Field 13. This means that regardless of the data that InfoStation finds in Field 13 of the input file, the code **ST** will be loaded into the patron record.

24.5.6.6 Example of a Date Decode Statement

A Date decode statement lets you modify the format of incoming date strings. In a Date decode statement . . .

- Parameter 1 specifies the date format of the incoming date string.
- Parameter 2 specifies how the date will be reformatted and returned.

Consider an example of a patron data upload where . . .

- Field 31 of the input file contains each patron’s registration date in the format **YYYDDDD**.
- AND-
- Your library wants to reformat the date as **YYYYMMDD** and load it into the 042 tag subfield \$a of the patron record.

You can define a Date decode table to reformat the date and load it into the patron record in the format **YYMMDD** (*Figure 24-19*).

	Parameter 1	Parameter 2	Decode Type
1	YYYYYDDD	YYYYMMDD	Date
			Replacement

Figure 24-19. Example of Date Decode Table

In the Date decode statement shown above . . .

- Parameter 1 defines the format of the incoming date string as **YYYYYDDD**.

- Parameter 2 specifies that dates should be reformatted as **YYYYMMDD**.

For example, when the date January 1, 2003 appears in the input file in the format **2003001**, it will be loaded into the patron record in the format **20030101**.

24.6 About Processing Names

The Name Processing option in the Upload to Database parameters of the Record Load and Extract reports lets you specify whether the name fields such as author and patron require special processing. You can set the Name Processing parameter to...

- **Off** - Name fields will be loaded *exactly* as they appear in the input file.
- **On** - Name fields will be loaded according to special processing rules specified in the text box.

The Name Processing option works in conjunction with the Name Element flags in the Field Definitions area of the report.

If special processing of names is required for extraction of record data to an output file, you can specify Split decode tables to ensure that the name data is placed in the appropriate fields in the output file.

The Name Processing option can be quite useful for customers who catalog all parts of a patron name, except for the prefix and suffix, in one subfield of tag 100 in the patron record. Patron name elements may be stored in ONE field in the patron record but in MORE than one field in a fixed-format or delimited file (e.g., the first name might be in Field 1 of a patron data file, the middle name in Field 2, and the last name in Field 3). Because of this, InfoStation must provide a way of exchanging patron name data between patron records and fixed-field and delimited files while maintaining proper formatting and field placement.

In this section, in describing the special processing of names in uploads and downloads (or extractions), we use the example of patron records where a patron name is stored in subfield \$a of the 100 tag in the format **[last name], [first name] [middle name]** (e.g., Smith, John Jacob).

Note: The Innovative-defined 2709 patron record format specifies that all three parts of the patron name be stored in three separate subfields of tag 100 of the patron record. However, Virtua also supports the storage of all parts of a patron name in a *single* subfield.

When you are performing a(n) . . .

- **Upload**, if each component of the patron name is stored in a different field of the input file, the Name Processing parameters work in conjunction with the Name Element flags to let you specify how individual name fields should be processed so that all components of the patron name end up in either the 100 or 110 tag of the patron record.
- **Download**, if you want to download each component of the patron name into a different field in the output file, you can set up a Split decode table to process the 100 or 110 tag so that each patron name element ends up in a different field in the output file.

In the following sections, we provide details on processing patron names for uploads and downloads.

24.6.1 Processing Patron Names for Uploads

For uploads, the Patron Record Load and Extract report lets you define special rules for processing the name fields in the input file so that they will be loaded into the patron record in the proper format.

Note: In the following examples, we assume that you store patron names in subfield \$a of the 100 or 110 tag in the format **[last name], [first name] [middle name]**. If you store patron names in some other format, you will need to modify the following instructions accordingly.

Consider an example where . . .

- In the input file, the patron name is stored in three separate fields in the following order:
 - ◆ Field 1 - First Name
 - ◆ Field 2 - Middle Name
 - ◆ Field 3 - Last Name
- In the patron record, the patron name is stored as **[last name], [first name] [middle name]** in subfield \$a of the 100 tag.

To configure name processing options to load the patron name elements into the patron record in the proper format,

1. In the Upload to Database area of the Configuration screen, turn the Name Processing option On. This tells InfoStation that you wish to apply special rules to the fields that you will designate as Name Elements in Step 3.
2. In the Name Processing text box, specify how the name fields in the input file should be combined within the 100 tag of the patron record. Use the variables **\$1**, **\$2**, and **\$3** to represent the three possible Name Elements, which you define in step 3. By default, the Name Processing text box specifies the format and order as **\$1, \$2 \$3**. This means that . . .
 - ◆ Name Element 1 (\$1) will be loaded first, followed by a comma and a space.
 - ◆ Name Element 2 (\$2) will be loaded after the space, followed by another space.
 - ◆ Name Element 3 (\$3) will be loaded after the last space.

Note: For our example, we will use the default name processing order. If you set a different order, you will need to adjust the Name Element flags in Step 3 appropriately.

3. Using the Field Definitions at the bottom of the Configuration screen, set the Name Element 1, Name Element 2, and Name Element 3 flags to specify which fields of the input file contain the first, second, and third name elements. The Name Element flags correspond to the variables you used in Step 2:
 - Name Element 1 = \$1
 - Name Element 2 = \$2
 - Name Element 3 = \$3

Figure 24-20 shows an example of how you might set the Field Definitions for name processing.

	Field Name	Length	Tag	Indicator 1	Indicator 2	Subfield Code	Special Flag	Error Handling	Decode Table
C 1	First Name	14	100			a	Name Element 2	<input checked="" type="radio"/> Log <input type="radio"/> Skip <input type="radio"/> Stop	
C 2	Middle Name	14	100			a	Name Element 3	<input checked="" type="radio"/> Log <input type="radio"/> Skip <input type="radio"/> Stop	
C 3	Last Name	20	100			a	Name Element 1	<input checked="" type="radio"/> Log <input type="radio"/> Skip <input type="radio"/> Stop	

Figure 24-20. Field Definitions - Example of Name Element Flags

According to the settings shown in Figure 24-20,

- The first field in the input file contains Name Element 2 (\$2), which is the first name.
- The second field in the input file contains Name Element 3 (\$3), which is the middle name.
- The third field in the input file contains Name Element 1 (\$1), which is the last name.

In the following table we summarize the information provided above:

Field	Place in Input File	Variable in Name Processing Order	Name Element Flag
First Name	Field 1	\$2	Name Element 2
Middle Name	Field 2	\$3	Name Element 3
Last Name	Field 3	\$1	Name Element 1

In this way, the patron name elements will be combined in subfield \$a of the patron record 100 tag using the following format:

- **\$1, \$2 \$3**, which is the same as . . .
- **[Name Element 1], [Name Element 2] [Name Element 3]**, which is . . .
- **[last name], [first name] [middle name]**, which, for example might be . . .
- **Smith, John Jacob**

24.6.2 Processing Patron Names for Downloads

In the patron record, all patron name elements may be stored in a single field: subfield \$a of the patron record 100 tag. When you are using the Patron Record Load and Extract report to download patron data into a fixed-format or delimited file, you may wish to download *each* patron name element into a *separate* field in the output file. You can do this by setting up a Split decode table for each patron name field.

Consider the following example, where . . .

- In the patron record the patron name is stored as **[Last Name], [First Name] [Middle Name]** in subfield \$a of the 100 tag.

-AND-

- In the output file, you want the patron name to be stored in three separate fields in the following order:
 - ◆ **Field 1** - First Name
 - ◆ **Field 2** - Middle Name
 - ◆ **Field 3** - Last Name

For this example, you will want to set up three Split decode tables (one for each field in the output file) to divide the patron name into three parts and load each part into a separate field in the output file.

Important: In the following instructions, we assume that you have already read the section “[Working with Decode Tables](#),” which provides an overview of Decode Tables and an introduction to the terminology and concepts used here.

To set up a Split decode table for our example,

1. Set up the Field Definitions in the following way ([Figure 24-21](#)):

	Field Name	Length	Tag	Indicator 1	Indicator 2	Subfield Code	Special Flag	Error Handling	Decode Table
<input type="radio"/> 1	First Name	14	100			a	None	<input checked="" type="radio"/> Log <input type="radio"/> Skip <input type="radio"/> Stop	
<input type="radio"/> 2	Middle Name	14	100			a	None	<input checked="" type="radio"/> Log <input type="radio"/> Skip <input type="radio"/> Stop	
<input type="radio"/> 3	Last Name	20	100			a	None	<input checked="" type="radio"/> Log <input type="radio"/> Skip <input type="radio"/> Stop	

Figure 24-21. Field Definitions for Uploading Patron Name Data

This means that in the output file, a patron’s . . .

- First name will be loaded into Field 1.
 - Middle Name will be loaded into Field 2.
 - Last Name will be loaded into Field 3.
2. For Field 1, which in this case is the patron’s *first* name, set up the following Split decode table ([Figure 24-22](#)):

Edit Decode Table - Field 1

Select a decode type and enter appropriate parameters in each box. In Split type decode parameters \s equals a Space character and \t equals a Tab character

	Parameter 1	Parameter 2	Decode Type
C 1	<input type="text" value="\s"/>	<input type="text" value="1"/>	Split ▼
C 2	<input type="text" value="\s"/>	<input type="text" value="0"/>	Split ▼
	<input type="text"/>	<input type="text"/>	Replacement ▼

Figure 24-22. Split Decode Table for Patron First Name

- According to the first decode statement in this Decode Table (Figure 24-22),
 - ◆ Parameter 1 specifies that InfoStation will take the patron data it finds in subfield \$a of the 100 tag and split it *first* at the first comma and space. So for our example, InfoStation will *first* split the patron name as . . .

0
1
[Last Name], | **[First Name] [Middle Name]**

- ◆ Parameter 2 specifies that array element 1 is the output of the first split. So for our example, the output from the first split is . . .

[First Name] [Middle Name]

- According to the second decode statement in this Decode Table (Figure 24-22),
 - ◆ Parameter 1 specifies that InfoStation will take the output from the first decode statement and split it at the first space. So for our example, where the output from the first decode statement is **[First Name] [Middle Name]**, InfoStation will split the patron name as . . .

0
1
[First Name] | **[Middle Name]**

- ◆ Parameter 2 specifies that array element 0 is the output of the second split. So for our example, the output from the second split is . . .

[First Name]

The second decode statement is the *last* split defined for this Decode Table. Therefore, the output from the second decode statement, **[First Name]**, is the *final* output from this Split decode table and will be downloaded into Field 1 of the output file. Remember that in the Field Definitions ([Figure 24-21](#)), we defined Field 1 as the First Name.

3. For Field 2, which for our example is the patron's *middle* name, set up the following Split decode table ([Figure 24-23](#)):

	Parameter 1	Parameter 2	Decode Type
<input type="radio"/> 1	\s	1	Split
<input type="radio"/> 2	\s	1	Split
			Replacement

Buttons: Add, Delete, Save, Close, Clear

Figure 24-23. Split Decode Table for Patron Middle Name

- According to the first decode statement in this Decode Table ([Figure 24-23](#)),
 - ◆ Parameter 1 specifies that InfoStation will take the patron data it finds in subfield \$a of the 100 tag and split it *first* at the first comma and space. So for our example, InfoStation will *first* split the patron name as . . .

0
1
[Last Name], | **[First Name] [Middle Name]**

- ◆ Parameter 2 specifies that Array Element 1 is the output of the first split. So for our example, the output from the first split is . . .

[First Name] [Middle Name]

- According to the second decode statement of the Decode Table),
 - ◆ Parameter 1 specifies that InfoStation will take the output from the first decode statement and split it at the first space. So for our example, where the output from the first decode statement is [First Name] [Middle Name], InfoStation will split the patron name as . . .

0
1
 [First Name] | [Middle Name]

- ◆ Parameter 2 specifies that **Array Element 1** is the output of the second split. So for our example, the output from the second split is . . .

[Middle Name]

The second decode statement is the *last* split defined for this Decode Table. Therefore, the output from the second decode statement, [Middle Name], is the *final* output from the Split decode table and will be downloaded into Field 2 of the output file. Remember that in the Field Definitions (*Figure 24-21*), we defined Field 2 as the Middle Name.

4. For Field 3, which for our example is the patron’s *last* name, set up the following Split decode table (*Figure 24-24*):

Edit Decode Table - Field 3

Select a decode type and enter appropriate parameters in each box. In Split type decode parameters \s equals a Space character and \t equals a Tab character

	Parameter 1	Parameter 2	Decode Type
C 1	<input type="text" value="\s"/>	<input type="text" value="0"/>	Split ▼
	<input type="text"/>	<input type="text"/>	Replacement ▼

Figure 24-24. Split Decode Table for Patron Last Name

- According to the first decode statement of this Decode Table ([Figure 24-24](#)),
 - ◆ Parameter 1 specifies that InfoStation will take the patron data it finds in subfield \$a of the 100 tag and split it *first* at the first comma and space. So for our example, InfoStation will *first* split the patron name as . . .

0	1
[Last Name],	[First Name] [Middle Name]

- ◆ Parameter 2 specifies that Array Element 0 is the output of the first split. So for our example, the output from the first split is . . .

[Last Name]

The first decode statement is the *only* split defined for this Decode Table. Therefore, the output from the first decode statement, **[Last Name]**, is the *final* output from the Split decode table and will be downloaded into Field 3 of the output file. Remember that in the Field Definitions ([Figure 24-21](#)), we defined Field 3 as the Last Name.

25. Appendix B - Changes in this Guide

25.1 Changes for Version 16.1

No changes were made.

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