Reference Guide

Integrated Library System

InfoStation®

Circulation Reports

VIRTUA ILS – INTEGRATED LIBRARY SYSTEM

InfoStation®

Circulation Reports Reference Guide

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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. This reference guide provides information about the reports related to the Circulation subsystem. Each of the reports discussed in this guide, except the Update Probationary Patrons report, belongs by default to the Circulation Report Group. The Update Probationary Patrons report belongs to the Administrative Report Group.

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

Specifically, in this guide, we provide details on the following reports:

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In this reference guide, the discussion is limited to features that are specific to Circulation reports. This reference guide does 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*.

The *InfoStation/Circulation 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 information about the InfoStation directory structure.
- *InfoStation/Serials Reports Reference Guide* - Provides details on the reports related to the Serials subsystem.
- *InfoStation/Acquisitions Reports Reference Guide* - Provides details on InfoStation reports related to the Acquisitions subsystem.
- *InfoStation/Cataloging Reports Reference Guide* - Provides details on InfoStation reports related to the Cataloging subsystem.
- *InfoStation/OPAC Reports Reference Guide* - Provides details on InfoStation reports related to the OPAC subsystem.

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

For each report discussed in this guide, 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.

- 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, this guide includes 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. Notice-generating Circulation Reports

Notice-generating Circulation reports, which are **CircReport.exe** based, let you generate information about items that qualify patrons to receive various types of Circulation notices, such as overdue or recall notices. This chapter describes each notice-generating Circulation report.

Important: If your institution needs to schedule multiple **CircReport.exe**-based reports to run in Update mode, Innovative recommends that you stagger the schedules at wide intervals. Scheduling multiple **CircReport.exe**-based reports to run simultaneously or too close together may cause some reports to generate errors and not complete their processing.

This chapter covers the following topics:

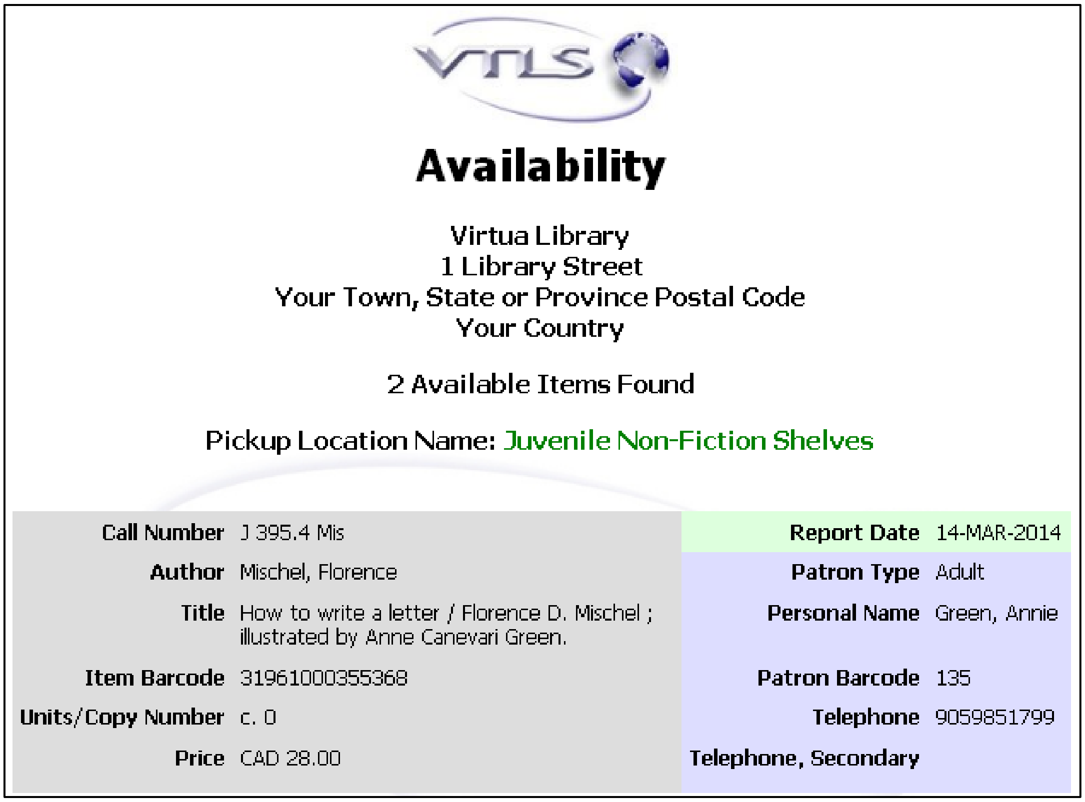
2.1 Availability Report

When a requested item is trapped, or checked in, Virtua assigns it the status On Hold (4705) and flags it for inclusion in the Availability report. When you run the Availability report, it generates a list of requested items that . . .

- Are currently available and ready for pickup (i.e., On Hold).
- Were requested by a patron who has NOT yet received an availability notice.
- Meet the location and patron type criteria that you set in the report configuration.

You can configure the Availability report simply to generate a list of qualifying available items, or you can configure the report to generate availability notices for patrons whose requested items have become available.

Figure 2-1 shows a portion of the default HTML output from the Availability report.



Availability

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

2 Available Items Found

Pickup Location Name: Juvenile Non-Fiction Shelves

Call Number	J 395.4 Mis	**Report Date**	14-MAR-2014
Author	Mischel, Florence	**Patron Type**	Adult
Title	How to write a letter / Florence D. Mischel ; illustrated by Anne Canevari Green.	**Personal Name**	Green, Annie
Item Barcode	31961000355368	**Patron Barcode**	135
Units/Copy Number	c. 0	**Telephone**	9059851799
Price	CAD 28.00	**Telephone, Secondary**	

Figure 2-1. Availability HTML Output

Important: You can configure Virtua to generate automatic e-mail notices when requested items are checked in. Patrons who receive an automatic e-mail notice are NOT eligible for inclusion in the Availability report. For details on generating automatic e-mail notices for available items, see the *Virtua Circulation Control/Requests User's Guide.*

2.1.1 Parameters Available for the Availability Report

Note: InfoStation will not let you save an Availability report configuration with the following combination of options: Output Format is set to Electronic Delivery, Update Database check box is selected, AND either none of the Honor Patron Communication Preferences check boxes are selected or all of the check boxes are selected.

The Availability report offers the following Report-specific Parameters:

- **Shelving Locations** (*required*) - Lets you limit your results to one or more shelving locations. To be included in the results, a requested item's current shelving location must match one of the locations that you select for the report configuration.

- **Patron Types** (*required*) - Lets you limit your results to one or more patron types. To be included in the results, an available item must have been requested by a patron who is assigned one of the patron types that you select for the report configuration.

- **Delimiter** (*optional*) - For delimited output, lets you specify the character that separates data on a line of output.

Note: Configurations use the Delimiter parameter *only* when the Output Format parameter is set to E-mail with Delimited File Attachment. For details on the Output Format parameter, see the *InfoStation User's Guide*.

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

  - Author
  - Call Number
  - Class or Homeroom
  - Department
  - Title
  - Institution
  - Pickup Location
  - Shelving Location
  - Patron ID
  - Patron Type Code
  - Patron Postal Code
  - College or School

- **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 database to indicate that availability notices have been sent to the appropriate patrons. *These patrons will no longer be eligible to receive an availability notice.*

Important:

- Do not set this parameter for "test" or internal configurations.
- If the Output Format is set to HTML, do not set this parameter. If you do, you will get an error message upon saving the report configuration.

- **Use Pickup Location For Notices** - When the Output Format is Electronic Delivery or Delimited File, lets you configure the report to use the request pickup location information in the output in place of the library location information entered in the report-specific parameters. You must select this setting if you want Virtua to include the Notice Library fields as data elements in the report output and if you want Virtua to validate the ordering of these fields.

- **Honor Patron Communication Preferences** (*optional*) - Lets you configure the report to generate results according to the Communication Preference setting in the Patron Editor, or address preference specified in tag 008/10 of each patron record, and the Output Format of the report configuration.

- **Honor Language Preference** (*optional*) - Lets you determine which patrons will be included in the output, based on the language preference specified in the patron record and the language of the report configuration.

- **Date Format** (*required*) - Lets you choose how dates will be formatted in the output. The default date format is DD-MON-YYYY.

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

2.1.2 Data Elements and Variables for the Availability Report

All notice-generating reports that use **CircReport.exe**, including the Availability report, can return a wide range of data elements related to patron, item, bibliographic, and holdings information. For a complete list of these data elements and their corresponding variables, see the section "Data Elements and Variables for Notice-generating Reports" in this reference guide.

2.1.3 Output Templates for the Availability Report

Location of files: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_6

Template	Contribution to Output
patron_email_page_header.tem	Generates the information that appears before the details of the available items retrieved by the report.

Template	Contribution to Output
patron_email_page_footer.tem	Generates the information that appears after the last item detail in the e-mail notice.
patron_email_row.tem	Within the Availability notice, returns the information for a single item. This template is repeated for each available item, generating a list.
html_page_header.tem	In HTML output, generates the information that appears before the details of the available items retrieved by the report.
html_header.tem	In HTML output, generates labels that group available items according to shelving location.
html_row.tem	In HTML output, generates the information for each available item.
html_page_footer.tem	In HTML output, generates the information that appears after the last item detail.
txt_message.tem	Generates the content of the Text message sent with Electronic Delivery, which is limited to 160 ASCII characters or 70 Unicode characters. This template has access to the item count detail that is included in the report output.

2.2 Availability (i-tiva) Report

The Availability (i-tiva) report lets you generate a list of available items requested by patrons who could **not** be contacted by the i-tiva system. Unlike the regular Availability report, which generates output using information stored in the Virtua database, the Availability (i-tiva) report runs against a results file generated by i-tiva. The file contains information about patrons who could not be notified via the i-tiva system.

Note: You will need to specify the name and location of the i-tiva results file using the i-tiva Results File parameter. This location is specified by the VTLS_TEMP environment variable. In order for InfoStation i-tiva reports to run correctly, in the **constants.cfg** for Infostation, the **temp_dir** *must* be set to **/usr/vtls/virtua/temp** so that the system can read the i-tiva files.

The Availability (i-tiva) report is a notice-generating report, which you can use to generate availability notices for patrons who could not be contacted by the i-tiva messaging system.

Important: This report should be used *only* by libraries that are also using the i-tiva messaging system. If you are NOT using this system to notify your patrons, use the regular Availability report instead of this report.

2.2.1 Parameters Available for the Availability (i-tiva) Report

The Availability (i-tiva) report offers the following Report-specific Parameters:

- **Delimiter** (*optional*) - For delimited output, lets you specify the character that separates data on a line of output.

  Note: Configurations use the Delimiter parameter *only* when the Output Format parameter is set to E-mail with Delimited File Attachment. For details on the Output Format parameter, see the *InfoStation User's Guide*.

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

  - Author

- Call Number
- Class or Homeroom
- Department
- Title
- Institution
- Pickup Location
- Shelving Location
- Patron ID
- Patron Type Code
- Patron Postal Code
- College or School

- **i-tiva Results File** (*required*) - Lets you specify the name and location (full path) of the i-tiva results file that you want to use for generating this InfoStation report. InfoStation will look at this results file, which contains information about patrons whom i-tiva could not contact by telephone, and generates a report. Like other Circulation reports, you can use this report to generate e-mail or paper notices for those patrons.

  Note: After the i-tiva Message system calls patrons, it creates a results file for failed calls. The Message system sends the results file via FTP to a location on your server that can be accessed by InfoStation. It is this filename and location that you will want to type in this text box. (For more information about **CircReport.exe** and the i-tiva Message system, and scheduling i-tiva InfoStation reports, see the *System Management: Reporting User's Guide*.)

- **Date Format** (*required*) - Lets you choose how dates will be formatted in the output. The default date format is DD-MON-YYYY.

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

2.2.2 Data Elements and Variables for the Availability (i-tiva) Report

All notice-generating reports that use **CircReport.exe**, including the Availability (i-tiva) report, can return a wide range of data elements related to patron, item, bibliographic, and holdings information. For a complete list of these data elements and their corresponding variables, see the section "Data Elements and Variables for Notice-generating Reports" in this reference guide.

2.2.3 Output Templates for the Availability (i-tiva) Report

Location of files: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_33

Template	Contribution to Output
patron_email_page.tem	Provides the overall framework of the availability notice, including text and the function that returns information for each available item.
patron_email_row.tem	Within the availability notice, returns the information for a single item. This template is repeated for each available item, generating a list.
html_page.tem	Provides the overall framework of the HTML output.
html_header.tem	Within HTML output, generates labels that group available items according to shelving location.
html_row.tem	Within HTML output, generates the information for each available item.

2.3 Availability Reminder Report

The Availability Reminder report (/usr/vtls/virtua/webrpt_XX_x/Cir/Cir_62) lets you generate a list of requested items that…

- Are available and ready for pickup (i.e., items On Hold).
- Were requested by a patron who has already received an availability notice but has not yet received an availability reminder notice.
- Meet the location and patron type criteria that you specify in the report configuration.

You can configure the Availability report to generate availability reminder notices for patrons or to generate a list of available requests expiring soon for in-house use.

The Availability Reminder report is modeled after the Availability report. For details about the report-specific parameters, see the section "Parameters Available for the Availability Report." The one additional parameter offered by the Availability Reminder report is **Number of Days Before Expiration**, which lets you specify the maximum number of days before the request expiration date to qualify the request for the report output or to send an availability reminder notice.

2.4 Bills Report

The Bills report generates a list of overdue items that . . .

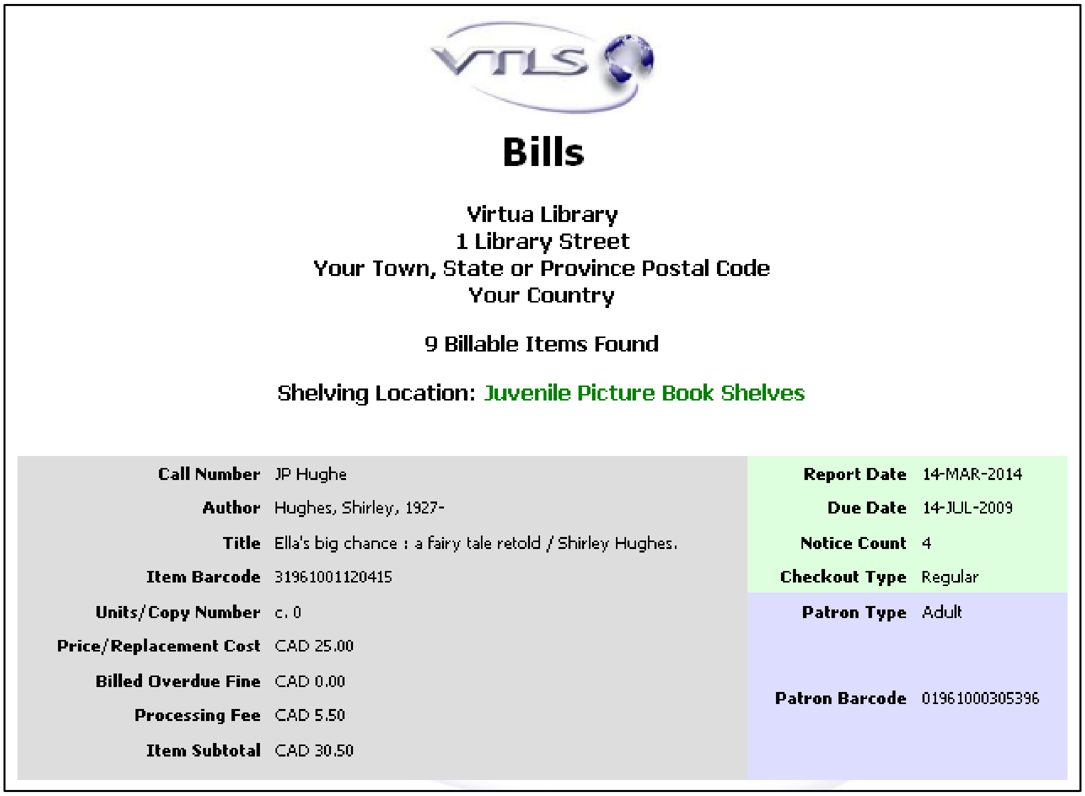
- Are eligible for billing.
- Are checked out to patrons who have NOT yet received a bill notice.
- Meet the location, patron type, and check-out type criteria that you set in the report configuration.

You can configure the Bills report simply to generate a list of qualifying billable items, or you can configure the report to generate bill notices for patrons who have the billable items checked out.

Note: When the Bills report is run on the same day that is the due date and next notice date for an item, the item is only included in the report output if the report time is *after* both the notice time and due time.

For additional information on how items qualify for inclusion in the Bills report, see the section "Virtua Settings Used by the Bills Report" in this chapter.

Figure 2-2 shows a portion of the default HTML output for the Bills report.



Bills

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

9 Billable Items Found

Shelving Location: Juvenile Picture Book Shelves

Call Number	JP Hughe	Report Date	14-MAR-2014
Author	Hughes, Shirley, 1927-	Due Date	14-JUL-2009
Title	Ella's big chance : a fairy tale retold / Shirley Hughes.	Notice Count	4
Item Barcode	31961001120415	Checkout Type	Regular
Units/Copy Number	c. 0	Patron Type	Adult
Price/Replacement Cost	CAD 25.00		
Billed Overdue Fine	CAD 0.00	Patron Barcode	01961000305396
Processing Fee	CAD 5.50		
Item Subtotal	CAD 30.50		

Figure 2-2. Bills HTML Output

Important: Patrons become eligible for inclusion in the Bills report *after* they have received the maximum number of overdue notices, as specified in the Location + Patron + Item Matrix. The Bills report, therefore, works properly *only* if a maximum number of overdue notices is set for each patron type in the Virtua Profiler. For details, see the section "Max Number of Notices for Non-recalled Items" in this chapter.

2.4.1 Parameters Available for the Bills Report

Note: InfoStation will not let you save a Bills report configuration with the following combination of options: Output Format is set to Electronic Delivery, Update Database check box is selected, AND either none of the Honor Patron Communication Preferences check boxes are selected or all of the check boxes are selected.

The Bills report offers the following Report-specific Parameters:

- **Shelving Locations** (*required*) - Lets you limit your results to one or more shelving locations. To be included in the results, an overdue item's current shelving location must match one of the locations that you select for the report configuration.

- **Patron Types** (*required*) - Lets you limit your results to one or more patron types. To be included in the results, an overdue item must be checked out to a patron who is assigned one of the patron types that you select for the report configuration.

- **Check-out Type** (*required*) - Lets you limit the output to billable items associated with a particular check-out type. You can generate results for . . .

  - All Check-outs
  - Regular Check-outs
  - In-house Check-outs
  - Reserve Check-outs

- **Delimiter** (*optional*) - For delimited output, lets you specify the character that separates data on a line of output.

  Note: Configurations use the Delimiter parameter *only* when the Output Format parameter is set to E-mail with Delimited File Attachment. For details on the Output Format parameter, see the *InfoStation User's Guide*.

- **Sort Parameters** (*required*) - Let you select a primary, secondary, and tertiary sort of your output using the following values:

  - Author
  - Call Number
  - Class or Homeroom
  - Department
  - Due Date
  - Title
  - Institution
  - Shelving Location
  - Patron ID
  - Patron Type Code
  - Patron Postal Code
  - College or School

- **Update Database** (*optional*) - Lets you choose whether InfoStation will update the database when you run the report configuration. If you select this check box, when you run the report configuration InfoStation will . . .

- ♦ Update the database to indicate that bill notices have been sent to the appropriate patrons. *These patrons will no longer be eligible to receive a bill.*
  -AND-
- ♦ Add the Billed for Replacement (4600) item status to items included in the output.
  -AND-
- ♦ Add the processing fee and item price to the account of each patron who receives a bill.

  Note: InfoStation adds the processing fee to patron accounts via the **CircReport.exe** parameter **--add_billing_fee**, which is defined for the Bills report in the **get_data** subroutine of the **Cir_report_4.cgi** file. By default, this parameter is set to 1 (one). If you do NOT want InfoStation to add the processing fee to patron records, set this parameter to 0 (zero).

Important:
- Do not set this parameter for "test" or internal configurations.
- If the Output Format is set to HTML, do not set this parameter. If you do, you will get an error message upon saving the report configuration.

- **Exceptions Only** - Selecting this check box tells InfoStation to report only on items for which 1) "Total Replacement Cost" is selected in the Location + Item Matrix in the Virtua Profiler AND 2) The Total Replacement Cost does not exist or could not be calculated as it is not greater than 0.

- **Use Patron's Registering Library For Notices** - When the Output Format is Electronic Delivery or Delimited File, lets you configure the report to use the patron's registered library location information in the output in place of the library location information entered in the report-specific parameters. You must select this setting if you want Virtua to include the Notice Library fields as data elements in the report output and if you want Virtua to validate the ordering of these fields.

- **Honor Patron Communication Preferences** (*optional*) - Lets you configure the report to generate results according to the Communication Preference setting in the Patron Editor, or address preference specified in tag 008/10 of each patron record, and the Output Format of the report configuration.

- **Honor Language Preference** (*optional*) - Lets you determine which patrons will be included in the output, based on the language preference specified in the patron record and the language of the report configuration.

- **Check-out Type Labels** (*optional*) - Let you specify labels for check-out types that appear in the output.

- **Date Format** (*required*) - Lets you choose how dates will be formatted in the output. The default date format is DD-MON-YYYY.

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

2.4.2 Virtua Profiler Settings Used by the Bills Report

The Bills report generates results using the following Virtua Profiler settings:

- **Notices/Limits tab of the Location + Patron + Item Matrix**: *Billing Period* for Non-recalled Items
- **Notices/Limits tab of the Location + Patron + Item Matrix**: *Max Number Of Notices* for Non-recalled Items
- **Circulation Basic Options**: *Billed Overdue Fines in Bills Report*
- **Location + Item Matrix**: *Replacement Cost at Billing* selection

2.4.2.1 Billing Period for Non-recalled Items

The Billing Period for *non*-recalled items specifies the amount of time that must pass between the date the *last* overdue notice is generated and the date a patron becomes eligible for inclusion in the Bills report.

> **Important:** If you set the Billing Period for non-recalled items to zero, patrons will become eligible to receive a bill notice *immediately* after they receive their last overdue notice.

2.4.2.2 Max Number of Notices for Non-recalled Items

The Max Number Of Notices for *non*-recalled items determines the maximum number of overdue notices that a patron can receive for a non-recalled, overdue item.

Each time you run the Overdues report in *update* mode, the notice count is incremented for the patrons who are included in the output. When a patron's notice count *exceeds* the Max Number Of Notices, that patron can no longer receive overdue notices and is eligible for inclusion in the Bills report.

2.4.2.3 Billed Overdue Fines in Bills Report

In the Circulation Basic Options, if the Billed Overdue Fines in Bills Report setting is selected, InfoStation will report on the overdue fine amount for each billed item in the output.

2.4.2.4 Replacement Cost at Billing

InfoStation will use the option selected in the Replacement Cost at Billing drop-down list in the Location + Item Matrix to calculate the Billed Total Replacement Cost for each billed item in the output. Where "Total Replacement Cost" is the option selected in the drop-down, you can select the Exceptions Only report parameter to generate an Exceptions report instead of a Bills report.

2.4.3 Data Elements and Variables for the Bills Report

All notice-generating reports that use **CircReport.exe**, including the Bills report, can return a wide range of data elements related to patron, item, bibliographic, and holdings information. For a complete list of these data elements and their corresponding variables, see the section "Data Elements and Variables for Notice-generating Reports" in this reference guide.

2.4.4 Output Templates for the Bills Report

Location of files: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_4

Template	Contribution to Output
patron_email_page_header.tem	Generates the information that appears before the details of the billable items retrieved by the report.
patron_email_page_footer.tem	Generates the information that appears after the last item detail in the e-mail notice.
patron_email_row.tem	Within the Bills notice, returns the information for a single item. This template is repeated for each billable item, generating a list.
html_page_header.tem	In HTML output, generates the information that appears before the details of the billable items retrieved by the report.

html_header.tem	In HTML output, generates labels that group billable items according to shelving location.
html_row.tem	In HTML output, generates the information for each billable item.
html_page_footer.tem	In HTML output, generates the information that appears after the last item detail.
txt_message.tem	Generates the content of the Text message sent with Electronic Delivery, which is limited to 160 ASCII characters or 70 Unicode characters. This template has access to the item count detail that is included in the report output.

2.5 Bills (i-tiva) Report

The Bills (i-tiva) report lets you generate a list of overdue, billable items that are checked out to patrons who could NOT be contacted by the i-tiva messaging system. Unlike the regular Bills report, which generates output using information stored in the Virtua database, the Bills (i-tiva) report runs against a results file generated by i-tiva. The file contains information about patrons who could not be notified via the i-tiva system.

Note: You will need to specify the name and location of the i-tiva results file using the i-tiva Results File parameter. This location is specified by the VTLS_TEMP environment variable. In order for InfoStation i-tiva reports to run correctly, in the **constants.cfg** for Infostation, the **temp_dir** *must* be set to **/usr/vtls/virtua/temp** so that the system can read the i-tiva files.

The Bills (i-tiva) report is a notice-generating report, which you can use to generate bills for patrons who were not notified by the i-tiva messaging system.

Important: This report should be used *only* by libraries that are also using the i-tiva messaging system. If you are NOT using this system to notify your patrons, use the regular Bills report instead of this report.

2.5.1 Parameters Available for the Bills (i-tiva) Report

The Bills (i-tiva) report offers the following Report-specific Parameters:

- **Delimiter** (*optional*) - For delimited output, lets you specify the character that separates data on a line of output.

  Note: Configurations use the Delimiter parameter *only* when the Output Format parameter is set to E-mail with Delimited File Attachment. For details on the Output Format parameter, see the *InfoStation User's Guide*.

- **Sort Parameters** (*required*) - Let you sort your output using the following values:
  - Author
  - Call Number
  - Class or Homeroom

- ♦ Department
- ♦ Due Date
- ♦ Title
- ♦ Institution
- ♦ Shelving Location
- ♦ Patron ID
- ♦ Patron Type Code
- ♦ Patron Postal Code
- ♦ College or School

- **i-tiva Results File** (*required*) - Lets you specify the name and location (full path) of the i-tiva results file that you want to use for generating this InfoStation report. InfoStation will look at this results file, which contains information about patrons whom i-tiva could not contact by telephone, and generates a report. Like other Circulation reports, you can use this report to generate e-mail or paper notices for those patrons.

  Note: After the i-tiva Message system calls patrons, it creates a results file for failed calls. The Message system sends the results file via FTP to a location on your server that can be accessed by InfoStation. It is this filename and location that you will want to type in this text box. (For more information about **CircReport.exe** and the i-tiva Message system, and scheduling i-tiva InfoStation reports, see the *System Management: Reporting User's Guide*.)

- **Date Format** (*required*) - Lets you choose how dates will be formatted in the output. The default date format is DD-MON-YYYY.

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

2.5.2 Data Elements and Variables for the Bills (i-tiva) Report

All notice-generating reports that use **CircReport.exe**, including the Bills (i-tiva) report, can return a wide range of data elements related to patron, item, bibliographic, and holdings information. For a complete list of these data elements and their corresponding variables, see the section "Data Elements and Variables for Notice-generating Reports" in this reference guide.

2.5.3 Output Templates for the Bills (i-tiva) Report

Location of files: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_31

Template	Contribution to Output
patron_email_page.tem	Provides the overall framework of the bill notice, including text and the function that returns the information for each overdue item.
patron_email_row.tem	Within the Bills notice, returns the information for a billable single item. This template is repeated for each billable item, generating a list.
html_page.tem	Provides the overall framework of the HTML output.
html_header.tem	Within HTML output, generates labels that group billable items according to shelving location.
html_row.tem	Within HTML output, generates the information for each billable item.

2.6 Change Request Pickup Location Report

The Change Request Pickup Location report (/usr/vtls/virtua/webrpt_XX_x/Cir/Cir_59) lets you change the pickup location of a group of requests that have not yet expired. In the report, you can specify the original pickup locations of the requests (see the Original Pickup Locations parameter) and the ONE new pickup location (see the New Pickup Location parameter) that you want to change to.

The report will identify requests based on the original pickup location and request type.

The report can also generate notices for patrons to inform them of the change of pickup location. The report supports all communication preferences. For details, see the online, context-sensitive help associated with the Honor Patron Communication Preferences parameter on the report's Configuration page.

2.7 Expired Bookings Report

The Expired Bookings report generates a list of expired bookings that meet the location and patron type criteria that you set in the report configuration. In the output, each expired booking is classified as Satisfied (i.e., available) or Unsatisfied (i.e., unavailable).

"Expired" bookings include . . .

- Available (i.e., trapped and On Hold) bookings that have expired according to the booking End Time.
  -AND-
- Unavailable (i.e., untrapped) bookings that have expired according to the booking End Time.

You can configure the Expired Bookings report simply to generate a list of expired bookings, or you can configure the report to generate expired bookings notices for patrons whose bookings have expired.

For additional information on how items qualify for inclusion in the Expired Bookings report, see the section "Virtua Settings Used by the Expired Bookings Report" in this chapter.

Figure 2-3 shows a portion of the default HTML output from the Expired Bookings report.

Expired Bookings

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

25 Expired Requests Found

Wilson Library

Satisfied Request

Call Number	ECM ECM-1-1168	**Request Expiration Date**	27-APR-2005
Author	Reich, Steve, 1936-		
Title	Music for a large ensemble ; Violin phase ; Octet sound recording / Steve Reich.	**Pickup Location Name**	Wilson Library
Item Barcode	2	**Request Category**	Satisfied Request
Units/Copy Number	c. 0	**Patron Type**	College Student
Shelving Location	Wilson Library	**Patron Barcode**	2000001203

Figure 2-3. Expired Bookings HTML Output

2.7.1 Parameters Available for the Expired Bookings Report

The Expired Bookings report offers the following Report-specific Parameters:

- **Patron Types** (*required*) - Lets you limit your results to one or more patron types. To be included in the results, an item must have been booked by a patron who is assigned one of the patron types that you select for the report configuration.

- **Delimiter** (*optional*) - For delimited output, lets you specify the character that separates data on a line of output.

> **Note:** Configurations use the Delimiter parameter *only* when the Output Format parameter is set to E-mail with Delimited File Attachment. For details on the Output Format parameter, see the *InfoStation User's Guide*.

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

  - Author
  - Call Number
  - Class or Homeroom
  - Department
  - Title
  - Institution
  - Shelving Location Code
  - Patron ID
  - Patron Type Code
  - Patron Postal Code
  - Pickup Location Code
  - College or School

- **Update Database** (*optional*) - Lets you choose whether InfoStation will update the database when you run the report configuration. If you select this check box, when you run the report configuration InfoStation will . . .

  - Update the database to indicate that an expired booking notice has been sent to the appropriate patrons. *These patrons will no longer be eligible to receive an expired booking notice.*
    -AND-
  - Delete the expired booking from the system. The expired booking will no longer appear on the Bookings for Item window.

> **Important:** When testing configurations of the Expired Bookings report, do NOT select the Update Database check box.

- **Honor Address Preference** (*optional*) - Lets you configure the report to generate results according to the address preference specified in the patron record and the Output Format of the report configuration.

- **Honor Language Preference** (*optional*) - Lets you determine which patrons will be included in the output, based on the language preference specified in the patron record and the language of the report configuration.

- **Date Format** (*required*) - Lets you choose how dates will be formatted in the output. The default date format is DD-MON-YYYY.

- **Expired Category Labels** (*optional*) - Let you specify labels that will appear in the output for each type of expired booking. Based on these labels, your library can determine how to process the items that appear in the output.

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

2.7.2 Virtua Settings Used by the Expired Bookings Report

The Expired Bookings report generates results using the booking End Time for the booked item. You can view the booking End Time on the Bookings for Item window in the Virtua client.

If the booking End Time passes before an unsatisfied booking becomes available OR before a satisfied booking is picked up by the requesting patron, the booking expires and becomes eligible for inclusion in the Expired Bookings report.

2.7.3 Expired Category Labels for the Expired Bookings Report

The Expired Bookings report classifies booking requests into five categories. You can customize the labels for the categories in the Expired Category Labels section on the Configuration screen. Below we describe the meaning of each category:

Category:	**Type of Expired Booking Request**:
Unsatisfied Request	A booking request that is untrapped (i.e., checked out) or trapped but not yet available at the pickup location.
Satisfied Request	A booking request for which an item has been trapped but not picked up. **Note:** A trapped booking request has the status On Hold and is available for pickup at the pickup location.
Route to Shelving Location	A satisfied booking request where no other booking requests or item requests exist and the pickup location is different from the shelving location. Items in this category need to be returned to their shelving location after the expired booking request is deleted.
Hold for New Request	An expired booking request with a satisfied booking or item request that needs to stay at its current location to satisfy the next booking request or item request.
Route to New Pickup Location	An expired booking request with a satisfied booking or item request that needs to be sent to another location to satisfy the next request.

Each of these categories has a meaning that is particular to a given location. For example, when you run the report configuration for the Main Library, the Hold for New Request category means "Hold for New Request at Main Library."

The location associated with a given booking and the category in which it is classified will help you determine what to do with the item (i.e., whether you need to send it to a different location or keep it at its current location).

2.7.4 Data Elements and Variables for the Expired Bookings Report

All notice-generating reports that use **CircReport.exe**, including the Expired Bookings report, can return a wide range of data elements related to patron, item, bibliographic, and holdings information. For a complete list of these data elements and their corresponding variables, see the section "Data Elements and Variables for Notice-generating Reports" in this reference guide.

2.7.5 Output Templates for the Expired Bookings Report

Location of files: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_38

Template	Contribution to Output
patron_email_page.tem	Provides the overall framework of the Expired Bookings notice, including text and the function that returns the information for each expired booking.
patron_email_row.tem	Within the Expired Bookings notice, returns the information for a single item. This template is repeated for each expired booking, generating a list.
html_page.tem	Provides the overall framework of the HTML output.
html_header_1.tem	Within HTML output, generates labels that group items according to shelving location.
html_header_2.tem	Within HTML output, generates the labels that group expired bookings as Satisfied and Unsatisfied.
html_row.tem	Within HTML output, generates the information for each expired booking.

2.8 Expired Requests Report

The Expired Requests report generates a list of expired requests that meet the location and patron type criteria that you set in the report configuration. In the output, each expired request is placed in one of the following categories: Satisfied request (i.e., available), Unsatisfied request (i.e., unavailable), Route to shelving location, Hold for new request, Route to new pickup location.

Caution: If you select the Update Database parameter in this report, the software not only updates the database, but also *deletes* the expired requests from the request queue.

"Expired" requests consist of . . .

- Trapped (satisfied/available) requests that have expired according to the Hold Pickup Time. Trapped requests can be either On Hold (i.e., ready for pickup) or In Transit to the pickup location.
  -AND-
- Untrapped (unsatisfied/unavailable) requests that have expired according to expiration date in the request record.

You can configure the Expired Requests report simply to generate a list of expired requests, or you can configure the report to generate expired request notices for patrons whose requests have expired.

For additional information on how items qualify for inclusion in the Expired Requests report, see the section "Virtua Settings Used by the Expired Requests Report" in this chapter.

Figure 2-4 shows a portion of the default HTML output from the Expired Requests report.

Expired Requests

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

4 Expired Requests Found

Adult Fiction Shelves

Satisfied Request

Call Number	FIC Barcl	Request Expiration Date	25-FEB-2014
Author	Barclay, Linwood	Request Type	H
Title	Too close to home / Linwood Barclay.	Pickup Location Name	Adult Fiction Shelves
Item Barcode	31961001448782	Request Category	Satisfied Request
Units/Copy Number	c. 0	Patron Type	Adult
Shelving Location	Adult Fiction Shelves	Patron Barcode	01961000247777

Figure 2-4. Expired Requests HTML Output

2.8.1 Parameters Available for the Expired Requests Report

The Expired Requests report offers the following Report-specific Parameters:

- **Pickup Locations** (*required*) - Lets you limit your results to one or more pickup locations. For an expired request to be included in the output, its pickup location must match one of the locations that you select for the report configuration.

- **Patron Types** (*required*) - Lets you limit your results to one or more patron types. To be included in the results, an item must have been requested by a patron who is assigned one of the patron types that you select for the report configuration.

- **Delimiter** (*optional*) - For delimited output, lets you specify the character that separates data on a line of output.

Note: Configurations use the Delimiter parameter *only* when the Output Format parameter is set to E-mail with Delimited File Attachment. For details on the Output Format parameter, see the *InfoStation User's Guide*.

- **Sort Parameters** (*required*) - Let you sort your output using the following values:
  - Author
  - Call Number
  - Class or Homeroom
  - Department
  - Title
  - Institution
  - Shelving Location Code
  - Patron ID
  - Patron Type Code
  - Patron Postal Code
  - Pickup Location Code
  - College or School

- **Update Database** (*optional*) - Lets you choose whether InfoStation will update the database when you run the report configuration. If you do not select this check box, you must select the Leave Fees Unchanged option in the Request Fee Action parameter. If you select this check box, when you run the report configuration, InfoStation will . . .
  - Update the database to indicate that an expired request notice has been sent to the appropriate patrons. *These patrons will no longer be eligible to receive an expired request notice.*
    -AND-
  - Delete the expired request from the request queue. When the request is deleted from the request queue, another request may become trapped in its place or the item status may change. For details on what happens when a request is deleted from the database, see the *Virtua Circulation Control/Requests User's Guide*.

Important: When testing configurations of the Expired Requests report, do NOT select the Update Database check box.

- **Request Fee Action** (*required*) - Lets you specify the action that InfoStation will take regarding any fees associated with the expired requests in the report output. Select one of the following radio button options:

- ♦ Leave Fees Unchanged - Fees associated with expired requests remain unchanged. When the Update Database parameter is OFF, you must select this option.
- ♦ Delete Request Fees - Virtua deletes all fees associated with the expired requests that are returned by the report.
- ♦ Assess Not-Picked-Up Fee - Virtua assesses fees for all expired requests returned by the report that . . .
  - Have a request status of Pick Up (as opposed to still being at a status of Pending).
    -AND-
  - Qualify for a fee to be assessed based on the Assess Fee When Request Is Not Picked Up setting for this request type in the Location + Patron + Item Matrix in the Virtua Profiler.

Note: For InfoStation to delete or assess a fee, the Update Database check box must be selected.

Request Fulfillment (*required*) - Lets you limit your results to specific types of "expired requests." You must select at least one check box, but you can restrict the output to requests that qualify for any combination of the following:
- ♦ Untrapped
- ♦ On Hold
- ♦ In Transit

- **Use Patron's Registering Library For Notices** - When the Output Format is Electronic Delivery or Delimited File, lets you configure the report to use the patron's registered library location information in the output in place of the library location information entered in the report-specific parameters. You must select this setting if you want Virtua to include the Notice Library fields as data elements in the report output and if you want Virtua to validate the ordering of these fields.

- **Honor Patron Communication Preferences** (*optional*) - Lets you configure the report to generate results according to the Communication Preference setting in the Patron Editor, or address preference specified in tag 008/10 of each patron record, and the Output Format of the report configuration.

- **Honor Language Preference** (*optional*) - Lets you determine which patrons will be included in the output, based on the language preference specified in the patron record and the language of the report configuration.

- **Date Format** (*required*) - Lets you choose how dates will be formatted in the output. The default date format is DD-MON-YYYY.

- **Expired Category Labels** (*optional*) - Let you specify labels that will appear in the output for each type of expired request. Based on these labels, your library can determine how to process the items that appear in the output.

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

2.8.2 Virtua Settings Used by the Expired Requests Report

The Expired Requests report generates results using the request expiration date. *Unavailable* requests expire according to their original request expiration date. For requests placed in the Virtua client, the expiration date is determined in one of two ways:

- By the Not Needed After Date specified when the request is placed.
  -OR-
- If a Not Needed After date is not defined in the request record, by the Default Expiration Period defined in the Location + Patron + Item Matrix in the Virtua Profiler.

Note: When set, the Due at Closing settings in the L + I Matrix will also affect the request expiration time.

Regardless of where the request was placed and how the expiration date was calculated, if the date passes before an unsatisfied request becomes available OR before a satisfied request is picked up by the requesting patron, the request expires and becomes eligible for inclusion in the Expired Requests report.

For details on setting the default request expiration date for requests placed in the Virtua client, see the *Virtua Profiler/Circulation Parameters User's Guide.*

For *available* requests, the request expiration date may be recalculated via settings defined in the Virtua Profiler. For details, see the *Virtua Profiler/Circulation Parameters User's Guide* or the *Virtua Workflow-Based Reference - Circulation Guide.*

2.8.3 Expired Category Labels for the Expired Requests Report

The Expired Requests report classifies requests into five categories. You can customize the labels for the categories in the Expired Category Labels section on the Configuration screen. Below we describe the meaning of each category:

Category:	Type of Expired Request:
Unsatisfied Request	An item-level request that is untrapped (i.e., checked out) or trapped but not yet available at the pickup location. -OR- A bibliographic-level request for which no item has been trapped.
Satisfied Request	A bibliographic- or item-level request for which an item has been trapped but not picked up. **Note:** A trapped request has the status On Hold and is available for pickup at the pickup location.
Route to Shelving Location	A satisfied request where no other requests exist in the queue and the pickup location is different from the shelving location. Items in this category need to be returned to their shelving location after the expired request is deleted.
Hold for New Request	A satisfied request that needs to stay at its current location to satisfy the next request in the queue.
Route to New Pickup Location	A satisfied request that needs to be sent to another location to satisfy the next request in the queue.

Each of these categories has a meaning that is particular to a given location. For example the, when you run the report configuration for the Main Library, the Hold for New Request category means "Hold for New Request at Main Library."

The location associated with a given request and the category in which it is classified will help you determine what to do with the item (i.e., whether you need to send it to a different location or keep it at it's current location).

Depending on the classification of a given request, different events may occur when you run the Expired Requests report in update mode and delete the request from the queue (e.g., the item status may be modified or another request may become trapped). For details on what happens when you delete a request from the database, see the *Virtua Circulation Control/Requests User's Guide*.

2.8.4 Data Elements and Variables for the Expired Requests Report

All notice-generating reports that use **CircReport.exe**, including the Expired Requests report, can return a wide range of data elements related to patron, item, bibliographic, and holdings information. For a complete list of these data elements and their corresponding variables, see the section "Data Elements and Variables for Notice-generating Reports" in this reference guide.

2.8.5 Output Templates for the Expired Requests Report

Location of files: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_13

Template	Contribution to Output
patron_email_page_header.tem	Generates the information that appears before the details of the expired requests retrieved by the report.
patron_email_page_footer.tem	Generates the information that appears after the last item detail in the e-mail notice.
patron_email_row.tem	Within a single row, returns the information for a single item. This template is repeated for each expired request, generating a list.
html_page_header.tem	In HTML output, generates the information that appears before the details of the expired requests retrieved by the report.
html_header.tem_1	In HTML output, generates labels that group expired requests according to shelving location.
html_header.tem_2	In HTML output, generates the labels that group expired requests as Satisfied and Unsatisfied.
html_row.tem	In HTML output, generates the information for each expired request.
html_page_footer.tem	In HTML output, generates the information that appears after the last item detail.

Template	Contribution to Output
txt_message.tem	Generates the content of the Text message sent with Electronic Delivery, which is limited to 160 ASCII characters or 70 Unicode characters. This template has access to the item count detail that is included in the report output.

2.9 Expired Requests (i-tiva) Report

The Expired Requests (i-tiva) report lets you generate a list of expired requests initiated by patrons who could **not** be contacted by the i-tiva system. Unlike the regular Expired Requests report, which generates output using information stored in the Virtua database, the Expired Requests (i-tiva) report runs against a results file generated by i-tiva. The file contains information about patrons who could not be notified via the i-tiva system.

Note: You will need to specify the name and location of the i-tiva results file using the i-tiva Results File parameter. This location is specified by the VTLS_TEMP environment variable. In order for InfoStation i-tiva reports to run correctly, in the **constants.cfg** for Infostation, the **temp_dir** *must* be set to **/usr/vtls/virtua/temp** so that the system can read the i-tiva files.

The Expired Requests (i-tiva) report is a notice-generating report, which you can use to generate expired request notices for patrons who have not yet been notified by the i-tiva massaging system.

Important: This report should be used *only* by libraries that are also using the i-tiva messaging system. If you are NOT using this system to notify your patrons, use the regular Expired Requests report instead of this report.

2.9.1 Parameters Available for the Expired Requests (i-tiva) Report

The Expired Requests (i-tiva) report offers the following Report-specific Parameters:

- **Delimiter** (*optional*) - For delimited output, lets you specify the character that separates data on a line of output.

  Note: Configurations use the Delimiter parameter *only* when the Output Format parameter is set to E-mail with Delimited File Attachment. For details on the Output Format parameter, see the *InfoStation User's Guide*.

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

- ♦ Call Number
- ♦ Class or Homeroom
- ♦ Department
- ♦ Title
- ♦ Institution
- ♦ Shelving Location Code
- ♦ Patron ID
- ♦ Patron Type Code
- ♦ Patron Postal Code
- ♦ Pickup Location Code
- ♦ College or School

- **i-tiva Results File** (*required*) - Lets you specify the name and location (full path) of the i-tiva results file that you want to use for generating this InfoStation report. InfoStation will look at this results file, which contains information about patrons whom i-tiva could not contact by telephone, and generates a report. Like other Circulation reports, you can use this report to generate e-mail or paper notices for those patrons.

  Note: After the i-tiva Message system calls patrons, it creates a results file for failed calls. The Message system sends the results file via FTP to a location on your server that can be accessed by InfoStation. It is this filename and location that you will want to type in this text box. (For more information about **CircReport.exe** and the i-tiva Message system, and scheduling i-tiva InfoStation reports, see the *System Management: Reporting User's Guide*.)

- **Date Format** (*required*) - Lets you choose how dates will be formatted in the output. The default date format is DD-MON-YYYY.

- **Expired Category Labels** (*optional*) - Let you specify labels that will appear in the output for each type of expired request. Based on these labels, your library can determine how to process the items that appear in the output.

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

2.9.2 Data Elements and Variables for the Expired Requests (i-tiva) Report

All notice-generating reports that use **CircReport.exe**, including the Expired Requests (i-tiva) report, can return a wide range of data elements related to patron, item, bibliographic, and holdings information. For a complete list of these data elements and their corresponding variables, see the section "Data Elements and Variables for Notice-generating Reports" in this reference guide.

2.9.3 Output Templates for the Expired Requests (i-tiva) Report

Location of files: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_36

Template	Contribution to Output
patron_email_page.tem	Provides the overall framework of the Expired Request notice, including text and the function that returns the information for each expired request.
patron_email_row.tem	Within the Expired Requests notice, returns the information for a single item. This template is repeated for each expired request, generating a list.
html_page.tem	Provides the overall framework of the HTML output.
html_header.tem	Within HTML output, generates labels that group available items according to shelving location.
html_header.tem_2	Within HTML output, generates the labels that group expired requests as Satisfied and Unsatisfied.
html_row.tem	Within HTML output, generates the information for each expired request.

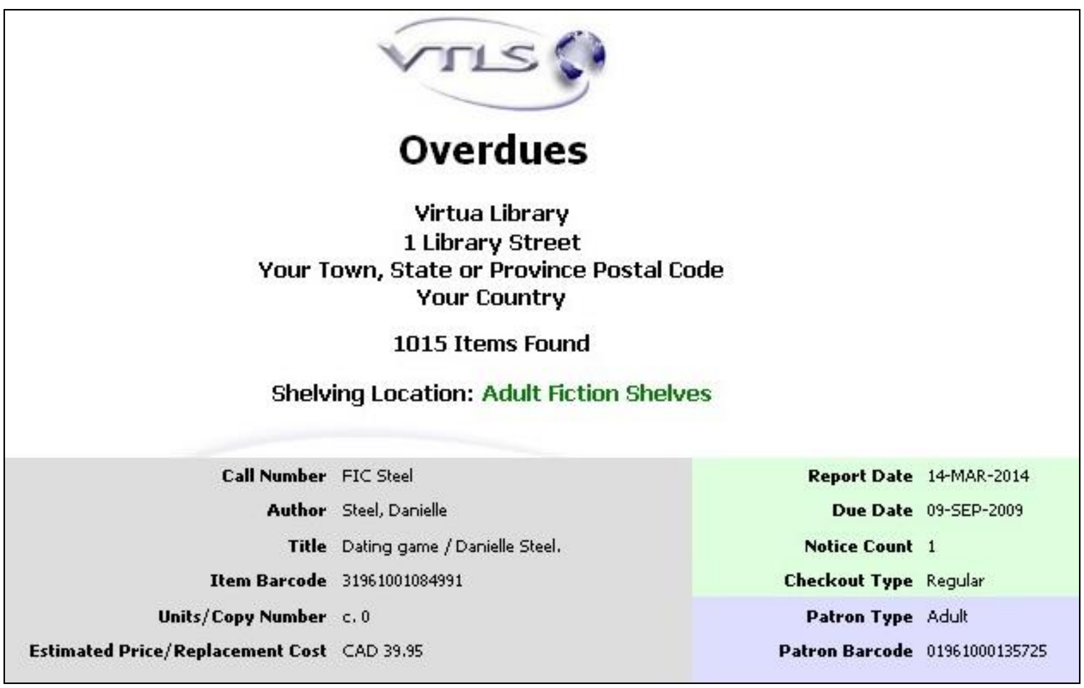
2.10 Overdues Report

The Overdues report generates a list of overdue items that meet the location, patron type, and check-out type criteria that you set in the report configuration. You can configure the Overdues report simply to generate a list of qualifying overdue items (e.g., a pre-notice search list), or you can configure the report to generate overdue notices for the patrons who have the overdue items checked out.

Note: When the Overdues report is run on the same day that is the due date and next notice date for an item, the item is only included in the report output if the report time is *after* both the notice time and due time.

For additional information on how items qualify for inclusion in the Overdues report, see the section “Virtua Settings Used by the Overdues Report” in this chapter.

Figure 2-5 shows a portion of the default HTML output from the Overdues report.



Overdues

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

1015 Items Found

Shelving Location: Adult Fiction Shelves

Call Number	FIC Steel	**Report Date**	14-MAR-2014
Author	Steel, Danielle	**Due Date**	09-SEP-2009
Title	Dating game / Danielle Steel.	**Notice Count**	1
Item Barcode	31961001084991	**Checkout Type**	Regular
Units/Copy Number	c. 0	**Patron Type**	Adult
Estimated Price/Replacement Cost	CAD 39.95	**Patron Barcode**	01961000135725

Figure 2-5. Overdues HTML Output

2.10.1 Parameters Available for the Overdues Report

Note: InfoStation will not let you save an Overdues report configuration with the following combination of options: Output Format is set to Electronic Delivery, Update Database check box is selected, AND either none of the Honor Patron Communication Preferences check boxes are selected or all of the check boxes are selected.

The Overdues report offers the following Report-specific Parameters:

- **Shelving Locations** (*required*) - Lets you limit your results to one or more shelving locations. To be included in the results, an overdue item's current shelving location must match one of the locations that you select for the report configuration.

- **Patron Types** (*required*) - Lets you limit your results to one or more patron types. To be included in the results, an overdue item must be checked out to a patron who is assigned one of the patron types that you select for the report configuration.

- **Check-out Type** (*required*) - Lets you limit the output to overdue items associated with a particular check-out type. You can generate results for . . .
  - All Check-outs
  - Regular Check-outs
  - In-house Check-outs
  - Reserve Check-outs

- **Notice Number to Generate** (*required*) - Lets you limit report output according to a patron's notice count. Using the Location + Patron + Item Matrix, you can determine the number of notices a patron can receive for an overdue item. As patrons receive notices, their notice count is incremented. The Notice Number to Generate parameter lets you create report configurations based on this notice count.

- **Delimiter** (*optional*) - For delimited output, lets you specify the character that separates data on a line of output.

  Note: Configurations use the Delimiter parameter *only* when the Output Format parameter is set to E-mail with Delimited File Attachment. For details on the Output Format parameter, see the *InfoStation User's Guide*.

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

    - Author
    - Call Number
    - Class or Homeroom
    - Department
    - Due Date
    - Title
    - Institution
    - Shelving Location
    - Patron ID
    - Patron Type Code
    - Patron Postal Code
    - College or School

- **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 database to indicate that overdue notices have been sent to the appropriate patrons, whose notice counts are incremented as appropriate.

> **Important:**
> - Do not set this parameter for "test" or internal configurations.
> - If the Output Format is set to HTML, do not set this parameter. If you do, you will get an error message upon saving the report configuration.

- **Use Patron's Registering Library For Notices** - When the Output Format is Electronic Delivery or Delimited File, lets you configure the report to use the patron's registered library location information in the output in place of the library location information entered in the report-specific parameters. You must select this setting if you want Virtua to include the Notice Library fields as data elements in the report output and if you want Virtua to validate the ordering of these fields.

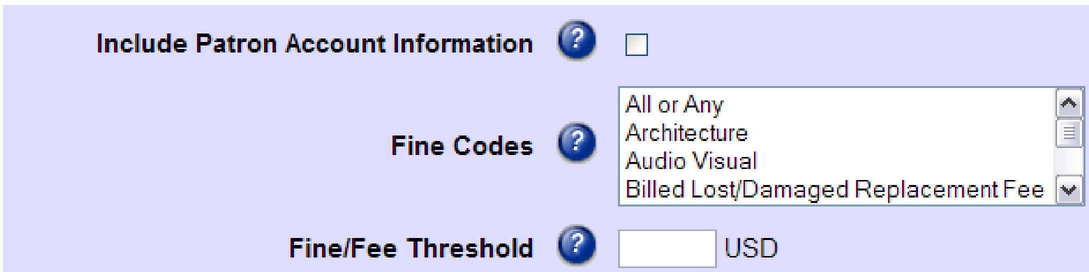
- **Honor Patron Communication Preferences** (*optional*) - Lets you configure the report to generate results according to the Communication Preference setting in the Patron Editor, or address preference specified in tag 008/10 of each patron record, and the Output Format of the report configuration.

- **Honor Language Preference** (*optional*) - Lets you determine which patrons will be included in the output, based on the language preference specified in the patron record and the language of the report configuration.

- **Check-out Type Labels** (*optional*) - Let you specify labels for check-out types that appear in the output.

- **Date Format** (*required*) - Lets you choose how dates will be formatted in the output. The default date format is DD-MON-YYYY.

- **Include Patron Account Info selections** (*optional*) – Lets you 1) determine whether patron account information, specifically a summary of active (i.e., not waived or disputed) fine and fee assessments, is included in the report output; 2) specify which fine codes InfoStation should consider when determining whether the patron exceeds the Fine/Fee Threshold amount; and 3) limit the report output to patron accounts with a balance that is equal to or greater than the specified threshold number.



Note: When the Overdues report is run in update mode and the Include Patron Account Information parameter is set, the report inserts a "Patron Account Statement has been issued" transaction into the Circulation Translation Log.

For additional information on these parameters, see the *InfoStation/Report Parameters Reference Guide* or view the InfoStation online help.

2.10.2 Virtua Settings Used by the Overdues Report

The Overdues report generates results using four Virtua Profiler settings:

- Is First Notice a Review Notice?
- Notice Period for Non-recalled Items
- Override Notices setting for Non-recalled Items
- Max Number Of Notices for Non-recalled Items

You can define all four settings, which we discuss below, in the Virtua Profiler on the Notices/Limits tab of the Location +Patron +Item Matrix.

2.10.2.1 Is First Notice a Review Notice?

The Is First Notice a Review Notice setting in the Location + Patron + Item Matrix determines whether review notices are generated for items that are about to come due.

When your system is configured to generate review notices, your patrons will not become eligible to receive an overdue notice for an item until a review notice has been generated. On the other hand, if your system is configured NOT to generate review notices, your patrons will become eligible to receive overdue notices as soon as all other eligibility criteria are met.

For information on generating review notices, see the section "Review Notices Report" in this guide.

2.10.2.2 Notice Period and Override Notices Setting for Non-recalled Items

The Notice Period or Override Notices setting for *non*-recalled items determines when patrons become eligible to receive first and subsequent overdue notices.

The Notice Period specifies the default amount of time that must pass before a patron becomes eligible to receive the first notice and subsequent notices for a non-recalled, overdue item.

The Override Notices setting specifies, for each numbered notice, a notice period that *overrides* the default value specified in the Notice Period field.

Patrons continue to become eligible to receive subsequent notices according to the Notice Period or Override Notices setting until they have received the Max Number Of Notices.

2.10.2.3 Max Number Of Notices for Non-recalled Items

The Max Number Of Notices for *non*-recalled items determines the maximum number of overdue notices that a patron can receive for a non-recalled, overdue item.

Each time you run the Overdues report in update mode, the notice count is incremented for the patrons included in the output. When a patron's notice count *exceeds* the Max Number Of Notices, the patron can no longer receive overdue notices and becomes eligible for inclusion in the Bills report.

When configuring notice-generating reports, keep in mind that . . .

- In the Overdues report, if you set the Notice Number to Generate to a number that *exceeds* the Max Number Of Notices, the report will NOT generate results.

- When the Max Number Of Notices is set to *zero* . . .
  - ♦ Patrons *never* become eligible to receive overdue notices.
    -BUT-
  - ♦ Running the Overdues report in update mode will cause patrons to become eligible to receive *bills*.

2.10.3 Data Elements and Variables for the Overdues Report

All notice-generating reports that use **CircReport.exe**, including the Overdues report, can return a wide range of data elements related to patron, item, bibliographic, and holdings information. For a complete list of these data elements and their corresponding variables, see the section "Data Elements and Variables for Notice-generating Reports" in this reference guide.

2.10.4 Output Templates for the Overdues Report

Location of files: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_3

Template	Contribution to Output
patron_email_page_header.tem	Generates the information that appears before the details of the overdue items retrieved by the report.
patron_email_page_footer.tem	Generates the information that appears after the last item detail in the e-mail notice.
patron_email_row.tem	Within the electronic Overdues notice, returns the information for a single item. This template is repeated for each overdue item, generating a list.
patron_acct_html_header.tem	In HTML output, generates the header for the patron account information section of the

	report.
patron_acct_html_footer.tem	In HTML output, generates the footer of the patron account information section of the report.
patron_acct_html_row.tem	In HTML output, returns all the information for a single fee assessment in the patron account section of the report. For a given patron, the **patron_acct_html_row.tem** template is repeated as long as unique information exists, generating a list of fee assessments.
patron_acct_patron_email_header.tem	In an e-mail, creates a heading for each group of fee assessments. The heading includes information related to the item for which the fee was originally assessed. All charges and payments related to the item appear below the appropriate item heading.
patron_acct_patron_email_page.tem	Provides the overall framework of the electronic patron account information when there are NO overdue items.
patron_acct_patron_email_row.tem	In an e-mail, returns all the information for a single fee assessment in the patron account section of the report. In the output, the **patron_acct_patron_email_row.tem** template is repeated for each assessment or payment related to a given item.
html_page_header.tem	In HTML output, generates the information that appears before the details of the overdue items retrieved by the report.
html_header.tem	In HTML output, generates labels that group overdue items according to shelving location.
html_row.tem	In HTML output, generates the information for a single overdue item.
html_page_footer.tem	In HTML output, generates the information that appears after the last item detail.
txt_message.tem	Generates the content of the Text message sent with Electronic Delivery, which is limited to 160 ASCII characters or 70 Unicode characters. This template has access to the item count detail that is included in the report output.

2.11 Overdues (i-tiva) Report

The Overdues (i-tiva) report lets you generate a list of overdue items checked out to patrons who could **not** be contacted by the i-tiva system. Unlike the regular Overdues report, which generates output using information stored in the Virtua database, the Overdues (i-tiva) report runs against a results file generated by i-tiva. The file contains information about patrons who could not be notified via the i-tiva system.

Note: You will need to specify the name and location of the i-tiva results file using the i-tiva Results File parameter. This location is specified by the VTLS_TEMP environment variable. In order for InfoStation i-tiva reports to run correctly, in the **constants.cfg** for Infostation, the **temp_dir** *must* be set to **/usr/vtls/virtua/temp** so that the system can read the i-tiva files.

The Overdues (i-tiva) report is a notice-generating report, which you can use to generate overdue notices for patrons who have not yet been notified by the i-tiva messaging system.

Important: This report should be used *only* by libraries that are also using the i-tiva messaging system. If you are NOT using this system to notify your patrons, use the regular Overdues report instead of this report.

2.11.1 Parameters Available for the Overdues (i-tiva) Report

The Overdues (i-tiva) report offers the following Report-specific Parameters:

- **Delimiter** (*optional*) - For delimited output, lets you specify the character that separates data on a line of output.

  Note: Configurations use the Delimiter parameter *only* when the Output Format parameter is set to E-mail with Delimited File Attachment. For details on the Output Format parameter, see the *InfoStation User's Guide*.

- **Sort Parameters** (*required*) - Let you sort your output using the following values:
  - Author
  - Call Number

- Class or Homeroom
- Department
- Due Date
- Title
- Institution
- Shelving Location
- Patron ID
- Patron Type Code
- Patron Postal Code
- College or School

- **i-tiva Results File** (*required*) - Lets you specify the name and location (full path) of the i-tiva results file that you want to use for generating this InfoStation report. InfoStation will look at this results file, which contains information about patrons whom i-tiva could not contact by telephone, and generates a report. Like other Circulation reports, you can use this report to generate e-mail or paper notices for those patrons.

  Note: After the i-tiva Message system calls patrons, it creates a results file. The Message system sends the results file via FTP to a location on your server that can be accessed by InfoStation. This location is specified by the VTLS_TEMP environment variable. It is this filename and location that you will want to type in this text box. (For information about **CircReport.exe,** the i-tiva Message system, and scheduling i-tiva Infostation reports, see the *System Management: Reporting User's Guide*.)

- **Date Format** (*required*) - Lets you choose how dates will be formatted in the output. The default date format is DD-MON-YYYY.

For additional information on these parameters, see the *InfoStation/Report Parameters Reference Guide* or view the InfoStation online help.

2.11.2 Data Elements and Variables for the Overdues (i-tiva) Report

All notice-generating reports that use **CircReport.exe**, including the Overdues (i-tiva) report, can return a wide range of data elements related to patron, item, bibliographic, and holdings information. For a complete list of these data elements and their corresponding variables, see the section "Data Elements and Variables for Notice-generating Reports" in this reference guide.

2.11.3 Output Templates for the Overdues (i-tiva) Report

Location of files: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_30

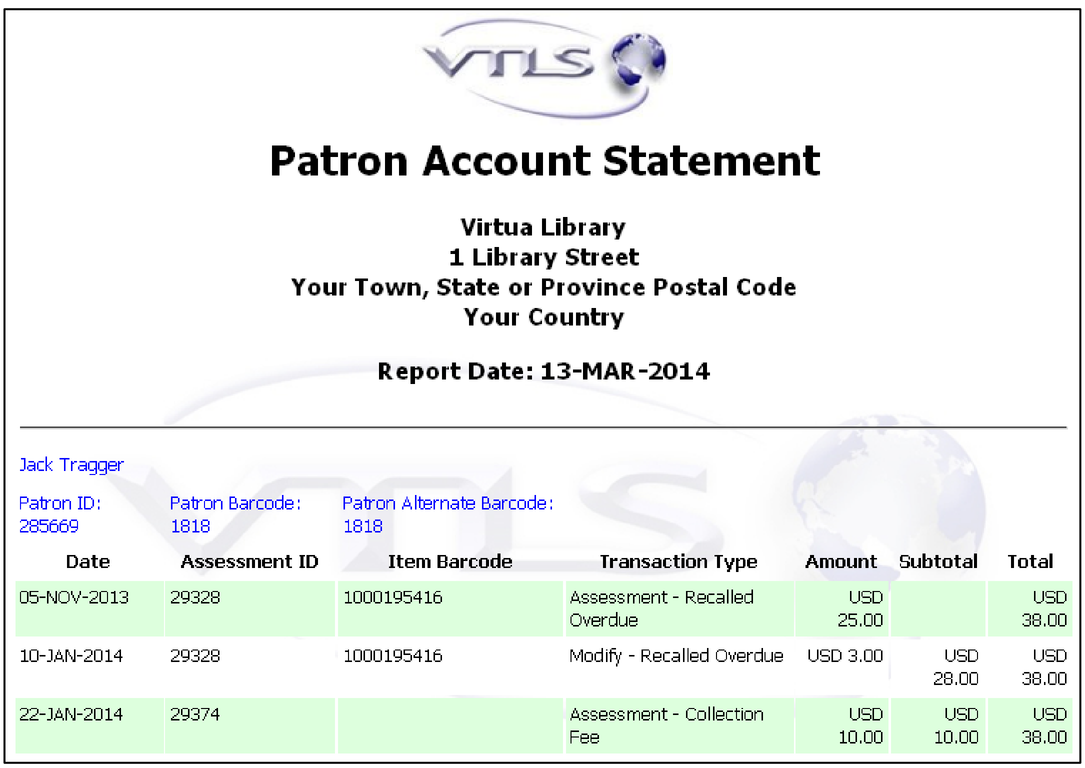
Template	Contribution to Output
patron_email_page.tem	Provides the overall framework of the overdue notice, including text and the function that returns the information for each overdue item.
patron_email_row.tem	Within the overdue notice, returns the information for a single item. This template is repeated for each overdue item, generating a list.
html_page.tem	Provides the overall framework of the HTML output.
html_header.tem	Within HTML output, generates labels that group available items according to shelving location.
html_row.tem	Within HTML output, generates the information for each overdue item.

2.12 Patron Account Statement Report

> **Important:** Before you use the Patron Account Statement report, you must configure Virtua to keep a log of financial transactions. To do this, select the *Log financial transactions to the Audit Trail* parameter in the Virtua Profiler. For details, see the *Virtua Profiler/Circulation Parameters User's Guide*.

The Patron Account Statement report generates a list of active (i.e., not waived or disputed) fine and fee assessments and payments associated with the patron accounts that meet the criteria specified in the report configuration. The output is grouped by patron and sorted by assessment ID. For information on how your configuration criteria affect your results, see the section "Parameters Available for the Patron Account Statement Report" in this chapter.

Figure 2-6 shows a portion of the default HTML output from the Patron Account Statement report.



Patron Account Statement

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

Report Date: 13-MAR-2014

Jack Tragger

Patron ID: 285669 | Patron Barcode: 1818 | Patron Alternate Barcode: 1818

Date	Assessment ID	Item Barcode	Transaction Type	Amount	Subtotal	Total
05-NOV-2013	29328	1000195416	Assessment - Recalled Overdue	USD 25.00		USD 38.00
10-JAN-2014	29328	1000195416	Modify - Recalled Overdue	USD 3.00	USD 28.00	USD 38.00
22-JAN-2014	29374		Assessment - Collection Fee	USD 10.00	USD 10.00	USD 38.00

Figure 2-6. Patron Account Statement HTML Output

Note: The Patron Account Statement report generates all account summaries in the database's Home Currency.

You can configure the Patron Account Statement report simply to generate a summary of patron account information, or you can use the report to generate patron account statement notices.

Note: When the Patron Account Statement report is run in update mode, the report inserts a "Patron Account Statement has been issued" transaction into the Circulation Translation Log.

The Patron Account Statement report is different from other notice-generating reports in that it does NOT use **CircReport.exe** to generate results. However, you can use the Patron Account Statement report to generate notices as you do with any other notice-generating report. There is no limit to the number of account statements that a patron can receive.

2.12.1 Parameters Available for the Patron Account Statement Report

The Patron Account Statement report offers various Report-specific Parameters that let you tell InfoStation which patron *accounts* to include in the output. For each qualifying account, InfoStation will return a list of fines and fees associated with that account if they meet your report criteria, including the notice threshold amount. For a given account to be included in the output, at least ONE fine or fee associated with it must match your configuration criteria.

The Patron Account Statement report offers the following Report-specific Parameters:

- **Log-in Locations** (*required*) - Lets you limit your results to accounts with fines assessed at one or more locations. To be included in the output, an account must contain at least one fine or fee assessed at a location that you select for the report configuration.

- **Patron Types** (*required*) - Lets you limit your results to one or more patron types. The output includes patron account statements only for the patron type(s) that you select for the report configuration.

- **Fine Codes** (*required*) - Lets you limit your results according to fine type. To be included in the output, an account must have a fine or fee that is assigned one of the fine types that you select for the report configuration.

- **Fine/Fee Threshold** (*required*) - Lets you limit the output to accounts with a balance OR fine assessment of a particular amount.
    - ♦ If you set the Date Range parameter to None, to be included in the output, a patron's account balance must meet or exceed the Fine/Fee Threshold. For example, if you set the Fine/Fee Threshold to 10 USD, the report will generate a list of patron accounts with a balance of $10.00 or more.
    - ♦ If you set the Date Range parameter to something other than None, InfoStation will return a list of accounts with at least one fine that was assessed during that date range but only if that particular fine meets or exceeds the Fine/Fee Threshold. For example, if you set the Date Range to Previous Week and the Fine/Fee Threshold to 10 USD, InfoStation will generate a list of patron accounts with fines of $10.00 or more that were assessed within the previous week.

Note:

- The Fine/Fee Threshold uses the database's home currency, which is indicated to the right of the Fine/Fee Threshold text box (e.g., USD).
- You cannot save a configuration where the Fine/Fee Threshold text box is empty or set to **0** (zero).

- **Number of Days Since Fine/Fee Assessment** (*optional*) - Lets you restrict the output of the report to those patrons who have fines or fees that are at least a certain number of days old. For example, if you set this parameter to 14, InfoStation will include in the output patron accounts that contain one or more assessments with a fine or fee that was assessed 14 or more days ago.
    - ♦ If you want the report to return only fine and fee results that have been assessed *exactly* equal to as many days as specified, select the **Exact Match** check box.
    - ♦ If you want the report to return ALL unpaid fine and fee results for all patron accounts, leave the Number of Days Since Notice Generated parameter blank.

Note: The latest possible date associated with the value set in the Number of Days Since Fine/Fee Assessment parameter must lie within the range of dates represented by the Date Range parameter configuration, if there is a Date Range configured.

- **Use Notice Date** (*optional*) The Use Notice Date parameter lets you specify whether the report will consider the Notice Date (associated with individual assessments in the patron account) when determining which patrons are returned in the report results. If you select the Use Notice Date check box, the report returns results only for patron accounts that have at least one assessment with a Notice Level value of 2. (A Notice Level of 2 indicates that the patron has already been billed.)

- **Number of Days Since Notice Generated** (*optional*) – Lets you specify the number of days to set as the Last Notice Threshold. The report will return results for patron accounts that contain one or more assessments with a Notice Date that is equal to or greater than the value specified in the Number of Days Since Notice Generated parameter.

- **Use Patron's Registering Library For Notices** - When the Output Format is Electronic Delivery or Delimited File, lets you configure the report to use the patron's registered library location information in the output in place of the library location information entered in the report-specific parameters. You must select this setting if you want Virtua to include the Notice Library fields as data elements in the report output and if you want Virtua to validate the ordering of these fields.

- **Honor Patron Communication Preferences** (*optional*) - Lets you configure the report to generate results according to the Communication Preference setting in the Patron Editor, or address preference specified in tag 008/10 of each patron record, and the Output Format of the report configuration.

  Note: The Patron Account Statement will NOT send output by text message.

- **Honor Language Preference** (*optional*) - Lets you determine which patrons will be included in the output, based on the language preference specified in the patron record and the language of the report configuration.

- **Omit Patrons in Collection** (*optional*) - Lets you determine which patrons will be included in the output. If you select the Omit Patrons in Collection check box, InfoStation will NOT report on patrons who are in collection, i.e., patrons whose records contain the delinquent patron block code 27.

- **Omit Delinquent Patrons** (*optional*) - Lets you determine which patrons will be included in the output. If you select the Omit Delinquent Patrons check box, InfoStation will NOT report on patrons who are flagged as delinquent, i.e., patrons whose records have the delinquent flag set to 1.

- **Output Assessment Subtotal Only** (*optional*) – (Only available when the Patron Account Statement report is configured to run in E-mail or Delimited File output formats.) Lets you limit your results to display only the subtotal owed for all transactions for the same assessment and NOT the transaction types.

- **Date Range** (*optional*) - Lets you limit your results to patrons that have had any type of transaction during a particular date range. To appear in the output, a patron's account must contain at least one transaction that took place during the date range AND meets or exceeds the Notice Threshold that you define for the report configuration.

- **Update First Statement Date** (*optional*) - Lets you update for each fine and fee assessment included in the output the "first account statement date," which is the date that the patron first received an account statement for that fine or fee.

> **Important:**
> - Do not set this parameter for “test” or internal configurations.
> - If the Output Format is set to HTML, do not set this parameter. If you do, you will get an error message upon saving the report configuration.

Once the first account statement date has been set for a fine or fee, it remains set and will not be changed by InfoStation. This means that when you run the Patron Account Statement report in update mode, InfoStation sets the first account statement date for all fines and fees for which the date has not yet been set. In this way, this date always reflects the *first* time that a patron received an account statement for a given fine or fee.

If you use the Delinquent Patron Accounts report to turn fines over to a collection agency, you will want to update this date each time you use the Patron Account Statement report to send account statements to patrons. The Delinquent Patron Accounts report determines delinquency based on the number of days since the first account statement was generated. If you do not set this date, you will not be able to generate results using the Delinquent Patron Accounts report. For details, see the section "Delinquent Patron Accounts Report" in this reference guide.

Note: For overdue fines, the first account statement date is the bill date (i.e., the date that you generated a bill notice using the Bills report). Running the Patron Account Statement report in update mode does not affect the bill date. For details, see the section "Bills Report" in this reference guide.

- **Date Format** - The Date Format parameter lets you specify how InfoStation should format dates in the output of a given configuration of the Patron Account Statement report. The default Date Format is DD-MON-YYYY.

For additional information on these parameters, see the *InfoStation/Report Parameters Reference Guide* or view the InfoStation online help.

2.12.2 Data Elements and Variables for the Patron Account Statement Report

The Patron Account Statement report returns a different set of data elements than other notice-generating reports. In addition, you cannot exclude data elements from the output via the Configuration screen. Rather, you can edit the output only by editing the output templates.

For your easy reference, below we list all the data elements that can be returned by the Patron Account Statement report.

Data Element	Variable	Description and Source
Address Preference Flag	address_pref_flag	A value in position 10 of the patron record 008 fixed fields that indicates the patron's address preference, either paper (0) or e-mail (1).
Amount	amount	For a patron account, the value associated with a given payment or assessment.
Attention Of	attention_of	The "attention of" name stored in the patron record in tag 270, subfield $h, where the first indicator is 1.
City	city	The city in the patron's primary paper address, stored in the patron record in tag 270, subfield $b, where the first indicator is 1.
Class	class	The class responsible for distributing patron account statements, stored in tag 301, subfield $e of the patron record.
College or School	college_or_school	The patron's college or school, stored in tag 301, subfield $c of the patron record.

Data Element	Variable	Description and Source
Control Number	control_number	The unique, system-assigned number associated with a given fine or fee assessment, which is assigned to the transaction at the time of the assessment.
Country	country	The country in the patron's primary paper address, stored in the patron record in tag 270, subfield $f, where the first indicator is 1.
County	county	The county in the patron's primary paper address, stored in the patron record in tag 270, subfield $c, where the first indicator is 1.
Date	date	The date on which a given assessment or payment was made.
Department	department	The patron's departmental affiliation, stored in tag 301, subfield $d of the patron record.
Due Date	due_date	The due date that was assigned when an item was checked out. -OR- If the item has been recalled since it was originally checked out, the new, calculated due date
E-mail Address, Primary	e_mail_address_primary	The patron's primary e-mail address, stored in the patron record in tag 271, subfield $a, where the first indicator is 1.
E-mail Address, Secondary	e_mail_address_secondary	The patron's secondary e-mail address, stored in the patron record in tag 271, subfield $a, where the first indicator is 2.
Entry Type	entry_type	The type of a given assessment or payment (e.g., Overdue Fine, Damaged Item, or Late Renewal).
FAX, Primary	telephone_primary_fax	The patron's primary FAX number, stored in the patron record in tag 271, subfield $l, where the first indicator is 1.
FAX, Secondary	telephone_secondary_fax	The patron's secondary fax number, stored in the patron record in tag 271, subfield $l, where the first indicator is 2.

Data Element	Variable	Description and Source
First Name	first_name	The patron's first name, taken from the 100 tag, subfield $a of the patron record (the text *after* the comma).
Home Library	home_library	The patron's home library, taken from tag 247, subfield $a of the patron record.
Institution Name	institution_name	The name of the patron's institutional affiliation, stored in tag 301, subfield $b of the patron record.
Institutional Affiliation	institution_affiliation	The role the patron plays with respect to the institution name (301 $b), stored in tag 301, subfield $a of the patron record.
Item Barcode	item_barcode	The library-assigned item barcode of the item associated with an entry in the patron's account.
Language	language	The patron's language preference, taken from tag … • tag 100, subfield $l of the patron record -OR- • tag 110, subfield $l of the patron record
Last Name	last_name	The patron's last name, taken from tag 100, subfield $a of the patron record (the text *before* the comma).
Library Telephone	library_telephone	The telephone number of the library.
Name	name	The patron's full, personal name (i.e., last name and first name), taken from tag… • tag 100, subfield $a of the patron record (all text) -OR- • tag 110, subfield $a of the patron record (all text)
Patron Barcode	patron_barcode	The library-assigned patron barcode, stored in tag 015, subfield $a of the patron record.
Patron ID	patron_id	The system-assigned patron identification number, stored in tag 001, subfield $a of the patron record.

Data Element	Variable	Description and Source
Patron Other Name	other_name	The patron's other (e.g., Chinese) name, stored in tag 111, subfield $a of the patron record.
Patron Other Name Suffix	other_name_suffix	The suffix associated with the patron's other name stored in tag 111, subfield $f of the patron record.
Patron Start Flag	patron_start_flag	The value that lets the report group results according to the patron who requested them.
Patron Type	patron_type	The patron type code assigned to the patron, stored in tag 030, subfield $a of the patron record.
Postal Code	postal_code	The postal code associated with the patron's primary paper address, stored in the patron record in tag 270, subfield $e where the first indicator is 1.
Prefix	prefix	The patron's prefix, taken from tag 100, subfield $e of the patron record.
Report Date	report_date	The date the report was run.
Shelving Location	shelf_location	The current shelving location of the requested item.
Special Telephone, Primary	telephone_primary_special	The specialized telephone number associated with the patron's primary paper address, stored in the patron record in tag 270, subfield $j, where the first indicator is 1.
Special Telephone, Secondary	telephone_secondary_special	The specialized telephone number associated with the patron's secondary paper address, stored in the patron record in tag 270, subfield $j, where the first indicator is 2.
State	state	The state associated with the patron's primary paper address, stored in the patron record in tag 270, subfield $d, where the first indicator is 1.
Street Address 1	street_address_1	The first line of the patron's street address, taken from the *first* occurrence of tag 270, subfield $a with a first indicator of 1.

Data Element	Variable	Description and Source
Street Address 2	street_address_2	The second line of the patron's street address, taken from the *second* occurrence of tag 270, subfield $a with a first indicator of 1.
Street Address 3	street_address_3	The third line of the patron's street address, taken from the *third* occurrence of tag 270, subfield $a with a first indicator of 1.
Street Address 4	street_address_4	The fourth line of the patron's street address, taken from the *fourth* occurrence of tag 270, subfield $a with a first indicator of 1.
Street Address 5	street_address_5	The fifth line of the patron's street address, taken from the *fifth* occurrence of tag 270, subfield $a with a first indicator of 1.
Subtotal	subtotal	The current total of a given assessment, taking into account the transactions (e.g., payments) related to that assessment.
Suffix	suffix	The patron' suffix, stored in tag 100, subfield $f of the patron record.
Telephone, Primary	telephone_primary	The telephone number associated with the patron's primary paper address, stored in the patron record in tag 270, subfield $k where the first indicator is 1.
Telephone, Secondary	telephone_secondary	The telephone number associated with the patron's secondary paper address, stored in the patron record in tag 270, subfield $k where the first indicator is 2.
Title	title	The title of a given item associated with an entry in a patron's account, taken from tag 245, subfield $a of the bibliographic record.
Total	total	For each patron, the total of all assessments and payments included in the output. Note that the total does not include waived or disputed fines and fees.

Data Element	Variable	Description and Source
Transaction Due Date	transaction_due_date	The due date of a checked in item that is associated with a fine or fee.
Type	type	They type of transaction assigned to an entry in a patron's account.

2.12.3 Output Templates for the Patron Account Statement Report

Location of files: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_16

Template	Contribution to Output
patron_email_page.tem	Provides the overall framework of the electronic patron account statement, including the text of the overdue letter.
patron_email_header.tem	In an e-mail, creates a heading for each group of fee assessments. The heading includes information related to the item for which the fee was originally assessed. All charges and payments related to the item appear below the appropriate item heading.
patron_email_row.tem	In an e-mail, returns the information for a single fee assessment. In the output, the **patron_email_row.tem** template is repeated for each assessment or payment related to a given item. The list of fee assessments appears below the appropriate item information heading, which is generated by the **patron_email_header.tem** template.
html_page_header.tem	In HTML output, generates the information that appears before the details of the fee assessments retrieved by the report.
html_header.tem	HTML output is formatted into tables. The **html_header.tem** template returns the labels that appear at the top of each column in the tables. In each table, rows of information are generated by the **html_row.tem** template.

Template	Contribution to Output
html_row.tem	In HTML output, returns all the information for a single fee assessment. For a given patron, the **html_row.tem** template is repeated as long as unique information exists, generating a list of fee assessments. The information returned by the **html_row.tem** template is labeled by the output from the **html_header.tem** template.
html_page_footer.tem	In HTML output, generates the information that appears after the last fee assessment detail.

2.13 Patron Expiration Reminders Report

The Patron Expiration Reminders report (/usr/vtls/virtua/webrpt_XX_x/Cir/Cir_63) generates a list of patrons whose patron records are due to expire based on the value specified in the Expiration Alert (Days) setting in the Patron Types parameter in the Virtua Profiler.

Note: Your output will include all patrons whose patron records are due to expire within the specified period of time. It will NOT include patrons whose patron records have already expired by the time you run the report.

The Patron Expiration Reminders report offers a wide range of parameters, which let you limit your results according to patron type, patron address, home library, academic affiliation, patron language preference, and patron communication preference. Optionally, you can also limit the output to patrons who have borrowed items at some time OR patrons who have items checked out at the time you run the report configuration. For details about each of these parameters, see the online, context-sensitive help on the report configuration page in the InfoStation.

The Patron Expiration Reminders report is a notice-generating report, which you can use to generate either expiration reminder notices for patrons or a list for in-house use of patrons whose records are nearing expiration. An Update Database option is available. When you run the report in update mode, the 042 tag in each patron record is given a subfield $g, which displays the date the expiration reminder, was sent.

The Patron Expiration Reminders report can return a wide range of data elements related to the patron and patron record.

Figure 2-7 shows an example of HTML output from the Patron Expiration Reminders report.

Patron Expiration Reminders

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

Barcode	vtls0215	Catherine Anne Andrews home
Expiration Date	09-APR-2014	
Circulation Count	0	
Patron Type	Faculty	
Language		
E-mail	andrewsc@vtls.com	
Telephone		
FAX		

Barcode	326, 623	Bungee Jumper 1414 Kraft Dr. Blacksburg, VA 24060
Expiration Date	24-JUN-2014	
Circulation Count	7	
Patron Type	Faculty	
Language		
E-mail		
Telephone		
FAX		

Figure 2-7. Patron Expiration Reminders HTML Output

2.14 Recalls Report

The Recalls report generates a list of recall requests that meet the location, patron type, and check-out type criteria that you set in the report configuration. You can configure the Recalls report simply to generate a list of qualifying recalled items, or you can configure the report to generate recall notices for patrons who have the requested items checked out.

For additional information on how items qualify for inclusion in the Recalls report, see the section "Virtua Settings Used by the Recalls Report" in this chapter.

Figure 2-8 shows an example of HTML output from the Recalls report.

Recalls

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

1 Recall Items Found

Shelving Location: Bryan Campus Library

Call Number	B2430.D484 D47 2005	**Report Date**	13-MAR-2014
Author		**Due Date**	05-FEB-2014
Title	Derrida [videorecording] / directed by Kirby Dick and Amy Ziering Kofman.	**Notice Count**	1
Item Barcode	1000208018	**Checkout Type**	Regular
Units/Copy Number	c. 1	**Patron Type**	Staff
Price	USD 0.00	**Patron Barcode**	meow01
		Personal Name	Cunning, Mechka
		Telephone	
		Telephone, Secondary	

Figure 2-8. Recalls HTML Output

Note: When you run the Recalls report in update mode, Virtua calculates a new due date for the requested item using the Guaranteed Circulation Period and the Mail Grace Period.

2.14.1 Parameters Available for the Recalls Report

The Recalls report offers the following Report-specific Parameters:

- **Shelving Locations** (*required*) - Lets you limit your results to one or more shelving locations. To be included in the results, an item's current shelving location must match one of the locations you choose for the report configuration.

- **Patron Types** (*required*) - Lets you limit your results to one or more patron types. To be included in the results, a recalled item must be checked out to a patron who is assigned one of the patron types that you select for the report configuration.

- **Check-out Type** (*required*) - Lets you limit the output to recalled items associated with a particular check-out type. You can generate results for . . .

  - All Check-outs
  - Regular Check-outs
  - In-house Check-outs
  - Reserve Check-outs

- **Delimiter** (*optional*) - For delimited output, lets you specify the character that separates data on a line of output.

  Note: Configurations use the Delimiter parameter *only* when the Output Format parameter is set to E-mail with Delimited File Attachment. For details on the Output Format parameter, see the *InfoStation User's Guide*.

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

  - Author
  - Call Number
  - Class or Homeroom
  - Department
  - Due Date
  - Title
  - Institution
  - Shelving Location

- Patron ID
- Patron Type Code
- Patron Postal Code
- College or School

- **Update Database** (*optional*) - Lets you choose whether InfoStation will update the database when you run the report configuration. If you select this check box, when you run the report configuration, InfoStation will . . .
  - Update the database to indicate that recall notices have been sent to the appropriate patrons. *These patrons will no longer be eligible to receive a recall notice*.
  - Calculate a new due date for the requested item.

> **Important:** When testing configurations of the Recalls report, do NOT select the Update Database check box.

- **Use Patron's Registering Library For Notices** - When the Output Format is Electronic Delivery or Delimited File, lets you configure the report to use the patron's registered library location information in the output in place of the library location information entered in the report-specific parameters. You must select this setting if you want Virtua to include the Notice Library fields as data elements in the report output and if you want Virtua to validate the ordering of these fields.

- **Honor Patron Communication Preferences** (*optional*) - Lets you configure the report to generate results according to the Communication Preference setting in the Patron Editor, or address preference specified in tag 008/10 of each patron record, and the Output Format of the report configuration.

- **Honor Language Preference** (*optional*) - Lets you determine which patrons will be included in the output, based on the language preference specified in the patron record and the language of the report configuration.

- **Check-out Type Labels** (*optional*) - Let you specify labels for check-out types that appear in the output.

- **Date Format** (*required*) - Lets you choose how dates will be formatted in the output. The default date format is DD-MON-YYYY.

For additional information on these parameters, see the *InfoStation/Report Parameters Reference Guide* or view the InfoStation online help.

2.14.2 Virtua Settings Used by the Recalls Report

The Recalls report generates results using the following Virtua Profiler settings:

- Guaranteed Circulation Period
- Mail Grace Period

You can define both settings, which we discuss below, in the Virtua Profiler on the Fines/Grace tab of the Location +Patron +Item Matrix.

2.14.2.1 Guaranteed Circulation Period

The Guaranteed Circulation Period specifies the number of days a patron is guaranteed a checked out item before it can come due because of a recall request.

For *regular* recalls, Virtua calculates the new due date by adding the remainder of the Guaranteed Circulation Period AND the Mail Grace Period to the run date of the Recalls report. For *immediate* recalls, the Guaranteed Circulation Period is ignored.

Note: Each time you run the Recalls report, Virtua *calculates* the hypothetical recall due date for each item (i.e., the due that that would be applied to recalled items if you were to generate notices on the current day). Virtua applies the new due date to recalled items, however, *only* when you run the Recalls report in update mode.

Virtua calculates a recall due date only if it shortens the original loan period. If the recall due date is no sooner than the original due date, the due date does not change. If the calculated due date falls on a day when the library is closed, Virtua adjusts the calculated due date forward to the next open day. Additionally, when calculating the new due date, Virtua looks at the Due at Closing setting in the Virtua Profiler to determine the time that should be associated with the new due date.

For additional information on the Guaranteed Circulation Period and how it is used to calculate the recall due date, see the *Virtua Profiler/Circulation Parameters User's Guide.*

2.14.2.2 Mail Grace Period

The Mail Grace Period specifies the amount of time required for a patron to receive a recall notice.

For *regular* recalls, Virtua calculates the new due date by adding the Mail Grace Period AND the remainder of the Guaranteed Circulation Period to the date on which the recall notice is generated. If the Guaranteed Circulation Period has passed when the request is placed, the Mail Grace Period *alone* determines the new due date of a recalled item.

For *immediate* recalls, the new due date is calculated by adding *only* the Mail Grace Period to the run date of the Recalls report.

Note: Each time you run the Recalls report, Virtua *calculates* the hypothetical recall due date for each item (i.e., the due that that would be applied to recalled items if you were to generate notices on the current day). Virtua applies the new due date to recalled items, however, *only* when you run the Recalls report in update mode.

Virtua calculates a recall due date only if it shortens the original loan period. If the recall due date is no sooner than the original due date, the due date does not change. If the calculated due date falls on a day when the library is closed, Virtua adjusts the calculated due date forward to the next open day. Additionally, when calculating the new due date, Virtua looks at the Due at Closing setting in the Virtua Profiler to determine the time that should be associated with the new due date.

For additional information on the Mail Grace Period and how it is used to calculate the new due date for recalls, see the *Virtua Profiler/Circulation Parameters User's Guide.*

2.14.3 Data Elements and Variables for the Recalls Report

All notice-generating reports that use **CircReport.exe**, including the Recalls report, can return a wide range of data elements related to patron, item, bibliographic, and holdings information. For a complete list of these data elements and their corresponding variables, see the section "Data Elements and Variables for Notice-generating Reports" in this reference guide.

2.14.4 Output Templates for the Recalls Report

Location of files: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_5

Template	Contribution to Output
patron_email_page_header.tem	Generates the information that appears before the details of the recall requests retrieved by the report.
patron_email_page_footer.tem	Generates the information that appears after the last item detail in the e-mail notice.
patron_email_row.tem	Within the Recalls notice, returns the information for a single item. This template is repeated for each recalled item, generating a list.
html_page_header.tem	In HTML output, generates the information that appears before the details of the recall requests retrieved by the report.
html_header.tem	In HTML output, generates labels that group recalled items according to shelving location.
html_row.tem	In HTML output, generates the information for each recalled item.
html_page_footer.tem	In HTML output, generates the information that appears after the last item detail.
text_message.tem	Generates the content of the Text message sent with Electronic Delivery, which is limited to 160 ASCII characters or 70 Unicode characters. This template has access to the item count detail that is included in the report output.

2.15 Recalls (i-tiva) Report

The Recalls (i-tiva) report lets you generate a list of recalled items checked out to patrons who could **not** be contacted by the i-tiva system. Unlike the regular Recalls report, which generates output using information stored in the Virtua database, the Recalls (i-tiva) report runs against a results file generated by i-tiva. The file contains information about patrons who could not be notified via the i-tiva system.

Note: You will need to specify the name and location of the i-tiva results file using the i-tiva Results File parameter. This location is specified by the VTLS_TEMP environment variable. In order for InfoStation i-tiva reports to run correctly, in the **constants.cfg** for Infostation, the **temp_dir** *must* be set to **/usr/vtls/virtua/temp** so that the system can read the i-tiva files.

The Recalls (i-tiva) report is a notice-generating report, which you can use to generate requested, overdue notices for patrons who have not yet been notified by the i-tiva message system.

Important: This report should be used *only* by libraries that are also using the i-tiva messaging system. If you are NOT using this system to notify your patrons, use the regular Recalls report instead of this report.

2.15.1 Parameters Available for the Recalls (i-tiva) Report

The Recalls report offers the following Report-specific Parameters:

- **Delimiter** (*optional*) - For delimited output, lets you specify the character that separates data on a line of output.

  Note: Configurations use the Delimiter parameter *only* when the Output Format parameter is set to E-mail with Delimited File Attachment. For details on the Output Format parameter, see the *InfoStation User's Guide*.

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

  - Author
  - Call Number

- Class or Homeroom
- Department
- Due Date
- Title
- Institution
- Shelving Location
- Patron ID
- Patron Type Code
- Patron Postal Code
- College or School

- **i-tiva Results File** (*required*) - Lets you specify the name and location (full path) of the i-tiva results file that you want to use for generating this InfoStation report. InfoStation will look at this results file, which contains information about patrons whom i-tiva could not contact by telephone, and generates a report. Like other Circulation reports, you can use this report to generate e-mail or paper notices for those patrons.

  Note: After the i-tiva Message system calls patrons, it creates a results file. The Message system sends the results file via FTP to a location on your server that can be accessed by InfoStation. This location is specified by the VTLS_TEMP environment variable. It is this filename and location that you will want to type in this text box. (For information about **CircReport.exe,** the i-tiva Message system, and scheduling i-tiva InfoStation reports, see the *System Management: Reporting User's Guide*.)

- **Date Format** (*required*) - Lets you choose how dates will be formatted in the output. The default date format is DD-MON-YYYY.

For additional information on these parameters, see the *InfoStation/Report Parameters Reference Guide* or view the InfoStation online help.

2.15.2 Data Elements and Variables for the Recalls (i-tiva) Report

All notice-generating reports that use **CircReport.exe**, including the Recalls (i-tiva) report, can return a wide range of data elements related to patron, item, bibliographic, and holdings information. For a complete list of these data elements and their corresponding variables, see the section "Data Elements and Variables for Notice-generating Reports" in this reference guide.

2.15.3 Output Templates for the Recalls (i-tiva) Report

Location of files: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_32

Template	Contribution to Output
patron_email_page.tem	Provides the overall framework of the Recall notice, including text and the function that returns item information.
patron_email_row.tem	Within the Recalls notice, returns the information for a single item. This template is repeated for each recalled item, generating a list.
html_page.tem	Provides the overall framework of the HTML output.
html_header.tem	Within HTML output, generates labels that group available items according to shelving location.
html_row.tem	Within HTML output, generates the information for each recalled item.

2.16 Recalled Bills Report

The Recalled Bills report generates a list of overdue items that . . .

- Are eligible for billing.
- Have been recalled by other patrons.
- Meet the location, patron type, and check-out type criteria that you set in the report configuration.

Note: If you want all *requested* items to be considered as recalled items for this report, run **SetConsiderAllRequestedItemsFlag.sh** (see the *System Management: Circulation User's Guide*).

You can configure the Recalled Bills report simply to generate a list of qualifying recalled, billable items, or you can configure the report to generate recalled bill notices for patrons who have the recalled, billable items checked out.

For additional information on how items qualify for inclusion in the Recalled Bills report, see the section "Virtua Settings Used by the Recalled Bills Report" in this chapter.

Figure 2-9 shows a portion of the default HTML output from the Recalled Bills report.

Recalled Bills

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

73 Overdues Found

Shelving Location: Central Lib Fine Arts/Media Center

Call Number	MU 786.9193 R	**Report Date**	06-JAN-2011
Author	Riley, Pete	**Due Date**	09-NOV-2009
Title	Crash course : drums / Pete Riley.	**Notice Count**	1
Item Barcode	0228455651981	**Checkout Type**	Regular
Units/Copy Number	c. 0	**Patron Type**	Adult
Price	USD 14.95	**Patron Barcode**	1118440922242
Processing Fee	USD 8.00		
Item Subtotal	USD 22.95		

Figure 2-9. Recalled Bills HTML Output

Note: Patrons become eligible for inclusion in the Recalled Bills report after they have received the maximum number of overdue notices for a recalled item. Therefore, the Recalled Bills report works properly *only* if the maximum number of overdue notices is set for each patron type in the Virtua Profiler. For details, see the section "Max Number Of Notices for Recalled Items" in this guide.

2.16.1 Parameters Available for the Recalled Bills Report

The Recalled Bills report offers the following Report-specific Parameters:

- **Shelving Locations** (*required*) - Lets you limit your results to one or more shelving locations. To be included in the results, an item's current shelving location must match one of the locations that you select for the report configuration.

- **Patron Types** (*required*) - Lets you limit your results to one or more patron types. To be included in the results, a recalled, billable item must be checked out to a patron who is assigned one of the patron types that you select for the report configuration.

- **Check-out Type** (*required*) - Lets you limit the output to recalled, billable items associated with a particular check-out type. You can generate results for . . .
  - All Check-outs
  - Regular Check-outs
  - In-house Check-outs
  - Reserve Check-outs

- **Delimiter** (*optional*) - For delimited output, lets you specify the character that separates data on a line of output.

> **Note:** Configurations use the Delimiter parameter *only* when the Output Format parameter is set to E-mail with Delimited File Attachment. For details on the Output Format parameter, see the *InfoStation User's Guide*.

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

  - Author
  - Call Number
  - Class or Homeroom
  - Department
  - Due Date
  - Title
  - Institution
  - Shelving Location
  - Patron ID
  - Patron Type Code
  - Patron Postal Code
  - College or School

- **Update Database** (*optional*) - Lets you choose whether InfoStation will update the database when you run the report configuration. If you select this check box, when you run the report configuration InfoStation will . . .

  - Update the database to indicate that a recalled bill notice has been sent to the appropriate patrons. *These patrons will no longer be eligible to receive a recall bill notice*.
    -AND-
  - Add the Billed for Replacement (4600) item status to items included in the output.

-AND-

♦ Add the processing fee and the item price the account of each patron who receives a recalled bill notice.

> **Note:** InfoStation adds the processing fee to patron accounts via the **CircReport.exe** parameter **--add_billing_fee**, which is defined for the Recalled Bills report in the **get_data** subroutine of the **Cir_report_8.cgi** file. By default, this parameter is set to 1 (one). If you do NOT want InfoStation to add the processing fee to patron records, set this parameter to 0 (zero).

> **Important:** When testing configurations of the Recalled Bills report, do NOT select the Update Database check box.

- **Use Patron's Registering Library For Notices** - When the Output Format is Electronic Delivery or Delimited File, lets you configure the report to use the patron's registered library location information in the output in place of the library location information entered in the report-specific parameters. You must select this setting if you want Virtua to include the Notice Library fields as data elements in the report output and if you want Virtua to validate the ordering of these fields.

- **Honor Patron Communication Preferences** (*optional*) - Lets you configure the report to generate results according to the Communication Preference setting in the Patron Editor, or address preference specified in tag 008/10 of each patron record, and the Output Format of the report configuration.

- **Honor Language Preference** (*optional*) - Lets you determine which patrons will be included in the output, based on the language preference specified in the patron record and the language of the report configuration.

- **Check-out Type Labels** (*optional*) - Let you specify labels for check-out types that appear in the output.

- **Date Format** (*required*) - Lets you choose how dates will be formatted in the output. The default date format is DD-MON-YYYY.

For additional information on these parameters, see the *InfoStation/Report Parameters Reference Guide* or view the InfoStation online help.

2.16.2 Virtua Settings Used by the Recalled Bills Report

The Recalled Bills report generates results using the following Virtua Profiler settings:

- Billing Period for Recalled Items
- Max Number Of Notices for Recalled Items

You can define both settings, which we discuss below, in the Virtua Profiler on the Notices/Limits tab of the Location +Patron +Item Matrix.

2.16.2.1 Billing Period for Recalled Items

The Billing Period for *recalled* items specifies the amount of time that must pass between the date the *last* recalled overdue notice is generated and the date the patron becomes eligible for inclusion in the Recalled Bills report.

Important: If you set the Billing Period for recalled items to *zero*, patrons become eligible to receive a recalled bill notice immediately after they receive their *last* recalled overdue notice.

Patrons receive their last recalled overdue notice according to the Max Number Of Notices for Recalled Items and the Notice Period or Override Notices setting for Recalled Items.

2.16.2.2 Max Number Of Notices for Recalled Items

The Max Number Of Notices for *recalled* items determines the maximum number of notices that a patron can receive for a recalled, overdue item.

2.16.3 Data Elements and Variables for the Recalled Bills Report

All notice-generating reports that use **CircReport.exe**, including the Recalled Bills report, can return a wide range of data elements related to patron, item, bibliographic, and holdings information. For a complete list of these data elements and their corresponding variables, see the section "Data Elements and Variables for Notice-generating Reports" in this reference guide.

2.16.4 Output Templates for the Recalled Bills Report

Location of files: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_8

Template	Contribution to Output
patron_email_page_header.tem	Generates the information that appears before the details of the records retrieved by the report.
patron_email_page_footer.tem	Generates the information that appears after the last item detail in the e-mail notice.
patron_email_row.tem	Within the Recalled Bills notice, returns the information for a single item. This template is repeated for each recalled, billable item, generating a list.
html_page_header.tem	In HTML output, generates the information that appears before the details of the records retrieved by the report.
html_header.tem	In HTML output, generates labels that group recalled, billable items according to shelving location.
html_row.tem	In HTML output, generates the information for each recalled, billable item.
html_page_footer.tem	In HTML output, generates the information that appears after the last item detail.
txt_message.tem	Generates the content of the Text message sent with Electronic Delivery, which is limited to 160 ASCII characters or 70 Unicode characters. This template has access to the item count detail that is included in the report output.

2.17 Recalled Bills (i-tiva) Report

The Recalled Bills (i-tiva) report lets you generate a list of recalled, billable items that are checked out patrons who could **not** be contacted by the i-tiva messaging system. Unlike the regular Recalled Bills report, which generates output using information stored in the Virtua database, the Recalled Bills (i-tiva) report runs against a results file generated by i-tiva. The file contains information about patrons who could not be notified via the i-tiva system.

Note: You will need to specify the name and location of the i-tiva results file using the i-tiva Results File parameter. This location is specified by the VTLS_TEMP environment variable. In order for InfoStation i-tiva reports to run correctly, in the **constants.cfg** for Infostation, the **temp_dir** *must* be set to **/usr/vtls/virtua/temp** so that the system can read the i-tiva files.

The Recalled Bills (i-tiva) report is a notice-generating report, which you can use to generate recalled bill notices for patrons who have not yet been notified by the i-tiva message system.

Important: This report should be used *only* by libraries that are also using the i-tiva messaging system. If you are NOT using this system to notify your patrons, use the regular Recalled Bills report instead of this report.

2.17.1 Parameters Available for the Recalled Bills (i-tiva) Report

The Recalled Bills report offers the following Report-specific Parameters:

- **Delimiter** (*optional*) - For delimited output, lets you specify the character that separates data on a line of output.

  Note: Configurations use the Delimiter parameter *only* when the Output Format parameter is set to E-mail with Delimited File Attachment. For details on the Output Format parameter, see the *InfoStation User's Guide*.

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

- Call Number
- Class or Homeroom
- Department
- Due Date
- Title
- Institution
- Shelving Location
- Patron ID
- Patron Type Code
- Patron Postal Code
- College or School

- **i-tiva Results File** (*required*) - Lets you specify the name and location (full path) of the i-tiva results file that you want to use for generating this InfoStation report. InfoStation will look at this results file, which contains information about patrons whom i-tiva could not contact by telephone, and generates a report. Like other Circulation reports, you can use this report to generate e-mail or paper notices for those patrons.

  Note: After the i-tiva Message system calls patrons, it creates a results file. The Message system sends the results file via FTP to a location on your server that can be accessed by InfoStation. This location is specified by the VTLS_TEMP environment variable. It is this filename and location that you will want to type in this text box. (For information about **CircReport.exe,** the i-tiva Message system, and scheduling i-tiva InfoStation reports, see the *System Management: Reporting User's Guide*.)

- **Date Format** (*required*) - Lets you choose how dates will be formatted in the output. The default date format is DD-MON-YYYY.

For additional information on these parameters, see the *InfoStation/Report Parameters Reference Guide* or view the InfoStation online help.

2.17.2 Data Elements and Variables for the Recalled Bills (i-tiva) Report

All notice-generating reports that use **CircReport.exe**, including the Recalled Bills (i-tiva) report, can return a wide range of data elements related to patron, item, bibliographic, and holdings information. For a complete list of these data elements and their corresponding variables, see the section "Data Elements and Variables for Notice-generating Reports" in this reference guide.

2.17.3 Output Templates for the Recalled Bills (i-tiva) Report

Location of files: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_35

Template	Contribution to Output
patron_email_page.tem	Provides the overall framework of the Recalled Bills notice, including text and the function that returns item information.
patron_email_row.tem	Within the Recalled Bills notice, returns the information for a single item. This template is repeated for each recalled, billable item, generating a list.
html_page.tem	Provides the overall framework of the HTML output.
html_header.tem	Within HTML output, generates labels that group available items according to shelving location.
html_row.tem	Within HTML output, generates the information for each recalled, billable item.

2.18 Recalled Overdues Report

The Recalled Overdues report generates a list of overdue items that . . .

- Have a next notice type of "recalled overdue."

  Note: An item is assigned the recalled overdue notice type when the item is overdue and a recall request is at the beginning of the request queue for that item, AND a recalled overdue notice has been sent to the patron for the item.

- Meet the location, patron type, and check-out type criteria that you set in the report configuration.

Note: If you want all *requested* overdue items to be considered as recalled overdue items for this report, run **SetConsiderAllRequestedItemsFlag.sh** (see the *System Management: Circulation User's Guide*).

You can configure the Recalled Overdues report simply to generate a list of qualifying recalled, overdue items, or you can configure the report to generate recalled overdue notices for patrons who have the recalled, overdue items checked out.

For additional information on how items qualify for inclusion in the Recalled Overdues report, see the section "Virtua Settings Used by the Recalled Overdues Report" in this chapter.

Figure 2-10 shows a portion of the default HTML output from the Recalled Overdues report.

Recalled Overdues

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

1378 Recalled Overdue Items Found

Shelving Location: Central Lib Fine Arts/Media Center

Call Number	794.8 Rune A	**Report Date**	06-JAN-2011
Author	Ashby, Alicia	**Due Date**	28-DEC-2009
Title	Rune factory : a fantasy harvest moon / [written by Alicia Ashby and Elizabeth Ellis].	**Notice Count**	1
Item Barcode	0228543411992	**Checkout Type**	Regular
Units/Copy Number	c. 0	**Patron Type**	Adult
Price	USD 17.00	**Patron Barcode**	1118439957548

Figure 2-10. Recalled Overdues HTML Output

Note: All recalled, overdue items (i.e., all items that appear on the Recalled Overdue page of the Activity tab of the Patron Information window in the Virtua client) qualify for inclusion in the Recalled Overdues report.

2.18.1 Parameters Available for the Recalled Overdues Report

The Recalled Overdues report offers the following Report-specific Parameters:

- **Shelving Locations** (*required*) - Lets you limit your results to one or more shelving locations. To be included in the results, an item's current shelving location must match one of the locations that you select for the report configuration.

- **Patron Types** (*required*) - Lets you limit your results to one or more patron types. To be included in the results, a recalled, overdue item must be checked out to a patron who is assigned one of the patron types that you select for the report configuration.

- **Check-out Type** (*required*) - Lets you limit the output to recalled, overdue items associated with a particular check-out type. You can generate results for . . .

- All Check-outs
- Regular Check-outs
- In-house Check-outs
- Reserve Check-outs

- **Notice Number to Generate** (*required*) - Lets you limit report output according to a patron's notice count. Using the Location + Patron + Item Matrix, you can determine the number of notices a patron can receive for a recalled, overdue item. As patrons receive notices, their notice count is incremented. The Notice Number to Generate parameter lets you create report configurations based on this notice count.

- **Delimiter** (*optional*) - For delimited output, lets you specify the character that separates data on a line of output.

> **Note:** Configurations use the Delimiter parameter *only* when the Output Format parameter is set to E-mail with Delimited File Attachment. For details on the Output Format parameter, see the *InfoStation User's Guide*.

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

- Author
- Call Number
- Class or Homeroom
- Department
- Due Date
- Title
- Institution
- Shelving Location
- Patron ID
- Patron Type Code
- Patron Postal Code
- College or School

- **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 database to indicate that recalled overdue notices have been sent to the appropriate patrons, whose counts will be incremented as appropriate.

> **Important:** When testing configurations of the Recalled Overdues report, do NOT select the Update Database check box.

- **Use Patron's Registering Library For Notices** - When the Output Format is Electronic Delivery or Delimited File, lets you configure the report to use the patron's registered library location information in the output in place of the library location information entered in the report-specific parameters. You must select this setting if you want Virtua to include the Notice Library fields as data elements in the report output and if you want Virtua to validate the ordering of these fields.

- **Honor Patron Communication Preferences** (*optional*) - Lets you configure the report to generate results according to the Communication Preference setting in the Patron Editor, or address preference specified in tag 008/10 of each patron record, and the Output Format of the report configuration.

- **Honor Language Preference** (*optional*) - Lets you determine which patrons will be included in the output, based on the language preference specified in the patron record and the language of the report configuration.

- **Check-out Type Labels** (*optional*) - Let you specify labels for check-out types that appear in the output.

- **Date Format** (*required*) - Lets you choose how dates will be formatted in the output. The default date format is DD-MON-YYYY.

For additional information on these parameters, see the *InfoStation/Report Parameters Reference Guide* or view the InfoStation online help.

2.18.2 Virtua Settings Used by the Recalled Overdues Report

The Recalled Overdues report generates results using the following Virtua Profiler settings:

- Notice Period for Recalled Items
- Override Notices setting for Recalled Items
- Max Number Of Notices for Recalled Items

You can define all three settings, which we discuss below, in the Virtua Profiler on the Notices/Limits tab of the Location +Patron +Item Matrix.

2.18.2.1 Notice Period and Override Notices Setting for Recalled Items

The Notice Period or Override Notices setting for *recalled* items determines when patrons become eligible to receive first and subsequent recalled overdue notices.

The Notice Period specifies the default amount of time that must pass before a patron becomes eligible to receive the first notice and subsequent notices for a recalled, overdue item.

The Override Notices setting specifies, for each numbered notice, a notice period that *overrides* the default value specified in the Notice Period field.

Patrons continue to become eligible to receive subsequent notices according to the Notice Period or Override Notices setting until they have received the Max Number Of Notices.

2.18.2.2 Max Number Of Notices for Recalled Items

The Max Number Of Notices for *recalled* items determines the maximum number of overdue notices that a patron can receive for a recalled, overdue item.

Each time you run the Recalled Overdues report in update mode, the notice count is incremented for the patrons included in the output. When a patron's notice count *exceeds* the Max Number Of Notices, the patron can no longer receive overdue notices and becomes eligible for inclusion in the Recalled Bills report.

The Max Number Of Notices for *recalled* items applies to the Recalled Overdues and Recalled Bills reports just as the Max Number Of Notices for *non-recalled* items applies to the Overdues and Bills reports.

When configuring notice-generating reports, keep in mind that . . .

- In the Recalled Overdues report, if you set the Notice Number to Generate to a number that *exceeds* the Max Number Of Notices, the report will NOT generate results.

- When the Max Number Of Notices is set to *zero* . . .
  - Patrons *never* become eligible to receive recalled overdue notices.
    -BUT-
  - Running the Recalled Overdues report in update mode will cause patrons to become eligible to receive Recalled Bills.

2.18.3 Data Elements and Variables for the Recalled Overdues Report

All notice-generating reports that use **CircReport.exe**, including the Recalled Overdues report, can return a wide range of data elements related to patron, item, bibliographic, and holdings information. For a complete list of these data elements and their corresponding variables, see the section "Data Elements and Variables for Notice-generating Reports" in this reference guide.

2.18.4 Output Templates for the Recalled Overdues Report

Location of files: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_7

Template	Contribution to Output
patron_email_page_header.tem	Generates the information that appears before the details of the recalled overdue items retrieved by the report.
patron_email_page_footer.tem	Generates the information that appears after the last item detail in the e-mail notice.
patron_email_row.tem	Within the electronic Recalled Overdues notice, returns the information for a single item. This template is repeated for each recalled overdue item, generating a list.
patron_acct_html_header.tem	In HTML output, generates the header for the patron account information section of the report.
patron_acct_html_footer.tem	In HTML output, generates the footer of the patron account information section of the report.
patron_acct_html_row.tem	In HTML output, returns all the information for a single fee assessment in the patron account section of the report. For a given patron, the **patron_acct_html_row.tem** template is repeated as long as unique information exists, generating a list of fee assessments.

Template	Contribution to Output
patron_acct_patron_email_header.tem	In an e-mail, creates a heading for each group of fee assessments. The heading includes information related to the item for which the fee was originally assessed. All charges and payments related to the item appear below the appropriate item heading.
patron_acct_patron_email_page.tem	Provides the overall framework of the electronic patron account information when there are NO recalled overdue items.
patron_acct_patron_email_row.tem	In an e-mail, returns all the information for a single fee assessment in the patron account section of the report. In the output, the **patron_acct_patron_email_row.tem** template is repeated for each assessment or payment related to a given item.
html_page_header.tem	In HTML output, generates the information that appears before the details of the recalled overdue items retrieved by the report.
html_header.tem	In HTML output, generates labels that group recalled overdue items according to shelving location.
html_row.tem	In HTML output, generates the information for each recalled overdue item.
html_page_footer.tem	In HTML output, generates the information that appears after the last item detail.
txt_message.tem	Generates the content of the Text message sent with Electronic Delivery, which is limited to 160 ASCII characters or 70 Unicode characters. This template has access to the item count detail that is included in the report output.

2.19 Recalled Overdues (i-tiva) Report

The Recalled Overdues (i-tiva) report lets you generate a list of recalled, overdue items checked out to patrons who could **not** be contacted by the i-tiva system. Unlike the regular Recalled Overdues report, which generates output using information stored in the database, the Recalled Overdues (i-tiva) report runs against a results file generated by i-tiva. The file contains information about patrons who could not be notified via the i-tiva system.

Note: You will need to specify the name and location of the i-tiva results file using the i-tiva Results File parameter. This location is specified by the VTLS_TEMP environment variable. In order for InfoStation i-tiva reports to run correctly, in the **constants.cfg** for Infostation, the **temp_dir** *must* be set to **/usr/vtls/virtua/temp** so that the system can read the i-tiva files.

The Recalled Overdues (i-tiva) report is a notice-generating report, which you can use to generate recalled, overdue notices for patrons who have not been notified by the i-tiva message system.

Important: This report should be used *only* by libraries that are also using the i-tiva messaging system. If you are NOT using this system to notify your patrons, use the regular Recalled Overdues report instead of this report.

2.19.1 Parameters Available for the Recalled Overdues (i-tiva) Report

The Recalled Overdues (i-tiva) report offers the following Report-specific Parameters:

- **Delimiter** (*optional*) - For delimited output, lets you specify the character that separates data on a line of output.

  Note: Configurations use the Delimiter parameter *only* when the Output Format parameter is set to E-mail with Delimited File Attachment. For details on the Output Format parameter, see the *InfoStation User's Guide*.

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

  - Author

- Call Number
- Class or Homeroom
- Department
- Due Date
- Title
- Institution
- Shelving Location
- Patron ID
- Patron Type Code
- Patron Postal Code
- College or School

- **i-tiva Results File** (*required*) - Lets you specify the name and location (full path) of the i-tiva results file that you want to use for generating this InfoStation report. InfoStation will look at this results file, which contains information about patrons whom i-tiva could not contact by telephone, and generates a report. Like other Circulation reports, you can use this report to generate e-mail or paper notices for those patrons.

  Note: After the i-tiva Message system calls patrons, it creates a results file. The Message system sends the results file via FTP to a location on your server that can be accessed by InfoStation. This location is specified by the VTLS_TEMP environment variable. It is this filename and location that you will want to type in this text box. (For information about **CircReport.exe,** the i-tiva Message system, and scheduling i-tiva InfoStation reports, see the *System Management: Reporting User's Guide*.)

- **Check-out Type Labels** (*optional*) - Let you specify labels for check-out types that appear in the output.

- **Date Format** (*required*) - Lets you choose how dates will be formatted in the output. The default date format is DD-MON-YYYY.

For additional information on these parameters, see the *InfoStation/Report Parameters Reference Guide* or view the InfoStation online help.

2.19.2 Data Elements and Variables for the Recalled Overdues (i-tiva) Report

All notice-generating reports that use **CircReport.exe**, including the Recalled Overdues (i-tiva) report, can return a wide range of data elements related to patron, item, bibliographic, and holdings information. For a complete list of these data elements and their corresponding variables, see the section "Data Elements and Variables for Notice-generating Reports" in this reference guide.

2.19.3 Output Templates for the Recalled Overdues (i-tiva) Report

Location of files: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_34

Template	Contribution to Output
patron_email_page.tem	Provides the overall framework of the Recalled Overdues notice, including text and the function that returns item information.
patron_email_row.tem	Within the Recalled Overdues notice, returns the information for a single item. This template is repeated for each recalled, overdue item, generating a list.
html_page.tem	Provides the overall framework of the HTML output.
html_header.tem	Within HTML output, generates labels that group available items according to shelving location.
html_row.tem	Within HTML output, generates the information for each recalled, overdue item.

2.20 Request Expiration Notification and Extension Report

The Request Expiration Notification and Extension report (/usr/vtls/virtua/webrpt_XX_x/Cir/Cir_60) generates a list of requests that expire within a specified number of days (see the Days Until Request Expiration parameter)

When the Output Format of the report configuration is set to Electronic Delivery, the report will notify patrons electronically that their requests are about to expire.

Note: To receive notices, patrons must have a valid e-mail address and a communication preference that includes e-mail communication.

The report can also supply patrons with a link to the URL of an external web service (see the Request Extension Web Service Address report parameter). Using the web service, patrons may extend the date of expiration of the request, which is determined by the Days to Extend Request Expiration parameter.

Note: The ability to extend the date of expiration depends upon a web page or application that your library must provide.

For details about the parameters specific to this report, refer to the online, context-sensitive help on the report's Configuration page.

2.20.1 Data Elements and Variables for the Request Expiration Notification and Extension Report

All notice-generating reports that use **CircReport.exe**, including the Request Expiration Notification and Extension report, can return a wide range of data elements related to patron, item, bibliographic, and holdings information. For a complete list of these data elements and their corresponding variables, see the section "Data Elements and Variables for Notice-generating Reports" in this reference guide.

2.21 Review Notices Report

The Review Notices report is a notice-generating report that lets you generate review notices for patrons whose borrowed items are about to come due. Review notices are sent before overdue notices and remind patrons to return their checked out items before the due date.

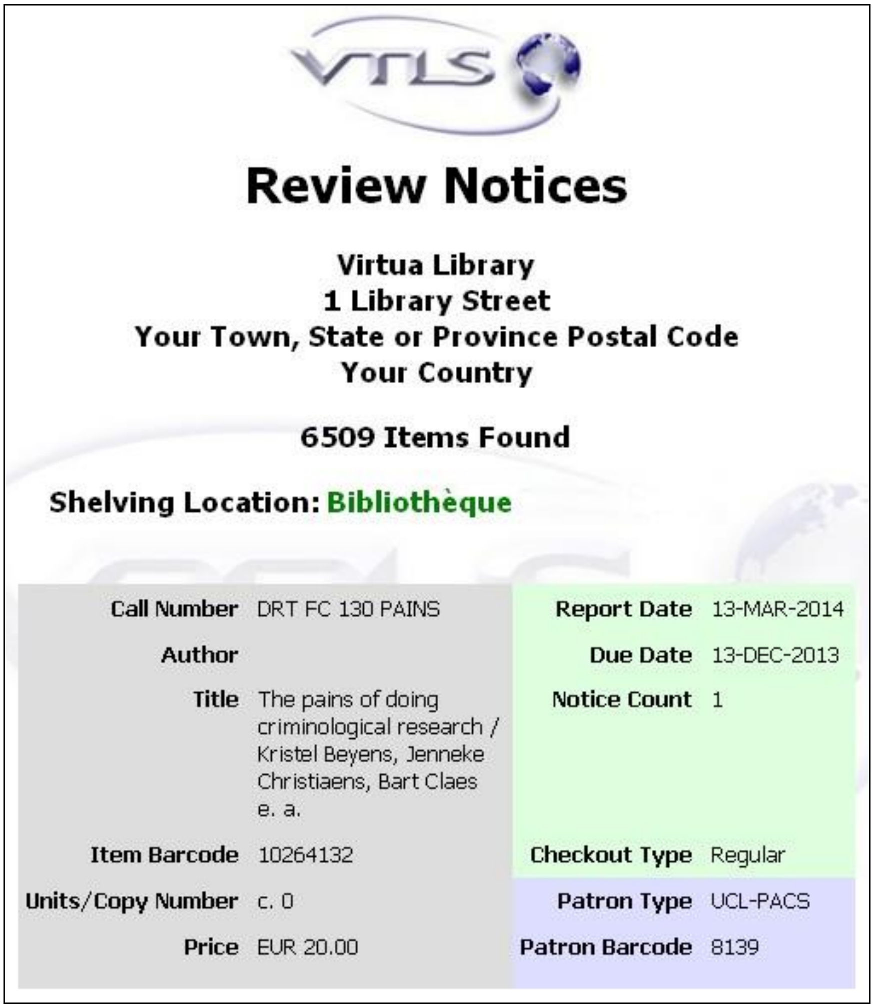
The Review Notices report generates a list of items that . . .

- Are checked out to patrons who are eligible to receive a review notices.
  -AND-
- Meet the location, patron type, and check-out type criteria that you set in the report configuration.

You can configure the Review Notices report simply to generate a list of items that qualify for review notices, or you can configure the report to generate review notices and send them to the borrowing patrons.

For additional information on how items qualify for inclusion in the Review Notices report, see the section "Virtua Settings Used by the Review Notices Report" in this chapter.

Figure 2-11 shows a portion of the default HTML output from the Review Notices report.



Review Notices

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

6509 Items Found

Shelving Location: Bibliothèque

Call Number	DRT FC 130 PAINS	**Report Date**	13-MAR-2014
Author		**Due Date**	13-DEC-2013
Title	The pains of doing criminological research / Kristel Beyens, Jenneke Christiaens, Bart Claes e. a.	**Notice Count**	1
Item Barcode	10264132	**Checkout Type**	Regular
Units/Copy Number	c. 0	**Patron Type**	UCL-PACS
Price	EUR 20.00	**Patron Barcode**	8139

Figure 2-11. Review Notices HTML Output

2.21.1 Parameters Available for the Review Notices Report

The Review Notices report offers the following Report-specific Parameters:

- **Shelving Locations** (*required*) - Lets you limit your results to one or more shelving locations. To be included in the results, an item's current shelving location must match one of the locations that you select for the report configuration.

- **Patron Types** (*required*) - Lets you limit your results to one or more patron types. To be included in the results, an item must be checked out to a patron who is assigned one of the patron types that you select for the report configuration.

- **Check-out Type** (*required*) - Lets you limit the output to overdue items associated with a particular check-out type. You can generate results for . . .
  - All Check-outs
  - Regular Check-outs
  - In-house Check-outs
  - Reserve Check-outs

- **Delimiter** (*optional*) - For delimited output, lets you specify the character that separates data on a line of output.

> **Note:** Configurations use the Delimiter parameter *only* when the Output Format parameter is set to E-mail with Delimited File Attachment. For details on the Output Format parameter, see the *InfoStation User's Guide*.

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

  - Author
  - Call Number
  - Class or Homeroom
  - Department
  - Due Date
  - Title
  - Institution
  - Shelving Location
  - Patron ID
  - Patron Type Code
  - Patron Postal Code
  - College or School

- **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 database to indicate that review notices have been sent to the appropriate patrons. These patrons will next be eligible to receive overdue notices.

Important:
• If your system is configured to generate review notices according to the Is First Notice a Review Notice setting in the Profiler, patrons will become eligible to review overdue notices only *after* a review notice has been generated and the database has been updated. For details on the Is First Notice a Review Notice

setting, see the section "Virtua Settings Used by the Review Notices Report" in this guide.
- When testing configurations of the Review Notices report, do NOT select the Update Database check box.

- **Suppress Overdue Items** – If you select this check box, InfoStation will not generate any report results or review notices that pertain to overdue items. If the option is enabled, overdue items that would normally qualify for a review notice will still be advanced to the next notice type, but they will not be included in the output of the report.

- **Use Patron's Registering Library For Notices** - When the Output Format is Electronic Delivery or Delimited File, lets you configure the report to use the patron's registered library location information in the output in place of the library location information entered in the report-specific parameters. You must select this setting if you want Virtua to include the Notice Library fields as data elements in the report output and if you want Virtua to validate the ordering of these fields.

- **Honor Patron Communication Preferences** (*optional*) - Lets you configure the report to generate results according to the Communication Preference setting in the Patron Editor, or address preference specified in tag 008/10 of each patron record, and the Output Format of the report configuration.

- **Honor Language Preference** (*optional*) - Lets you determine which patrons will be included in the output, based on the language preference specified in the patron record and the language of the report configuration.

- **Check-out Type Labels** (*optional*) - Let you specify labels for check-out types that appear in the output.

- **Date Format** (*required*) - Lets you choose how dates will be formatted in the output. The default date format is DD-MON-YYYY.

For additional information on these parameters, see the *InfoStation/Report Parameters Reference Guide* or view the InfoStation online help.

2.21.2 Virtua Settings Used by the Review Notices Report

The Review Notices report generates results using the following Virtua Profiler settings:

- Is First Notice a Review Notice?
- Review Notice Days Before Due Date

You can define the settings, which we discuss below, in the Virtua Profiler on the Notices/Limits tab of the Location +Patron +Item Matrix.

2.21.2.1 Is First Notice a Review Notice?

The Is First Notice a Review Notice setting determines whether review notices are generated.

This setting determines whether patrons become eligible for inclusion in the Review Notices report. If the setting is set to . . .

- **Yes**, patrons become eligible for inclusion in the Review Notices report before their checked-out items reach their due date. When your system is configured to generate review notices, patrons cannot become eligible to receive an overdue notice for an item until a review notice has been generated.
- **No**, patrons do NOT become eligible for inclusion in the Review Notices report. When your system is configured NOT to generate review notices, the first type of notice a patron can receive is an overdue notice.

2.21.2.2 Review Notice Days Before Due Date

The Review Notice Days Before Due Date determines when a patron becomes eligible to receive a review notice.

This setting specifies how many days before the due date a patron becomes eligible for inclusion in the Review Notices report. This setting is used only if Is First Notice a Review Notice is set to Yes, which enables the generation of review notices.

2.21.3 Data Elements and Variables for the Review Notices Report

All notice-generating reports that use **CircReport.exe**, including the Review Notices report, can return a wide range of data elements related to patron, item, bibliographic, and holdings information. For a complete list of these data elements and their corresponding variables, see the section "Data Elements and Variables for Notice-generating Reports" in this reference guide.

2.21.4 Output Templates for the Review Notices Report

Location of files: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_24

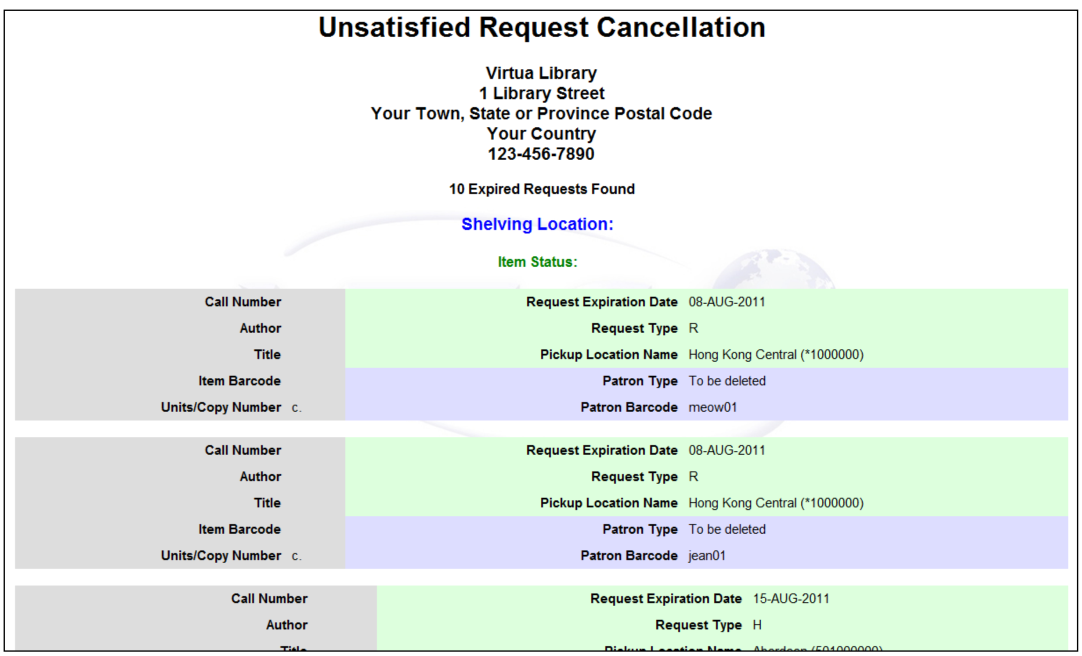
Template	Contribution to Output
patron_email_page_header.tem	Generates the information that appears before the details of the checked out items retrieved by the report. This template for the Review Notices specifically provides the patron barcode number in the header.
patron_email_page_footer.tem	Generates the information that appears after the last item detail in the e-mail notice.
patron_email_row.tem	Within the Review Notices report, returns the information for a single item. This template is repeated for each checked out item, generating a list.
html_page_header.tem	In HTML output, generates the information that appears before the details of the checked out items retrieved by the report.
html_header.tem	In HTML output, generates labels that group checked out items according to shelving location.
html_row.tem	In HTML output, generates the information for a single checked out item.
html_page_footer.tem	In HTML output, generates the information that appears after the last item detail.
txt_message.tem	Generates the content of the Text message sent with Electronic Delivery, which is limited to 160 ASCII characters or 70 Unicode characters. This template has access to the item count detail that is included in the report output.

2.22 Unsatisfied Request Cancellation Report

The Unsatisfied Request Cancellation report generates a list of items with request queues that should be cleared because the items carry a status for which requests are not allowed. If run in update mode, the report also clears qualifying requests associated with the items returned in the report output, and notifies patrons if a request they have placed is cleared.

For example, if the status Lost is configured in the Status Displays parameter so that hold requests are not allowed for items that carry that status, running the Unsatisfied Request Cancellation report in update mode clears all hold requests placed for the qualifying items but does NOT clear loan, page and recall requests. Similarly, if the status Missing is configured so that no requests of any type are allowed, running the report in update mode clears all requests placed for the qualifying items.

Figure 2-12 shows the default HTML output for the Unsatisfied Request Cancellation report.



Unsatisfied Request Cancellation

Virtua Library
1 Library Street
Your Town, State or Province Postal Code
Your Country
123-456-7890

10 Expired Requests Found

Shelving Location:

Item Status:

Call Number		**Request Expiration Date**	08-AUG-2011
Author		**Request Type**	R
Title		**Pickup Location Name**	Hong Kong Central (*1000000)
Item Barcode		**Patron Type**	To be deleted
Units/Copy Number	c.	**Patron Barcode**	meow01

Call Number		**Request Expiration Date**	08-AUG-2011
Author		**Request Type**	R
Title		**Pickup Location Name**	Hong Kong Central (*1000000)
Item Barcode		**Patron Type**	To be deleted
Units/Copy Number	c.	**Patron Barcode**	jean01

Call Number		**Request Expiration Date**	15-AUG-2011
Author		**Request Type**	H

Figure 2-12. Unsatisfied Request Cancellation HTML Output

Note that you can configure Virtua to display an alert message when a user applies a status to an item that qualifies its request queue to be cleared via the Unsatisfied Request Cancellation InfoStation report. For more information about the Request Clear Notification parameter, which controls this behavior, see the see the *Virtua Profiler/Circulation Parameters User's Guide*.

2.22.1 Parameters Available for the Unsatisfied Request Cancellation Report

The Unsatisfied Request Cancellation report offers the following Report-specific Parameters:

- **Delimiter** (*optional*) - For delimited output, lets you specify the character that InfoStation users to separate data in a line of output.

> **Note:** Configurations use the Delimiter parameter *only* when the Output Format parameter is set to E-mail with Delimited File Attachment. For details on the Output Format parameter, see the *InfoStation User's Guide*.

- **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.
- **Tertiary Sort** *(required)* - Lets you specify the tertiary sort that is used to order the report output.
- **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, qualifying requests associated with the items returned in the report output will be cleared.
  - If you do NOT select the Update Database check box, requests associated with the items returned in the report output will not be cleared.

Important: Select the Update Database check box only for configurations that produce electronic notices OR for configurations that produce delimited output, which you will use to create paper notices.

- If you select the Update Database check box for a configuration that does NOT produce patron notices, InfoStation will update the database to indicate that request cancellation notices have been sent to ALL the patrons included in the output, even though the patrons have NOT actually received notices
- We recommend that you run the Unsatisfied Request Cancellation report in update mode only after you have tested your report configuration to verify that it produces the desired results.
- InfoStation will not allow a report configuration to be saved with both HTML output mode and Update Database selected.

- **Delete Request Fees** (*optional*) - Lets you specify whether InfoStation will delete any fees associated with the unsatisfied requests that have been canceled.

- **Use Patron's Registering Library For Notices** - When the Output Format is Electronic Delivery or Delimited File, lets you configure the report to use the patron's registered library location information in the output in place of the library location information entered in the report-specific parameters. You must select this setting if you want Virtua to include the Notice Library fields as data elements in the report output and if you want Virtua to validate the ordering of these fields.

- **Honor Language Preference** (*optional*) - Lets you determine which patrons will be included in the output, based on the language preference specified in the patron record and the language of the report configuration.

- **Honor Patron Communication Preferences** (*optional*) - Lets you configure the report to generate results according to the Communication Preference setting in the Patron Editor, or address preference specified in tag 008/10 of each patron record, and the Output Format of the report configuration.

For additional information on these parameters, see the *InfoStation/Report Parameters Reference Guide* or view the InfoStation online help.

2.22.2 Data Elements and Variables for the Unsatisfied Request Cancellation Report

All notice-generating reports that use **CircReport.exe**, including the Unsatisfied Request Cancellation report, can return a wide range of data elements related to patron, item, bibliographic, and holdings information. For a complete list of these data elements and their corresponding variables, see the section "Data Elements and Variables for Notice-generating Reports" in this reference guide.

2.22.3 Output Templates for the Unsatisfied Request Cancellation Report

Location of files: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_53

Template	Contribution to Output
html_page_header.tem	Generates the header of the HTML output, including the report name, the library name and address information, and the Items Found count.
html_header_1.tem	Generates an appropriate shelving location label, which appears before each group of items returned in the HTML output of the report (items are grouped by shelving location, then item status in the output).
html_header_2.tem	Generates an appropriate item status label, which appears before each sub-group of items returned in the HTML output of the report.
html_row.tem	Generates the information displayed in the HTML output for each item returned by the report, including details about the item, the request placed on it, and the patron who placed the request.
html_page_footer.tem	Generates the information that appears below the last item detail listed in the HTML output.
patron_email_page_header.tem	Generates the header of the patron e-mail notice, including the library name and address information, and the introductory text that appears before the list of items.
patron_email_row.tem	Generates the information for each item listed in the patron e-mail notice, including details about the item and the request placed on it.
patron_email_page_footer.tem	Generates the information that appears below the last item detail listed in the patron e-mail notice.
txt_message.tem	Generates the content of the Text message sent with Electronic Delivery, which is limited to 160 ASCII characters or 70 Unicode characters.

2.23 Update Probationary Patrons Report

The Update Probationary Patrons is an Administrative, notice-generating report that allows for updating the patron type of probationary patrons who are in good standing. It invokes the script **RestorePatronToGoodStanding.sh**, which has been updated to allow more options (see the *System Management: Circulation User's Guide*). Depending on the setting of the Update Database parameter in the report configuration, you can use the report to generate either an electronic notice for patrons who qualify for an update to their patron type or a list of patrons for in-house use only.

Specifically, the Update Probationary Patrons report does the following:

- Identifies patrons who are assigned a temporary patron type and have been in good standing (i.e., have no overdue check-outs, patron blocks, or billed material) after a minimum period of days since the time of registration (Minimum Days Since Registration).
- Updates the temporary patron type assigned to each of these patrons. It does this by using values specified in the Current Patron Type/New Patron Type report-specific parameters.
- When the Update Database parameter is selected, generates an electronic notice to the patrons whose patron type has been updated, informing them that their patron account has been changed. To receive an electronic notice, a patron must have an electronic communication preference or at least a valid e-mail address configured in their patron record.

For details about the parameters specific to this report, refer to the online, context-sensitive help on the report's Configuration page.

2.24 Data Elements and Variables for Notice-generating Reports

Below are all of the data elements that can be returned by notice-generating reports that use **CircReport.exe**. Additionally, the following table lists each data element's corresponding variable, which you can use to edit the output templates.

Each notice-generating report that uses **CircReport.exe** can return *most* of the data elements listed in the following tables. For the specific list of data elements that can be returned by a report, see the Configuration screen for that report. The following reports use **CircReport.exe**:

- Availability Report
- Availability (i-tiva) Report
- Bills Report
- Expired Bookings Report
- Expired Requests Report
- Inventory Control
- Overdues Report
- Recalled Bills Report
- Recalled Overdues Report
- Recalls Report
- Request Expiration Notification and Extension Report
- Review Notices Report
- Unsatisfied Request Cancellation Report

Note: Both the Change Request Pickup Location report and Patron Account Statement report can be used to generate notices, but in the following table we do not include the data elements for those reports as they do not use **CircReport.exe**. For details about the data elements that can be returned by the Patron Account Statement report, see the section "Data Elements and Variables for the Patron Account Statement Report" in this guide.

For additional information on configuring report output to include or exclude the desired data elements, see the *InfoStation User's Guide.*

Hint: Within an output template, you can easily identify the field label variable that corresponds to the variable (i.e., value). The field label variable simply adds the prefix **u_** and suffix **_label** to the variable. For example:

%($u_item_class_name_label)%: %($item_class_name)%

For more information on variables and field label variables, see the *InfoStation User's Guide*.

Data Element	Variable	Description and Source
Address Preference Flag	address_preference_flag	A value in the patron record that indicates the patron's address preference, either paper (0) or e-mail (1), stored in the 008/10 of the patron record.
Attention Of	attention	The "attention of" name stored in the patron record in the 270 tag, subfield $h of the primary address.
Author	author	The author of a given item, taken from tag 100, subfield $a; tag 110, subfield $a; OR 880, subfield $a of the bibliographic record.
Note: InfoStation checks for alternate authors via the $CHECK_880_FLAG variable in the **VRept.pm** module. By default, this variable is set to 1 (one). If you want InfoStation always to return author information from the 1xx tag, you can set this variable to 0 (zero). Because this is a global variable, its setting affects ALL reports that use **CircReport.exe**.		
Bibliographic Record ID	bib_id	The system-assigned Bib-ID for the item's parent bibliographic record, stored in the 001 tag.
Billed Overdue Fine	billed_overdue_fine	The overdue fine that would have been assessed had the item been checked in at the time the report was executed. The inclusion of this element is based on a setting in the Circulation Basic Options in the Profiler.
Total Billed Overdue Fines	total_billed_overdue_fine	The total of all of the "billed overdue fines" for all of the items in the Bills report.

Data Element	Variable	Description and Source
Billed Total Replacement Cost	billed_replacement_cost	The total replacement cost that is calculated based on the option selected in Replacement Cost at Billing drop-down list in the Location+Item Matrix in the Profiler.
Total Billed Total Replacement Costs	total_billed_replacement_cost	The total of all of the “billed total replacement costs” for all of the items in the Bills report.
Call Number	call_number	The item-level call number of a given item.
Call Number Sortkey	call_number_sortkey	The normalized call number value that the report uses to sort items by call number.
Check-out Type	checkout_type	The check-out type assigned to an item at check-out.
Class or Homeroom	class	The patron’s class or homeroom (i.e., the class responsible for distributing circulation notices), stored in tag 301, subfield $e of the patron record.
College or School	school	The patron’s college or school, stored in tag 301, subfield $c of the patron record.
Copy Number	copy_number	The copy number of a given item.
Department	department	The patron’s departmental affiliation, stored in tag 301, subfield $d of the patron record.
Due Date	due_date	The due date that was assigned when an item was checked out. -OR- If the item has been recalled since it was originally checked out, the new, calculated due date.
E-mail, Primary	email_primary	The patron’s primary e-mail address, stored in the patron record in tag 271, subfield $a, where the first indicator is 1.

Data Element	Variable	Description and Source
E-mail, Secondary	email_secondary	The patron's secondary e-mail address, stored in the patron record in tag 271, subfield $a, where the first indicator is 2.
Estimated Overdue Fine	overdue_fine	The estimated overdue fine associated with the overdue item.
Estimated Price/Replace-ment Cost	item_price	The estimated replacement cost of the item.
Estimated Processing Fee	processing_fee	The estimated process fee associated with the overdue item.
Expired Category	expired_category	The category associated with an expired request. For details, see the section "Expired Category Labels for the Expired Requests Report" in this guide.
FAX, Primary	fax_primary	The patron's primary fax number, stored in the patron record in the 270 tag, subfield $l of the primary address.
FAX, Secondary	fax_secondary	The patron's secondary fax number, stored in the patron record in the 270 tag, subfield $l of the secondary address.
Full Patron Record (MARC)	full_patron_record	The complete patron record, including ALL tags and subfields in the patron 2709 MARC communications format record.
Holdings ID	holdings_id	The system-assigned Holdings-ID associated with an item, taken from the 001 tag of the related holdings records.
Holdings Units	holdings_units	The number of units associated with an item attached to a holdings record, taken from tag 866, subfield $a of holdings record.
Home Library	home_library	The patron's home library, stored in tag 247, subfield $a of the patron record.

Data Element	Variable	Description and Source
Institution	institution	The name of the institution with which the patron is affiliated, taken from tag 301, subfield $b of the patron record.
Item Accession Number	item_accession_number	The accession number assigned to the item
Item Barcode	item_barcode	The library-assigned item barcode associated with an item.
Item Class Name	item_class_name	The name of the item class assigned to a given item.
Item Class Code	item_class_code	The code associated with a given item class, defined in the Virtua Profiler.
Item ID	item_id	The system-assigned item ID, stored in the item record.
Item Price	item_price	The price of a given item.
Item Subtotal	item_subtotal	The sum of the processing fee and the item price for a single item.
Item Units	item_units	The number of units associated with a multivolume work.
Items Found Label	items_found	The total number of items found by the report.
Language Preference	language_preference	The patron's language preference, taken from either tag 100, subfield $l or tag 110, subfield $l of the patron record.
Library Alternate Name	library_alternate_name	An alternate (e.g., Chinese) name for the library.
Library Telephone	library_telephone	The telephone number of the library.
Main Location	main_location_name	The name of the item's owning location.

Data Element	Variable	Description and Source
Notice Library Name	notice_library_name	To be used in place of the data in the Library Name parameter when the Output Format is Electronic Delivery or Delimited Output AND the **Use Patron's Registering Library For Notices** check box OR **Use Pickup Location For Notices** check box (for the Availability report only) is selected.
Notice Library Alternate Name	notice_library_alternate_name	To be used in place of the data in the Library Alternate Name parameter when the Output Format is Electronic Delivery or Delimited Output AND the **Use Patron's Registering Library For Notices** check box OR **Use Pickup Location For Notices** check box (for the Availability report only) is selected.
Notice Library Address 1	notice_library_address_1	To be used in place of the data in the Library Address 1 parameter when the Output Format is Electronic Delivery or Delimited Output AND the **Use Patron's Registering Library For Notices** check box OR **Use Pickup Location For Notices** check box (for the Availability report only) is selected.
Notice Library Address 2	notice_library_address_2	To be used in place of the data in the Library Address 2 parameter when the Output Format is Electronic Delivery or Delimited Output AND the **Use Patron's Registering Library For Notices** check box OR **Use Pickup Location For Notices** check box (for the Availability report only) is selected.

Data Element	Variable	Description and Source
Notice Library Address 3	notice_library_address_3	To be used in place of the data in the Library Address 3 parameter when the Output Format is Electronic Delivery or Delimited Output AND the **Use Patron's Registering Library For Notices** check box OR **Use Pickup Location For Notices** check box (for the Availability report only) is selected.
Notice Library Address 4	notice_library_address_4	To be used in place of the data in the Library Address 4 parameter when the Output Format is Electronic Delivery or Delimited Output AND the **Use Patron's Registering Library For Notices** check box OR **Use Pickup Location For Notices** check box (for the Availability report only) is selected.
Notice Library Address 5	notice_library_address_5	To be used in place of the data in the Library Address 5 parameter when the Output Format is Electronic Delivery or Delimited Output AND the **Use Patron's Registering Library For Notices** check box OR **Use Pickup Location For Notices** check box (for the Availability report only) is selected.
Notice Library Telephone	notice_library_telephone	To be used in place of the data in the Library Telephone parameter when the Output Format is Electronic Delivery or Delimited Output AND the **Use Patron's Registering Library For Notices** check box OR **Use Pickup Location For Notices** check box (for the Availability report only) is selected.
Notice Number	notice_number	The notice number associated with a given notice.
Operator ID	operator_id	The Virtua user ID of the staff member associated with the original transaction.
Part Title	part_title	Titles assigned to volumes in a series, taken from tag 245, subfield $n and $p of the bibliographic record.

Data Element	Variable	Description and Source
Patron Barcode	patron_barcode	The library-assigned patron barcode, stored in tag 015, subfield $a of the patron record.
Patron City	city	The city in the patron's primary paper address, stored in the patron record in tag 270, subfield $b, where the first indicator is 1.
Patron Country	country	The country in the patron's primary paper address, stored in the patron record in tag 270, subfield $f, where the first indicator is 1.
Patron County	county	The county in the patron's primary paper address, stored in the patron record in tag 270, subfield $c, where the first indicator is 1.
Patron First Name	first_name	The patron's first name, stored in tag 100, subfield $h of the patron record.
Patron Full Name	full_name	The patron's full name, taken from . . . • tag 100, subfields $a and $h of the patron record -OR- • tag 110, subfields $a, $b, and $c of the patron record
Patron ID	patron_id	The system-assigned patron number, stored in the 001 tag of the patron record.
Patron Last Name	last_name	The patron's last name, stored in tag 100, subfield $a of the patron record.
Patron Name Prefix	prefix	The prefix associated with the patron name, stored in tag 100, subfield $e of the patron record.
Patron Name Suffix	suffix	The suffix associated with the patron name, stored in tag 100, subfield $f of the patron record.
Patron Other Name	other_name	The patron's other (e.g., Chinese) name, stored in tag 111, subfield $a of the patron record.

Data Element	Variable	Description and Source
Patron Other Name Suffix	other_name_suffix	The suffix associated with the patron's other name stored in tag 111, subfield $f of the patron record.
Patron Personal Name	personal_name	The patron's full, personal name (i.e., last name and first name), taken from… • tag 100, subfield $a and $h of the patron record, all text -OR- • tag 110, subfield $a of the patron record, all text
Patron Postal Code	postal_code	The postal code associated with the patron's primary paper address, stored in the patron record in tag 270, subfield $e, where the first indicator is 1.
Patron Primary Specialized Telephone	telephone_primary_specialized	The specialized telephone number associated with the patron's primary paper address, stored in the patron record in tag 270, subfield $j, where the first indicator is 1.
Patron Primary Telephone	telephone_primary	The telephone number associated with the patron's primary paper address, stored in the patron record in tag 270, subfield $k, where the first indicator is 1.
Patron Secondary Specialized Telephone	telephone_secondary_specialized	The specialized telephone number associated with the patron's secondary paper address, stored in the patron record in tag 270, subfield $j, where the first indicator is 2.
Patron Secondary Telephone	telephone_secondary	The telephone number associated with the patron's secondary paper address, stored in the patron record in tag 270, subfield $k, where the first indicator is 2.
Patron Start Flag	patron_start_flag	The value that indicates the beginning of a new set of items belonging to a different patron, used in generating notices.

Data Element	Variable	Description and Source
Patron State	state	The state associated with the patron's primary paper address, stored in the patron record in tag 270, subfield $d, where the first indicator is 1.
Patron Street Address 1	address_line_1	The first line of the patron's street address, taken from the *first* occurrence of 270, subfield $a with a first indicator of 1.
Patron Street Address 2	address_line_2	The second line of the patron's street address, taken from the *second* occurrence of 270, subfield $a with a first indicator of 1.
Patron Street Address 3	address_line_3	The third line of the patron's street address, taken from the *third* occurrence of 270, subfield $a with a first indicator of 1.
Patron Street Address 4	address_line_4	The fourth line of the patron's street address, taken from the *fourth* occurrence of 270, subfield $a with a first indicator of 1.
Patron Street Address 5	address_line_5	The fifth line of the patron's street address, taken from the *fifth* occurrence of 270, subfield $a with a first indicator of 1.
Patron Type	patron_type_name	The description for a given patron type, taken from tag 245, subfield $a of the patron record.
Patron Type Code	patron_type_code	The patron type code assigned to the patron, taken from tag 030, subfield $a of the patron record.
Pickup Location Code	pickup_location_code	The code assigned to the location that is designated as the pickup location for the item.
Pickup Location Name	pickup_location_name	The name of the location that is designated as the pickup location for the item.

Data Element	Variable	Description and Source
Processing Fee	processing_fee	The Processing Fee associated with an item, defined in the Location + Patron Matrix in the Virtua Profiler.
Total Processing Fee	total_processing_fee	Total of all processing fees in the report.
Report Date	report_date	The date the report was run.
Request Expiration Date	expiration date	The date after which an available item will no longer be held for the patron who requested it, calculated from the Hold Pickup Time set in the Virtua Profiler.
Request Type	request_type	The type of request originally placed on an item.
Shelving Location (Name)	item_location_name	The name of the shelving location for a given item.
Shelving Location Code	item_location_code	The code assigned to the shelving location of a given item.
Title	title	The title of a given item, taken from tag 245, subfield $a of the bibliographic record.
Note: InfoStation checks for alternate titles via the $CHECK_880_FLAG variable in the **VRept.pm** module. By default, this variable is set to 1 (one). If you want InfoStation always to return title information from the 245 tag, you can set this variable to 0 (zero). Because this is a global variable, its setting affects ALL reports that use **CircReport.exe**.		
Total Fee	total_fee	For a single patron, the sum of the item subtotals for all the items in a given notice.

3. Non-notice-generating Circulation Reports

Non-notice-generating Circulation reports let you generate information about your Circulation Control subsystem, such as statistics on the items circulated in your library. This chapter describes each non-notice-generating Circulation report.

This chapter provides details on the following reports:

⇒ Reserves Remove List Report
⇒ Shelving Pull List Report
⇒ Transition Disputed Items Report
⇒ Undelivered Notices Report
⇒ Unique Management Report
⇒ Unsatisfied Requests Report

3.1 Basic Circulation Statistics Report

The Basic Circulation Statistics report generates circulation statistics based on the criteria that you set in the report configuration. The output of the report will be a subset of the output of the Patron Statistics report; it will NOT include transactions such as check-ins, requests or notices. Figure 3-1 shows a portion of the default HTML output from the Basic Circulation Statistics report.

Basic Circulation Statistics

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

Transaction Type : Regular Check-outs

Location Type : Log-in Location

Scugog PL: 01-FEB-2014 00:00:00 - 28-FEB-2014 23:59:59

	Adult (AD)	Juvenile (JU)	Total
Adult Fiction (1)	9 (100.0%)		9 (100.0%)
Adult Non-Fiction (2)	1 (100.0%)		1 (100.0%)
Adult Paperback (3)	4 (80.0%)	1 (20.0%)	5 (100.0%)
DVD Feature Film (10)	3 (100.0%)		3 (100.0%)
Juvenile Non-FIction (20)	8 (100.0%)		8 (100.0%)
Music CD (32)	1 (100.0%)		1 (100.0%)
Total	26 (96.3%)	1 (3.7%)	27 (100.0%)

Figure 3-1. Basic Circulation Statistics HTML Output

In the Basic Circulation Statistics report, Transactions, Shelving Locations, Item Classes *or* Collection Codes, Patron Types, and Date Range are required parameters.

Therefore, for a given check-out type and within a given date range, the report lists the number of items circulated . . .

- Within each selected item class or by each selected collection code.
- By each selected patron type.
- At each selected location.

3.1.1 Parameters Available for the Basic Circulation Statistics Report

The Basic Circulation Statistics 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:** This parameter is used *only* when you generate *plain text e-mail output*. Other output formats use other formatting methods. You must, however, set this parameter for each configuration of the Basic Circulation Statistics report, regardless of the Output Format.

- **Transaction Types** (*required*) - Lets you specify one or more check-out types to include in the output. The report returns statistics only for the check-out types you select for the report configuration.

> **Note:** The Materials Booking Check-outs and Materials Booking Check-outs Renewals options are not valid and do not affect the output statistics.

- **Location Type** (*required*) - Lets you choose which type of location the Locations parameter will use to gather results. You can choose . . .

  - **Log-in Location** - The report will gather statistics on transactions performed at the log-in location(s) that you select for the report configuration.
  - **Shelving Location** - The report will gather statistics on transactions associated with items that are currently shelved at the location(s) that you select for the report configuration.
  - **Owning Location** - The report will gather statistics on transactions associated with items that are owned by the location(s) that you select for the report configuration.

- **Locations** (*required*) - Lets you configure the report to gather circulation statistics for one or more locations. This parameter works in conjunction with the Location Type parameter, which specifies whether the Locations parameter uses log-in, shelving, or owning locations to generate results.

- **Patron Types** (*required*) - Lets you configure the report to gather circulation statistics for one or more specific patron types.

- **Item Classes** (*required*) - Lets you limit your results to check-outs/renewals associated with one or more item classes. To be included in the output, the circulated item must be assigned one of the item classes that you select in the Item Classes list box.
  -OR-
- **Collection Codes** (*required*) - Lets you limit your results to check-outs/renewals associated with one or more collection codes. To be included in the output, the circulated item must be assigned one of the collection codes that you select in the Collection Codes list box.

- **Calculate Percentage Options** (*required*) - Let you choose a calculation to include in the output. You can select one of the following options:
  - **Calculate Percent of Patron Type** - The report will calculate the percentage of each patron type that is circulating items of a given item class or collection code.
    -OR-
  - **Calculate Percent of Item Class *or* Collection Code** - The report will calculate the percentage that each item class or that each collection code contributes to the total number of circulating items.
    -OR-
  - **Do Not Calculate Percentages** - The report will NOT perform a calculation to include in the output.

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

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

3.1.2 Variables Used in the Basic Circulation Statistics Report

The following table liststhe variables that you can use to edit output templates for the Basic Circulation Statistics report.

Hint: Within an output template, you can easily identify the field label variable that corresponds to the variable (i.e., value). The field label variable simply adds the prefix **u_** and suffix **_label** to the variable. For example:
%($u_item_class_name_label)%: %($item_class_name)%
For more information on variables and field label variables, see the *InfoStation User's Guide*.

Data Element	Variable
Date Range	date_range
Item Class	item_class
Location	location
Patron Type	patron_type
Transaction Type	transaction_type
Collection Codes	collection_codes

3.1.3 Output Templates for the Basic Circulation Statistics Report

Location of files: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_9

Template	Contribution to Output
html_page.tem	Provides the overall framework of the HTML output.
email_page.tem	Provides the overall framework of the e-mail output.

3.2 Blocked Patrons Report

The Blocked Patrons report generates a list of patrons that have a *manual* block in either the 043 tag or the 007 fixed fields of their patron record and meet the patron information criteria that you set for the report configuration.

Figure 3-2 shows an example of HTML output from the Blocked Patrons report.

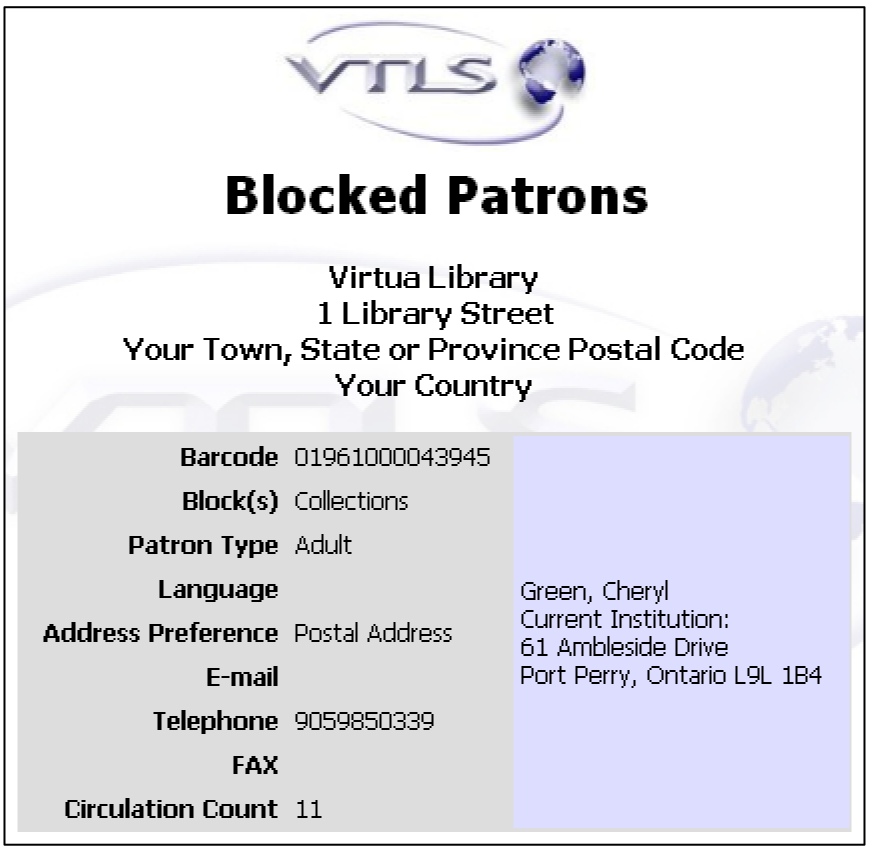


Figure 3-2. Blocked Patrons HTML Output

The Blocked Patrons report offers various parameters that let you limit the output according to information stored in the patron record, including contact information, home library, academic affiliation, address preference, and creation date range. In addition, you can limit the output to patrons who are blocked for one or more specific reasons.

3.2.1 Parameters Available for the Blocked Patrons Report

The Blocked Patrons report offers the following Report-specific Parameters:

- **Block Types** (*required*) - Lets you limit the output to patrons who are blocked for one or more specific reasons. Patrons are included in the output if their patron records contain one of the manual blocks that you select for the report configuration.

- **Patron Types** (*required*) - Lets you limit the output according to patron type. Blocked patrons are included in the output only if their patron type matches one of the patron types that you select for the report configuration.

- **Cities** (*required*) - Lets you limit the output according to patron city. Blocked patrons are included in the output if a city you select for the configuration exists in the 270 tag, first indicator 1, subfield $b of their patron record.

- **Counties** (*required*) - Lets you limit the output according to patron county. Patrons are included in the output if a county you select for the configuration exists in 270 tag, first indicator 1, subfield $c of their patron record.

- **States** (*required*) - Lets you limit the output according to patron state. Blocked patrons are included in the output if a state you select for the configuration exists in the 270 tag, first indicator 1, subfield $d of their patron record.

- **Countries** (*required*) - Lets you limit the output according to patron country. Blocked patrons are included in the output if a country you select for the configuration exists in the 270 tag, first indicator 1, subfield $f of their patron record.

- **Postal Codes** (*required*) - Lets you limit the output according to patron postal code. Blocked patrons are included in the output if a postal code you select for the configuration exists in the 270 tag, first indicator 1, subfield $e of their patron record.

- **Home Libraries** (*required*) - Lets you limit the output according to patron home library. Blocked patrons are included in the output if a library you select for the configuration exists in tag 247, subfield $a of their patron record.

- **Institutions** (*required*) - Lets you limit the output according to institution. Blocked patrons are included in the output if an institution you select for the configuration exists in the 300 tag, subfield $b of their patron record.

- **Colleges or Schools** (*required*) - Lets you limit the output by college or school. Blocked patrons are included in the output if a school you select for the configuration exists in the 300 tag, subfield $c of their patron record.

- **Departments** (*required*) - Lets you limit the output by department. Blocked patrons are included in the output if a department you select for the configuration exists in tag 301, subfield $d of their patron record.

- **Classes or Homerooms** (*required*) - Lets you limit the output by class or homeroom. Blocked patrons are included in the output if a class or homeroom you select for the configuration exists in tag 301, subfield $e of their patron record.

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

  - Block(s)
  - City
  - Circulation Count
  - Class or Homeroom
  - College or School
  - Country
  - County
  - Department
  - Institution
  - Language
  - Home Library
  - Patron Type
  - Postal Code
  - State

- **Address Preferences** (*required*) - Lets you limit the output according to a patron's address preference. You can choose . . .
  - **E-mail** - The report finds patron records in which the address preference is set to primary e-mail (i.e., position 10 of the 008 fixed fields is set to 1).
  - **Postal Address** - The report finds patron records in which the address preference is set to primary paper (i.e., position 10 of the 008 fixed fields is set to 0).

  > **Hint:** To generate a list of ALL patron records, choose both E-mail AND Postal Address.

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

3.2.2 Virtua Settings Related to the Blocked Patrons Report

Via the Block Code Definitions parameter in the Virtua Profiler (*Figure 3-3*), you can create descriptions of the codes that you use to block patrons manually via the 043 tag and the 007 fixed fields of the patron record.

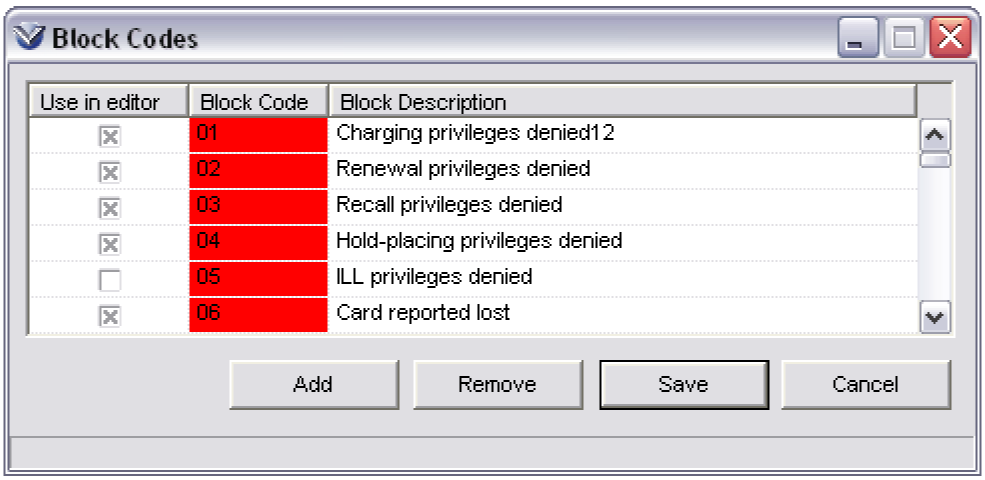


Figure 3-3. Block Code Definitions Parameter

When you insert a block *code* into the 043 tag or the 007 fixed fields of a patron record, Virtua uses the *description* that you have defined for that code to identify the manual block to Virtua users. InfoStation uses the block code descriptions in two ways:

- The descriptions appear in the Block Types list box on the Configuration - Blocked Patrons screen report. By selecting descriptions from the list box, you can limit the output of the Blocked Patrons report to patrons whose patron records contain specific block codes.
- InfoStation displays the block code descriptions in the output to identify the blocks that are assigned to each patron.

Note: If descriptions do NOT exist for your block codes, InfoStation will display the *code* instead of a description in the Block Types list box and in the output.

For additional information on patron blocks, see the *Virtua Circulation Control/Introduction and Basic Transactions User's Guide* or the *Virtua Profiler/Circulation Parameters User's Guide.*

3.2.3 Data Elements and Variables for the Blocked Patrons Report

The following table liststhe name, variable, description, and source for each data element that is retrieved by default by the Blocked Patrons report. You can edit the output templates to include or exclude any data element listed below.

Hint: Within an output template, you can easily identify the field label variable that corresponds to the variable (i.e., value). The field label variable simply adds the prefix **u_** and suffix **_label** to the variable. For example:
%($u_item_class_name_label)%: %($item_class_name)%
For more information on variables and field label variables, see the *InfoStation User's Guide*.

Data Element	Variable	Description and Location in Patron Record
Address Preference	address_preference	A value in the patron record that indicates the patron's address preference, either paper (0) or e-mail (1), taken from 008/10.
Attention Of	attention_of	The "attention of" name stored in 270 1, subfield $h.
Barcode	barcode	The library-assigned patron barcode, stored in tag 015, subfield $a.
Blocks	blocks	A description of each manual block that exists in the patron record, taken from the 043 tag and/or the 007 fixed fields.
Circulation Count	circ_count	The *total* number of items associated with a patron record since that record was created (i.e., NOT the *current* circulation count).
City	city	The city associated with the patron's primary paper address, stored in 270 1 , subfield $b.
Class or Homeroom	class	The patron's class or homeroom (i.e., the class responsible for distributing circulation notices), stored in tag 301, subfield $e.

Data Element	Variable	Description and Location in Patron Record
College or School	college	The patron's college or school, stored in tag 301, subfield $c.
Country	country	The country associated with the patron's primary paper address, stored in 270 1, subfield $b.
County	county	The county associated with the patron's primary paper address, stored in 270 1, subfield $c.
Department	department	The patron's departmental affiliation, stored in tag 301, subfield $d.
E-mail, Primary	email_primary	The patron's primary e-mail address, stored in 271 1, subfield $a.
E-mail, Secondary	email_secondary	The patron's secondary e-mail address, stored in 271 2, subfield $a.
FAX, Primary	fax_primary	The patron's primary fax number, stored in 271 1, subfield $l.
FAX, Secondary	fax_secondary	The patron's secondary fax number, stored in 271 2, subfield $l.
First Name	first_name	The patron's first name, taken from tag 100, subfield $a (the text *after* the comma).
Home Library	library	The patron's home library, stored in tag 247, subfield $a.
Institution	institution	The institution with which the patron is affiliated, stored in tag 301, subfield $b.
Institution Affiliation	institution_affiliation	The patron's role with respect to the institution, stored in tag 301, subfield $a.
Language	language	The patron's language preference, stored in either the tag 100, subfield $l or the tag 110, subfield $l.
Last Name	last_name	The patron's last name, taken from tag 100, subfield $a (the text *before* the comma).

Data Element	Variable	Description and Location in Patron Record
Name	name	The patron's full name (i.e., last name and first name) taken from tag 100, subfield $a (all text).
Patron Type	patron_type	The description for a given patron type, stored in tag 245, subfield $a.
Postal Code	postal_code	The postal code associated with the patron's primary paper address, stored in the patron record in tag 270, subfield $e, where the first indicator is 1.
Prefix	prefix	The patron's prefix, stored in tag 100, subfield $e.
State	state	The state associated with the patron's primary address, stored in the patron record in tag 270, subfield $d, where the first indicator is 1.
Street Address 1	street_address_1	The first line of the patron's street address, stored in the first occurrence of, subfield $a in the 270 1 tag.
Street Address 2	street_address_2	The second line of the patron's street address, stored in the second occurrence of, subfield $a in the 270 1 tag.
Suffix	suffix	The patron's suffix, stored in tag 100, subfield $f of the patron record.
Telephone, Primary	telephone_primary	The telephone number associated with the patron's primary paper address, stored in the patron record in tag 270, subfield $k, where the first indicator is 1.
Telephone, Primary Special	telephone_primary_special	The specialized telephone number associated with the patron's primary paper address, stored in the patron record in tag 270, subfield $j, where the first indicator is 1.

Data Element	Variable	Description and Location in Patron Record
Telephone, Secondary	telephone_secondary	The telephone number associated with the patron's secondary paper address, stored in the patron record in tag 270, subfield $k, where the first indicator is 2.
Telephone, Secondary Special	telephone_secondary_special	The specialized telephone number associated with the patron's secondary paper address, stored in the patron record in tag 270, subfield $j, where the first indicator is 2.

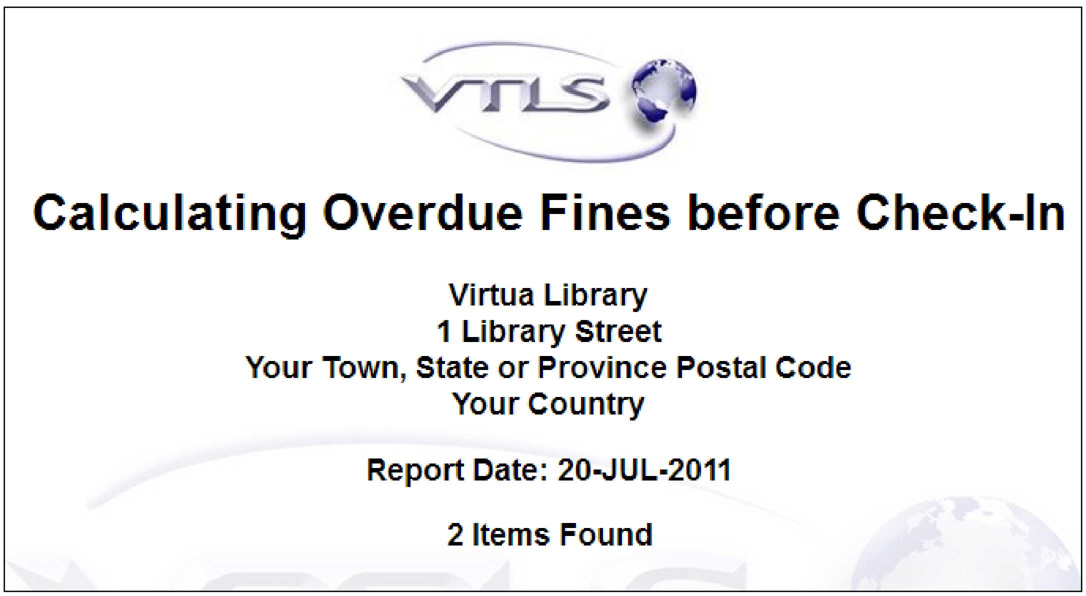
3.2.4 Output Templates for the Blocked Patrons Report

Location of files: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_26

Template	Contribution to Output
html_page.tem	Provides the overall framework of the HTML output.
html_row.tem	In HTML output, returns information related to a single blocked patron.
email_page.tem	Provides the overall framework of the e-mail output.
email_row.tem	In e-mail output, returns information related to a single blocked patron.

3.3 Calculating Overdue Fines before Check-In

The Calculating Overdue Fines before Check-In report (/usr/vtls/virtua/webrpt_XX_x/Cir/Cir_58) has two major functions: 1) Identifies overdue items that have not been checked in and 2) Calculates the associated overdue fine amounts. Using the Projected Check-In Date value specified in the report configuration, this report only calculates the potential fines. It does not generate notices to the patrons, nor does it post the overdue fines to the patron account.


Calculating Overdue Fines before Check-In

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

Report Date: 20-JUL-2011

2 Items Found

Figure 3-4. Calculating Overdue Fines before Check-In Report - Results (Part 1)

Patron Barcode: don01

Call Number	622.2(075) Б 917	**Due Date**	22-APR-2011
Author	Dober, Richard P.		20-JUL-2011 13:07
Title	Environmental design / Richard P. Dober.	**Checkout Type**	Check-out Type
Item Barcode	00000000000109	**Estimated Overdue Fine**	USD 9.00
Units/Copy Number	c. 1	**Patron Name**	LXX XX MING
Shelving Location	Wilson Library	**Patron Type**	Library Board Member
Collection Code	Collection Codes	**Patron Barcode**	don01
Collection Code Description		**Patron Alternate Barcode**	

Total Estimated Patron Fines: USD 9.00

Total Patrons With Overdues: 2

Total Overdue Items: 2

Grand Total Fines For All Patrons: USD 9.00

Figure 3-5. Calculating Overdue Fines before Check-In Report - Results (Part 2)

3.3.1 Parameters Available for the Calculating Overdue Fines before Check-In Report

You can limit report results by setting the following parameters:

- Projected Check-in Date
- Check-out Type
- Shelving Location
- Patron Type
- Item Class
- Collection Code

3.4 Check-outs by Swiss Book Classes

Note: This report is for use by the Swiss National Library ONLY.

The Check-outs by Swiss Book Classes report lets you generate a count of regular and in-house check-outs grouped by the Swiss book classes found in tag 993$c or tag 999$c of the bibliographic record. The count can be limited by date range and patron-related criteria specified in the report configuration. Figure 3-6 shows the Configuration screen for the Check-outs by Swiss Book Classes.

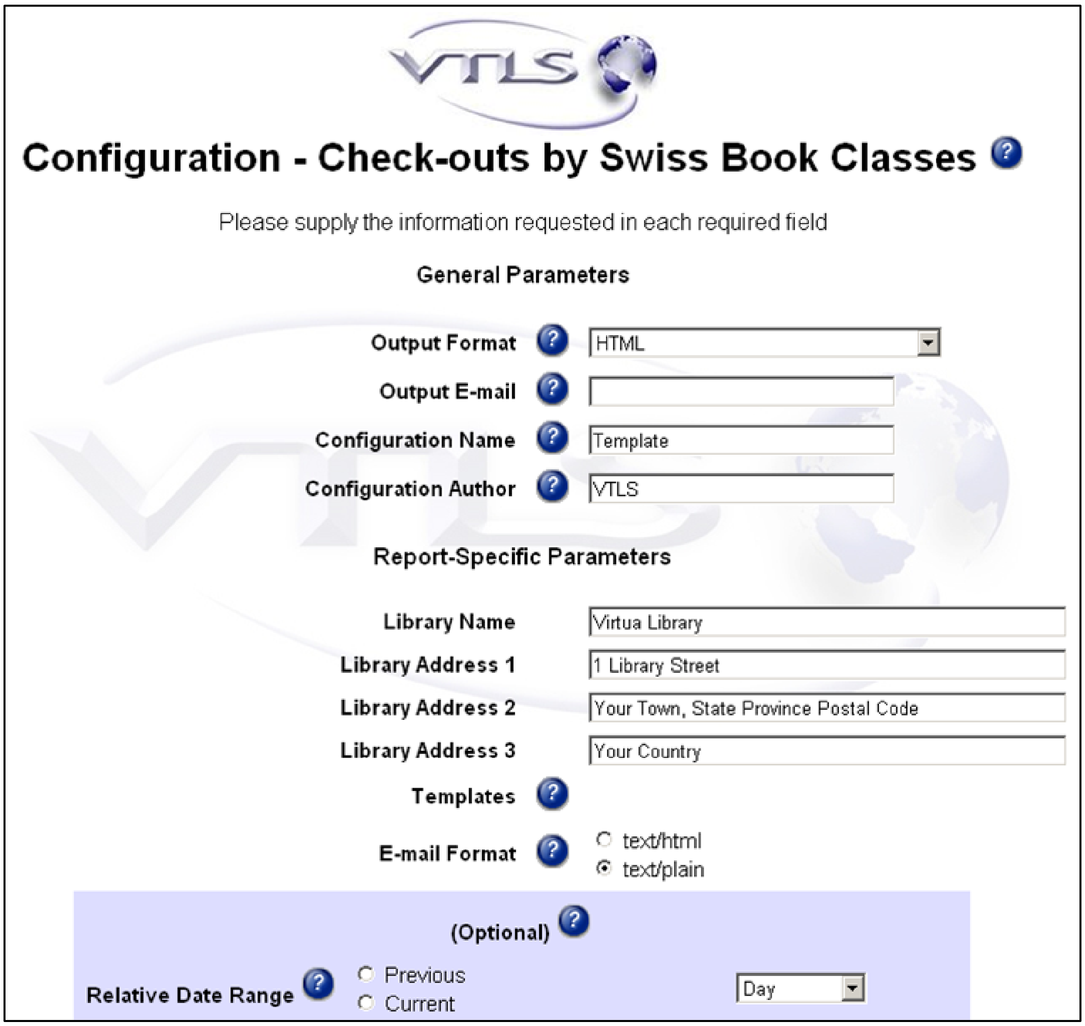


Figure 3-6. Check-outs by Swiss Book Classes – Configuration Screen

3.4.1 Parameters Available for the Check-outs by Swiss Book Classes

The Check-outs by Swiss Book Classes report offers the following Report-specific Parameters:

- **Date Range** (*optional*) - Lets you limit your results to a particular date range. To be counted by the report, the check-out must have occurred during the date range that you specify for the report configuration.

- **Virtua Users** (*required*) - Lets you limit your output by Virtua user as defined in the User Profiles. For the check-out to be counted by the report, one of the Virtua users selected in this parameter must have performed the check-out.

- **Patron ZIP Codes** (*required*) - Lets you limit your results by ZIP code. For the check-out to be counted by the report, the ZIP code stored in tag 270 subfield $e of the patron record must match one of the values selected in this parameter.

- **Patron Year of Birth** (*required*) - Lets you limit your results by patron year of birth. For the check-out to be counted by the report, the patron's year of birth stored in tag 100 subfield $d of the patron record must match one of the values selected in this parameter.

- **Patron Prefixes** (*required*) - Lets you limit your results by patron prefix. For the check-out to be counted by the report, the patron prefix stored in tag 100 subfield $e of the patron record must match one of the values selected in this parameter.

- **Patron Language** (*required*) - Lets you limit your results by patron prefix. For the check-out to be counted by the report, the patron language stored in tag 100 subfield $1 of the patron record must match one of the values selected in this parameter.

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

3.4.2 Data Elements Returned by the Check-outs by Swiss Book Classes Report

The following table liststhe name, variable, and description of each data element that is retrieved by the Check-outs by Swiss Book Classes report. You can edit the output templates to include or exclude any data element listed below.

Data Element	Variable	Description
Swiss Book Class	class	The Swiss Book Class that the check-out counts apply to
Home Loan	home_loan_count	For the Swiss Book Class, the number of home loan check-outs.
Reading Room	reading_room_count	For the Swiss Book Class, the number of reading room check-outs.
Class Total	class_total	For the Swiss Book Class, the total number of check-outs.
Total Check-outs	home_loan_total reading_room_total grand_total	The total of home loan check-outs, the total of reading room check-outs, and the grand total of all check-outs.

3.4.3 Output Templates for the Check-outs by Swiss Book Classes Report

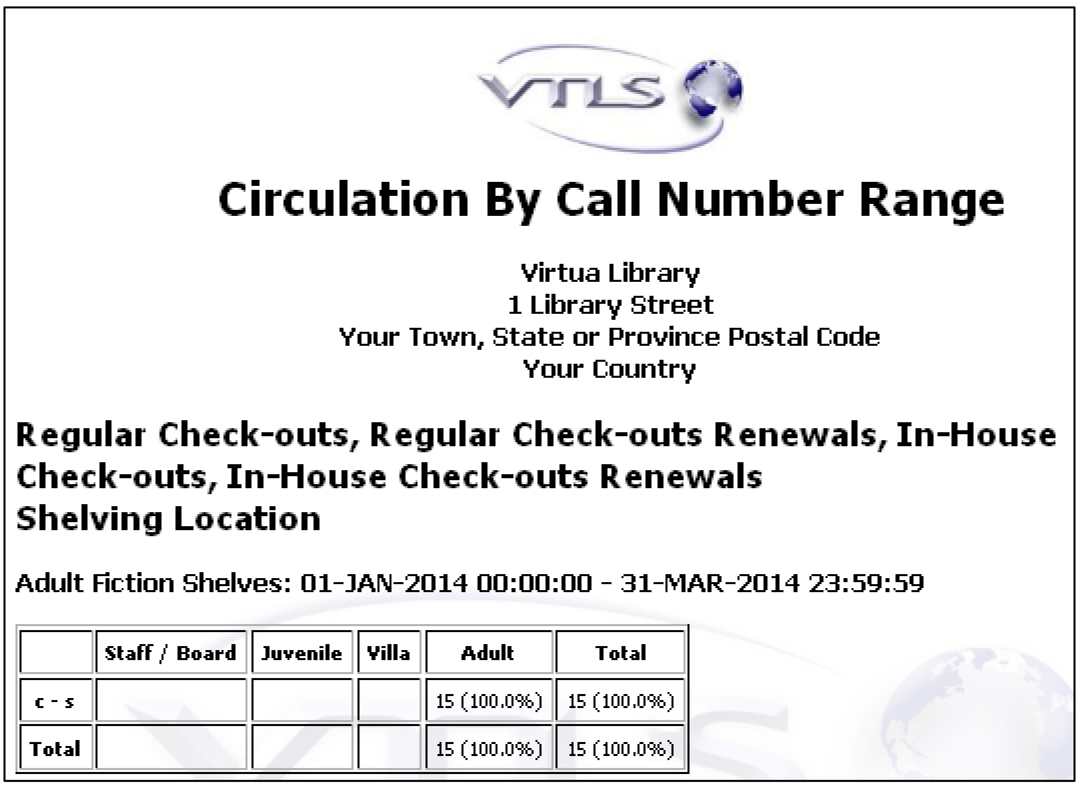
Location: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_41/[filename]

Filename	Contribution to Output
html_page.tem	Provides the overall framework of the HTML output and determines the placement of the html_row template.
html_row.tem	In HTML output, provides the check-out information for one Swiss Book Class.
email_page.tem	Provides the overall framework of the e-mail output and determines the placement of the e-mail_row template..
email_row.tem	In e-mail output, provides the check-out information for one Swiss Book Class.

3.5 Circulation by Call Number Range Report

The Circulation by Call Number Range report is a collection management tool that can help you assess the popularity of items in your library. For each call number range you specify, the report returns a count of items circulated at each location during a particular date range.

Figure 3-7 shows an example of HTML output from the Circulation by Call Number Range report.



Circulation By Call Number Range

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

Regular Check-outs, Regular Check-outs Renewals, In-House Check-outs, In-House Check-outs Renewals
Shelving Location

Adult Fiction Shelves: 01-JAN-2014 00:00:00 - 31-MAR-2014 23:59:59

	Staff / Board	Juvenile	Villa	Adult	Total
c - s				15 (100.0%)	15 (100.0%)
Total				15 (100.0%)	15 (100.0%)

Figure 3-7. Circulation by Call Number Range HTML Output

The report output contains a separate table of results for each location you select in the report configuration. For example, Figure 3-7 displays the table for the Main Library. Above the table, the Date Range appears, indicating the date range over which the statistics were collected, in this case 01-JAN-2014 - 31-MAR-2014.

Each call number range you specify for the report configuration appears as a separate row in each output table. The table's column headings can display patron types OR item classes, depending on how you set the Select Column for Crosstab parameter. Figure 3-7 shows an example of a configuration where Select Column for Crosstab is set to Patron Types. This configuration generates a count of items circulated by each *patron type* within each call number range.

The number of columns that appears in the table corresponds to the number of patron types or item classes you that select in the report configuration.

For each circulation count that appears in the output, the report also displays a percentage, which is calculated according to the Select Percent Column setting. For details, see the following section.

The output table also displays a total of each column and row. The bottom, right cell of the table displays the total circulation count for all call number ranges and patron types or item classes.

3.5.1 Parameters Available for the Circulation by Call Number Range Report

The Circulation by Call Number range report offers the following Report-specific Parameters:

- **Call Number Ranges** (*required*) - Lets you configure the report to retrieve circulation counts for one or more specific call number ranges.

  Note: This parameter limits results using item-level call numbers if they are available. If your library does not use item-level call numbers, or if a call number is not defined for a given item, the Call Number Ranges parameter will filter your results using the item's inherited bibliographic call number, as specified by the Call Number Index and Priority parameter, which you define in the Virtua Profiler.

- **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:** This parameter is used *only* when you generate *plain text e-mail output*. Other output formats use other formatting methods. You must set this parameter for each configuration of the Circulation by Call Number Range report.

- **Transaction Types** (*required*) - Lets you limit the output to circulation counts for one or more transaction types.

- **Shelving Locations** (*required*) - Lets you configure the report to gather circulation counts for one or more specific shelving locations.

- **Item Classes** (*required*) - Lets you select one or more item classes by which to cross-tabulate your results. If you set Select Column for Crosstab to Item Class, the item classes you select in the Item Classes list box appear as the column headings in your output.

- **Patron Types** (*required*) - Lets you select one or more patron types by which to cross-tabulate your results. If you set Select Column for Crosstab to Patron Type, the patron types you select in the Patron Types list box appear as the column headings in your output.

- **Select Column for Crosstab** (*required*) - Lets you choose how the report cross-tabulates data in the output. The Crosstab setting determines which values are used as the column values in your output. You can choose to cross-tabulate data by . . .
  - **Item Class** - For each call number range, the report returns the number of items circulated within each item class you select in the Item Classes list box.

    -OR-
  - **Patron Type** - For each call number range, the report returns the number of items circulated by each patron type you select in the Patron Types list box.

- **Select Percent Column** (*required*) - Lets you choose how the report calculates percentages. You can choose . . .
  - **Selected Column** - The report calculates the contribution of each call number range to the total circulation for each column value (either item classes or patron types). For example, such a calculation might provide the percentage each call number range contributes to the total circulation by the Faculty patron type.

    -OR-
  - **Call Number Ranges** - The report calculates the contribution of each column value to the total circulation for each call number range. For example, such a calculation might provide the percentage that the Faculty patron type contributes to the total circulation within a particular call number range.

- **Date Range** (*required*) - Lets you specify a date range for the result set. For an item to appear in the output, it must have circulated during the date range that you specify for the report configuration.

For additional information on these parameters, see the *InfoStation/Report Parameters Reference Guide* or view the InfoStation online help.

3.5.2 Variables Used In the Circulation by Call Number Range Report

The following table liststhe variables you can use to edit output templates for the Circulation by Call Number Range report.

Hint: Within an output template, you can easily identify the field label variable that corresponds to the variable (i.e., value). The field label variable simply adds the prefix **u_** and suffix **_label** to the variable. For example:
%($u_item_class_name_label)%: %($item_class_name)%
For more information on variables and field label variables, see the *InfoStation User's Guide*.

Data Element	Variable
End Date	end_date
Shelving Location	location
Patron Type	patron_type
Range	range
Start Date	start_date
Transaction Type	transaction_type

3.5.3 Output Templates for the Circulation by Call Number Range Report

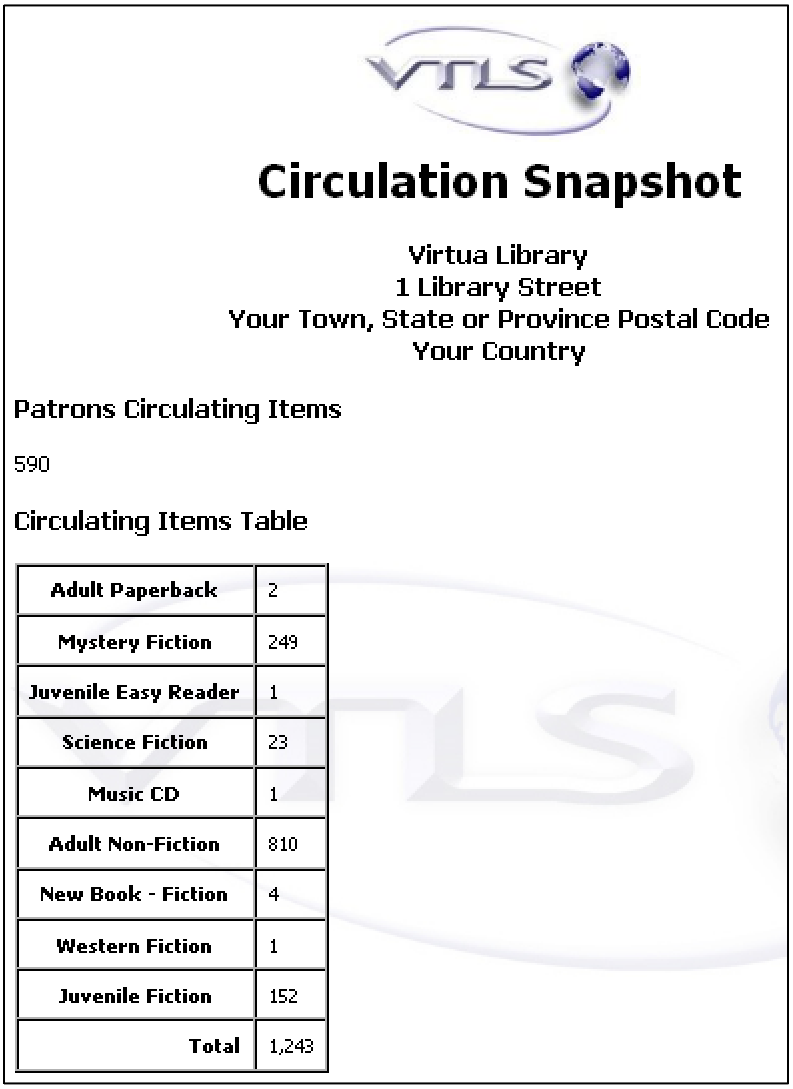
Location of files: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_15

Template	Contribution to Output
html_page.tem	Provides the overall framework of the HTML output.

email_page.tem	Provides the overall framework of the e-mail output.

3.6 Circulation Snapshot Report

The Circulation Snapshot report generates a summary of the circulation statistics that exist in the database at the time you run the report. You have the option of restricting the output to specific shelving locations. Figure 3-8 shows a portion of the default HTML output from the Circulation Snapshot report.



Circulation Snapshot

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

Patrons Circulating Items

590

Circulating Items Table

Adult Paperback	2
Mystery Fiction	249
Juvenile Easy Reader	1
Science Fiction	23
Music CD	1
Adult Non-Fiction	810
New Book - Fiction	4
Western Fiction	1
Juvenile Fiction	152
Total	1,243

Figure 3-8. Circulation Snapshot HTML Output

Note: The Circulation Snapshot report returns a "snapshot" of the Circulation subsystem by reporting the circulation counts that exist in the database at the *exact* time you run the report. The report does not return statistics that have been gathered over a period of time. For example, if you run the report at 8:00 a.m. on May 31, 2014, Patrons Circulating Items is . . .

- The total number of patrons who have items checked out AT 8:00 a.m. ON May 31, 2014.
- NOT the number of patrons who checked out items that day, that week, or that month.

The Circulation Snapshot report returns the current number of . . .

- Patrons circulating items.
- Items in circulation, according to item class.
- Item-level requests.
- Bibliographic-level requests.
- Item statuses.
- Bibliographic statuses.

This report generates statistics for ALL patron types, item classes, check-out types, request types, and statuses. You can limit the report output to statistics from a particular location or locations by using the Shelving Locations parameter.

Hint: The standard e-mail output of this report is not very easy to read due to the large number of tables in the report. The standard e-mail output is generated in "text/plain" mode. However, the report is much easier to read when the standard e-mail output is in "text/html mode." To obtain "text/html" as the mode instead of "text/plain," do the following: 1) Copy the contents of the "html_page" template over to the "email_page" template, and then 2) Remove the DOCTYPE declaration, image tag, and the &VREPT function references.

3.6.1 Parameters Available for the Circulation Snapshot Report

The Circulation Snapshot report offers the following Report-specific Parameters:

- **Shelving Locations** (*required*) - Allows you to limit the report output to statistics from one or more specific shelving locations.

- **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:** This parameter is used *only* when you generate plain text e-mail output. Other output formats use other formatting methods.

- **Transaction Type Labels** (*optional*) - Let you specify labels for request types. In the output, the Transaction Type Labels appear in the item- and bibliographic-level request tables.

For additional information on these parameters, see the *InfoStation/Report Parameters Reference Guide* or view the InfoStation online help.

3.6.2 Data Elements and Variables for the Circulation Snapshot Report

Below we describe the circulation counts included in the Circulation Snapshot report output. Using the Field Labels on the Configuration screen, you can specify the label for each table.

> **Hint:** Within an output template, you can easily identify the field label variable that corresponds to the variable (i.e., value). The field label variable simply adds the prefix **u_** and suffix **_label** to the variable. For example:
> **%($u_item_class_name_label)%: %($item_class_name)%**
> For more information on variables and field label variables, see the *InfoStation User's Guide*.

- **Patrons Circulating Items** (circulating_patrons) - The number of patrons with items in circulation at the time you run the report.
- **Circulating Items Table** (circulating_items_table) - Displays for each item class the current number of items in circulation.
- **Current Item-level Requests** (item_status_table) - A set of tables that displays for each item class and patron type the current number of each type of item-level request (i.e., hold, recall, loan, and page).
- **Current Bibliographic-level Requests** (bib_requests_table) - A table that displays for each patron type the current number of each type of bibliographic-level request (i.e., hold, recall, loan, and page).

- **Item Status Table** (item_requests_table) - Lists the number of items currently at a given item status.
- **Bib Status Table** (bib_status_table) - Lists the number of the bibliographic records with items currently at a given item status.

Note: The Item Status Table and Bib Status Table display only the item classes that have associated items.

3.6.3 Output Templates for the Circulation Snapshot Report

Location of files: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_10

Template	Contribution to Output
html_page.tem	Provides the overall framework of the HTML output.
email_page.tem	Provides the overall framework of the e-mail output.

3.7 Collected Fines Report

The Collected Fines report generates a list of the fine and fee transactions that exist in the database at the time you run the report. It also produces three lists of totals: Transaction Type Totals, Payment Method Totals, and Fine Type Totals. The lists show the total amount corresponding to each transaction type, payment method, and fine type reported on.

You can choose to limit the report results by date range, location, transaction type, or payment method. Figure 3-9 shows a portion of the default HTML output from the Collected Fines report. The three lists of totals appear at the top of the output.

Collected Fines

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

Transaction Type Totals

Assessment	USD 1,027,291.39
Payment	USD -1,022,590.57
Dispute	USD -100.00
Reinstate	USD 0.00
Waive	USD 0.00
Delete	USD -40,026.32
Modify	USD -386.49

Payment Method Totals

Other	USD 0.00
Cash	USD -910,817.99
Check	USD -125.25
Debit	USD 0.00
Credit	USD 0.00
Moneris	USD 0.00
Unknown	USD -111,647.33

Fine Type Totals

Architecture	USD 2.00
Booking Fine	USD 0.00
Item Price Fee	USD -330.00
Late Renewal	USD -34,348.00
Materials Booking	USD 3.00
Media Services	USD 3.00
Miscellaneous Fee	USD 2.00
Overdue	USD -1,158.00
Periodical/Document	USD 4.00
Processing Fee	USD 20.00
Request Not Picked Up	USD -1.00
Request Picked Up	USD -2.67
Request Placed	USD -9.99
Request Trapped	USD -5.33
Reserve	USD 1.00
Returned Damaged	USD 5.00
Service Charge	USD 3.00

Assessment Id	Date	Location	Transaction Type	Fine Type	Transaction_Amount	Payment Method	Patron Barcode	User Name	Receipt Number	Reference Number	Adjustment Note
31719	01-OCT-2013 11:06:36	Brenham Campus Library	Payment	Late Renewal	USD -4.00	Cash	1118	staff	309		
31720	01-OCT-2013 11:06:36	Brenham Campus Library	Payment	Late Renewal	USD -4.00	Cash	1118	staff	309		
31703	01-OCT-2013 13:42:18	Brenham Campus Library	Dispute	Item Price Fee	USD -50.00	Unknown	531	staff			dispute
31701	01-OCT-2013 13:42:29	Brenham Campus Library	Dispute	Item Price Fee	USD -50.00	Unknown	531	staff			dispute

Figure 3-9. Collected Fines HTML Output

3.7.1 Parameters Available for the Collected Fines Report

The Collected Fines report offers the following Report-specific Parameters:

- **Date Range** (*optional*) - Lets you limit your results to fines transactions completed during a particular date range.
- **Only Report Totals** (*optional*) - Lets you limit your results to only the total amounts collected for each fine type, and to not include individual transactions in the report output.

- **Location** *(required)* - Lets you limit your results to the location at which the fine assessment or payment took place. The report returns results for the locations you select. If the default All or Any option is selected, the report returns results for all locations.
- **Payment Method** *(required)* - Lets you limit your results to fine transactions that have specific payment methods associated with them. The report returns results for the payment methods you select. If the default All or Any option is selected, the report returns results for all payment methods.
- **Transaction Type** *(required)* - Lets you limit your results to particular types of fine transactions. The report returns results for the transaction types you select. If the default All or Any option is selected, the report returns results for all transaction types.
- **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.
- **Tertiary Sort** *(required)* - Lets you specify the tertiary sort that is used to order the report output.

3.7.2 Data Elements and Variables for the Collected Fines Report

The following table liststhe name, variable, description, and source for each data element that is retrieved by default by the Collected Fines report. You can edit the output templates to include or exclude any data element listed below.

Hint: Within an output template, you can easily identify the field label variable that corresponds to the variable (i.e., value). The field label variable simply adds the prefix **u_** and suffix **_label** to the variable. For example:
%($u_item_class_name_label)%: %($item_class_name)%
For more information on variables and field label variables, see the *InfoStation User's Guide*.

Data Element	Variable	Description and Location in Patron Record
Assessment ID	assessment_id	The unique, system-assigned number of a given fine assessment or payment.

Data Element	Variable	Description and Location in Patron Record
Date	transaction_date	The transaction date of the fine assessment or payment.
Location	location_string	The location at which the fine assessment or payment took place.
Transaction Type	transaction_type_string	The type of fine transaction (assessment, payment, modification, etc.).
Fine Type	fine_type	The type of fine associated with the fine transaction.
Transaction Amount	transaction_amount_formatted	The amount of the fine transaction.
Payment Method	method_string	The payment method associated with the fine payment.
Patron Barcode	patron_barcode	The patron barcode of the patron associated with the fine transaction.
User Name	user_name	The user name of the Virtua user who performed the fine transaction.
Receipt Number	receipt_number	The receipt number associated with the fine transaction.
Reference Number	reference_number	The transaction reference number associated with the fine transaction.
Adjustment Note	adjustment_note	Any adjustment note associated with the fine transaction.

3.7.3 Output Templates for the Collected Fines Report

Location of files: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_43

Template	Contribution to Output
html_page.tem	Provides the overall framework of the HTML output.
email_page.tem	Provides the overall framework of the e-mail output.
html_row.tem	In HTML output, generates the information for each row of report results.

Template	Contribution to Output
html_detail.tem	Specifies the labels for the headings at the top of the table of report results in the HTML output.
email_detail.tem	Specifies the labels for the headings at the top of the table of report results in the e-mail output.
email_row.tem	In e-mail output, generates the information for each row of report results.

3.8 Delinquent Patron Accounts Report

Important:

- Before you use the Delinquent Patron Accounts report, you must configure Virtua to keep a log of financial transactions. To do this, select the *Log financial transactions to the Audit Trail* parameter in the Virtua Profiler. For details, see the *Virtua Profiler/Circulation Parameters User's Guide*.
- You MUST run the Patron Account Statement Report before running the Delinquent Patron Account Report.

The Delinquent Patron Accounts report generates a list of fines and fees that are considered "delinquent," according to the information in the patron account and criteria that you specify in the report configuration. This report can generate output that is appropriate for sending to a collection agency, such as Unique Management Services.

Fines and fees are considered delinquent according to the First Statement Date stored in the patron account. When you configure the Delinquent Patron Accounts report, you specify the Number of Days Since Account Statement Generated (i.e., the number of days past the First Statement Date) that will qualify a patron for inclusion in the report. You can set the First Statement Date for all fines and fees by running the Patron Account Statement report.

Figure 3-10 shows an example of HTML output from the Delinquent Patron Accounts report.

Note: The Delinquent Patron Accounts report does not generate any new fine results for patrons that have already been flagged as delinquent.

Delinquent Patron Accounts

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

Start Date: 01-SEP-2013 00:00:00
End Date: 31-AUG-2013 23:59:59

Block Delinquent Patrons: Off
Flag Delinquent Patrons: Off

Name	Patron Barcode	Institution Name	Address
JENNIFER ROSE PEREZ - 256657	350422		3442 COWBIRD LN, BELLVILLE, TX 77418
Date of Birth		**Social Security Number**	
	Author		
	Title	Capital punishment / Steffanie Richardson, book editor.	
	Item Barcode	1000203388	
	Assessment Date	11-SEP-2013	
	Assessment ID	21925	
		Overdue	7.00
		Assessment Subtotal	7.00

Figure 3-10. Delinquent Patron Accounts HTML Output

3.8.1 Parameters Available for the Delinquent Patron Accounts Report

The Delinquent Patron Accounts report offers the following Report-specific Parameters:

Important:
Of the available parameters, five update the database: Additional Collection Fee, Collection Fee Amount or Percentage, Flag Delinquent Patrons, Block Delinquent Patrons, and Set Patron Fines to Zero. Because they update the database,

- Do not set any of these parameters for "test" or internal configurations.
- If the Output Format is set to HTML, do not set any of these parameters. If you do, you will get an error message upon saving the report configuration.

- **Patron Types** (*required*) - Lets you limit your results to one or more patron types. Your output will include delinquent account information for patrons who are assigned one of the patron types that you select for the report configuration.

- **Fine Codes** (*required*) - Lets you limit your results according to fine type. To be included in the output, a delinquent fine or fee must be assigned one of the fine types that you select for the report configuration.

- **Threshold** (*required*) - Lets you limit the output to accounts with a balance of a particular amount. To be included in the output, a patron's account must have a balance that meets or exceeds the Notice Threshold. For example, if you set the Notice Threshold to **10 USD**, the report will generate a list of patron accounts with a balance of $10.00 or more.

Note:

- For the Notice Threshold, you can use any whole number or decimal up to six digits in length.
- The Notice Threshold uses the database's home currency, which is indicated to the right of the Notice Threshold text box (e.g., USD).
- You cannot save a configuration where the Notice Threshold text box is empty or set to 0 (zero).

- **Number of Days Since Account Statement Generated** (*required*) - Lets you limit your results to patrons whose accounts have been delinquent for a certain amount of time. For a fine or fee to be included in the output, the First Statement Date must be equal to or greater than the Number of Days Since Account Statement Generated that you define in the report configuration. For example, if you set the Number of Days Since Account Statement Generated to 60, InfoStation will include in the output overdue fines for which the first statement was generated 60 or more days ago.

Note: You can set the First Statement Date for all fines and fees by running the Patron Account Statement report. For details, see the section "Patron Account Statement Report" in this guide.

- **Additional Collection Fee** (*optional*) - Lets you specify whether InfoStation will add an additional fee to the items or accounts included in your output. You can choose from the following options:
  - **No collection fee** - To each patron account included in the output, InfoStation will NOT add an additional collection fee.
  - **Charge additional collection fee for each item** - To each fine and fee included in the output, InfoStation will add an additional collection fee in the amount specified by the Collection Fee Amount or Percentage parameter.
  - **Charge a percentage of each fine as collection fee** - To each fine or fee included in the output, InfoStation will add a supplementary collection fee. The amount of the collection fee will be a percentage of each given fine or fee, as specified by the Collection Fee Amount or Percentage parameter.
  - **Charge additional collection fee to each patron account** - To each patron account included in the output, InfoStation will add a collection fee in the amount specified by the Collection Fee Amount or Percentage parameter.
  - **Charge additional percentage of the patron balance as collection fee** - To each patron account included in the output, InfoStation will add a supplementary collection fee. The amount of the collection fee will be a percentage of the patron's account balance, as specified by the Collection Fee Amount or Percentage parameter.

Note: Collection fees added to patron accounts will be assessed using the system-assigned CF fine code defined in the Virtua Profiler. For details, see the *Virtua Profiler/Circulation Parameters User's Guide*. If a fee is added to a patron's account, the transaction is recorded in the Audit Trail. For details on the Audit Trail, see the *Virtua Introduction and Basic Transactions User's Guide*.

- **Collection Fee Amount or Percentage** (*optional if the Additional Collection Fee parameter is set to No Collection Fee, otherwise required*) - Lets you specify the amount per fine or the percentage per fine that will be added to each qualifying patron account when you run the report configuration. This parameter works in conjunction with the Additional Collection Fee parameter. If you set the Additional Collection Fee parameter to . . .
    - **No collection fee** - This parameter is ignored.
    - **Charge additional collection fee for each item** - This parameter lets you define the amount that InfoStation will add to each fine included in the output.
    - **Charge a percentage of each fine as collection fee** - This parameter lets you define the percentage of each fine that InfoStation will add to the patron account.
    - **Charge additional collection fee to each patron account** - This parameter specifies the amount that InfoStation will add to patron account included in the output.
    - **Charge additional percentage of the patron balance as collection fee** - This parameter specifies the percentage of the patron account balance that InfoStation will add to the patron account as the collection fee.

- **Social Security Number Format** (*optional*) - Lets you specify the format in which you store social security numbers in your patron records. Any social security number that does not match this format will NOT appear in the output.

Hint: Use the character X (capital letter x) to represent digits in the SSN. For example, you might specify the format XXX-XX-XXXX, XXXXXXXXX, or 00XXX-XX-XXXX.

- **Filter on Address Blocks** (*optional*) - Lets you specify whether InfoStation should include in the output patrons who have an address block in the 007 or 043 tag of their patron record.
    - If you want InfoStation to include in the output patrons who have address blocks, do NOT select the Filter On Address Blocks check box.
    - If you do NOT want InfoStation to include in the output patrons who have address blocks, select the Filter On Address Blocks check box.

- **Flag Delinquent Patrons** (*optional*) - Lets you specify whether InfoStation should update the database to save a delinquent patron flag with any patron records that InfoStation determines qualify as delinquent. The Unique Management report requires this flag to be set for any patrons that are to be managed for Unique Management collections.
    - If you want InfoStation to update the database to add a delinquent patron flag to patron records of delinquent patrons, select the Flag Delinquent Patrons check box.

- ♦ If you do NOT want InfoStation to update the database to add a delinquent patron flag to patron records of delinquent patrons, do NOT select the Flag Delinquent Patrons check box.

Note:

- The Delinquent Patron Account report applies an actual alert or a block to a qualifying patron only when the threshold specified in the Delinquent Owed Amount value (see the Alerts and Blocks Matrix) is met or exceeded and this flag is enabled.
- Running the Unique Management report after the patron has paid the necessary fees will remove the delinquent flag from the patron's record.

- **Block Delinquent Patrons** (*optional*) - Lets you specify whether InfoStation should add a delinquent patron block to the patron record 043 tag of patrons included in the output.
  - ♦ If you want InfoStation to add a delinquent patron block (block code **27**) to the patron record 043 tag of patrons included in the output, select the Block Delinquent Patrons check box.
  - ♦ If you do NOT want InfoStation to add a delinquent patron block to the patron record 043 tag of patrons included in the output, do NOT select the Block Delinquent Patrons check box.

- **Set Patron Fines to Zero** (*optional*) - Lets you specify whether InfoStation should set to zero the fines and fees reported in the output. Note that this parameter sets individual fines and fees to zero. It does NOT set the entire patron account balance to zero.
  - ♦ If you want InfoStation to set to zero the fines and fees reported in the output, select the Set Patron Fines to Zero check box.
  - ♦ If you do NOT want InfoStation to set to zero the fines and fees reported in the output, do NOT select the Set Patron Fines to Zero check box.

Note: When you are running the Delinquent Patron Accounts report to send information to a collection agency . . .

- Select this option if, after you send fines to a collection agency, the library is no longer responsible for collecting payment and the collection agency instead collects payment on behalf of the library.
- Do NOT select this option if you use Unique Management as your collection agency. Unique Management does not accept payment on behalf of the library. Instead, the agency simply tries to encourage patrons to submit payment to the library.

- **Suppress Bibliographic Information** (*optional*) - Lets you choose to suppress the information about the items to protect patron privacy.

- **Date Range** (*optional*) - Lets you limit your results to fines that have a bill date during a particular date range. To appear in the output, a fine must have been billed during the date range that you specify for the report configuration.

For additional information on these parameters, see the *InfoStation/Report Parameters Reference Guide* or view the InfoStation online help.

3.8.2 Data Elements and Variables for the Delinquent Patron Accounts Report

The Delinquent Patron Accounts report returns various information related to delinquent patrons and their accounts. For your easy reference, below we list all the data elements that can be returned by the Delinquent Patron Accounts report.

When you run the Delinquent Patron Accounts report, InfoStation checks to see if any patrons included in the output are minors, according to position 11 of the 008 fixed fields.

- If 008/11 contains a **0** (zero) or a blank, the patron is NOT considered a minor, and InfoStation returns address information only for the delinquent patron.

- If 008/11 contains a **1**, the patron is considered a minor, and InfoStation looks in position 14 of the 008 fixed fields to see who should be contacted regarding the patron's account.
  - If 008/14 is set to 1 (subordinate notified first), InfoStation returns address information from the minor's patron record only.
  - If 008/14 is set to 0 (responsible person notified first), InfoStation looks at tag 711, subfield $i to get the patron barcode of the proxy and then retrieves address information for *both* the proxy and the minor.

InfoStation uses the same variables to return name and address information for both proxies and minors, so we do not distinguish between proxies and minors when discussing address information in the table below. Note that all *account* information is retrieved only for the delinquent patron. Name and address information, however, may be retrieved for only the delinquent patron OR for both the delinquent patron and the proxy, as appropriate.

Hint: Within an output template, you can easily identify the field label variable that corresponds to the variable (i.e., value). The field label variable simply adds the prefix **u_** and suffix **_label** to the variable. For example:
%($u_item_class_name_label)%: %($item_class_name)%
For more information on variables and field label variables, see the *InfoStation User's Guide*.

Data Element	Variable	Description and Source
Suppressed	suppressed	The label given to bibliographic fields when the Suppress Bibliographic Information parameter is selected.
Assessment Amount	assessment_amount	The amount assessed for a given fine or fee.
Assessment Date	assessment_date	The date a given fine or fee was assessed.
Assessment ID	assessment_id	The unique, system-assigned number of a given assessment.
Assessment Subtotal	assessment_subtotal	The total of a single fine or fee assessment, including any additional collection fee.
Attention Of	attention_of	The "attention of" name stored in the patron record in tag 270, subfield $h, where the first indicator is 1.
Author	author	The author of the item associated with the fine assessment.
City	city	The city in the patron's primary paper address, stored in the patron record in tag 270, subfield $b, where the first indicator is 1.
Class	class	The class responsible for distributing patron account statements, stored in tag 301, subfield $e of the patron record.
Collection Fee	collection_fee	The collection fee added to a given item, as defined by the Additional Collection Fee parameter.
College or School	college_or_school	The patron's college or school, stored in tag 301, subfield $c of the patron record.

Data Element	Variable	Description and Source
Country	country	The country in the patron's primary paper address, stored in the patron record in tag 270, subfield $f, where the first indicator is 1.
County	county	The county in the patron's primary paper address, stored in the patron record in tag 270, subfield $c, where the first indicator is 1.
Date of Birth	date_of_birth	The delinquent patron's date of birth, taken from subfield $d of the patron record 100 tag.
Department	department	The patron's departmental affiliation, stored in tag 301, subfield $d of the patron record.
E-mail Address, Primary	e_mail_address_primary	The patron's primary e-mail address, stored in the patron record in tag 271, subfield $a, where the first indicator is 1.
E-mail Address, Secondary	e_mail_address_secondary	The patron's secondary e-mail address, stored in the patron record in tag 271, subfield $a, where the first indicator is 2.
FAX, Primary	telephone_primary_fax	The patron's primary FAX number, stored in the patron record in tag 271, subfield $l, where the first indicator is 1.
FAX, Secondary	telephone_secondary_fax	The patron's secondary fax number, stored in the patron record in tag 271, subfield $l, where the first indicator is 2.
Fine Code	fine_code	The fine type associated with a given fine or fee.
First Name	first_name	The patron's first name, taken from the 100 tag, subfield $a of the patron record (the text *after* the comma).
Home Library	home_library	The patron's home library, taken from tag 247, subfield $a of the patron record.
Institution Name	institution_name	The name of the patron's institutional affiliation, stored in tag 301, subfield $b of the patron record.
Institutional Affiliation	institution_affiliation	The role the patron plays with respect to the institution name (301 $b), stored in tag 301, subfield $a of the patron record.

Data Element	Variable	Description and Source
Item Barcode	item_barcode	The library-assigned item barcode of the item associated with an entry in the patron's account.
Language	language	The patron's language preference, taken from tag … • tag 100, subfield $l of the patron record -OR- • tag 110, subfield $l of the patron record
Last Name	last_name	The patron's last name, taken from tag 100, subfield $a of the patron record (the text *before* the comma).
Name	name	The patron's full, personal name (i.e., last name and first name), taken from tag… • tag 100, subfield $a of the patron record (all text) -OR- • tag 110, subfield $a of the patron record (all text)
Parent or Guardian	parent_or_guardian	The name of a minor patron's parent or guardian, taken from tag 100 $a of the patron record.
Patron Barcode	patron_barcode	The library-assigned patron barcode, stored in tag 015, subfield $a of the patron record.
Patron ID	patron_id	The system-assigned patron number, stored in the 001 tag of the patron record.
Patron Total	patron_total	For a given patron, the total amount owed, including all fine and fee assessments and all collection fees included in the output.
Patron Type	patron_type	The patron type code assigned to the patron, stored in tag 030, subfield $a of the patron record.
Postal Code	postal_code	The postal code associated with the patron's primary paper address, stored in the patron record in tag 270, subfield $e where the first indicator is 1.

Data Element	Variable	Description and Source
Prefix	prefix	The patron's prefix, taken from tag 100, subfield $e of the patron record.
Social Security Number	social_security_number	The social security number of the delinquent patron, taken from subfield $a of the patron record 020 tag.
Special Telephone, Primary	telephone_primary_special	The specialized telephone number associated with the patron's primary paper address, stored in the patron record in tag 270, subfield $j, where the first indicator is 1.
Special Telephone, Secondary	telephone_secondary_special	The specialized telephone number associated with the patron's secondary paper address, stored in the patron record in tag 270, subfield $j, where the first indicator is 2.
State	state	The state associated with the patron's primary paper address, stored in the patron record in tag 270, subfield $d, where the first indicator is 1.
Street Address 1	street_address_1	The first line of the patron's street address, taken from the *first* occurrence of tag 270, subfield $a with a first indicator of 1.
Street Address 2	street_address_2	The second line of the patron's street address, taken from the *second* occurrence of tag 270, subfield $a with a first indicator of 1.
Suffix	suffix	The patron' suffix, stored in tag 100, subfield $f of the patron record.
Telephone, Primary	telephone_primary	The telephone number associated with the patron's primary paper address, stored in the patron record in tag 270, subfield $k, where the first indicator is 1.
Telephone, Secondary	telephone_secondary	The telephone number associated with the patron's secondary paper address, stored in the patron record in tag 270, subfield $k, where the first indicator is 2.
Title	title	The title of a given item associated with an entry in a patron's account, taken from tag 245, subfield $a of the bibliographic record.

3.8.3 Output Templates for the Delinquent Patron Accounts Report

Location of files: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_28

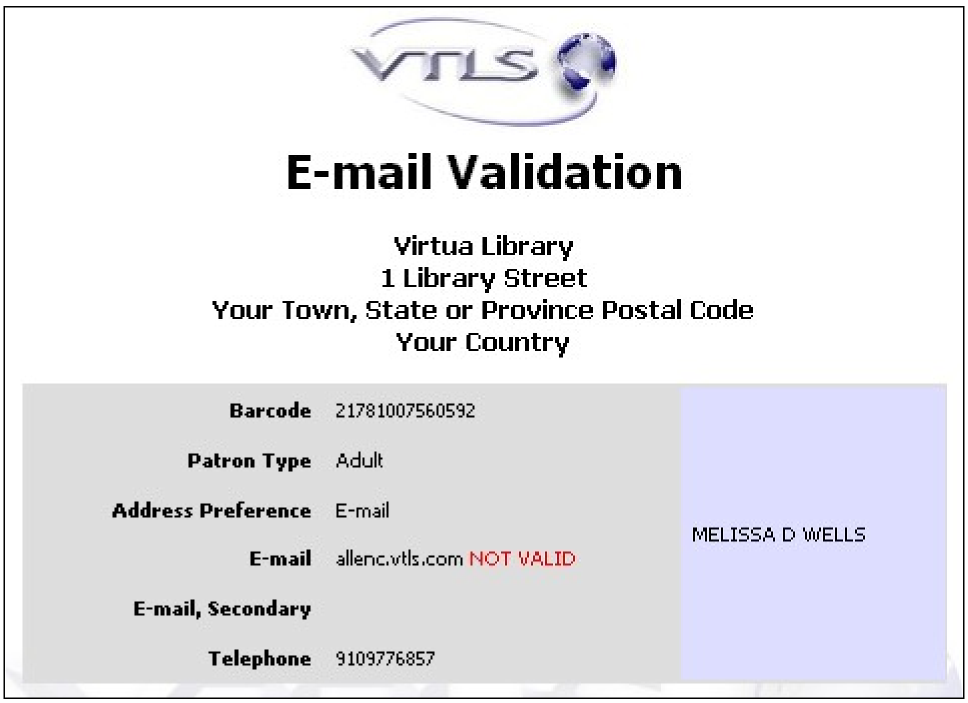
Template	Contribution to Output
html_page.tem	Provides the overall framework of the HTML output.
html_header.tem	In HTML output, generates labels that group billable items according to shelving location.
html_row.tem	In HTML output, generates the information for each billable item.
html_proxy_row.tem	In HTML output, returns patron information for a group of fines and fees related to a given proxy.
html_total.tem	In HTML output, returns the total of all fines and fees included in the output for a given patron.
email_page.tem	Provides the overall framework of the e-mail output.
email_header.tem	In e-mail output, generates labels that group billable items according to shelving location.
email_row.tem	In e-mail output, generates the information for each billable item.
email_proxy_row	In e-mail output, returns patron information for a group of fines and fees related to a given proxy.
email_total.tem	In e-mail output, returns the total of all fines and fees included in the output for a given patron.

3.9 E-mail Validation Report

The E-mail Validation report generates a list of patrons records that . . .

- Meet the patron type and address preference criteria that you set in the report configuration.
  -AND-
- Contain at least one *invalid* e-mail address.

  Figure 3-11 shows an example of HTML output from the E-mail Validation report.



E-mail Validation

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

Barcode	21781007560592	MELISSA D WELLS
Patron Type	Adult	
Address Preference	E-mail	
E-mail	allenc.vtls.com NOT VALID	
E-mail, Secondary		
Telephone	9109776857	

Figure 3-11. E-mail Validation HTML Output

Patrons with multiple e-mail addresses appear in the output if *at least one* of their e-mail addresses is invalid. In the output, each e-mail address is labeled as either VALID or NOT VALID.

Note: The E-mail Validation report determines the validity of each e-mail address based *only* on format.

3.9.1 Parameters Available for the E-mail Validation Report

The E-mail Validation report offers the following Report-specific Parameters:

- **Patron Types** (*required*) - Lets you limit the output to one or more patron types. To appear in the output, a patron must be of a patron type you select for the report configuration.

- **Address Preferences** (*required*) - Lets you limit the output according to patron address preference. You can choose . . .
    - **E-mail** - The report finds patron records in which the address preference is set to primary e-mail (i.e., position 10 of the 008 fixed fields is set to 1).
    - **Postal Address** - The report finds patron records in which the address preference is set to primary paper (i.e., position 10 of the 008 fixed fields is set to 0).

Important: Keep in mind that the E-mail Validation report does not return a list of ALL patron records based on address preference. The report retrieves *only* those patron records that have a given address preference AND contain at least one invalid e-mail address.

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

    - College or School
    - Department
    - Institution
    - Home Library
    - Patron Type

For additional information on these parameters, see the *InfoStation/Report Parameters Reference Guide* or view the InfoStation online help.

3.9.2 Data Elements and Variables for the E-mail Validation Report

The following table liststhe name, variable, description, and source for each data element that is retrieved by default by the E-mail Validation report. You can edit the output templates to include or exclude any data element listed below.

Hint: Within an output template, you can easily identify the field label variable that corresponds to the variable (i.e., value). The field label variable simply adds the prefix **u_** and suffix **_label** to the variable. For example:
%($u_item_class_name_label)%: %($item_class_name)%
For more information on variables and field label variables, see the *InfoStation User's Guide*.

Data Element	Variable	Description and Location in Patron Record
Address Preference	address_preference	A value in the patron record that indicates the patron's address preference, either paper (0) or e-mail (1), taken from 008/10.
Attention Of	attention_of	The "attention of" name stored in 270 1, subfield $h.
Barcode	barcode	The library-assigned patron barcode, stored in tag 015, subfield $a.
Circulation Count	circ_count	The *total* number of items associated with a patron record since that record was created (i.e., NOT the *current* circulation count).
City	city	The city associated with the patron's primary paper address, stored in 270 1 , subfield $b.
Class or Homeroom	class	The patron's class or homeroom (i.e., the class responsible for distributing circulation notices), stored in tag 301, subfield $e.
College or School	college	The patron's college or school, stored in tag 301, subfield $c.
Country	country	The country associated with the patron's primary paper address, stored in 270 1 , subfield $b.
County	county	The county associated with the patron's primary paper address, stored in 270 1 , subfield $c.

Data Element	Variable	Description and Location in Patron Record
Department	department	The patron's departmental affiliation, stored in tag 301, subfield $d.
E-mail, Primary	email_primary	The patron's primary e-mail address, stored in 271 1 , subfield $a.
E-mail, Secondary	email_secondary	The patron's secondary e-mail address, stored in 271 2 , subfield $a.
FAX, Primary	fax_primary	The patron's primary fax number, stored in 271 1 , subfield $l.
FAX, Secondary	fax_secondary	The patron's secondary fax number, stored in 271 2 , subfield $l.
First Name	first_name	The patron's first name, taken from tag 100, subfield $a (the text *after* the comma).
Home Library	library	The patron's home library, stored in tag 247, subfield $a.
Institution	institution	The institution with which the patron is affiliated, stored in tag 301, subfield $b.
Institution Affiliation	institution_affiliation	The patron's role with respect to the institution, stored in tag 301, subfield $a.
Language	language	The patron's language preference, stored in either the tag 100, subfield $l or the tag 110, subfield $l.
Last Name	last_name	The patron's last name, taken from tag 100, subfield $a (the text *before* the comma).
Name	name	The patron's full name (i.e., last name and first name) taken from tag 100, subfield $a (all text).
Patron Type	patron_type	The description for a given patron type, stored in tag 245, subfield $a.

Data Element	Variable	Description and Location in Patron Record
Postal Code	postal_code	The postal code associated with the patron's primary paper address, stored in the patron record in tag 270, subfield $e, where the first indicator is 1.
Prefix	prefix	The patron's prefix, stored in tag 100, subfield $e.
State	state	The state associated with the patron's primary address, stored in the patron record in tag 270, subfield $d, where the first indicator is 1.
Street Address 1	street_address_1	The first line of the patron's street address, stored in the first occurrence of, subfield $a in the 270 1 tag.
Street Address 2	street_address_2	The second line of the patron's street address, stored in the second occurrence of, subfield $a in the 270 1 tag.
Suffix	suffix	The patron's suffix, stored in tag 100, subfield $f of the patron record.
Telephone, Primary	telephone_primary	The telephone number associated with the patron's primary paper address, stored in the patron record in tag 270, subfield $k, where the first indicator is 1.
Telephone, Primary Special	telephone_primary_special	The specialized telephone number associated with the patron's primary paper address, stored in the patron record in tag 270, subfield $j, where the first indicator is 1.
Telephone, Secondary	telephone_secondary	The telephone number associated with the patron's secondary paper address, stored in the patron record in tag 270, subfield $k, where the first indicator is 2.

Data Element	Variable	Description and Location in Patron Record
Telephone, Secondary Special	telephone_secondary_special	The specialized telephone number associated with the patron's secondary paper address, stored in the patron record in tag 270, subfield $j, where the first indicator is 2.

3.9.3 Output Templates for the E-mail Validation Report

Location of files: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_14

Template	Contribution to Output
html_page.tem	Provides the overall framework of the HTML output.
html_row.tem	In HTML output, returns the information related to a single patron record.
email_page.tem	Provides the overall framework of the e-mail output.
email_row.tem	In e-mail output, returns the information related to a single patron record.

3.10 Excessive Requests Report

The Excessive Requests report generates a list of titles for which an "excessive" number of outstanding requests exist. This report can help your library determine when to purchase additional copies of popular items. Figure 3-12 shows a portion of the default HTML output for the Excessive Requests report.

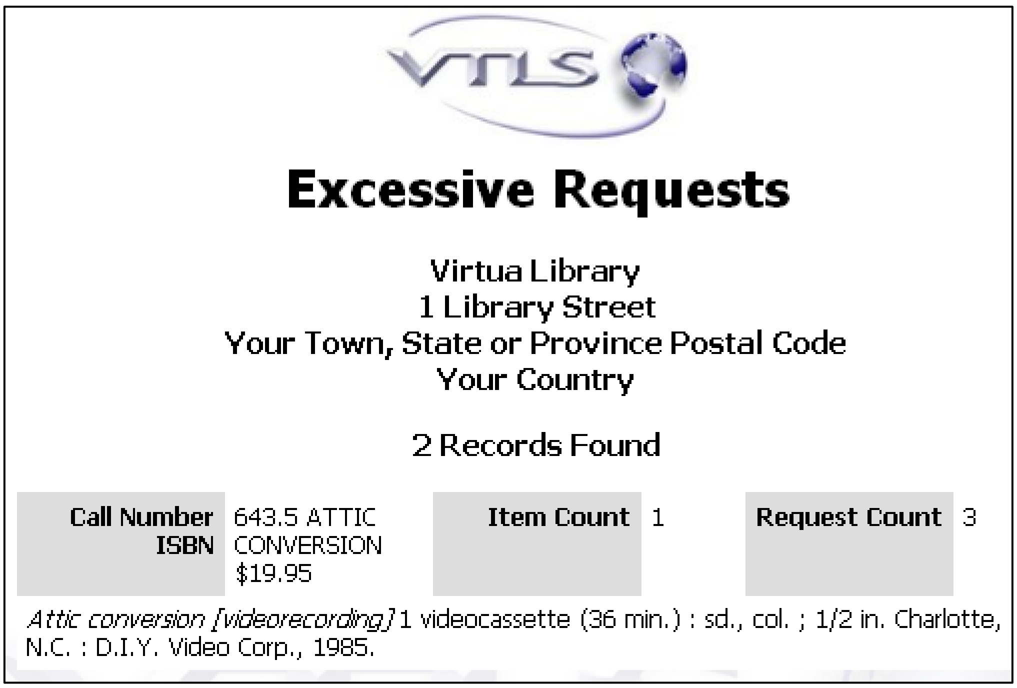


Figure 3-12. Excessive Requests HTML Output

For each configuration of the Excessive Requests report, you can define what is considered an "excessive" number of requests. You can generate results by defining in the configuration . . .

- The total number of outstanding requests that is considered excessive.
  -OR-
- The ratio of requests to items that is considered excessive.

3.10.1 Parameters Available for the Excessive Requests Report

The Excessive Requests report offers the following Report-specific Parameters:

- **Search Criteria** (*required*) - Lets you specify how you want to gather results. You can choose . . .
  - **Request Count** - Generates a list of records with a number of requests *equal to or greater than* the Request Count that you specify for the report configuration. -OR-
  - **Request Ratio** - Generates a list of records that *exceed* the Request Count to Item Count ratio that you specify for the report configuration.

If you set the Search Criteria to Request Count, InfoStation generates results using *only* the value in the Request Count text box. For example, if you type **5** in the Request Count text box, InfoStation generates a list of records that have five or more outstanding requests.

Note: If you set the Search Criteria to Request Count but you do NOT type a value in the Request Count text box, InfoStation interprets the count as ONE and generates a list of all records with one or more outstanding requests.

If you set the Search Criteria to Request Ratio, InfoStation generates results using the values in the Request Count AND Item Count text boxes. For example, if you type **3** in the Request Count text box and **1** in the Item Count text box, InfoStation generates a list of records that have *more* than three requests per item.

- **Item Class** - Lets you limit the output to records with the specified item class. If the default All or Any option is selected, the report returns results for records with any item class.

- **Collection Code** - Lets you limit the output to records with the specified collection code. If the default All or Any option is selected, the report returns results for records with any collection code.

- **Request Count** (*required*) - Lets you specify the number of requests that must exist for a record for that record appear in the output.

- **Item Count** (*required only if your Search Criteria is Request Ratio*) - In combination with the Request Count, lets you specify the requests to items ratio that a record must exceed to appear in the output.

For additional information on these parameters, see the *InfoStation/Report Parameters Reference Guide* or view the InfoStation online help.

3.10.2 Data Elements and Variables for the Excessive Requests Report

The following table liststhe name, variable, description, and source for each data element that is retrieved by default by the Excessive Requests 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: Within an output template, you can easily identify the field label variable that corresponds to the variable (i.e., value). The field label variable simply adds the prefix **u_** and suffix **_label** to the variable. For example:
%($u_item_class_name_label)%: %($item_class_name)%
For more information on variables and field label variables, see the *InfoStation User's Guide*.

Data Element	Variable	Description and Source
Author	author	The author of the requested title, taken from either the 100 or 100 tag of the bibliographic record.
Call Number	call_number	The bibliographic-level call number. This is the call number with the highest priority as determined by the Call Number Index and Priority parameter.
Title	title	The title of the requested material, taken from tag 245, subfield $a of the bibliographic record.
ISBN	tag_020	The ISBN of the requested material, taken from the 020 tag of the bibliographic record.
ISSN	tag_022	The ISSN of the requested material, taken from the 022 tag of the bibliographic record.
Edition	tag_250	The edition of the requested material, taken from the 250 tag of the bibliographic record.

Data Element	Variable	Description and Source
Publication	tag_260	Publication information associated with the requested material, taken from the 260 tag of the bibliographic record.
Physical Description	tag_300	A physical description of the requested material, taken from the 300 tag of the bibliographic record.

3.10.3 Output Templates for the Excessive Requests Report

Location of files: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_17

Template	Contribution to Output
html_page.tem	Provides the overall framework of the HTML output, including a count of the total number of records found.
html_row.tem	In HTML output, returns the information for a single record.
email_page.tem	Provides the overall framework of the e-mail output, including a count of the total number of records found.
email_row.tem	In e-mail output, returns the information for a single record.

3.11 Expired Agency Request Items Report

The Expired Agency Request Items report generates a list of items that are currently shelved at their requesting locations, and that should be returned to their owning locations because the agency request placed against them has expired. Figure 3-13 shows an example of HTML output from the Expired Agency Request Items report.

Expired Agency Request Items

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

Title	Author	Call Number	Item Barcode	Owning Location Name
The Old Man and Mr. Smith : a fable / Peter Ustinov.	Ustinov, Peter	F Us8o 1991	1000121408	BRENHAM READING ROOM
Mrs. Dalloway / Virginia Woolf.	Woolf, Virginia, 1882-1941	F W883m 1990	1000116040	BRENHAM READING ROOM

Outputted 2 items. Updated 0 items for 2 agency requests.

Log In Reports List Scheduled Jobs Log Out

InfoStation® 2011.1 for Virtua

Figure 3-13. Expired Agency Request Items HTML Output

You can choose to limit the report output by agency request pickup location.

You can also choose to run the Expired Agency Request Items report in update mode, which deletes all expired agency requests returned by the report.

Note: It is possible for an agency request to expire without ever being fulfilled with any items. As a result, the total number of logged updated agency requests can be larger than the number of updated agency request items.

3.11.1 Parameters Available for the Expired Agency Request Items Report

The Expired Agency Request Items report offers the following Report-specific Parameters:

- **Pickup Locations** (*required*) - Allows you to limit the report output to expired agency requests for one or more specific pickup locations.

- **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, InfoStation will delete all expired agency requests returned by the report. Additionally, InfoStation will break any internal links that exist between an expired agency request and an item (i.e., for items that were linked to an agency request but were never pulled from the shelves, or items that were delivered to the requesting location but that are not currently checked out) and remove the *Agency request satisfied status* from all items that were associated with the request.
  - If you do NOT select the Update Database check box, expired agency requests returned by the report will not be deleted.

For additional information on these parameters, see the *InfoStation/Report Parameters Reference Guide* or view the InfoStation online help.

3.11.2 Data Elements and Variables for the Expired Agency Request Items Report

The following table liststhe name, variable, description, and source for each data element that is retrieved by default by the Expired Agency Request Items report. You can edit the output templates to include or exclude any data element listed below.

Hint: Within an output template, you can easily identify the field label variable that corresponds to the variable (i.e., value). The field label variable simply adds the prefix **u_** and suffix **_label** to the variable. For example:
%($u_item_class_name_label)%: %($item_class_name)%
For more information on variables and field label variables, see the *InfoStation User's Guide*.

Data Element	Variable	Description
Title	title	The title of the item, taken from tag 245, subfield $a of the bibliographic record.
Author	author	The author of the title, taken from either the 100 or 110 tag of the bibliographic record.
Call Number	call_number	The item-level call number of the item.
Item Barcode	item_barcode	The library-assigned item barcode.
Owning Location Name	owning_location_name	The item's owning location.
Result Message	result_msg	A summary of the total number of items retrieved by the report, the number of items updated, and the number of expired agency requests.

3.11.3 Output Templates for the Expired Agency Request Items

Location of files: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_51

Template	Contribution to Output
html_page_header.tem	In HTML output, generates the report information that appears before the expired agency request items retrieved.
html_header.tem	In HTML output, generates the labels that appear as column headings for the list of items returned by the report.
html_row.tem	In HTML output, generates information related to a single expired agency request item.
html_page_footer.tem	In HTML output, generates the footer that appears below the list of items returned by the report.
email_page_header.tem	In e-mail output, generates the report information that appears before the expired agency request items retrieved.

email_header.tem	In e-mail output, generates the header that appears before the list of items retrieved by the report.
email_row.tem	In e-mail output, generates information related to a single expired agency request item.
email_page_footer.tem	In e-mail output, generates the footer that appears below the list of items returned by the report.
no_output_msg.tem	In HTML output, generates the screen shown when there *are* expired agency request items returned by the report, but none of the items generate any report output.

3.12 Expiring Patrons Report

The Expiring Patrons report generates a list of patrons who meet the specified patron information criteria and whose patron records are due to expire within the amount of time specified for the report configuration. Figure 3-14 shows an example of HTML output from the Expiring Patrons report.

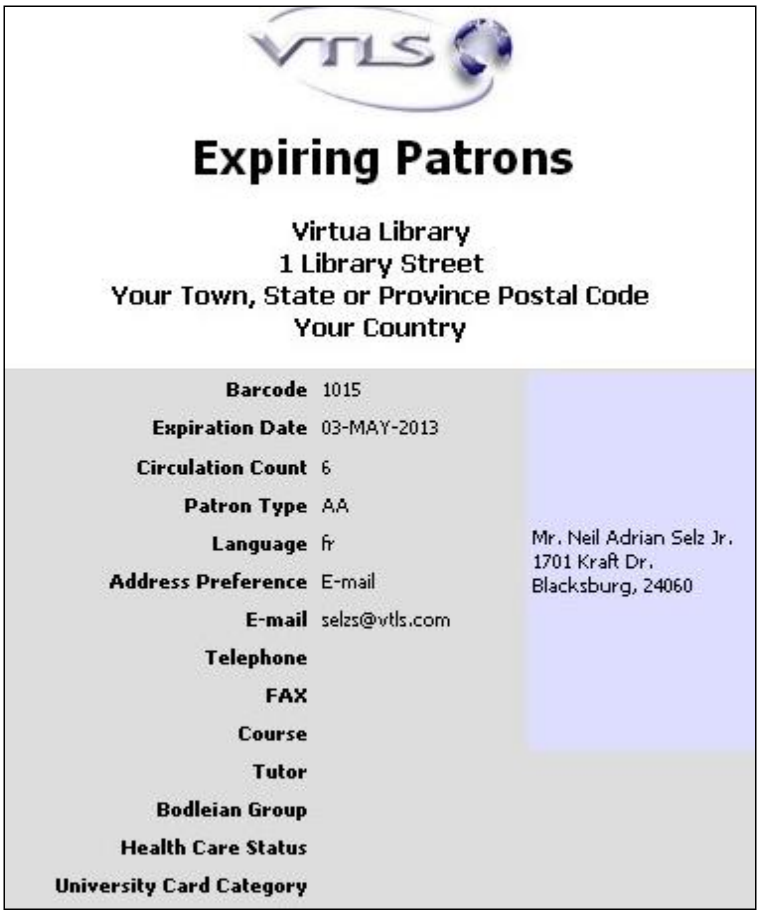


Figure 3-14. Expiring Patrons HTML Output

Note: The output contains . . .

- All patrons records that are due to expire within the specified period.
  -AND-
- All patron records that have already expired by the date the configuration is run.

The Expiring Patrons report offers various parameters that let you limit the output according to patron information, including contact information, home library, academic affiliation, and address preference. In addition, you can optionally limit the output to only those patrons who . . .

- Have borrowed items at some time.
  -OR-
- Have items checked out at the time you run the report.

Additionally, in HTML and e-mail output, the report includes a count of how many patrons are included in the list of results.

3.12.1 Parameters Available for the Expiring Patrons Report

The Expiring Patrons report offers the following Report-specific Parameters:

- **Patron Types** (*required*) - Lets you limit the output according to patron type. Expiring patrons will appear in the output only if they belong to one of the patron types that you select for the report configuration.

- **Cities** (*required*) - Lets you limit the output according to city. Patrons are included in the output if a city you select for the configuration exists in 270 tag first indicator 1, subfield $b of their patron record.

- **Counties** (*required*) - Lets you limit the output according to county. Patrons are included in the output if a county you select for the configuration exists in 270 tag first indicator 1 , subfield $c of their patron record.

- **States** (*required*) - Lets you limit the output according to state. Patrons are included in the output if a state you select for the configuration exists in 270 tag first indicator 1 , subfield $d of their patron record.

- **Countries** (*required*) - Lets you limit the output according to country. Patrons are included in the output if a country you select for the configuration exists in 270 tag first indicator 1, subfield $f of their patron record.

- **Postal Codes** (*required*) - Lets you limit the output according to postal code. Patrons are included in the output if a postal code you select for the configuration exists in 270 tag first indicator 1, subfield $e of their patron record.

- **Home Libraries** (*required*) - Lets you limit the output according to home library. Patrons are included in the output if a library you select for the configuration exists in tag 247, subfield $a of their patron record.

- **Institutions** (*required*) - Lets you limit the output according to institution. Patrons are included in the output if an institution you select for the configuration exists in 300, subfield $b of their patron record.

- **Colleges or Schools** (*required*) - Lets you limit the output by college or school. Patrons are included in the output if a school you select for the configuration exists in tag 300, subfield $c of their patron record.

- **Departments** (*required*) - Lets you limit the output by department. Patrons are included in the output if a department you select for the configuration exists in tag 301, subfield $d of their patron record.

- **Classes or Homerooms** (*required*) - Lets you limit the output by class or homeroom. Patrons are included in the output if a class or homeroom you select for the configuration exists in tag 301, subfield $e of their patron record.

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

  - City
  - Circulation Count
  - Class or Homeroom
  - College or School
  - Country
  - County
  - Department
  - Expiration Date
  - Institution
  - Language
  - Home Library
  - Patron Type
  - Postal Code
  - State

- **Address Preferences** (*required*) - Lets you limit the output according to a patron's address preference. You can choose . . .
  - **E-mail** - The report finds patron records in which the address preference is set to primary e-mail (i.e., position 10 of the 008 fixed fields is set to 1).
  - **Postal Address** - The report finds . . .
    - Patron records in which the address preference is set to primary paper (i.e., position 10 of the 008 fixed fields is set to 0).

-AND-

- Patron records with NO address preference (i.e., position 10 of the 008 fixed fields is blank).

Hint: To generate a list of ALL expiring patron records, choose both E-mail AND Postal Address.

- **Expiring Within X Weeks** (*required*) - Lets you limit the output according to the patron record expiration date, which is stored in the 042 tag, subfield $b of the patron record. To appear in the output, a patron record must be due to expire within the number of weeks you specify for the report configuration.

  For this parameter, you must type a number in the text box before you can save the report configuration. Valid values for this parameter are 0 to 99. By default, the text box contains a **4**, meaning that if you do not change the value, the report configuration will find patrons whose records are scheduled to expire within four weeks.

  Note: Patrons qualify for inclusion in the output based on the date the report is run, not the date the configuration is created. Therefore, to be included in the output, a patron record must expire within **x** weeks of the run date.

- **Show Only Patrons Who Have Circulated Items** (*optional*) - If you select this check box, the report generates a list of *only* the expiring patrons who have checked out at least one item from your library.

- **Show Only Patrons With Items Currently Checked Out** (*optional*) - If you select this check box, the report generates a list of *only* the expiring patrons who have items checked out at the time you run the report.

Note:

- If you select *neither* of the Show Only Patrons parameters, the report returns a list of ALL patron records, regardless of circulation history.
- If you select *both* of the Show Only Patrons parameters, the report returns a list of patrons with items currently checked out who have also circulated items prior to checking out their currently borrowed material.

For additional information on these parameters, see the *InfoStation/Report Parameters Reference Guide* or view the InfoStation online help.

3.12.2 Data Elements and Variables for the Expiring Patrons Report

The following table liststhe name, variable, description, and source for each data element that is retrieved by default by the Expiring Patrons report. You can edit the output templates to include or exclude any data element listed below.

Hint: Within an output template, you can easily identify the field label variable that corresponds to the variable (i.e., value). The field label variable simply adds the prefix **u_** and suffix **_label** to the variable. For example:
%($u_item_class_name_label)%: %($item_class_name)%
For more information on variables and field label variables, see the *InfoStation User's Guide*.

Data Element	Variable	Description and Location in Patron Record
Address Preference	address_preference	A value in the patron record that indicates the patron's address preference, either paper (0) or e-mail (1), taken from 008/10.
Attention Of	attention_of	The "attention of" name stored in 270 1, subfield $h.
Barcode	barcode	The library-assigned patron barcode, stored in tag 015, subfield $a.
Circulation Count	circ_count	The *total* number of items associated with a patron record since that record was created (i.e., NOT the *current* circulation count).
City	city	The city associated with the patron's primary paper address, stored in 270 1 , subfield $b.
Class or Homeroom	class	The patron's class or homeroom (i.e., the class responsible for distributing circulation notices), stored in tag 301, subfield $e.
College or School	college	The patron's college or school, stored in tag 301, subfield $c.

Data Element	Variable	Description and Location in Patron Record
Country	country	The country associated with the patron's primary paper address, stored in 270 1 , subfield $b.
County	county	The county associated with the patron's primary paper address, stored in 270 1 , subfield $c.
Department	department	The patron's departmental affiliation, stored in tag 301, subfield $d.
E-mail, Primary	email_primary	The patron's primary e-mail address, stored in 271 1 , subfield $a.
E-mail, Secondary	email_secondary	The patron's secondary e-mail address, stored in 271 2 , subfield $a.
Expiration Date	expiration_date	The date that the patron's library privileges are due to expire, stored in 042, subfield $b.
FAX, Primary	fax_primary	The patron's primary fax number, stored in 271 1 , subfield $l.
FAX, Secondary	fax_secondary	The patron's secondary fax number, stored in 271 2 , subfield $l.
First Name	first_name	The patron's first name, taken from tag 100, subfield $a (the text *after* the comma).
Home Library	library	The patron's home library, stored in tag 247, subfield $a.
Institution	institution	The institution with which the patron is affiliated, stored in tag 301, subfield $b.
Institution Affiliation	institution_affiliation	The patron's role with respect to the institution, stored in tag 301, subfield $a.
Language	language	The patron's language preference, stored in either the tag 100, subfield $l or the tag 110, subfield $l.
Last Name	last_name	The patron's last name, taken from tag 100, subfield $a (the text *before* the comma).

Data Element	Variable	Description and Location in Patron Record
Name	name	The patron's full name (i.e., last name and first name) taken from tag 100, subfield $a (all text).
Patron Type	patron_type	The description for a given patron type, stored in tag 245, subfield $a.
Postal Code	postal_code	The postal code associated with the patron's primary paper address, stored in the patron record in tag 270, subfield $e, where the first indicator is 1.
Prefix	prefix	The patron's prefix, stored in tag 100, subfield $e.
State	state	The state associated with the patron's primary address, stored in the patron record in tag 270, subfield $d, where the first indicator is 1.
Street Address 1	street_address_1	The first line of the patron's street address, taken from the *first* occurrence of, tag 270, subfield $a with a first indicator of 1.
Street Address 2	street_address_2	The second line of the patron's street address, taken from the *second* occurrence of, tag 270, subfield $a with a first indicator of 1.
Suffix	suffix	The patron's suffix, stored in tag 100, subfield $f of the patron record.
Telephone, Primary	telephone_primary	The telephone number associated with the patron's primary paper address, stored in the patron record in tag 270, subfield $k, where the first indicator is 1.

Data Element	Variable	Description and Location in Patron Record
Telephone, Primary Special	telephone_primary_special	The specialized telephone number associated with the patron's primary paper address, stored in the patron record in tag 270, subfield $j, where the first indicator is 1.
Telephone, Secondary	telephone_secondary	The telephone number associated with the patron's secondary paper address, stored in the patron record in tag 270, subfield $k, where the first indicator is 2.
Telephone, Secondary Special	telephone_secondary_special	The specialized telephone number associated with the patron's secondary paper address, stored in the patron record in tag 270, subfield $j, where the first indicator is 2.

3.12.3 Output Templates for the Expiring Patrons Report

Location of files: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_25

Template	Contribution to Output
html_page.tem	Provides the overall framework of the HTML output.
html_row.tem	In HTML output, returns information related to a single patron.
email_page.tem	Provides the overall framework of the e-mail output.
email_row.tem	In e-mail output, returns information related to a single patron.

3.13 Failed Notices Report

3.13.1 Overview

The Failed Notices report (/usr/vtls/virtua/webrpt_XX_x/Cir/Cir_56) generates a list of notices that the report attempted (successfully or unsuccessfully) to mark as undeliverable. The notices reported on have been sent by *other* notice-generating reports. If the Failed Notices report is successful at marking a notice as undeliverable, the action will reset the notice schedule, making the database look as though the failed notice was never sent. Once a notice has been "rolled back" in this way, it will be resent the next time that the report that generated it is run.

Note: Notice-generating reports will attempt redelivery the same way they attempt initial delivery. Only one delivery attempt (e-mail send) will be made per patron notice per run.

3.13.2 How the Report Works

The Failed Notices report interacts with the PoP3 e-mail account specified in the Reply To field or From (if no Reply To is specified) field of notice-generating reports. The Failed Notices report will examine each of the account's e-mails and determine if the e-mail has a unique identifier.

The Failed Notices report sends the information it gathers from the e-mail and unique identifier to a server program called **RollbackNotices.exe**. This program "rolls back" notices to their unsent state. It makes the database look as though a failed notice was not sent. The notice is, however, logged to the Transaction Log in the client, and the transaction is marked as “Rolled Back – [Notice Type].”

The Failed Notices report outputs a summary of the notices it attempted to roll back and indicates whether the roll back was successful. The report logs ALL e-mails to the **log.Cir_56.[process_id]** log file, which resides in the configured InfoStation temp directory and then deletes ALL e-mails, whether processing was successful or unsuccessful. The report also deletes any log files older than 60 days.

3.13.3 About the Report Output

The Failed Notices contains the following data fields as output:

- Patron barcode
- Patron name
- Patron e-mail
- Notice type (i.e., Overdues, Bills, etc.)
- Notice date
- Notice location (i.e., location that sent the notice)
- Notice identifier
- Status of the notice roll back (i.e., failure, success, not found, unsupported notice type, partly paid assessment, fully paid assessment, assessment modified)

The report also outputs any error messages related to the rollback.

3.13.4 About the "Note to Add to Patron Record Report" Parameter

In addition to reporting on undelivered notices, the Failed Notices report, via **RollbackNotices.exe**, adds a library-defined, report-specific note to tag 504 in the patron record (see the required *Note to Add to Patron Record* field in Figure 3-15). The 504 note tag is added only when the failed notice threshold (i.e., x number of notices within the past y days) has been exceeded. The failed notice threshold is established in a Virtua Profiler parameter (see the next section, below).

In addition to adding the note, **RollbackNotices.exe** automatically changes a patron's communication preference to Paper (tag 008 in the patron record) when notification e-mails sent to the patron could not be delivered after the specified number of attempts has been exceeded. At the same time, **RollbackNotices.exe** adds subfield $t to the 504 note tag. Subfield $t displays the transaction reference number of the notice that caused the patron's e-mail preference to be disabled. In this way, libraries will be able to determine when Virtua updated the communication preference.

The note will be displayed to library staff the next time the patron checks out or requests an item, and it will be displayed to patrons using Chamo or Chivas. This note is also included in the **Patron_Note_v** Ad Hoc view as a *Preference Changed to Paper* type note.

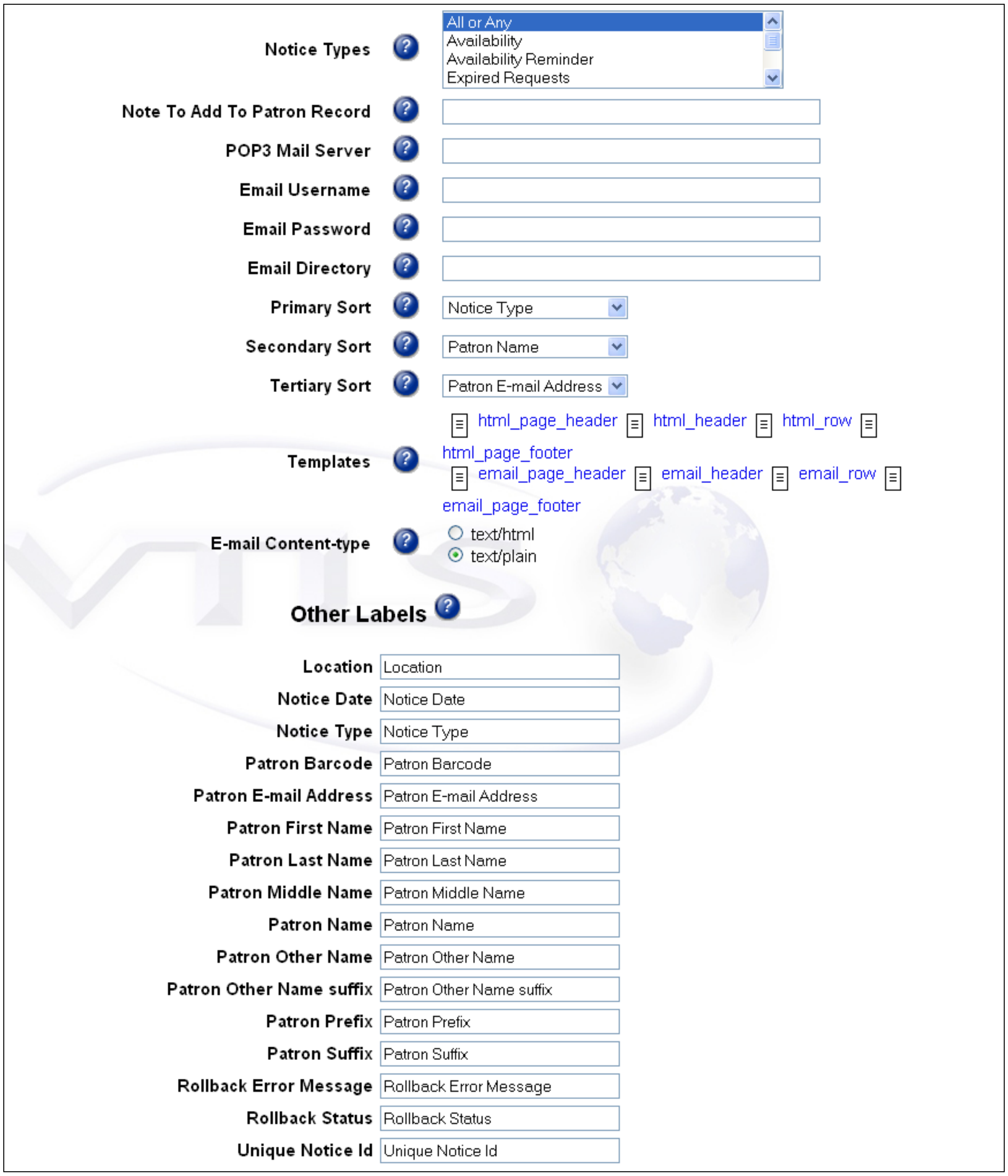


Figure 3-15. Failed Notices Configuration Screen

3.13.5 About the E-mail Directory Parameter

Note: This parameter is meant to be used only for testing purposes.

The E-mail Directory parameter allows you to configure the report to read e-mails from a directory on the server, instead of reading e-mails by logging in to a PoP3 e-mail account. This can help library or Innovative staff users troubleshoot problems with PoP3 e-mail servers, or test the report when configuring it for the first time.

To set the E-mail Directory parameter, type the path of the directory in the E-mail Directory text box.

When you enter a value for the E-mail Directory parameter, InfoStation attempts to read all files in the specified server directory as e-mails instead of logging in to a PoP3 e-mail server. Note that each file in the directory represents a separate e-mail. Each file should contain both the message header and the message body.

Note: If you do not specify a value for the E-mail Directory parameter, you *must* specify a value for the E-mail Server parameter in order to save the report configuration successfully. If you specify a value for the E-mail Directory parameter, the E-mail Server, E-mail Username, and E-mail Password parameters will be ignored.

3.13.6 Virtua Profiler Setting Related to the Failed Notices Report

To know when to post the library-defined note and change the patron's communication preference to Paper, the Failed Notices report uses the values specified in the Notification Options parameter in the Virtua Profiler (*Figure 3-16*). The Notification Options parameter lets you set two values with regard to failed notifications:

- Number of times Virtua should send a failed notification.
- Period of time (in terms of days or weeks) within which those notifications should be sent.

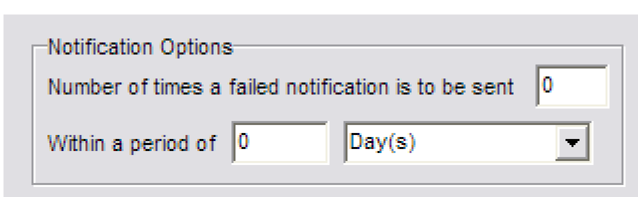


Figure 3-16. Notification Options Parameter

3.14 Highest Circulating Titles Report

The Highest Circulating Titles report (/usr/vtls/virtua/webrpt_XX_x/Cir/Cir_61) generates a list of the highest-circulating titles and accompanying items that meet the criteria you specify in the report configuration. The report will NOT return bibliographic records that have no attached items.

Figure 3-17 shows an example of HTML output from the Highest Circulating Titles report.

Highest Circulating Titles Report

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

Selection Criteria

Call Number Ranges			
Item Statuses	All or Any	**Collection Code Groups**	All or Any
Shelving Locations	Hong Kong Central (*1000000)	**Creation Date Range**	01-JAN-2000 - 31-DEC-2012
Publication Date Range		**Type**	a
Bibliographic Level		**Language Code**	

1

Bib ID	11339	**Bibliographic Call Number**	813/.54	**Fixed Length Data**	121015s1999 nyu 000 1 eng
Author	Gaiman, Neil.	**Title**	Stardust / Neil Gaiman.		
Physical Description	238 p. ; 25 cm.	**Edition**	1st ed.		

Item Barcode	Item Class	Location	Item Call Number	Copy	Circulation Count
55668822331151	Adult Lending CD-ROM	Hong Kong Central (*1000000)		1	48
88888888888883	Adult Lending Books	Hong Kong Central (*1000000)		1	57

2

Bib ID	42568	**Bibliographic Call Number**	821/.914	**Fixed Length Data**	121015s2010 nyua j 000 0 eng
Author	Gaiman, Neil.	**Title**	Instructions / Neil Gaiman ; [illustrated by] Charles Vess.		
Physical Description	1 v. (unpaged) : col. ill. ; 21 cm.	**Edition**	1st ed.		

Item Barcode	Item Class	Location	Item Call Number	Copy	Circulation Count
62626262626606	Adult Lending Books	Hong Kong Central (*1000000)		1	33

Figure 3-17. Highest Circulating Titles Report HTML Output

You can limit the report output by a number of criteria (*Figure 3-18*). For details about each report-specific parameter, see the context-sensitive help on the Configuration page of the report.

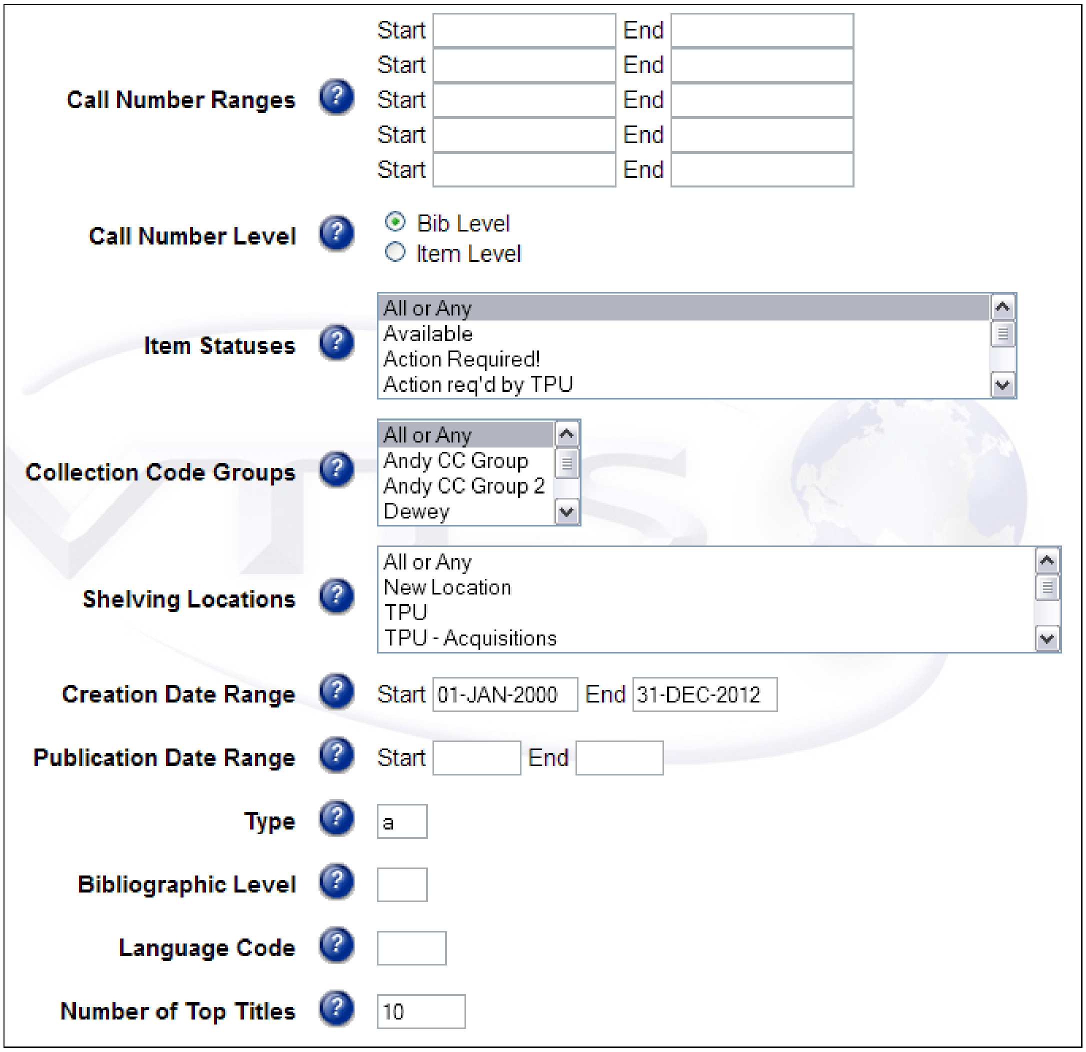


Figure 3-18. Highest Circulating Titles Report Filters

The data elements displayed in the output are shown in (*Figure 3-19*). By default, the report output is sorted first by circulation count, then by title, and thirdly by bibliographic call number.

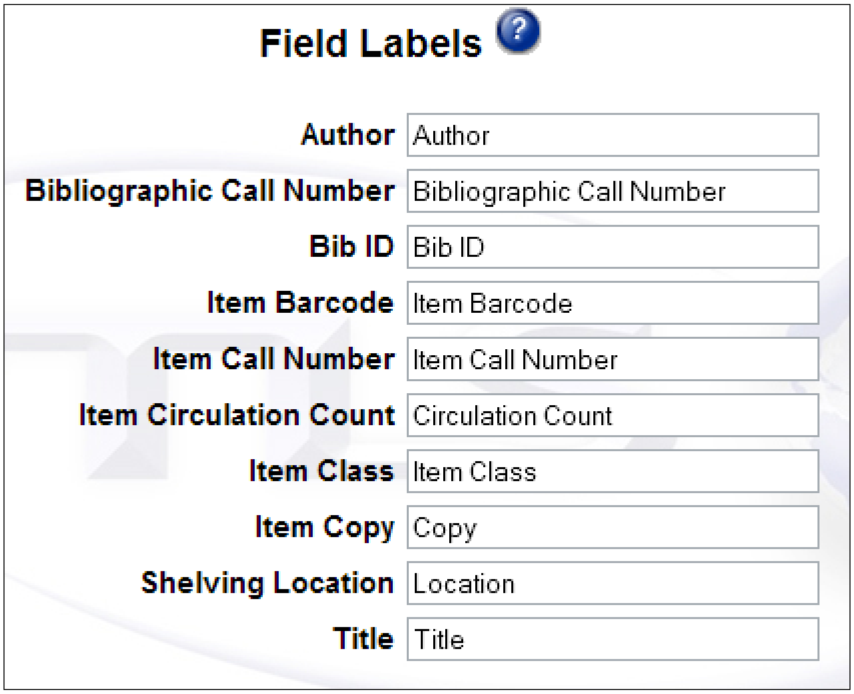


Figure 3-19. Highest Circulating Titles Report Data Elements

3.15 Inventory Control Utility

Note: For tips on how to prepare your library for using the Inventory Control Utility, see Appendix D.

The Inventory Control Utility serves as a Web interface to the existing **CircReport.exe** program. Broadly, the utility…

- Provides comprehensive inventory and stock control functions for handling partial and full stock rotations and stocktaking exercises.
- Allows library staff to select items for exercises such as collection-specific and branch-specific stocktaking.

More specifically, the Inventory Control Utility report (/usr/vtls/virtua/webrpt_XX_x/Cir/Cir_57) does the following:

- Accepts an input file of item barcodes that represents the items on a shelf or a range of shelves in your library.
- Generates an internal list of barcodes based on the specified call number range and checks the input file list of barcodes against the internally generated list.
- Reports on the discrepancies between the two lists.

The utility reports on discrepancies by outputting *only* those items that have an error condition associated with them or for which there is an inventory or shelving problem. The only time an item is included in the output is when it does not match with what *should be* in the input file of barcodes, as indicated by the specified call number range.

Common inventory or shelving problems that the utility can report on are:

- Barcodes that do not exist in your system.
- Items in general circulation that should be on reserve.
- Items in the wrong location.
- Items on your shelf that are reported as being checked out.
- Items on your shelf that are reported as having a status that should not be associated with a shelved item.
- Items with no call number assigned in the system.
- Items that do not belong in the range of barcodes.
- Missing items.
- Items belonging in the specified range that are out of order.

In addition, the Inventory Control Utility does the following:

- Allows library staff to use proposed handheld devices (PDAs) to conduct such exercises. The Inventory Control Utility will be able to exchange the inventory data with these devices with minimal staff intervention.
- When run in Update mode, updates the "Last Inventory Date" field and the "Last Inventoried by" field on the Statistics tab of the Item Information window in the Virtua client.

Note: The utility will be able to update the "Last Inventoried by" field by capturing the user ID of the user who configured the Inventory Control Utility.

3.15.1 About the Parameters

On the Configuration screen of the Inventory Control Utility, you can select options for filtering the report output such as owning location, collection code, item status, and item call number range.

- The Item Status parameter lets you select item statuses that you want Virtua to treat as invalid, or as error conditions, for the purposes of the Inventory Report. You will not be able to save the report configuration unless you select an option in the Item Status parameter, even if the option is "None."
- In the Input File field, you are required to enter the location/path of an input file of item barcodes.
- The Enable No Call Number Check determines whether items with no call number (error code NOCALL) will be included in the report output.

For more details about each parameter, see the context-sensitive online help associated with each element on the Configuration screen of the report.

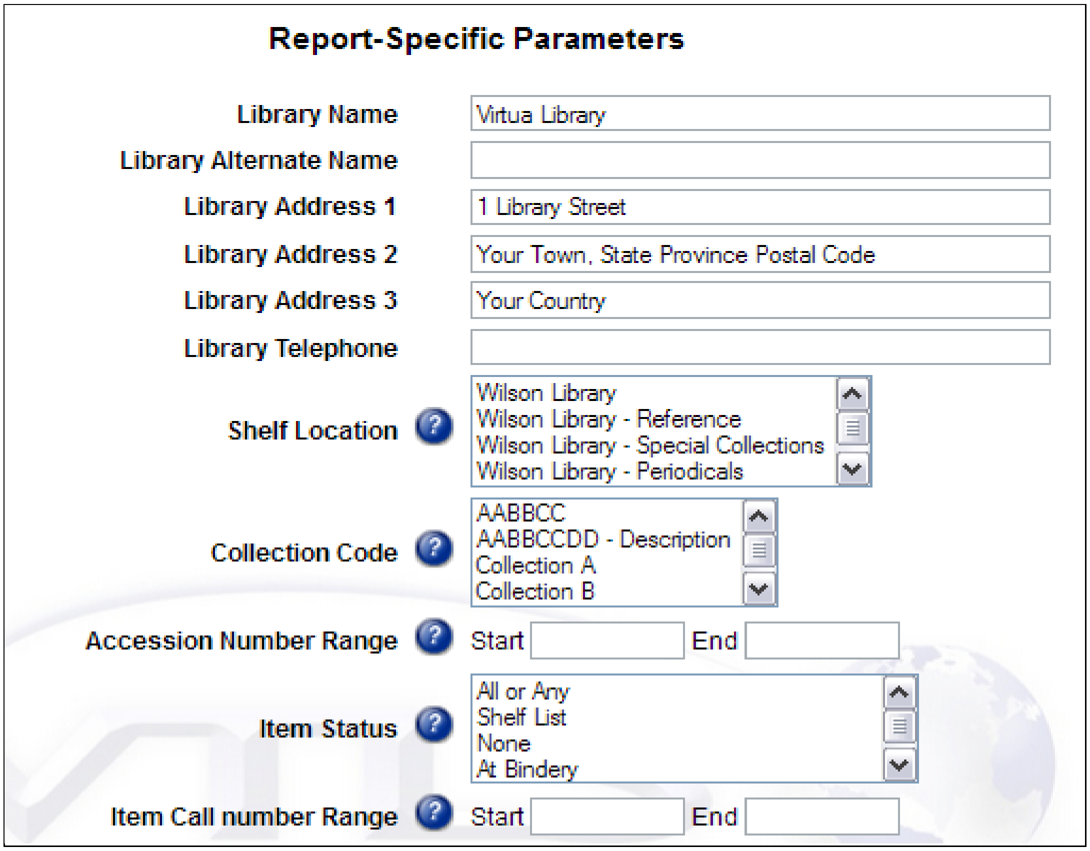


Figure 3-20. Inventory Control Utility - Configuration (1)

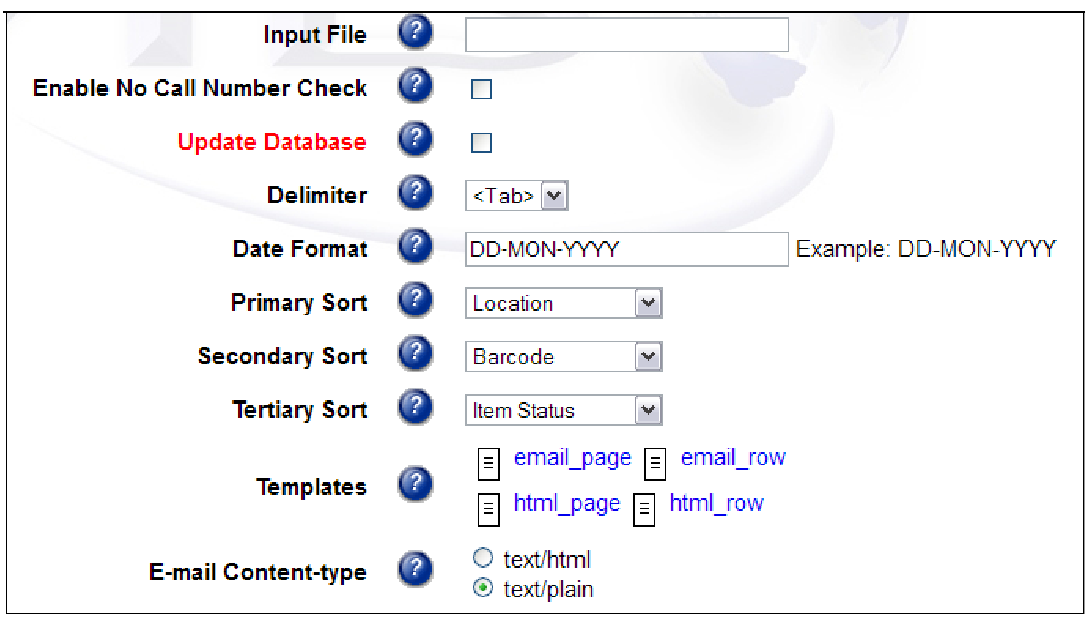


Figure 3-21. Inventory Control Utility - Configuration (2)

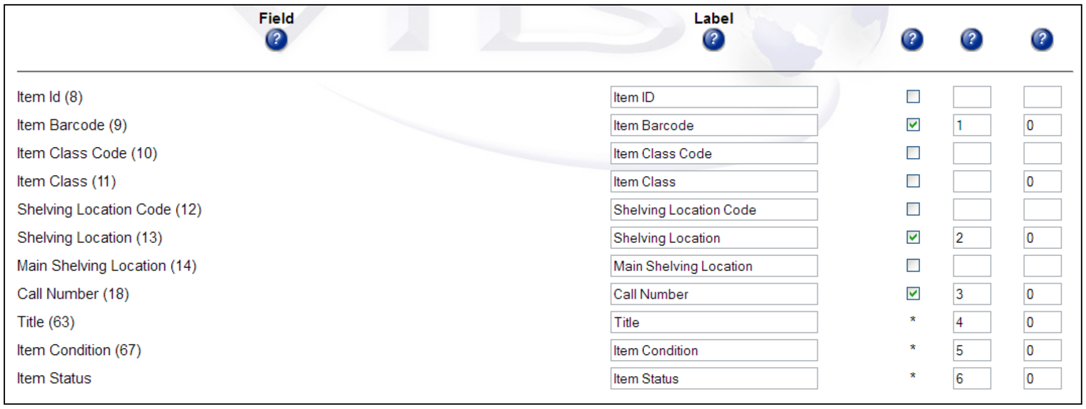


Figure 3-22. Inventory Control Utility - Configuration (3)

3.15.2 About the Output

Based on the configuration shown in the three figures above, the output of the Inventory Control Utility will look like Figure 3-23. For each line item, the report displays the fields you specified in the configuration and generates a code in the Item Condition column, which represents an error condition for that item.

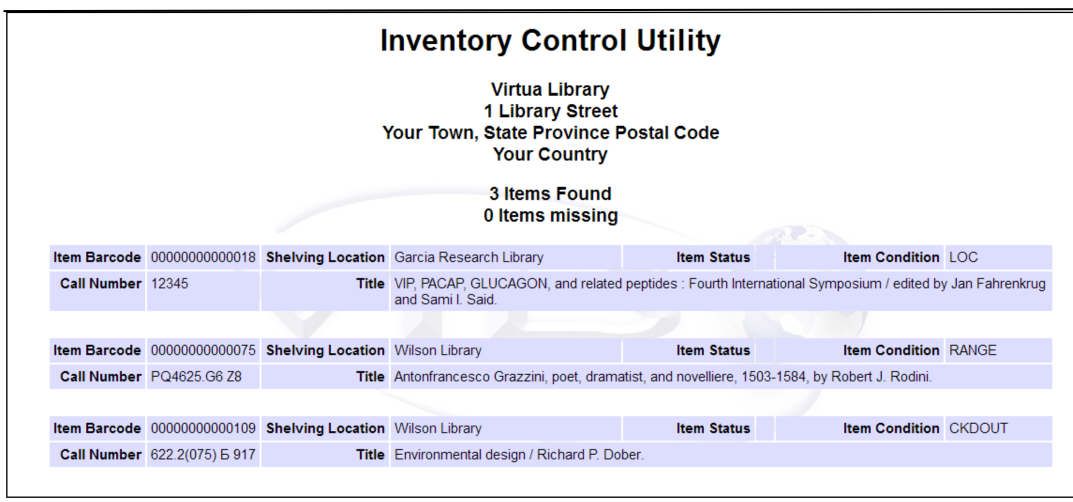


Figure 3-23. Inventory Control Utility - Report Output

An inventoried item may possess multiple error conditions, but Virtua will report on only ONE of them in the Item Condition column in the output. Virtua selects which error condition to report on based on a priority listing of error type codes, as shown below:

- **BAR** - Barcode is not found in the system.
- **RESR** - Item is supposed to be on reserve.
- **LOC** - Item belongs to another location.
- **CKDOUT** - Item is supposed to be checked out.
- **STAT** - Item has a status that should not be attached to a shelved item.
- **NOCALL** - Item has no call number AND the report parameter Enable No Call Number Check is selected.
- **RANGE** - Item's call number is out of the specified range.
- **KWNMSS** - Item has previously been identified as missing (and still is).
- **MISS** - Item is missing (the first time the item is identified as such).
- **CALL** - Call number is out of order.
- **ACCNUM** – Item's accession number is not in the specified range.
- **COLCODE** – Item is missing the specified collection code.

3.16 Items by Status Report

The Items by Status report generates a list of items that meet the status and location criteria that you set in the report configuration. For example, you can configure the Items by Status report to generate a list of all items at the Main Library with the status On Hold (4705).

Figure 3-24 shows an example of HTML output from the Items by Status report.

Items by Status

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

Total Items: 58

On Hold - 4705

Item Barcode	31961001138508	**Call Number/Copy**	291.4 Tol 0	**Item Units**		**Location**	Adult Non-Fiction Shelves	**Date Set**	20-AUG-2009
		Date Checked Out		**Date Due**		**Patron Name**		**Status**	On Hold
Author	Tolle, Eckhart, 1948-				**Title**	The power of now : a guide to spiritual enlightenment / Eckhart Tolle.			
Physical Description	xvii, 193 p. ; 24 cm.				**Edition**				
Item Barcode	31961000940326	**Call Number/Copy**	636.707 Mon 0	**Item Units**		**Location**	Adult Non-Fiction Shelves	**Date Set**	25-AUG-2009
		Date Checked Out		**Date Due**		**Patron Name**		**Status**	On Hold
Author	Monks of New Skete				**Title**	The art of raising a puppy / by The Monks of New Skete.			
Physical Description	274 p.				**Edition**	1st ed.			

Figure 3-24. Items by Status HTML Output

In the Items by Status report, Shelving Locations, Statuses, and Circulation Statuses are required parameters. In this way, the output always contains a list of items that…

- Meet the item and circulation status criteria defined for the report configuration.
  -AND-
- Are shelved at one of the locations selected for the report configuration.

In addition, you can optionally set the Minimum Age (Days At Status) parameter to limit your results based on the amount of time an item has been at a particular status.

By default, the Items by Status report output is grouped by item status. Each item status that you select for the configuration provides a heading for a group of output. Below each heading appears a group of items at that status. If an item is assigned multiple statuses, it can appear in the output multiple times, once under each appropriate status heading.

3.16.1 Parameters Available for the Items by Status Report

The Items by Status report offers the following Report-specific Parameters:

- **Minimum Age (Days at Status)** (*optional*) - Lets you limit the output to items that have been at a given status for a specified number of days. For example, if you set the Minimum Age (Days At Status) to 60, items are included in the results if they have been at a given status for 60 days or more. The Minimum Age (Days At Status) parameter accepts any number up to four digits in length.

  Note: When using the Minimum Age (Days at Status) parameter, you must specify at least one status in the Statuses parameter.

- **Shelving Locations** (*required*) - Lets you limit the output to one or more shelving locations. To appear in the output, an item's current shelving location must match one of the locations that you select for the report configuration.

- **Statuses** (*required*) - Lets you choose one or more item statuses to include in the results. To be included in the output, an item must be at one of the statuses that you select for the report configuration.

  Note: The Statuses list box contains a list of the item statuses that are configured via the Status Displays parameter in the Virtua Profiler. The Statuses list box displays ALL the items statuses defined for the database, regardless of whether they are assigned to items. The list box also contains the following options:
  - **All or Any** - Generates a list of all items at any status.
  - **Shelf List** - Generates a list of all items having no status, and sorts the list by shelf location (regardless of the Sort Parameter settings that are configured).
  - **None** - Generates a list of all items having no status, and sorts the list according to the Sort Parameter settings that are configured. Note that the None option should not be used if you have specified a Minimum Age (Days at Status).

- **Circulation Status** (*required*) - Lets you limit your results according to circulation status. You can choose to include in your output items that are . . .

  - **Checked Out** - InfoStation will include in the output only items that are checked out.
  - **Not Checked Out** - InfoStation will include in the output only items that are NOT checked out.
  - **Either** - InfoStation will include in the output ALL the items that meet your other configuration criteria, regardless of whether they are checked out.

Note: To be included in the output, an item must meet both your item status criteria AND your circulation status criteria.

- **Item Barcode Range** (*optional*) - Lets you limit your results to items within a particular barcode range. To be included in the output, an item's barcode must fall between the Start and End barcodes that you define for the report configuration.

Hint: If you prefer NOT to limit your results to a particular barcode range, leave the Start and End text boxes empty.

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

  - Shelving Location
  - Status
  - Call Number
  - Patron Name

- **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)
  - Author (100 tag)
  - Corporate Author (110 tag)
  - Title (245 tag)
  - Edition (250 tag)
  - Publication (260 tag)
  - Physical Description (300 tag)

For additional information on these parameters, see the *InfoStation/Report Parameters Reference Guide* or view the InfoStation online help.

3.16.2 Data Elements and Variables for the Items by Status Report

The following table lists the name, variable, description, and source for each data element that is retrieved by default by the Items by Status 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: Within an output template, you can easily identify the field label variable that corresponds to the variable (i.e., value). The field label variable simply adds the prefix **u_** and suffix **_label** to the variable. For example:
%($u_item_class_name_label)%: %($item_class_name)%
For more information on variables and field label variables, see the *InfoStation User's Guide*.

Data Element	Variable	Description and Source
Author	tag_100	The author of the item, taken from the 100 tag of the bibliographic record.
Bib-ID	tag_001	The system-assigned Bib-ID of the item's parent record, stored in the 001 tag of the bibliographic record.
Call Number	call_number	The item-level call number.
Corporate Name	tag_110	The corporate author associated with the item, stored in the 110 tag of the bibliographic record.
Date Checked Out	date_checked_out	The date the item was checked out.
Date Due	date_due	The date the item is due.
Date Set	date_set	The date a status was assigned to a given item.
Edition	tag_250	The edition of a given item, taken from the 250 tag of the bibliographic record.
Item Barcode	item_barcode	The library-assigned item barcode of a given item. Appears in the Virtua client in the Barcode field on the Item Elements tab of the Item Information window.

Data Element	Variable	Description and Source
Item Copy	item_copy	The copy number of a given item.
Item Price	item_price	The price of a given item.
Item Units	item_units	The number of units associated with a multivolume item. **Note:** You can use this data element to return any information stored in the item Units field. For example, if your library stores volume information in the Units field, this data element will report the Item Volume.
Shelving Location	location_name	The item's shelving location.
Physical Description	tag_300	A physical description associated with the item, taken from the 300 tag of the bibliographic record.
Publication	tag_260	The publication information associated with the item, taken from the 260 tag of the bibliographic record.
Status	status	The name of a given item status, defined in the Status Displays parameter in the Virtua Profiler.
Status ID	status_id	The status code for a given item status, defined in the Status Displays parameter in the Virtua Profiler.
Title	tag_245	The title of the item, taken from the 245 tag of the bibliographic record.

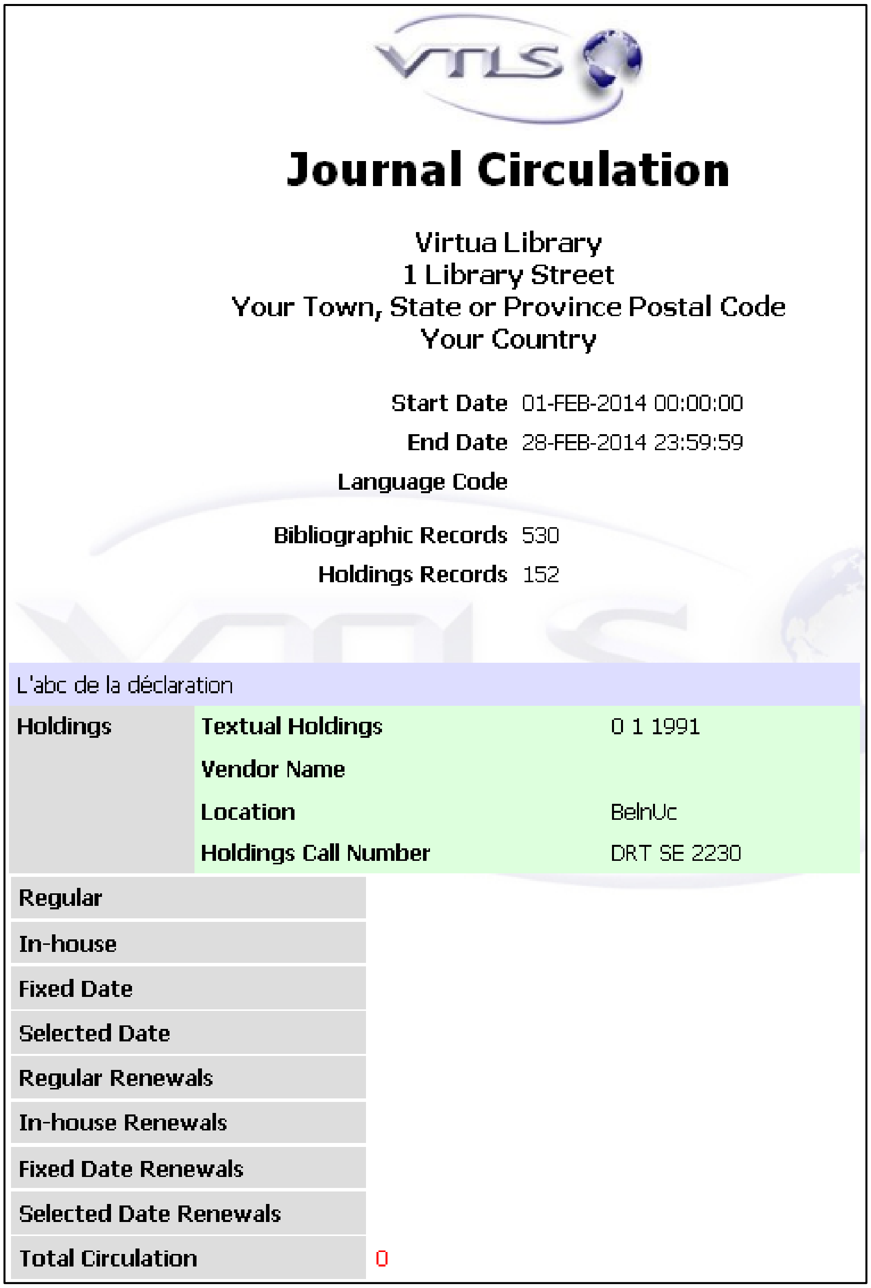
3.16.3 Output Templates for the Items by Status Report

Location of files: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_2

Template	Contribution to Output
html_page.tem	Provides the overall framework of the HTML output.
html_header.tem	In the output, items are groups according to item status. This template labels each group of items with the appropriate item status.
html_row.tem	In HTML output, returns the information related to a single item.
email_page.tem	Provides the overall framework of the e-mail output.
email_header.tem	In the output, items are grouped according to item status. This template labels each group of items with the appropriate item status.
email_row.tem	In e-mail output, returns the information related to a single item.

3.17 Journal Circulation Report

The Journal Circulation compiles circulation statistics for serial titles in the database. You can limit the output by location, item class, patron type, date range, and language. Figure 3-25 shows an example of the HTML output from the Journal Circulation report.



Journal Circulation

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

Start Date 01-FEB-2014 00:00:00
End Date 28-FEB-2014 23:59:59
Language Code

Bibliographic Records 530
Holdings Records 152

L'abc de la déclaration		
Holdings	**Textual Holdings**	0 1 1991
	Vendor Name	
	Location	BelnUc
	Holdings Call Number	DRT SE 2230

Regular	
In-house	
Fixed Date	
Selected Date	
Regular Renewals	
In-house Renewals	
Fixed Date Renewals	
Selected Date Renewals	
Total Circulation	0

Figure 3-25. Journal Circulation HTML Output

Note: The Journal Circulation report compiles circulation statistics for ALL items attached to a given serial record, at both the bibliographic and holdings levels.

InfoStation first uses your configuration filters to limit the serial titles included in the output. For example, your output will include *only* the serial titles that have one or more items that meet the Item Classes criteria that you selected for your report configuration.

InfoStation then uses your filters to limit the circulation statistics reported in the output. In this way, for each qualifying serial title, the circulation statistics will reflect the circulation of the selected item class(es), at the selected location(s), by the selected patron type(s), and during the selected date range.

3.17.1 Parameters Available for the Journal Circulation Report

The Journal Circulation report offers the following Report-specific Parameters:

- **Shelving Locations** (*required*) - Lets you limit your results to one or more shelving locations. To be included in the results, a serial must have one or more items that are shelved at one of the locations you select for the report configuration.

  Note: The Locations parameter limits serials, NOT circulation statistics. For each qualifying serial title, InfoStation will report cumulative circulation statistics for ALL items shelved at any location.

- **Item Classes** (*required*) - Lets you limit your results by item class. To be included in the output, a serial must have one or more items that are assigned one of the item classes that you select for the report configuration.

  Note: The Item Classes parameter limits serials, NOT circulation statistics. For each qualifying serial title, InfoStation will report cumulative circulation statistics for ALL items of any item class.

- **Patron Types** (*required*) - Lets you limit your results by patron type. To be counted in the results, an item must have been circulated by a patron who is assigned one of the patron types that you select for the report configuration.

  Note: The Patron Types parameter limits *only* the circulation statistics reported in the output. Serial records qualify for inclusion in the output if they meet your location, item class, and language criteria. Then, for each qualifying serial, InfoStation will report only the circulation statistics that are associated with the patron type(s) that you select.

- **Circulation Date Range** (*required*) - Lets you limit your results by date range. To be counted in the results, an item must have been circulated during the date range that you select for the report configuration.

Note: The Date Range parameter limits *only* the circulation statistics reported in the output. Serial records qualify for inclusion in the output if they meet your location, item class, and language criteria. Then, for each qualifying serial, InfoStation will report only the circulation statistics accumulated during the date range that you select for the report configuration.

- **Language** (*optional*) - Lets you limit your results to serials of a particular language. To be included in the output, positions 35-37 of a serial bibliographic record must contain the language code that you type in the Language text box.

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

  - Author
  - Bibliographic Call Number
  - Title

For additional information on these parameters, see the *InfoStation/Report Parameters Reference Guide* or view the InfoStation online help.

3.17.2 Data Elements and Variables for the Journal Circulation Report

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

Hint: Within an output template, you can easily identify the field label variable that corresponds to the variable (i.e., value). The field label variable simply adds the prefix **u_** and suffix **_label** to the variable. For example:
%($u_item_class_name_label)%: %($item_class_name)%
For more information on variables and field label variables, see the *InfoStation User's Guide*.

Data Element	Variable	Description and Source
Author	author	The author of the serial, taken from the 100 tag of the bibliographic record.
Bib-ID	bib_id	The Bib-ID of the serial, taken from the 001 tag of the bibliographic record.

Data Element	Variable	Description and Source
Bibliographic Call Number	bib_call_number	The bibliographic-level call number of the serial. This is the call number with the highest priority as determined by the Call Number Index and Priority parameter.
Holdings Call Number	holdings_call_number	The holdings-level call number, taken from the holdings record.
Holdings Copy	holdings_copy	The copy number of a given holdings record.
Holdings ID	holdings_id	The holdings-ID, taken from the 001 tag of the holdings record.
Holdings Location	holdings_location	The holdings location of a given holdings record, taken from the 852 tag subfield $a.
Textual Holdings	textual_holdings	The textual holdings information, taken from the 866 tag of the holdings record.
Title	title	The title of the serial, taken from the 245 tag of the bibliographic record.
Total Circulation	total_circulation	The total circulation count associated with a serial title.
Vendor Name	vendor_name	The vendor associated with a holdings record.

3.17.3 Output Templates for the Journal Circulation Report

Location of files: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_27

Template	Contribution to Output
html_page.tem	Provides the overall framework of the HTML output.
html_bib_row.tem	In HTML output, returns the information related to a bibliographic item.
html_holdings_row.tem	In HTML output, returns the information related to a single holdings record.

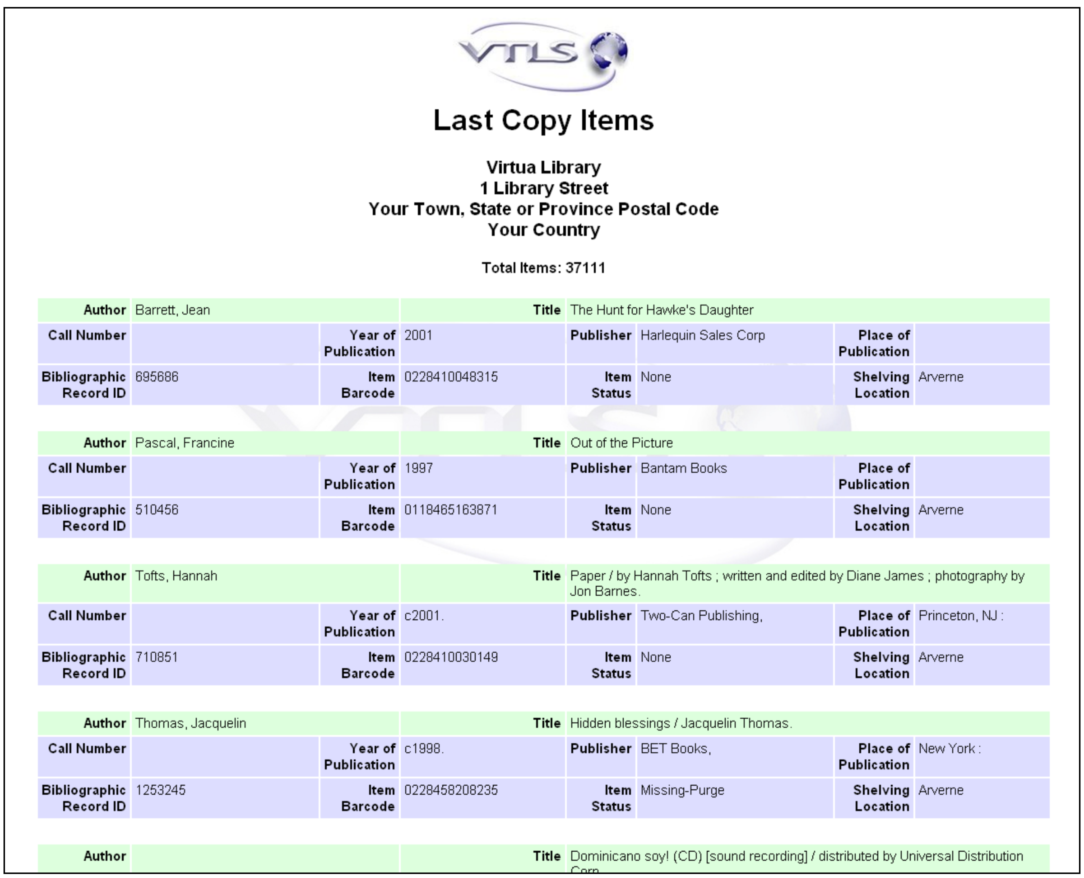
Template	Contribution to Output
email_page.tem	Provides the overall framework of the e-mail output.
email_bib_row	In e-mail output, returns the information related to a bibliographic item.
email_holdings_row	In e-mail output, returns the information related to a single holdings record.

3.18 Last Copy Items Report

The Last Copy Items report generates a list of the "last copy" items in the database. An item qualifies as a last copy if it is the only item attached to its parent bibliographic or holdings record. You can specify whether the report generates a list of items that are . . .

- The last copy of that item at any location.
  -OR-
- The last copy of that item at the item's shelving location.

Figure 3-26 shows the default HTML output for the Last Copy Items report.



Last Copy Items

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

Total Items: 37111

Author	Barrett, Jean			**Title**	The Hunt for Hawke's Daughter		
Call Number		**Year of Publication**	2001	**Publisher**	Harlequin Sales Corp	**Place of Publication**	
Bibliographic Record ID	695686	**Item Barcode**	0228410048315	**Item Status**	None	**Shelving Location**	Arverne
Author	Pascal, Francine			**Title**	Out of the Picture		
Call Number		**Year of Publication**	1997	**Publisher**	Bantam Books	**Place of Publication**	
Bibliographic Record ID	510456	**Item Barcode**	0118465163871	**Item Status**	None	**Shelving Location**	Arverne
Author	Tofts, Hannah			**Title**	Paper / by Hannah Tofts ; written and edited by Diane James ; photography by Jon Barnes.		
Call Number		**Year of Publication**	c2001.	**Publisher**	Two-Can Publishing,	**Place of Publication**	Princeton, NJ :
Bibliographic Record ID	710851	**Item Barcode**	0228410030149	**Item Status**	None	**Shelving Location**	Arverne
Author	Thomas, Jacquelin			**Title**	Hidden blessings / Jacquelin Thomas.		
Call Number		**Year of Publication**	c1998.	**Publisher**	BET Books,	**Place of Publication**	New York :
Bibliographic Record ID	1253245	**Item Barcode**	0228458208235	**Item Status**	Missing-Purge	**Shelving Location**	Arverne
Author				**Title**	Dominicano soy! (CD) [sound recording] / distributed by Universal Distribution Corp.		

Figure 3-26. Last Copy Items HTML Output

You can limit the report output to include only last copy items specified item statuses, circulation statuses, or shelving locations. For example, you can configure the Last

Copy Items report to generate a list of all checked out last copy items at the Main Library with the status On Hold

3.18.1 Parameters Available for the Last Copy Items Report

The Last Copy Items report offers the following Report-specific Parameters:

- **Find Items That Are . . .** *(required)* - Lets you specify whether the report returns “last copy” items that are You can choose to return items that are . . .
  - **The Last Copy** - InfoStation will include in the output items that are the last copy of that item at any location.
  - **The Last Copy At The Item’s Shelving Location** - InfoStation will include in the output items that are the last copy of that item at the item’s shelving location.

Note: If you choose the Last Copy At The Item’s Shelving Location option, InfoStation may find multiple “last copy” items for the same parent bibliographic record if the items are unique copies at different shelving locations.

- **Shelving Locations** (*required*) - Lets you limit your output to one or more shelving locations. To appear in the output, an item’s shelving location must match one of the locations that you select for the report configuration.

- **Item Statuses** (*optional*) - Lets you choose one or more item statuses to include in the results. To be included in the output, “last copy” items must be at one of the statuses that you select for the report configuration.

Note: The Item Statuses list box contains item statuses you define via the Status Displays parameter in the Virtua Profiler. The Statuses list box displays ALL the items statuses defined for the database, regardless of whether they are assigned to items.

- **Circulation Status** (*required*) - Lets you limit your results according to circulation status. You can choose to include in your output “last copy” items that are . . .

  - **Checked Out** - InfoStation will include in the output only items that are checked out.
  - **Not Checked Out** - InfoStation will include in the output only items that are NOT checked out.
  - **Either** - InfoStation will include in the output ALL the items that meet your other configuration criteria, regardless of whether they are checked out.

Note: To be included in the output, an item must meet both your item status criteria AND your circulation status criteria.

- **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.

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

For additional information on these parameters, see the *InfoStation/Report Parameters Reference Guide* or view the InfoStation online help.

3.18.2 Data Elements and Variables for the Last Copy Items Report

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

Hint: Within an output template, you can easily identify the field label variable that corresponds to the variable (i.e., value). The field label variable simply adds the prefix **u_** and suffix **_label** to the variable. For example:
%($u_item_class_name_label)%: %($item_class_name)%
For more information on variables and field label variables, see the *InfoStation User's Guide*.

Data Element	Variable	Description and Source
Total Items	total_items	The total number of "last copy" items returned by the report.
Author	author	The author of the title, taken from the 100 tag of the bibliographic record.
Title	title	The title of the item, taken from tag 245, subfield $a of the bibliographic record.
Call Number	call_number	The item-level call number of the item.
Year of Publication	year_of_publication	The year of publication of the title, taken from the subfield $c of the 264 tag (second indicator "1") when present or the 260 tag in the bibliographic_fields table.
Publisher	publisher	The publisher of the title, taken from the subfield $b of the 264 tag (second indicator "1") when present or the 260 tag in the bibliographic_fields table.
Place of Publication	place_of_publication	The place of publication of the title, taken from the subfield $a of the 264 tag (second indicator "1") when present or the 260 tag in the bibliographic_fields table.
Bibliographic Record ID	bib_id	The system-assigned Bib-ID of the reserve item's parent record, taken from the 001 tag of the bibliographic record.
Item Barcode	item_barcode	The library-assigned item barcode.
Item Status	status	The status of the item.
Shelving Location	location_name	The item's shelving location.

3.18.3 Output Templates for the Last Copy Items Report

Location of files: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_52

Template	Contribution to Output
html_page.tem	Provides the overall framework of the HTML output and generates the Total Items count returned by the report.

Template	Contribution to Output
html_header.tem	In the output, items are grouped according to the Primary Sort, Secondary Sort, and Tertiary Sort settings. This template may be used to insert an appropriate heading between each group of results.
html_row.tem	Within HTML output, generates item information details for each "last copy" item returned by the report.
email_page.tem	Provides the overall framework of the e-mail output and generates the Total Items count returned by the report.
email_header.tem	In the output, items are grouped according to the Primary Sort, Secondary Sort, and Tertiary Sort settings. This template may be used to insert an appropriate heading between each group of results.
email_row.tem	Within e-mail output, generates the item information details for each "last copy" item returned by the report.

3.19 Media Booking Pull List Report

The Media Booking Pull List report generates a list of items that need to be prepared for scheduled item bookings, according to the booking Prep Start Time specified for a booked item. You can view the Prep Start Time on the Bookings for Item window in the Virtua client.

Figure 3-27 shows the default HTML output for the Media Booking Pull List report.

Media Booking Pull List

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

Date Range : All Dates

Locations : All or Any

Shelf Location	Pickup Location	Title	Call Number	Second Call Number	Item Class	Barcode	Status	Start Prep Time	Start Time	End Time	End Inspection Time
Wilson Library	Wilson Library	Adversity and grace : studies in recent American literature / by Preston M. Browning, Jr. [and others] Edited by Nathan A. Scott, Jr.			Juvenile-Non-Fiction	1000001211	Available	18-MAR-2005 13:00:00	18-MAR-2005 13:00:00	20-MAR-2005 13:00:00	20-MAR-2005 13:00:00
Wilson Library	Wilson Library	העשור הראשון, תש"ח-תשי"ח / העורכים, צבי צמרת וחנה יבלונקה.			Books	24635	Available	16-FEB-2005 00:00:00	16-FEB-2005 01:00:00	19-FEB-2005 01:00:00	19-FEB-2005 02:00:00

Figure 3-27. Media Booking Pull List HTML Output

For details on how items qualify for inclusion in the output, see the section "Virtua Settings Related to the Media Booking Pull List Report" in this chapter.

3.19.1 Parameters Available for the Media Booking Pull List Report

The Media Booking Pull List report offers the following Report-specific Parameters:

- **Date Range** (*optional*) - To appear in the output, an item's booking Prep Start Time must be during the date range that you specify for the report configuration. You can choose to limit report output by…
  - **Relative Date Range** - Allows you to specify a current or previous period.

-OR-

- **Fixed Date Range** - Allows you to specify a range of dates.

Note: If you do NOT specify a Date Range, an item qualifies for inclusion if its Prep Start Time falls *on* or *before* the date you run the report.

- **Locations** (*required*) - Lets you limit your output to one or more locations. To appear in the output, an item must currently be shelved at one of the locations that you select for the report configuration.

- **Other Labels** (*optional*) - Lets you specify labels that will appear in the output of the Media Booking Pull List report.

For additional information on these parameters, see the *InfoStation/Report Parameters Reference Guide* or view the InfoStation online help.

3.19.2 Virtua Settings Related to the Media Booking Pull List Report

The Prep Start Time setting appears on the Bookings for Item window in the Virtua client. It indicates the time that preparation for an item booking should begin.

The Media Booking Pull List report determines which items qualify for inclusion in the output by looking at the Prep Start Time value in the Bookings for Item window.

3.19.3 Data Elements and Variables for the Media Booking Pull List Report

The following table liststhe name, variable, description, and source for each data element that is retrieved by default by the Media Booking Pull List report. You can edit the output templates to include or exclude any data element listed below.

Hint: Within an output template, you can easily identify the field label variable that corresponds to the variable (i.e., value). The field label variable simply adds the prefix **u_** and suffix **_label** to the variable. For example:
%($u_item_class_name_label)%: %($item_class_name)%
For more information on variables and field label variables, see the *InfoStation User's Guide*.

Data Element	Variable	Description and Source
Title	title	The title of the item, taken from tag 245, subfield $a of the bibliographic record.
Call Number	call_number	The item-level call number of the item.
Second Call Number	second_call_number	The second item-level call number of the item.
Item Class	item_class	The item class of the item.
Barcode	item_barcode	The library-assigned item barcode.
Status	status	The status of the item.
Start Prep Time	start_prep_time	The booking Prep Start Time.
Start Time	start_time	The booking Start Time.
End Time	end_time	The booking End Time.
End Inspection Time	end_inspection_time	The booking Inspection End Time.

3.19.4 Output Templates for the Media Booking Pull List Report

Location of files: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_39

Template	Contribution to Output
html_page.tem	Provides the overall framework of the HTML output.
html_header.tem	Within HTML output, generates library name and address information and labels for Date Range and Location(s) information.
html_row.tem	Within HTML output, generates the information for each booked item that needs to be pulled from the shelves.

Template	Contribution to Output
email_page.tem	Provides the overall framework of the e-mail output.
email_header.tem	Within e-mail output, generates library name and address information and labels for Date Range and Location(s) information.
email_detail.tem	Within e-mail output, generates the information for each booked item that needs to be pulled from the shelves.

3.20 Number of Patrons Report

The Number of Patrons report lets you generate 1) a total count of patrons in the database and 2) a count of selected patrons based on criteria such as ZIP code, year of patron's birth, and patron prefix, which are specified in the report configuration. Figure 3-28 shows a portion of HTML output from the Number of Patrons report.

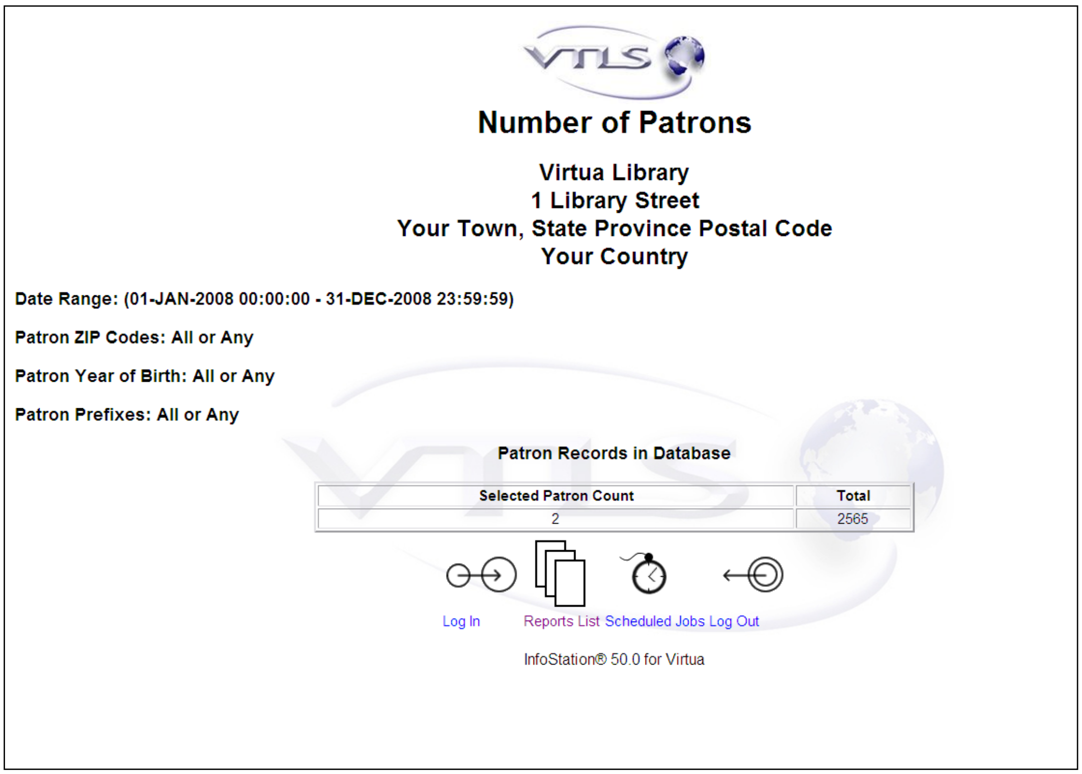


Figure 3-28. Number of Patrons HTML Output

3.20.1 Parameters Available for the Number of Patrons Report

The Number of Patrons report offers the following Report-specific Parameters:

- **Date Range** (*optional*) - Lets you limit your results to a particular date range. To be counted by the report, a patron must have had an activity logged in the circ_transaction_log during the date range that you specify for the report configuration.

- **Patron ZIP Codes** (*required*) - Lets you limit your results by ZIP code. To be counted by the report, the patron record must contain in tag 270 subfield $e one of the ZIP codes selected in this parameter.

- **Patron Birth Date Range** (*optional*) - Lets you limit your results by patron birth date. To be counted by the report, the patron record must contain in tag 100 subfield $d a birth date that falls within the date range specified in this parameter.

- **Patron Prefix** (*required*) - Lets you limit your results by patron prefix. To be counted by the report, the patron record must contain in tag 100 subfield $e one of the patron prefixes selected in this parameter.

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

3.20.2 Data Elements Returned by the Number of Patrons Report

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

Data Element	Variable	Description
Selected Patron Count	selected_total	The number of patron records returned based on the criteria selected in the report configuration.
Total	grand_total	The total number of patron records in the database.

3.20.3 Output Templates for the Number of Patrons Report

Location: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_40/[filename]

Filename	Contribution to Output
html_page.tem	Provides the overall framework of the HTML output.

Filename	Contribution to Output
email_page.tem	Provides the overall framework of the e-mail output.

3.21 Patron Barcode List Report

The Patron Barcode List report lets you generate a list of patrons identified by barcodes that fall within a barcode range specified in the report configuration. InfoStation returns the list of patron barcodes along with the patron names. Figure 3-29 shows a portion of HTML output from the Patron Barcode List report.

Patron Barcode List

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

Barcode	Patron Name
0828	DeVan, Kimberly
1	Patron One
101	Calhoun, Angela
1024	Vann, Japonica
1032	Gardner, Jason
1090	Morse, Jeri
1170	Sheffield, Jon
120	Adam, Anne
12345X	Newtestname2
1296	Horton, Kathryn
1400	Starry, Larry
1404	Adams, Larry
1556	Martin, Amy
1861	Walden, Patricia
1940	Salley, Randi
2	Patron Two

Figure 3-29. Patron Barcode List HTML Output

3.21.1 Parameters Available for the Patron Barcode List Report

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

Note: InfoStation assumes that barcodes consist of leading alpha characters (letters) and trailing numeric characters (numbers). The system also assumes that padded zeros may be used to create a fixed-length barcode; for example, a nine-digit barcode with the value of 1 might be represented as 000000001.

- **Barcode Prefix** (*optional*) - Lets you specify a starting value for all patron barcodes in the report output. When this parameter is set,
  - ALL the leading alpha characters of a patron barcode must match exactly on this value in order for the barcode to appear in the output.
  - InfoStation matches on trailing characters only. It assumes that the remainder of the barcode is numeric and compares it to the specified Barcode Range values.

- **Barcode Range** (*required*) - Lets you limit your output to patron barcodes that fall within the range specified by the Starting Barcode and the Ending Barcode.
  - When the Barcode Prefix parameter is used, the range values must be numeric and may contain zeros (0) as padding characters.
  - When the Barcode Prefix parameter is NOT used, the range values can be either alpha or numeric. InfoStation matches on leading characters only. Any portion of a barcode that is longer than the specified range values is treated as a wildcard and so will always match the range.

- **Primary Sort** (*required*) - Lets you determine whether the report is sorted by barcode value (default sort) or name.

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

3.21.2 Data Elements Returned by the Patron Barcode List Report

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

Data Element	Variable	Description
Prefix	u_prefix_label	The alpha prefix, if any, used in the report configuration.
Starting Barcode	u_barcode_ start_label	The starting value of the barcode range.
Ending Barcode	u_barcode_end_label	The ending value of the barcode range.
Barcode	patron_barcode	The barcode number of the item. Barcodes may be of varying length but still match the leading prefix and trailing numeric range.
Name	patron_name	The name associated with the patron barcode.

3.21.3 Output Templates for the Patron Barcode List Report

Location: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_42/[filename]

Filename	Contribution to Output
html_page.tem	Provides the overall framework of the HTML output.
html_row.tem	In HTML output, generates the barcode and name of every patron in the output.
email_page.tem	Provides the overall framework of the e-mail output.
email_row.tem	In e-mail output, generates the barcode and name of every patron in the output.

3.22 Patron List Report

The Patron List report generates a list of patrons who meet the patron information criteria that you set in the report configuration. Figure 3-30 shows an example of HTML output from the Patron List report.

Figure 3-30. Patron List HTML Output

The Patron List report offers various parameters that let you limit the output according to information stored in the patron record, including contact information, home library, academic affiliation, address preference, and creation date range. In addition, you can optionally limit the output by returning only those patrons who . . .

- Have borrowed items at some time.
  -OR-
- Have items checked out at the time you run the report.

Additionally, in HTML and e-mail output, the report includes a count of how many patrons are included in the list of results.

3.22.1 Parameters Available for the Patron List Report

The Patron List report offers the following Report-specific Parameters:

- **Patron Types** (*required*) - Lets you limit the output according to patron type. Patrons are included in the output only if their patron type matches one of the patron types that you select for the report configuration.

- **Cities** (*required*) - Lets you limit the output according to patron city. Patrons are included in the output if a city you select for the configuration exists in 270 tag, first indicator 1, subfield $b of their patron record.

- **Counties** (*required*) - Lets you limit the output according to patron county. Patrons are included in the output if a county you select for the configuration exists in 270 tag, first indicator 1, subfield $c of their patron record.

- **States** (*required*) - Lets you limit the output according to patron state. Patrons are included in the output if a state you select for the configuration exists in 270 tag, first indicator 1, subfield $d of their patron record.

- **Countries** (*required*) - Lets you limit the output according to patron country. Patrons are included in the output if a country you select for the configuration exists in 270 tag, first indicator 1, subfield $f of their patron record.

- **Postal Codes** (*required*) - Lets you limit the output according to patron postal code. Patrons are included in the output if a postal code you select for the configuration exists in 270 tag, first indicator 1, subfield $e of their patron record.

- **Home Libraries** (*required*) - Lets you limit the output according to patron home library. Patrons are included in the output if a library you select for the configuration exists in tag 247, subfield $a of their patron record.

- **Institutions** (*required*) - Lets you limit the output according to institution. Patrons are included in the output if an institution you select for the configuration exists in tag 301, subfield $b of their patron record.

- **Colleges or Schools** (*required*) - Lets you limit the output by college or school. Patrons are included in the output if a school you select for the configuration exists in tag 301, subfield $c of their patron record.

- **Departments** (*required*) - Lets you limit the output by department. Patrons are included in the output if a department you select for the configuration exists in tag 301, subfield $d of their patron record.

- **Classes or Homerooms** (*required*) - Lets you limit the output by class or homeroom. Patrons are included in the output if a class or homeroom you select for the configuration exists in tag 301, subfield $e of their patron record.

- **Date Range** (*optional*) - Lets you limit the output to patrons whose library privileges are valid during a specific date range. To be included in your output, a patron's library privileges must be valid during the date range that you specify for the report, according to the dates stored in subfields, subfield $a and, subfield $b of the patron record 042 tag.

Note: To be included in the output, a patron record must be valid for the entire date range that you define. For example, if a patron's library privileges began within the specified date range but expired before the end of the date range, that patron will NOT be included in your results.

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

  - City
  - Circulation Count
  - Class or Homeroom
  - College or School
  - Country
  - County
  - Department
  - Institution
  - Language
  - Home Library
  - Patron Type
  - Postal Code
  - State

- **Communication Preferences** (*required*) - Lets you limit the output according to a patron's address preference. You can choose one or more of the following options:

  - **Postal Address** - The report finds records in which the address preference is set to primary paper (i.e., position 10 of the 008 fixed fields is set to 0).
  - **E-mail** - The report finds records in which the address preference is set to primary e-mail (i.e., position 10 of the 008 fixed fields is set to 1).
  - **Text** - The report finds records in which the address preference is set to text message, or specialized telephone number (i.e., position 10 of the 008 fixed fields is set to 2).

- ♦ **Both Text and Email** - The report finds records in which the address preference is set to both text and e-mail (i.e., position 10 of the 008 fixed fields is set to 3).

  Hint: To generate a list of ALL patrons, select ALL of the communication preference options in the list box.

- **Show Only Patrons Who Have Circulated Items** (*optional*) - Lets you limit your results to patrons who have circulated items. If you select this check box, InfoStation will include in your output *only* the patrons who have checked out at least one item from your library.

- **Show Only Patrons With Items Currently Checked Out** (*optional*) - Lets you limit your results to patrons who have items currently checked out. If you select this check box, InfoStation will include in your output *only* the patrons who have items checked out at the time you run the report.

Note:
- If you select *neither* of the Show Only Patrons parameters, the report returns a list of ALL patron records, regardless of circulation history.
- If you select *both* of the Show Only Patrons parameters, the report returns a list of patrons with items currently checked out who have also circulated items prior to checking out their currently borrowed material.

- **Show Self-registered Patrons** (*optional*) - Lets you limit your results to patrons who were registered via the Patron Self-registration system in Chamo. If you select this check box, InfoStation will include in your output *only* the patron records that contain the string *Patron Self-registration* in subfield $a of the 541 tag.

Note: You can configuration the Patron Self-registration system to add the string *Patron Self-registration* to subfield $a of the patron record 541 tag. For details on configuring the Patron Self-registration system, see the *Chamo Administration Guide*.

Hint: If you do NOT select the Show Self-registered Patrons check box, your results will contain a list of ALL qualifying patrons, regardless of how they were registered.

For additional information on these parameters, see the *InfoStation/Report Parameters Reference Guide* or view the InfoStation online help.

3.22.2 Data Elements and Variables for the Patron List Report

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

Hint: Within an output template, you can easily identify the field label variable that corresponds to the variable (i.e., value). The field label variable simply adds the prefix **u_** and suffix **_label** to the variable. For example:
%($u_item_class_name_label)%: %($item_class_name)%
For more information on variables and field label variables, see the *InfoStation User's Guide*.

Data Element	Variable	Description and Location in Patron Record
Address Preference	address_preference	A value in the patron record that indicates the patron's address preference, either paper (0) or e-mail (1), taken from 008/10.
Attention Of	attention_of	The "attention of" name stored in 270 1, subfield $h.
Barcode	barcode	The library-assigned patron barcode, stored in tag 015, subfield $a.
Circulation Count	circ_count	The *total* number of items associated with a patron record since that record was created (i.e., NOT the *current* circulation count).
City	city	The city associated with the patron's primary paper address, stored in 270 1 , subfield $b.

Data Element	Variable	Description and Location in Patron Record
Class or Homeroom	class	The patron's class or homeroom (i.e., the class responsible for distributing circulation notices), stored in tag 301, subfield $e.
College or School	college	The patron's college or school, stored in tag 301, subfield $c.
Country	country	The country associated with the patron's primary paper address, stored in 270 1 , subfield $b.
County	county	The county associated with the patron's primary paper address, stored in 270 1 , subfield $c.
Department	department	The patron's departmental affiliation, stored in tag 301, subfield $d.
E-mail, Primary	email_primary	The patron's primary e-mail address, stored in 271 1 , subfield $a.
E-mail, Secondary	email_secondary	The patron's secondary e-mail address, stored in 271 2 , subfield $a.
FAX, Primary	fax_primary	The patron's primary fax number, stored in 271 1 , subfield $l.
FAX, Secondary	fax_secondary	The patron's secondary fax number, stored in 271 2 , subfield $l.
First Name	first_name	The patron's first name, taken from tag 100, subfield $a (the text *after* the comma).
Home Library	library	The patron's home library, stored in tag 247, subfield $a.
Institution	institution	The institution with which the patron is affiliated, stored in tag 301, subfield $b.

Data Element	Variable	Description and Location in Patron Record
Institution Affiliation	institution_affiliation	The patron's role with respect to the institution, stored in tag 301, subfield $a.
Language	language	The patron's language preference, stored in either the tag 100, subfield $l or the tag 110, subfield $l.
Last Name	last_name	The patron's last name, taken from tag 100, subfield $a (the text *before* the comma).
Name	name	The patron's full name (i.e., last name and first name) taken from tag 100, subfield $a (all text).
Patron Type	patron_type	The description for a given patron type, stored in tag 245, subfield $a.
Postal Code	postal_code	The postal code associated with the patron's primary paper address, stored in the patron record in tag 270, subfield $e, where the first indicator is 1.
Prefix	prefix	The patron's prefix, stored in tag 100, subfield $e.
State	state	The state associated with the patron's primary address, stored in the patron record in tag 270, subfield $d, where the first indicator is 1.
Street Address 1	street_address_1	The first line of the patron's street address, stored in the first occurrence of, subfield $a in the 270 1 tag.
Street Address 2	street_address_2	The second line of the patron's street address, stored in the second occurrence of, subfield $a in the 270 1 tag.

Data Element	Variable	Description and Location in Patron Record
Suffix	suffix	The patron’s suffix, stored in tag 100, subfield $f of the patron record.
Telephone, Primary	telephone_primary	The telephone number associated with the patron’s primary paper address, stored in the patron record in tag 270, subfield $k, where the first indicator is 1.
Telephone, Primary Special	telephone_primary_special	The specialized telephone number associated with the patron’s primary paper address, stored in the patron record in tag 270, subfield $j, where the first indicator is 1.
Telephone, Secondary	telephone_secondary	The telephone number associated with the patron’s secondary paper address, stored in the patron record in tag 270, subfield $k, where the first indicator is 2.
Telephone, Secondary Special	telephone_secondary_special	The specialized telephone number associated with the patron’s secondary paper address, stored in the patron record in tag 270, subfield $j, where the first indicator is 2.

3.22.3 Output Templates for the Patron List Report

Location of files: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_12

Template	Contribution to Output
html_page.tem	Provides the overall framework of the HTML output.
html_row.tem	In HTML output, returns information related to a single patron.
email_page.tem	Provides the overall framework of the e-mail output.
email_row.tem	In e-mail output, returns information related to a single patron.

3.23 Patron Statistics Report

The Patron Statistics report generates and calculates, for a specified date range and for each patron type in the database, statistics on the use of ALL transaction types possible (such as requests, check-ins, check-outs, and notices) in the circulation transaction log. You have the option of limiting the output by patron type. Figure 3-31 shows a portion of the default HTML output from the Patron Statistics report.

Patron Statistics

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

Selected Period: 01-JAN-2004 00:00:00 - 31-DEC-2004 23:59:59

Patron Type	Current Patron Count	Total Circulation	Number Circulating	Percent Circulating
Resident Faculty	512	20	12	2.34
High School Student	3	0	0	0.00
Other Borrower	1027	19	9	0.88
Resident Adult	4	0	0	0.00
Resident Juvenile	3	0	0	0.00
Staff	516	42	15	2.91
College Student	509	51	10	1.96

Figure 3-31. Patron Statistics HTML Output

The report returns the following statistics for the date range and patron types that you specify for a given report configuration:

- Patron Count
- Total Circulation
- Number Circulating
- Percent Circulating

3.23.1 Parameters Available for the Patron Statistics Report

The Patron Statistics report offers the following Report-specific Parameters:

- **Patron Types** (*optional*) - Lets you limit the output to the specified patron types. The report returns patron statistics for the patron types that you select. If no patron types are selected, the report returns statistics for every patron type configured in your database.

- **Institution Name Filter** (*optional*) - Lets you limit the output to the specified institutions. The report returns patron statistics for the patrons that belong to the institution that you select. If the default All or Any option is selected, the report returns statistics for patrons belonging to any institution.

- **College or School Filter** (*optional*) - Lets you limit the output by college or school. Statistics for a patron are included in the output if a college or school you select exists in the tag 301, subfield $c of their patron record. If the default All or Any option is selected, the report returns statistics for patrons belonging to any college or school.

- **Department Filter** (*optional*) - Lets you limit the output by department. Statistics for a patron are included in the output if a department you select exists in the tag 301, subfield $d of their patron record. If the default All or Any option is selected, the report returns statistics for patrons belonging to any department.

- **Major Filter** (*optional*) - Lets you limit the output by major. Statistics for a patron are included in the output if a major you select exists in the tag 301, subfield $f of their patron record. If the default All or Any option is selected, the report returns statistics for patrons with any major.

- **Date Range** (*required*) - Lets you limit the output to a particular date range. The report returns the number of circulating patrons and the percent of circulating patrons for the date range that you specify for the report configuration.

  For each configuration of the Patron Statistics report, you must set the Date Range parameter. The Start Date and End Date use the date format DD-MON-YYYY HH:MI:SS, where HH:MM:SS is optional. For example, 11:00 a.m. on January 1, 2012 is 01-JAN-2012 11:00:00.

  Note: The date range does NOT apply to the Patron Count or Total Circulation statistics.

For additional information on these parameters, see the *InfoStation/Report Parameters Reference Guide* or view the InfoStation online help.

3.23.2 Data Elements and Variables for the Patron Statistics Report

The following table liststhe name, variable, description, and source for each data element that is retrieved by default by the Patron Statistics report. You can edit the output templates to include or exclude any data element listed below.

Hint: Within an output template, you can easily identify the field label variable that corresponds to the variable (i.e., value). The field label variable simply adds the prefix **u_** and suffix **_label** to the variable. For example:
%($u_item_class_name_label)%: %($item_class_name)%
For more information on variables and field label variables, see the *InfoStation User's Guide*.

Data Element	Variable	Description
Current Patron Count	count	The number of patrons in the database that are assigned a particular patron type.
Patron Type	patron_type	The list of patron types selected in the report configuration. Patron types are defined via the Patron Types parameter in the Virtua Profiler and assigned to patrons via the patron record.
Number Circulating	number_circulating	The number of patrons who circulated items during the date range that you specify for the report configuration.
Percent Circulating	percent_circulating	The percentage of patrons belonging to a particular patron type who circulated items during the date range specified for the report configuration. InfoStation calculates the Percent Circulating using the following equation: **Percent Circulating = (Number Circulating / Patron Count) * 100**

Data Element	Variable	Description
Total Circulation	total_circulation	The total number of items circulated by a given patron type during the specified date range.

3.23.3 Output Templates for the Patron Statistics Report

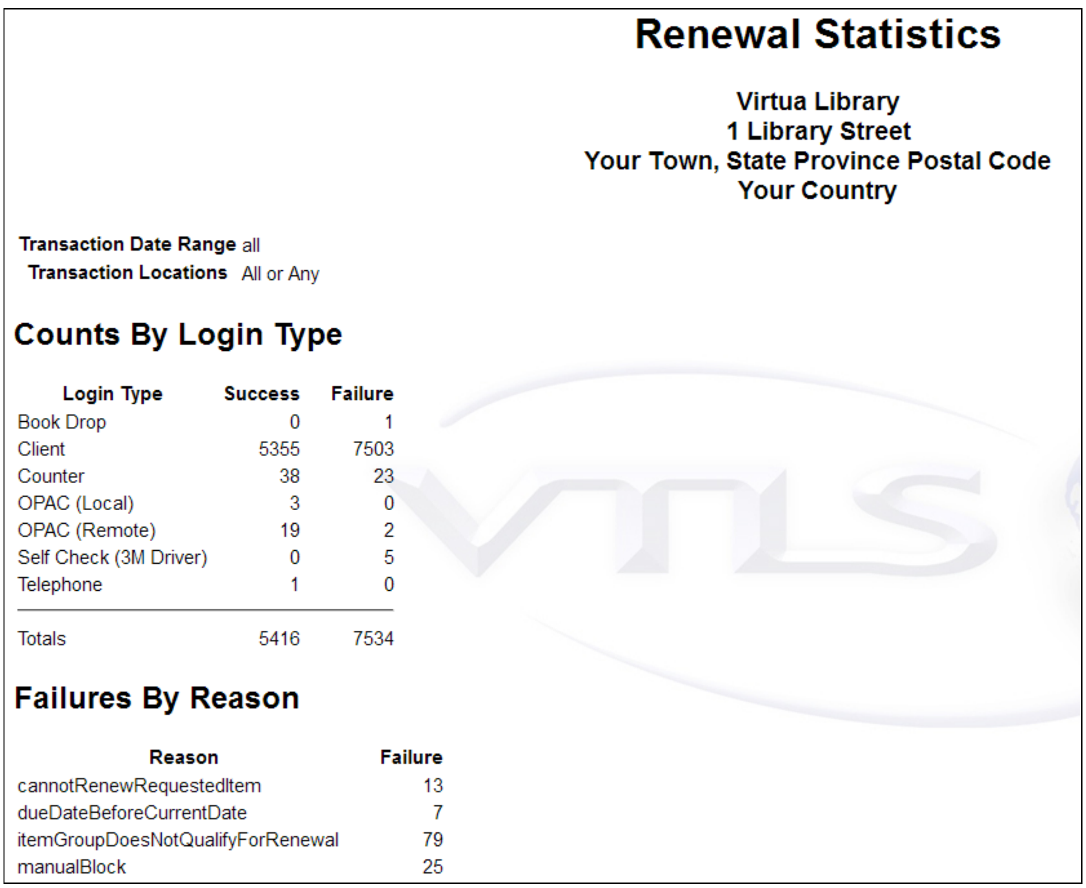
Location of files: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_11

Template	Contribution to Output
html_page.tem	Provides the overall framework of the HTML output.
html_header.tem	In the table of HTML output, this template generates a single row of labels at the top of the table. These labels provide the column headings for the data elements returned by the html_row.tem template.
html_row.tem	In the table of HTML output, this template generates a single row of statistics for each patron type. The values returned by this template are labeled by the column headings generated by the html_header.tem template.
email_page.tem	Provides the overall framework of the e-mail output.
email_header.tem	In the table of e-mail output, this template generates a single row of labels at the top of the table. These labels provide the column headings for the data elements returned by the email_row.tem template.
email_row.tem	In the table of e-mail output, this template generates a single row of statistics for each patron type. The values returned by this template are labeled by the column headings generated by the email_header.tem template.

3.24 Renewal Statistics Report

The Renewal Statistics report generates counts of successful and unsuccessful renewals and reports them by the log-in type used when the patron performed the renewal. The log-in types returned by the report are Client, OPAC—local or remote, Telephone, Self-Check, Counter, Book Drop, or Unknown. The report output also provides a count of blocked or denied renewals organized by the reason for the failure.

Renewal statistics are generated by filtering the renewal entries from the Circulation Transaction Log based upon the criteria you select in this report configuration. You have the option of limiting the output by date range and/or transaction location. Figure 3-32 shows a portion of the default HTML output from the Renewal Statistics report.



Renewal Statistics

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

Transaction Date Range all
Transaction Locations All or Any

Counts By Login Type

Login Type	Success	Failure
Book Drop	0	1
Client	5355	7503
Counter	38	23
OPAC (Local)	3	0
OPAC (Remote)	19	2
Self Check (3M Driver)	0	5
Telephone	1	0
Totals	5416	7534

Failures By Reason

Reason	Failure
cannotRenewRequestedItem	13
dueDateBeforeCurrentDate	7
itemGroupDoesNotQualifyForRenewal	79
manualBlock	25

Figure 3-32. Renewal Statistics HTML Output

3.24.1 Parameters Available for the Renewal Statistics Report

The Renewal Statistics report offers the following Report-specific Parameters:

- **Date Range** (*required*) - Lets you limit the output to a particular date range. The report returns renewal statistics for the date range that you specify for the report configuration.

  For each configuration of the Renewal Statistics report, you must set the Date Range parameter. The Start Date and End Date use the date format DD-MON-YYYY HH:MI:SS, where HH:MM:SS is optional. For example, 11:00 a.m. on January 1, 2012 is 01-JAN-2012 11:00:00.

- **Transaction Locations** (*required*) - Lets you limit the output by the location where the renewal transaction took place.

For additional information on these parameters, see the *InfoStation/Report Parameters Reference Guide* or view the InfoStation online help.

3.24.2 Data Elements and Variables for the Renewal Statistics Report

The following table liststhe name, variable, description, and source for each data element that is retrieved by default by the Renewal Statistics report. You can edit the output templates to include or exclude any data element listed below.

Hint: Within an output template, you can easily identify the field label variable that corresponds to the variable (i.e., value). The field label variable simply adds the prefix **u_** and suffix **_label** to the variable. For example:
%($u_item_class_name_label)%: %($item_class_name)%
For more information on variables and field label variables, see the *InfoStation User's Guide*.

Data Element	Variable	Description
Client Type	client_label	The label used to display a client type in the Counts By Log-in Type table.
Log-in Type	login_label	The label used to display a log-in type in the Counts By Log-in Type table.

Data Element	Variable	Description
Success Count	success_count	The number of successful renewals displayed in the Counts By Log-in Type table for a particular client type and log-in type combination.
Failure Count	failure_count	The number of failed renewals displayed in the Counts By Log-in Type table for a particular client type and log-in type combination.
Total Successes	total_success_count	The total number of successful renewals displayed in the Counts By Log-in table, for all client and log-in types.
Total Failures	total_failure_count	The total number of failed renewals displayed in the Counts By Log-in table, for all client and log-in types.
Reason	reason	The reasons for failure displayed in the Failures By Reason table.
Failures by Reason	reason_count	The number of failed renewals associated with each category of renewal failure reasons shown in the Failures By Reason table.

3.24.3 Output Templates for the Renewal Statistics Report

Location of files: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_54

Template	Contribution to Output
html_page_header.tem	Generates the header of the HTML output, including the report name and the library name and address information.
html_page_footer.tem	Generates the footer of the HTML output, which appears below the last renewal statistics counts.
html_reasons_header.tem	In the HTML output, generates a single row of labels at the top of the table of renewal failure counts listed by failure reason.
html_reasons_row.tem	In the HTML output, generates a row of statistics (failure reason, number of failures) for each renewal failure reason listed in the table of renewal failure counts.
html_reasons_footer.tem	In the HTML output, generates the footer for the table of renewal failure counts.
html_no_reasons.tem	In the HTML output, generates the label displayed when there are no failure reasons associated with any of the failed renewals returned by the report.
html_login_types_header.tem	In the HTML output, generates a single row of labels at the top of the table of counts of successful and failed renewals for each log-in type.
html_login_types_row.tem	In the HTML output, generates a row of statistics (log-in type, number of successful renewals, number of failures) for each log-in type returned by the report.
html_login_types_footer.tem	In the HTML output, generates the footer for the table of counts of successful and failed renewals for each log-in type.
email_page_header.tem	Generates the header of the e-mail output, including the report name and the library name and address information.
email_page_footer.tem	Generates the footer of the e-mail output, which appears below the last renewal statistics counts.

Template	Contribution to Output
email_reasons_header.tem	In the e-mail output, generates a single row of labels at the top of the table of renewal failure counts listed by failure reason.
email_reasons_row.tem	In the e-mail output, generates a row of statistics (failure reason, number of failures) for each renewal failure reason listed in the table of renewal failure counts.
email_reasons_footer.tem	In the e-mail output, generates the footer for the table of renewal failure counts.
email_no_reasons.tem	In the e-mail output, generates the label displayed when there are no failure reasons associated with any of the failed renewals returned by the report.
email_login_types_header.tem	In the e-mail output, generates a single row of labels at the top of the table of counts of successful and failed renewals for each log-in type.
email_login_types_row.tem	In the e-mail output, generates a row of statistics (log-in type, number of successful renewals, number of failures) for each log-in type returned by the report.
email login_types_footer.tem	In the e-mail output, generates the footer for the table of counts of successful and failed renewals for each log-in type.

3.25 Reserves Activate List Report

The Reserves Activate List report generates a list of items that qualify for activation, according to their scheduled Active Period and parameters that you set in the report configuration. Figure 3-33 sshow a portion of the default HTML output from the Reserves Activate List report.

Reserves Activate List

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

Record(s) Found: 1

Call Number		**Item Barcode**	1000166177	*Texas criminal law and motor vehicle handbook.* [Altamonte Springs, FL] : Gould Publications of Texas Inc.,
Instructor	Stanberry, Robert D.	**Course**	LGLA1307 Stanberry - Introduction to law and the legal professions	
Reserve State	Scheduled	**Reserve Location**	BRYAN LIBRARY RESERVE	

Figure 3-33. Reserves Activate List Report Output

To appear in the output, a reserve item's scheduled Active Period must *include* the start date of the report configuration (i.e., the start date must fall between the begin date and end date of the reserve item's Active Period).

Note: You can use the Start Date parameter to specify the start date for the report configuration. If you do NOT set the Start Date parameter, InfoStation uses the *current* date as the configuration's start date.

If you run the Reserves Activate List report in update mode, qualifying reserve items change from scheduled to active. If you do NOT run the report in update mode, items remain scheduled, and the output merely displays a list of reserve item that *qualify* for activation.

Figure 3-33 shows the output of a report not run in update mode. If the report had been run in update mode, the Reserve State label would display *Active* rather than *Scheduled*.

3.25.1 Parameters Available for the Reserves Activate List Report

The Reserves Activate List report offers the following Report-specific Parameters:

- **Start Date** (*optional*) - Lets you limit report output according to the begin date of the reserve Active Period. To appear in the output, a reserve item's Active Period must *include* the specified Start Date (i.e., the Start Date must fall between the begin date and end date of the Active Period).

  Note: If you do NOT specify a Start Date, an item qualifies for inclusion if its Active Period is scheduled to begin *before* the date on which the report is run.

- **Reserve Locations** (*required*) - Lets you limit your output to one or more reserve locations. To appear in the output, an item's current reserve location must match one of the locations that you select for the report configuration.

- **Shelving Locations** (*required*) - Lets you limit your output to one or more shelving locations. To appear in the output, an item's current shelving location must match one of the locations that you select for the report configuration.

- **Instructors** (*required*) - Lets you limit your output to one or more instructors. To appear in the output, an item must be on reserve for one of the instructors you select for the report configuration.

- **Courses** (*required*) - Lets you limit your output to one or more courses. To appear in the output, an item must be on reserve for one of the courses you select for the report configuration.

- **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, items included in the output will be *activated* when you run the report. Additionally, InfoStation will reset to zero the Temporary Reserve Count of all activated reserve items.
  - ♦ If you do NOT select the Update Database check box, items included in the output will remain *scheduled* when you run the report.

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

- Author
- Call Number
- Course and Section
- Course Title
- Instructor
- Item Barcode
- Reserve Location
- Shelving Location
- Title

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

For additional information on these parameters, see the *InfoStation/Report Parameters Reference Guide* or view the InfoStation online help.

3.25.2 Virtua Settings Related to the Reserves Activate List Report

You can set the scheduled Active Period for reserve items on the Add/Modify Reserve Item window in the client (*Figure 3-34*).

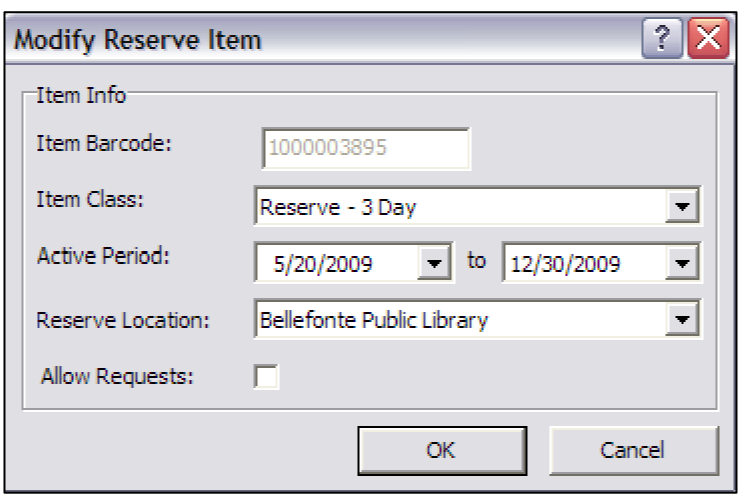


Figure 3-34. Add/Modify Reserve Item Window

To be eligible for inclusion in the Reserves Activate List report, a reserve item's scheduled Active Period must include the start date of the report configuration (i.e., the start date must fall between the begin date and end date of the reserve item's Active Period). For details on the start date, see the section "Parameters Available for the Reserves Activate List Report" in this chapter.

3.25.3 Data Elements and Variables for the Reserves Activate List Report

The following table liststhe name, variable, description, and source for each data element that is retrieved by default by the Reserves Activate 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: Within an output template, you can easily identify the field label variable that corresponds to the variable (i.e., value). The field label variable simply adds the prefix **u_** and suffix **_label** to the variable. For example:
%($u_item_class_name_label)%: %($item_class_name)%
For more information on variables and field label variables, see the *InfoStation User's Guide*.

Data Element	Variable	Description and Source
Author	author	The author of the reserve item, taken from the 100 tag of the bibliographic record.
Begin Date	begin_date	The start date of the reserve item's Active Period.
Bib-ID	bib_id	The system-assigned Bib-ID of the reserve item's parent record, taken from the 001 tag of the bibliographic record.
Call Number	call_number	The item-level call number of the reserve item.
Course ID	course_id	The course ID of the course for which the item is on reserve.
Course Title	course_title	The name of the course for which the item is on reserve.

Data Element	Variable	Description and Source
Edition	tag_250	The edition of the reserve item, taken from 250 tag of the bibliographic record.
End Date	end_date	The start date of the reserve item's Active Period.
Instructor	instructor_name	The name of the instructor for which the item is on reserve, taken from tag 100, subfield $a or tag 110, subfield $a of the instructor's patron record.
Item Barcode	item_barcode	The library-assigned item barcode of a reserve item.
Item Class	item_class	The reserve item class assigned to the item.
Item Status	item_status	The items status assigned to the reserve item.
Publication	tag_260	The publication information for the reserve item, taken from the 260 tag of the bibliographic record.
Reserve Location	reserve_location	The location at which the item is on reserve.
Reserve State	reserve_state	The state of the reserve item, either scheduled or active.
Section	section	The class section associated with the course for which the item is on reserve.
Shelving Location	shelf_location	The reserve item's shelving location.
Title	title	The title of the reserve item, taken from tag 245, subfield $a of the bibliographic record.

3.25.4 Output Templates for the Reserves Activate List Report

Location of files: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_20

Template	Contribution to Output
html_page.tem	Provides the overall framework of the HTML output, including library name and address information and a count of the total number of qualifying reserve items.
html_row.tem	Within HTML output, generates the information for each reserve

	item that qualifies for activation.
email_page.tem	Provides the overall framework of the e-mail output, including library name and address information and a count of the total number of qualifying reserve items.
email_row.tem	Within e-mail output, generates the information for each reserve item that qualifies for activation.

3.26 Reserves Current Active List Report

The Reserves Current Active List report generates a list of items that are currently on active reserve and meet the criteria for location, course, and instructor set in the report configuration. Figure 3-35 shows a portion of the default HTML output for the Reserves Current Active List report.

Reserves Current Active List

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

Record(s) Found: 1185

Call Number		**Item Barcode**	1000006602	Snapp, Roscoe Raymond, 1889- *Beef cattle : their feeding and management in the corn belt states, by Roscoe R. Snapp.* Third edition. New York, John Wiley & Sons, inc.; London, Chapman & Hall, ltd., c1939.
Instructor	Glenn Dinkle	**Course**	101 A - Beef Cattle	
Reserve Location	BRENHAM LIBRARY RESERVE	**Item Status**	On Reserve	
Begin Date	18-DEC-2013	**End Date**	15-NOV-2013	

Figure 3-35. Reserves Current Active List HTML Output

3.26.1 Parameters Available for the Reserves Current Active List Report

The Reserves Current Active List report offers the following Report-specific Parameters:

- **Reserve Locations** (*required*) - Lets you limit your output to one or more reserve locations. To appear in the output, an item's current reserve location must match one of the locations that you select for the report configuration.

- **Shelving Locations** (*required*) - Lets you limit your output to one or more shelving locations. To appear in the output, a reserve item's current shelving location must match one of the locations that you select for the report configuration.

- **Instructors** (*required*) - Lets you limit your output to one or more instructors. To appear in the output, an item must currently be on reserve for one of the instructors you select for the report configuration.

- **Courses** (*required*) - Lets you limit your output to one or more courses. To appear in the output, an item must currently be on reserve for one of the courses you select for the report configuration.

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

  - Author
  - Call Number
  - Course and Section
  - Course Title
  - Instructor
  - Item Barcode
  - Reserve Location
  - Shelving Location
  - Title

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

For additional information on these parameters, see the *InfoStation/Report Parameters Reference Guide* or view the InfoStation online help.

3.26.2 Parameters Required for Reserves Current Active List Configurations

For each configuration of the Reserves Current Active List report, you must set the following parameters:

- Primary and Secondary Sort
- Reserve Locations
- Shelving Locations
- Instructors
- Courses

In this way, your results will always contain a list of reserve items that meet your location, instructor, and course criteria, sorted on the values that you specify.

For each required parameter, you must select at least one value from the list box. You can generate results for ALL reserve locations, shelf locations, instructors, and courses by selecting *All or Any* in the appropriate list boxes. If you do NOT select a value for these parameters, they default to *All or Any*.

3.26.3 Data Elements & Variables for the Reserves Current Active List Report

The following table liststhe name, variable, description, and source for each data element that is retrieved by default by the Reserves Current Active 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: Within an output template, you can easily identify the field label variable that corresponds to the variable (i.e., value). The field label variable simply adds the prefix **u_** and suffix **_label** to the variable. For example:
%($u_item_class_name_label)%: %($item_class_name)%
For more information on variables and field label variables, see the *InfoStation User's Guide*.

Data Element	Variable	Description and Source
Author	author	The author of the reserve item, taken from the 100 tag of the bibliographic record.
Begin Date	begin_date	The start date of the reserve item's Active Period.
Bib-ID	bib_id	The system-assigned Bib-ID of the reserve item's parent record, taken from the 001 tag of the bibliographic record.
Call Number	call_number	The item-level call number of the reserve item.
Course ID	course_id	The course ID of the course for which the item is on reserve.
Course Title	course_title	The name of the course for which the item is on reserve.
Edition	tag_250	The edition of the reserve item, taken from 250 tag of the bibliographic record.
End Date	end_date	The start date of the reserve item's Active Period.
Instructor	instructor_name	The name of the instructor for which the item is on reserve, taken from tag 100, subfield $a or tag 110, subfield $a of the instructor's patron record.
Item Barcode	item_barcode	The library-assigned item barcode of a reserve item.
Item Class	item_class	The reserve item class assigned to the item.
Item Status	item_status	The items status assigned to the reserve item.
Publication	tag_260	The publication information for the reserve item, taken from the 260 tag of the bibliographic record.
Reserve Location	reserve_location	The location at which the item is on reserve.
Reserve State	reserve_state	The state of the reserve item, either scheduled or active.
Section	section	The class section associated with the course for which the item is on reserve.
Shelving Location	shelf_location	The reserve item's shelving location.
Title	title	The title of the reserve item, taken from tag 245, subfield $a of the bibliographic record.

3.26.4 Output Templates for the Reserves Current Active List Report

Location of files: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_22

Template	Contribution to Output
html_page.tem	Provides the overall framework of the HTML output, including library name and address information and a count of the total number of current reserve items.
html_row.tem	Within HTML output, generates the information for each reserve item that is currently on reserve
email_page.tem	Provides the overall framework of the e-mail output, including library name and address information and a count of the total number of current reserve items.
email_row.tem	Within e-mail output, generates the information for each reserve item that is currently on reserve.

3.27 Reserves Pull List Report

The Reserves Pull List report generates a list of scheduled reserve items that need to be pulled from the shelves and moved to the reserve area. Figure 3-36 shows a portion of the default HTML output for the Reserves Pull List report.

Reserves Pull List

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

Record(s) Found: 6

Call Number		**Item Barcode**	1000169580	Kottak, Conrad *Mirror for Humanity; a concise introduction to Cultural anthropology* 7th ed. N.Y.; McGraw-Hill, c2010
Instructor	Grossman, Pamela B.	**Course**	Anthropology -All Anthropology Department - Cultural Anthropology	
Shelving Location	BRYAN LIBRARY RESERVE - Available		**Reserve Location**	BRYAN LIBRARY RESERVE

Figure 3-36. Reserves Pull List HTML Output

The Reserves Pull List report generates a list of reserve items that need to be pulled from the shelves according to their Pull Dates. To appear in the output, an item's Pull Date must fall *on* or *before* . . .

- The Start Date specified for the report configuration.
  -OR-
- If no Start Date is specified, the date you run the report.

For details on the Pull Date, see the section "Virtua Settings Related to the Reserves Pull List Report" in this chapter.

3.27.1 Parameters Available for the Reserves Pull List Report

The Reserves Pull List report offers the following Report-specific Parameters:

- **Start Date** (*optional*) - Lets you limit report output by Pull Date. To appear in the output, a reserve item's Pull Date must fall *on* or *before* the Start Date specified for the report configuration. For example, if you set the Start Date to 01-JAN-2012, to appear in the output, a reserve item's Pull Date must be 01-JAN-2012 or earlier.

  Note: If you do NOT specify a Start Date, an item qualifies for inclusion if its Pull Date falls *on* or *before* the date that you run the report.

- **Reserve Locations** (*required*) - Lets you limit your output to one or more reserve locations. To appear in the output, an item's current reserve location must match one of the locations that you select for the report configuration.

- **Shelving Locations** (*required*) - Lets you limit your output to one or more shelving locations. To appear in the output, a reserve item's current shelving location must match one of the locations that you select for the report configuration.

- **Instructors** (*required*) - Lets you limit your output to one or more instructors. To appear in the output, an item must be on reserve for one of the instructors you select for the report configuration.

- **Courses** (*required*) - Lets you limit your output to one or more courses. To appear in the output, an item must be on reserve for one of the courses you select for the report configuration.

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

  - Author
  - Call Number
  - Course and Section
  - Course Title
  - Instructor
  - Item Barcode
  - Reserve Location
  - Shelving Location
  - Title

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

For additional information on these parameters, see the *InfoStation/Report Parameters Reference Guide* or view the InfoStation online help.

3.27.2 Virtua Settings Related to the Reserves Pull List Report

The Reserves Pull List report generates results using the following Virtua settings:

- Reserve Pull Period
- Scheduled Active Period

3.27.2.1 Reserve Pull Period

Via the Location Names parameter, which appears on the Global Settings tab in the Virtua Profiler, you can specify a Reserve Pull Period Days value for each location.

The Reserve Pull Period Days value represents the expected amount of time that a location needs to process reserve material.

When you create a reserve item, Virtua determines the Pull Date by adding the Reserve Pull Period Days to the begin date of the item's Scheduled Active Period. For example, if you create a new reserve item where the Active Period begins August 20, 2013, and the Reserve Pull Period is 10 days, then the Pull Date is August 10, 2013.

InfoStation looks at a reserve item's Pull Date to determine whether it qualifies for inclusion in the Reserves Pull List report. You can see a reserve item's Pull Date on the Information - View Reserves window in the Virtua client.

3.27.2.2 Scheduled Active Period

You can set the scheduled Active Period for reserve items on the Add/Modify Reserve Item window in the client (*Figure 3-37*).

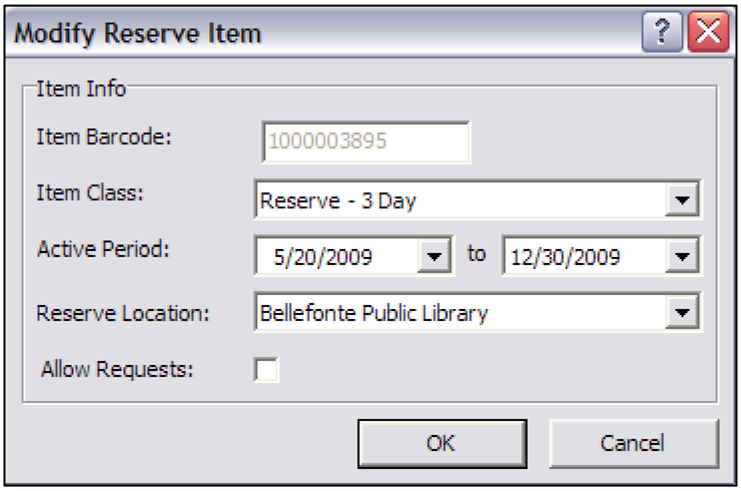


Figure 3-37. Add/Modify Reserve Item Window

To qualify for inclusion in the Reserves Pull List Report a reserve item's Pull Date must fall on or before the start date specified for the report configuration. For details on the Pull Date, see the previous section. For details on the start date, see the section "Parameters Available for the Reserves Pull List Report" in this chapter.

3.27.3 Data Elements and Variables for the Reserves Pull List Report

The following table liststhe name, variable, description, and source for each data element that is retrieved by default by the Reserves Pull 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: Within an output template, you can easily identify the field label variable that corresponds to the variable (i.e., value). The field label variable simply adds the prefix **u_** and suffix **_label** to the variable. For example:
%($u_item_class_name_label)%: %($item_class_name)%

For more information on variables and field label variables, see the *InfoStation User's Guide*.

Data Element	Variable	Description and Source
Author	author	The author of the reserve item, taken from the 100 tag of the bibliographic record.
Begin Date	begin_date	The start date of the reserve item's Active Period.
Bib-ID	bib_id	The system-assigned Bib-ID of the reserve item's parent record, taken from the 001 tag of the bibliographic record.
Call Number	call_number	The item-level call number of the reserve item.
Course ID	course_id	The course ID of the course for which the item is on reserve.
Course Title	course_title	The name of the course for which the item is on reserve.
Edition	tag_250	The edition of the reserve item, taken from 250 tag of the bibliographic record.
End Date	end_date	The start date of the reserve item's Active Period.
Instructor	instructor_name	The name of the instructor for which the item is on reserve, taken from tag 100, subfield $a or tag 110, subfield $a of the instructor's patron record.
Item Barcode	item_barcode	The library-assigned item barcode of a reserve item.
Item Class	item_class	The reserve item class assigned to the item.
Item Status	item_status	The items status assigned to the reserve item.
Publication	tag_260	The publication information for the reserve item, taken from the 260 tag of the bibliographic record.
Reserve Location	reserve_location	The location at which the item is on reserve.
Reserve State	reserve_state	The state of the reserve item, either scheduled or active.
Section	section	The class section associated with the course for which the item is on reserve.

Data Element	Variable	Description and Source
Shelving Location	shelf_location	The reserve item's shelving location.
Title	title	The title of the reserve item, taken from tag 245, subfield $a of the bibliographic record.

3.27.4 Output Templates for the Reserves Pull List Report

Location of files: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_19

Template	Contribution to Output
html_page.tem	Provides the overall framework of the HTML output, including library name and address information and a count of the total number of qualifying reserve items.
html_row.tem	Within HTML output, generates the information for each reserve item that needs to be pulled from the shelves.
email_page.tem	Provides the overall framework of the e-mail output, including library name and address information and a count of the total number of qualifying reserve items.
email_row.tem	Within e-mail output, generates the information for each reserve item that needs to be pulled from the shelves.

3.28 Reserves Remove List Report

The Reserves Remove List report generates a list of active reserve items that have expired and need to be deleted or archived. Figure 3-38 shows a portion of the default HTML output for the Reserves Remove List report.

Reserves Remove List

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

Record(s) Found: 1164

Call Number		**Item Barcode**	1000074082	Blinn College Library. *Audio-visual holdings; a combined list of the audio-visual materials of the library and the instructional divisions.* [Brenham, Tex.,], Blinn College Library, 1978-
Instructor	Reserve Desk, Brenham	**Course**	Reserve Desk, Brenham BLINN COLLECTION - Library	
Reserve State	Active	**Reserve Location**	BRENHAM LIBRARY RESERVE	
Begin Date	12-JUN-2013	**End Date**	10-JAN-2014	

Figure 3-38. Reserve Remove List HTML Output

The Reserves Remove List report produces a list of reserve items that qualify for deactivation according to their scheduled Active Period. To appear in the output, the end date of an item's Active Period must fall *on* or *before* the start date for the report configuration.

Note: Via the Start Date parameter, you can specify a start date for the report configuration. If you do NOT set the Start Date parameter, InfoStation sets the start date to the date on which the report is run.

If you run the report in update mode, qualifying, active reserve items are archived. If you do NOT run the report in update mode, items remain active, and the output merely displays a list of reserve item that *qualify* for deactivation.

Figure 3-38 shows the output of a report NOT run in update mode. If the report had been run in update mode, the Reserve State displays *Archived* rather than *Active*.

Additionally, you can configure the report to delete qualifying reserve items. If items are deleted when you run the report, the Reserve State displays *Deleted*.

3.28.1 Parameters Available for the Reserves Remove List Report

The Reserves Remove List report offers the following Report-specific Parameters:

- **Start Date** (*optional*) - Lets you limit report output according to the end date of the reserve Active Period. To appear in the output, a reserve item's scheduled Active Period must end *on* or *before* the specified Start Date.

  Note: If you do NOT specify a Start Date, an item qualifies for inclusion if its Active Period is scheduled to end on or before the date on which the report is run.

- **Reserve Locations** (*required*) - Lets you limit your output to one or more reserve locations. To appear in the output, an item's current reserve location must match one of the locations that you select for the report configuration.

- **Shelving Locations** (*required*) - Lets you limit your output to one or more shelving locations. To appear in the output, an item's current shelving location must match one of the locations that you select for the report configuration.

- **Instructors** (*required*) - Lets you limit your output to one or more instructors. To appear in the output, an item must be on reserve for one of the instructors you select for the report configuration.

- **Courses** (*required*) - Lets you limit your output to one or more courses. To appear in the output, an item must be on reserve for one of the courses you select for the report configuration.

- **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, items included in the output are *archived* when you run the report. When a reserve item is archived, it moves from the *current* reserve list to the *archived* reserve list.

> **Note:** When a reserve item is archived by the Reserves Remove List report, the end date of its Active Period is set to the date on which you run the report.

- **Delete Reserve Items** (*optional*) - Lets you choose whether you want to delete qualifying reserve items when you run the report. If you select the Delete Reserve Items check box, items included in the output are deleted from their reserve lists when you run the report.

> **Important:** If you want to delete expired reserve items when you run the report, you must select both the Update Database check box AND the Delete Reserve Items check box.

- **Sort Parameters** (*required*) - Let you sort your results on the following values:
  - Author
  - Call Number
  - Course and Section
  - Course Title
  - Instructor
  - Item Barcode
  - Reserve Location
  - Shelving Location
  - Title

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

For additional information on these parameters, see the *InfoStation/Report Parameters Reference Guide* or view the InfoStation online help.

3.28.2 Virtua Settings Related to the Reserves Remove List Report

You can set the scheduled Active Period for reserve items on the Add/Modify Reserve Item window in the client (*Figure 3-39*).

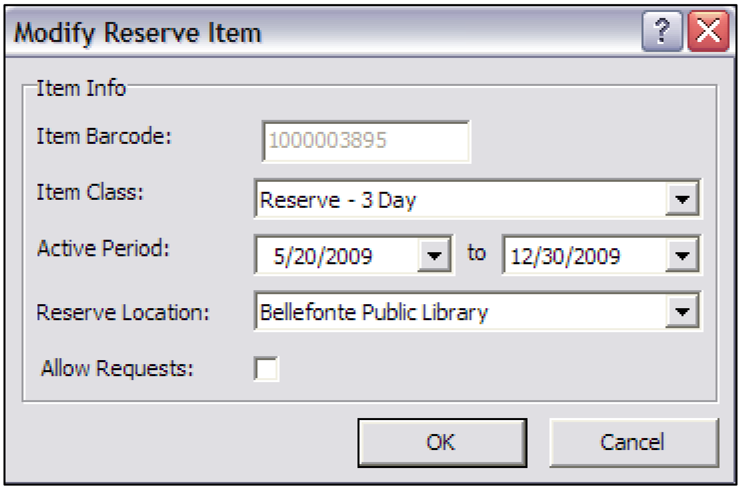


Figure 3-39. Add/Modify Reserve Item Window

To qualify for inclusion in the Reserves Remove List Report the *end* date of a reserve item's Active Period must fall on or before the start date of the report configuration. For details on the start date, see the section "Parameters Available for the Reserves Remove List Report" in this chapter.

3.28.3 Data Elements and Variables for the Reserves Remove List Report

The following table liststhe name, variable, description, and source for each data element that is retrieved by default by the Reserves Remove 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: Within an output template, you can easily identify the field label variable that corresponds to the variable (i.e., value). The field label variable simply adds the prefix **u_** and suffix **_label** to the variable. For example:

%($u_item_class_name_label)%: %($item_class_name)%
For more information on variables and field label variables, see the *InfoStation User's Guide*.

Data Element	Variable	Description and Source
Author	author	The author of the reserve item, taken from the 100 tag of the bibliographic record.
Begin Date	begin_date	The start date of the reserve item's Active Period.
Bib-ID	bib_id	The system-assigned Bib-ID of the reserve item's parent record, taken from the 001 tag of the bibliographic record.
Call Number	call_number	The item-level call number of the reserve item.
Course ID	course_id	The course ID of the course for which the item is on reserve.
Course Title	course_title	The name of the course for which the item is on reserve.
Edition	tag_250	The edition of the reserve item, taken from 250 tag of the bibliographic record.
End Date	end_date	The start date of the reserve item's Active Period.
Instructor	instructor_name	The name of the instructor for which the item is on reserve, taken from tag 100, subfield $a or tag 110, subfield $a of the instructor's patron record.
Item Barcode	item_barcode	The library-assigned item barcode of a reserve item.
Item Class	item_class	The reserve item class assigned to the item.
Item Status	item_status	The items status assigned to the reserve item.
Publication	tag_260	The publication information for the reserve item, taken from the 260 tag of the bibliographic record.
Reserve Location	reserve_location	The location at which the item is on reserve.
Reserve State	reserve_state	The state of the reserve item, either scheduled or active.

Data Element	Variable	Description and Source
Section	section	The class section associated with the course for which the item is on reserve.
Shelving Location	shelf_location	The reserve item's shelving location.
Title	title	The title of the reserve item, taken from tag 245, subfield $a of the bibliographic record.

3.28.4 Output Templates for the Reserves Remove List Report

Location of files: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_21

Template	Contribution to Output
html_page.tem	Provides the overall framework of the HTML output, including library name and address information and a count of the total number of qualifying reserve items.
html_row.tem	Within HTML output, generates the information for each reserve item that qualifies for activation.
email_page.tem	Provides the overall framework of the e-mail output, including library name and address information and a count of the total number of qualifying reserve items .
email_row.tem	Within e-mail output, generates the information for each reserve item that qualifies for activation.

3.29 Shelving Pull List Report

The Shelving Pull List report generates a list of items that need to be taken from their current shelving locations and returned to their owning locations, according to the At Shelving Location Until date specified in the item record. Figure 3-40 shows the default HTML output for the Shelving Pull List report.

Shelving Pull List

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

Record(s) Found: 2

Shelving Location (From)	Owning Location (To)	Call Number	Author	Title	Publication	Item Barcode
Brenham Campus Library	BRENHAM STACKS	c. 0	Brontë, Emily, 1818-1848	The complete poems / Emily Jane Brontë ; edited by Janet Gezari.	London, England ; New York, N.Y., USA : Penguin Books, 1992.	1414

Figure 3-40. Shelving Pull List HTML Output

For details on how items qualify for inclusion in the output, see the section "Virtua Settings Related to the Shelving Pull List Report" in this chapter.

3.29.1 Parameters Available for the Shelving Pull List Report

The Shelving Pull List report offers the following Report-specific Parameters:

- **Date Range** (*optional*) - Lets you limit report output according an item's shelving location expiration date. To appear in the output, a item's At Shelving Location

Until date must be during the date range that you specify for the report configuration.

Note: If you do NOT specify a Date Range, an item qualifies for inclusion if its At Shelving Location Until date falls *on* or *before* the date you run the report.

- **Shelving Locations (From)** (*required*) - Lets you limit your output to one or more shelving locations. To appear in the output, an item must currently be shelved at one of the locations that you select for the report configuration.

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

  - Author
  - Call Number
  - Owning Location (To)
  - Date
  - Shelving Location (From)
  - Title

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

For additional information on these parameters, see the *InfoStation/Report Parameters Reference Guide* or view the InfoStation online help.

3.29.2 Virtua Settings Related to the Shelving Pull List Report

The At Shelving Location Until field appears on the Item Elements tab of the Item Information window in the Virtua client. The setting indicates how long an item should stay at its shelving location before being returned to its owning location.

Note: When an item for which the At Shelving Location Until date has passed is checked in, Virtua will automatically reset the shelving location to the owning location. Run the Shelving Pull List report when you want to retrieve items that are past their At Shelving Location Until date but are still on the shelves (because they have not been checked out or checked in).

The Shelving Pull List report determines which items qualify for inclusion in the output by looking at the At Shelving Location Until value in the item record.

- If you do NOT specify a Date Range in your Shelving Pull List configuration, the report finds all items whose At Shelving Location Until expires on or before the day you run the report.
- If you specify a Date Range in your Shelving Pull List configuration, the report finds all items whose At Shelving Location Until expires between the Start Date and the End Date.

3.29.3 Data Elements and Variables for the Shelving Pull List Report

The following table liststhe name, variable, description, and source for each data element that is retrieved by default by the Shelving Pull 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: Within an output template, you can easily identify the field label variable that corresponds to the variable (i.e., value). The field label variable simply adds the prefix **u_** and suffix **_label** to the variable. For example:
%($u_item_class_name_label)%: %($item_class_name)%
For more information on variables and field label variables, see the *InfoStation User's Guide*.

Data Element	Variable	Description and Source
Author	author	The author of the item, taken from the 100 tag of the bibliographic record.
Barcode	item_barcode	The library-assigned item barcode.
Call Number	call_number	The item-level call number of the reserve item.
Copy	item_copy	The copy number of the item.
Edition	tag_250	The edition of the item, taken from the 250 tag of the bibliographic record.
Owning Location (To)	owning_location	The owning location of the item (i.e., the location to which the item needs to be returned).
Publication	tag_260	The publication information for the item, taken from the 260 tag of the bibliographic record.

Data Element	Variable	Description and Source
Shelving Location (From)	shelf_location	The location at which the item is currently shelved (i.e., the library that needs to return the item to its owning location).
Subject	tag_650	The subject associated with the item, taken from the 650 tag of the bibliographic record.
Title	title	The title of the item, taken fromtag 245, subfield $a of the bibliographic record.
Units	item_units	The number of units associated with a multivolume work.

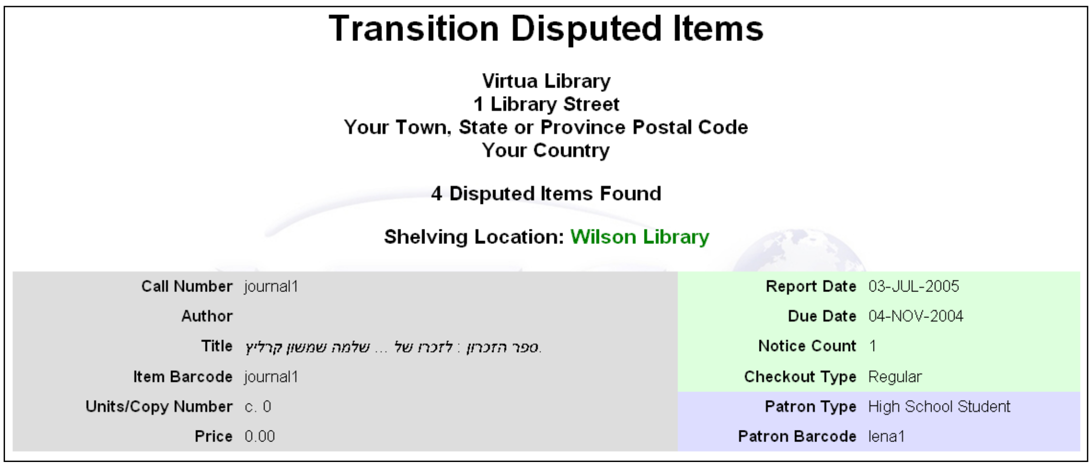
3.29.4 Output Templates for the Shelving Pull List Report

Location of files: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_18

Template	Contribution to Output
html_page.tem	Provides the overall framework of the HTML output, including library name and address information and a count of the total number of items found by the report.
html_row.tem	Within HTML output, generates the information for each item that needs to be returned to its owning location.
email_page.tem	Provides the overall framework of the e-mail output, including library name and address report reserve items information and a count of the total number of items found by the report.
email_row.tem	Within e-mail output, generates the information for each item that needs to be returned to its owning location.

3.30 Transition Disputed Items Report

The Transition Disputed Items report lets you change items that are at a status of Disputed to a status of Overdue after a user-defined number of days. Changing an item to a status of Overdue will also re-instate all fines and cause the next notice generated to be an overdue bill. In Figure 3-41 we show the default HTML output for the Transition Disputed Items report.



Transition Disputed Items

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

4 Disputed Items Found

Shelving Location: Wilson Library

Call Number	journal1	**Report Date**	03-JUL-2005
Author		**Due Date**	04-NOV-2004
Title	ספר הזכרון : לזכרו של ... שלמה שמשון קרליץ.	**Notice Count**	1
Item Barcode	journal1	**Checkout Type**	Regular
Units/Copy Number	c. 0	**Patron Type**	High School Student
Price	0.00	**Patron Barcode**	lena1

Figure 3-41. Transition Disputed Items HTML Output

3.30.1 Parameters Available for the Transition Disputed Items Report

The Transition Disputed Item report offers the following Report-specific Parameters.

- **Shelving Locations (From)** (*required*) - Lets you limit your results to disputed items associated with one or more shelving locations. To be included in the output, a disputed item must be shelved at one of the locations that you select for the report configuration.

- **Patron Types** (*required*) - Lets you limit your results to disputed items associated with one or more patron types. To be included in the output, a disputed item must be checked out to a patron who is assigned one of the patron types that you select for the report configuration.

- **Check-out Type** (*required*) - Lets you limit your results to disputed items associated with a particular check-out type. To be included in the output, a disputed item must have been checked out using the check-out type that you select in this pull-down list box.

  You can generate results for . . .
  - All Check-outs
  - Regular Check-outs
  - In-house Check-outs
  - Reserve Check-outs

- **Sort Parameters** (*required*) - Let you sort your results on the following values:
  - Author
  - Call Number
  - Class or Homeroom
  - Department
  - Due Date
  - Title
  - Institution
  - Shelving Location Code
  - Patron ID
  - Patron Type Code
  - Patron Postal Code
  - College or School

- **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, items included in the output will be set to billable status when you run the report.
  - If you do NOT select the Update Database check box, items included in the output will remain at disputed status when you run the report.

- **Days in Dispute** (*required*) – Lets you specify the number of days an item must be at disputed status to qualify to appear on the report.

- **Date Format** (*required*) - Lets you choose how dates will be formatted in the output. The default date format is DD-MON-YYYY.

3.30.2 Data Elements and Variables for the Transition Disputed Items Report

The following table liststhe name, variable, description, and source for each data element that can be retrieved by the Transition Disputed Items Report 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: Within an output template, you can easily identify the field label variable that corresponds to the variable (i.e., value). The field label variable simply adds the prefix **u_** and suffix **_label** to the variable. For example:
%($u_item_class_name_label)%: %($item_class_name)%
For more information on variables and field label variables, see the *InfoStation User's Guide*.

Data Element	Variable	Description and Source
Address Preference Flag	address_preference_flag	A value in the patron record that indicates the patron's address preference, either paper (0) or e-mail (1), stored in the 008/10 of the patron record.
Attention Of	attention	The "attention of" name stored in the patron record in the 270 tag, subfield $h of the primary address.
Author	author	The author of a given item, taken from tag 100, subfield $a; tag 110, subfield $a; OR 880, subfield $a of the bibliographic record.
Note: InfoStation checks for alternate authors via the $CHECK_880_FLAG variable in the **VRept.pm** module. By default, this variable is set to 1 (one). If you want InfoStation always to return author information from the 1xx tag, you can set this variable to 0 (zero). Because this is a global variable, its setting affects ALL reports that use **CircReport.exe**.		
Bibliographic Record ID	bib_id	The system-assigned Bib-ID for the item's parent bibliographic record, stored in the 001 tag.

Data Element	Variable	Description and Source
Call Number	call_number	The item-level call number of a given item.
Call Number Sortkey	call_number_sortkey	The normalized call number value that the report uses to sort items by call number.
Check-out Type	checkout_type	The check-out type assigned to an item at check-out.
Class or Homeroom	class	The patron's class or homeroom (i.e., the class responsible for distributing circulation notices), stored in tag 301, subfield $e of the patron record.
College or School	school	The patron's college or school, stored in tag 301, subfield $c of the patron record.
Copy Number	copy_number	The copy number of a given item.
Department	department	The patron's departmental affiliation, stored in tag 301, subfield $d of the patron record.
Due Date	due_date	The due date that was assigned when an item was checked out. -OR- If the item has been recalled since it was originally checked out, the new, calculated due date.
E-mail, Primary	email_primary	The patron's primary e-mail address, stored in the patron record in tag 271, subfield $a, where the first indicator is 1.
E-mail, Secondary	email_secondary	The patron's secondary e-mail address, stored in the patron record in tag 271, subfield $a, where the first indicator is 2.
FAX, Primary	fax_primary	The patron's primary fax number, stored in the patron record in the 270 tag, subfield $l of the primary address.

Data Element	Variable	Description and Source
FAX, Secondary	fax_secondary	The patron's secondary fax number, stored in the patron record in the 270 tag, subfield $l of the secondary address.
Full Patron Record (MARC)	full_patron_record	The complete patron record, including ALL tags and subfields in the patron 2709 MARC communications format record.
Holdings ID	holdings_id	The system-assigned Holdings-ID associated with an item, taken from the 001 tag of the related holdings records.
Holdings Units	holdings_units	The number of units associated with an item attached to a holdings record, taken from tag 866, subfield $a of holdings record.
Home Library	home_library	The patron's home library, stored in tag 247, subfield $a of the patron record.
Institution	institution	The name of the institution with which the patron is affiliated, taken from tag 301, subfield $b of the patron record.
Item Barcode	item_barcode	The library-assigned item barcode associated with an item.
Item Class	item_class	The item class assigned to a given item.
Item Class Code	item_class_code	The code associated with a given item class, defined in the Virtua Profiler.
Item ID	item_id	The system-assigned item ID, stored in the item record.
Item Price	item_price	The price of a given item.
Item Units	item_units	The number of units associated with a multivolume work.
Items Found	items_found	The total number of items found by the report.

Data Element	Variable	Description and Source
Language Preference	language_preference	The patron's language preference, taken from either tag 100, subfield $l or tag 110, subfield $l of the patron record.
Main Location	main_location_name	The name of the item's owning location.
Notice Number	notice_number	The notice number associated with a given notice.
Operator ID	operator_id	The Virtua user ID of the staff member associated with the original transaction.
Part Title	part_title	Titles assigned to volumes in a series, taken from tag 245, subfield $n and $p of the bibliographic record.
Patron Barcode	patron_barcode	The library-assigned patron barcode, stored in tag 015, subfield $a of the patron record.
Patron City	city	The city in the patron's primary paper address, stored in the patron record in tag 270, subfield $b, where the first indicator is 1.
Patron Country	country	The country in the patron's primary paper address, stored in the patron record in tag 270, subfield $f, where the first indicator is 1.
Patron County	county	The county in the patron's primary paper address, stored in the patron record in tag 270, subfield $c, where the first indicator is 1.
Patron First Name	first_name	The patron's first name, stored in tag 100, subfield $a of the patron record (the text after the comma).

Data Element	Variable	Description and Source
Patron Full Name	full_name	The patron's full name, taken from . . . • tag 100, subfields $a, $b, and $c of the patron record -OR- • tag 110, subfields $a, $b, and $c of the patron record
Patron ID	patron_id	The system-assigned patron number, stored in the 001 tag of the patron record.
Patron Last Name	last_name	The patron's last name, stored in tag 100, subfield $a of the patron record (the text before the comma).
Patron Name Prefix	prefix	The prefix associated with the patron name, stored in tag 100, subfield $e of the patron record.
Patron Name Suffix	suffix	The suffix associated with the patron name, stored in tag 100, subfield $f of the patron record.
Patron Personal Name	personal_name	The patron's full, personal name (i.e., last name and first name), taken from… • tag 100, subfield $a of the patron record, all text -OR- • tag 110, subfield $a of the patron record, all text
Patron Postal Code	postal_code	The postal code associated with the patron's primary paper address, stored in the patron record in tag 270, subfield $e, where the first indicator is 1.
Patron Primary Specialized Telephone	telephone_primary_specialized	The specialized telephone number associated with the patron's primary paper address, stored in the patron record in tag 270, subfield $j, where the first indicator is 1.

Data Element	Variable	Description and Source
Patron Primary Telephone	telephone_primary	The telephone number associated with the patron's primary paper address, stored in the patron record in tag 270, subfield $k, where the first indicator is 1.
Patron Secondary Specialized Telephone	telephone_secondary_specialized	The specialized telephone number associated with the patron's secondary paper address, stored in the patron record in tag 270, subfield $j, where the first indicator is 2.
Patron Secondary Telephone	telephone_secondary	The telephone number associated with the patron's secondary paper address, stored in the patron record in tag 270, subfield $k, where the first indicator is 2.
Patron Start Flag	patron_start_flag	The value that indicates the beginning of a new set of items belonging to a different patron, used in generating notices.
Patron State	state	The state associated with the patron's primary paper address, stored in the patron record in tag 270, subfield $d, where the first indicator is 1.
Patron Street Address 1	address_line_1	The first line of the patron's street address, taken from the first occurrence of 270 , subfield $a with a first indicator of 1.
Patron Street Address 2	address_line_2	The second line of the patron's street address, taken from the second occurrence of 270, subfield $a with a first indicator of 1.
Patron Street Address 3	address_line_3	The third line of the patron's street address, taken from the third occurrence of 270, subfield $a with a first indicator of 1.
Patron Type	patron_type_name	The description for a given patron type, taken from tag 245, subfield $a of the patron record.

Data Element	Variable	Description and Source
Patron Type Code	patron_type_code	The patron type code assigned to the patron, taken from tag 030, subfield $a of the patron record.
Report Date	report_date	The date the report was run.
Shelving Location (Name)	item_location_name	The name of the shelving location for a given item.
Shelving Location Code	item_location_code	The code assigned to the shelving location of a given item.
Title	title	The title of a given item, taken from tag 245, subfield $a of the bibliographic record.
Note: InfoStation checks for alternate titles via the $CHECK_880_FLAG variable in the **VRept.pm** module. By default, this variable is set to 1 (one). If you want InfoStation always to return title information from the 245 tag, you can set this variable to 0 (zero). Because this is a global variable, its setting affects ALL reports that use **CircReport.exe**.		

3.30.3 Output Templates for the Transition Disputed Items Report

Location of files: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_37

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

3.31 Undelivered Notices Report

Whereas the Failed Notices report generates a list of notices it attempted (successfully or unsuccessfully) to mark as undeliverable, the Undelivered Notices report (/usr/vtls/virtua/webrpt_XX_x/Cir/Cir_55) lists notices by type that were *previously* marked as undeliverable and indicates whether the notices have been resent (*Figure 3-42*). You can filter the output of the report by notice type. By default, the output is sorted first by notice type, then by patron name, and thirdly by patron e-mail address.

Undelivered Notices

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

Availability

Patron Barcode	Patron Name	Patron E-mail Address	Notice Date	Notice Has Been Sent Again?
601	a other name-Diane Barringer (Diane Barringer)	barricka@vtls.com	06-APR-2011	No
601	a other name-Diane Barringer (Diane Barringer)	barricka@vtls.com	05-APR-2011	Yes
601	a other name-Diane Barringer (Diane Barringer)	barricka@vtls.com	06-APR-2011	No
bradTest	Chinese name name (Brad P Myers suffix)	myersb@vtls.com	02-MAY-2011	No

Bill

Patron Barcode	Patron Name	Patron E-mail Address	Notice Date	Notice Has Been Sent Again?
bradTest	Chinese name name (Brad P Myers suffix)	myersb@vtls.com	29-APR-2011	Yes
bradTest	Chinese name name (Brad P Myers suffix)	myersb@vtls.com	29-APR-2011	Yes

Figure 3-42. Undelivered Notices HTML Output

3.32 Unique Management Report

Important: Before you use the Unique Management report, you must configure Virtua to keep a log of financial transactions. To do this, select the *Log financial transactions to the Audit Trail* parameter in the Virtua Profiler. For details, see the *Virtua Profiler/Circulation Parameters User's Guide*. You must also run the Delinquent Patron Accounts report before running the Unique Management report.

Note: The Unique Management report is not included with the standard InfoStation distribution. For information on getting this report, contact Innovative Customer Support.

The Unique Management report lets you generate information about delinquent patron accounts and send it to Unique Management Services, Inc. The Unique Management report generates *updated* information about the patrons already included in the Patron Accounts report.

The Delinquent Patron Accounts report offers a parameter which lets you add block code 027 to the 043 tag of patron records included in the output. This block, which is system defined, indicates that the patron record is blocked due to fine delinquencies. When you run the Unique Management report, InfoStation finds patrons with block code 027 and returns information about changes that have been made to their accounts (e.g., fines been added or payments made) since the report was last run.

This means that before you can use the Unique Management report, you must create and run a Delinquent Patron Accounts report configuration which adds the block code 027 to the patron record 043 tag of delinquent patrons.

3.32.1 Parameters Available for the Unique Management Report

The Unique Management report offers the following Report-specific Parameters:

- **Social Security Number Format** (*optional*) - Lets you specify the format in which you store social security numbers in your patron records. Any social security number that does not match this format will not be included in the output.

  Hint: Use the character **X** to represent digits in the SSN. For example, you might specify the format XXX-XX-XXXX, XXXXXXXXX, or 00XXX-XX-XXXX.

- **Start Date** (*required*) - Lets you specify the date after which InfoStation should check for changes to delinquent patron accounts. For each patron who has a 27 block, the Unique Management report will report changes that have affected the patron's account balance since the Start Date that you specify.

  Each time you run the Unique Management report, the start date will be reset automatically to match the run date. In this way, each time you run the report, the output will contain a list of patrons whose accounts have been modified since the report was last run.

  Note: Keep in mind that in most cases you will NOT need to modify the Start Date. You should change this setting only when you want to override the last run date. If you set this date incorrectly, you will send inaccurate information to Unique Management.

- **Show Only Patrons With Current Activity** - Checking this box will cause InfoStation to report ONLY delinquent patrons who have had activity since the Start Date specified in the report, which is not necessarily all patrons with a 27 block. If you do NOT select this option, this report will NOT print detailed information about the delinquent transactions. This check box should NOT be checked if you are sending a sync report to Unique Management.

- **Ignore 027 Block** - This parameter affects how InfoStation decides whether a patron is to be cleared from Unique Management collections:
  - When the parameter check box is NOT checked, InfoStation will clear a delinquent patron from collections if block code 027 is not present in the patron record.
  - When the check box is checked, InfoStation will evaluate whether a delinquent patron's account balance is less than the value that is set in the Minimum Threshold for Delinquency parameter. If it is less, then the patron qualifies to be cleared from Unique Management collections.

    Note: If you run the Delinquent Patron Accounts report with the Block Delinquent Patrons parameter unchecked, then when you run the Unique Management report, make sure that the Ignore 027 Block parameter is checked.

- **Minimum Threshold for Delinquency** - This parameter is used *only* if the Ignore 027 Block check box is checked. When the Ignore 027 Block check box is checked, InfoStation uses the value of the Minimum Threshold for Delinquency parameter to determine whether a patron qualifies to be cleared from Unique Management collections. If a delinquent patron has an account balance that is less than the Minimum Threshold for Delinquency value, the patron qualifies to be cleared from Unique Management collections. The value can be any whole number or decimal up to six digits in length.

- **Add Processing Fee to Waived/Disputed** - When this check box is selected, the Unique Management report will separate out the processing fee and list it in the Amount Waived/Disputed column. When this check box is not selected, the processing fee will be combined with the item price fee and listed in the Value of Materials Returned column.

- **Update Database** (*optional*) - Lets you choose whether InfoStation will update the patron records in the database when you run the report configuration. If you select the Update Database check box, when you run the report configuration, InfoStation will set the delinquent_flag to 0 for every patron who has a delinquent_flag of 1 in the patron table and does NOT have a block code of 27 in the patron_block table.

Important:

- Do not set this parameter for "test" or internal configurations.
- If the Output Format is set to HTML, do not set this parameter. If you do, you will get an error message upon saving the report configuration.

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

3.32.2 Data Elements and Variables for the Unique Management Report

The following table liststhe name, variable, description, and source for each data element that is retrieved by default by the Unique Management report. You can edit the output templates to include or exclude any data element listed below.

Hint: Within an output template, you can easily identify the field label variable that corresponds to the variable (i.e., value). The field label variable simply adds the prefix **u_** and suffix **_label** to the variable. For example:
%($u_item_class_name_label)%: %($item_class_name)%
For more information on variables and field label variables, see the *InfoStation User's Guide*.

Data Element	Variable	Description and Source
Account Number	patron_id	The patron barcode associated with the account.
Amount Added by the Library	amount_added	The amount of money added to the patron's account by the library.
Amount Paid	amount_paid	The amount paid on the account by the patron.
Amount Waived	amount_waived	The amount waived AND disputed on the account.
Balance	account_balance	The current balance of the patron's account.
Library Name	library_name	The name of the library with which the patron account is associated.
Patron Name	patron_name	The name of the patron who owns a given account.
Social Security Number	social_security_number	The social security number of the patron who owns a given account.
Value of Materials Returned	value_returned	The value of the items that have been returned to the library by this patron.
Summary Data	summary_data	Label for the summary section of the report, which consists of five totals.
Total Amount Added by the Library	total_added	The total amount of money added to patron accounts by the library.
Total Amount Paid	total_paid	The total amount paid on all accounts by all patrons.
Total Records Updated	total_records_updated	The total number of records that were updated for this report.
Total Value of Materials Returned	total_returned	The total value of the items that have been returned to the library by all patrons in this report.
Total Amount Waived	total_waived	The total amount waived AND disputed on all accounts.

3.32.3 Output Templates for the Unique Management Report

Location of files: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_29

Template	Contribution to Output
html_page.tem	Provides the overall framework of the HTML output.
html_summary.tem	In HTML output and in the log file, defines the display of the summary patron data, which consists of the label for the summary section and five totals.
html_row.tem	In HTML output, returns the information associated with a single patron.
email_page.tem	Provides the overall framework of the e-mail output.
email_summary.tem	In e-mail output, defines the display of the summary patron data, which consists of the label for the summary section and five totals.
email_row.tem	In e-mail output, returns the information associated with a single patron.

3.33 Unsatisfied Requests Report

The Unsatisfied Requests report generates information about available items and patrons associated with unsatisfied requests (excluding inactive requests). With regard to grouped items, an item will qualify for the report only if both the primary item and secondary item(s) qualify for the report.

The report is useful to libraries that allow requests against available items and requests against bibliographic records without attached items. You can use the results of the report to trap or transfer items for requests that have not yet been satisfied.

Note: If the request is against ...

- A bibliographic record that has no items attached, the output will not display any item information.
- The primary item in grouped items and that item is not available (i.e., it is checked out or at a status that prevents that type of request), the output will not display any item information; secondary items will not be returned in the output.
- A secondary item in grouped items and that item is not available (i.e., it is checked out or at a status that prevents that type of request), the output will not display the primary item.

Virtua considers an unsatisfied request as:

- An item-level request for an item that is available (i.e., not checked out) and untrapped OR an item that is trapped but not yet available at the pickup location. -OR-
- A bibliographic-level request for which no item has been trapped.

Note: For additional information about trapping requests, see the *Virtua Circulation Control/Requests User's Guide.*

The results of the report will consist of only ONE available item per request. The report will first try to report on an available item at the pickup location associated with the request. If unsuccessful, the report will try to report on the next available item from the next location listed on the request routing list.

In Figure 3-43 we show the default HTML output for the Unsatisfied Requests report.

Unsatisfied Requests

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

Record(s) Found: 3

Call Number / Item Barcode	796.51 As32 / asdf3	**Units/Copy Number**	c. 1
Author	Ashbaugh, Byron L.	**Item Status**	
Title	Trail planning and layout.	**Patron Name**	
Request Type	H	**Patron Barcode**	29210260
Owning Location / Shelf Location	Hong Kong Central (*1000000) / Hong Kong Central (*1000000)	**Pickup Location**	Hong Kong Central (*1000000)

Call Number / Item Barcode	/ 101	**Units/Copy Number**	c. 1
Author		**Item Status**	
Title	Questions of ethics in counselling and therapy / Caroline Jones (contributing editor) ; Carol Shillito-Clarke ... [et al.].	**Patron Name**	
Request Type	R	**Patron Barcode**	102
Owning Location / Shelf Location	Hong Kong Central (*1000000) / Hong Kong Central (*1000000)	**Pickup Location**	Hong Kong Central (*1000000)

Figure 3-43. Unsatisfied Requests Report HTML Output

The Unsatisfied Requests report offers configuration options to include or exclude bibliographic-level requests and to restrict the output by request type(s), shelf location(s), and item status(es).

Using the numerous Field Labels available in the report configuration, you can determine what information you want the Unsatisfied Request report to display in the output.

3.33.1 Parameters Available for the Unsatisfied Requests Report

The Unsatisfied Requests report offers the following Report-specific Parameters:

- **Shelf Locations** - Lets you limit your results to one or more shelf locations.
  - ♦ For an item-level request, the item will be included in the results if the item's current shelving location must match one of the locations that you select for the report configuration.

- For a bibliographic-level request, the bibliographic record will be included in the results if it has an available item at one of the locations that you select for the report configuration.

Note: In a consortium environment, the Shelf Locations parameter shows only locations from the current user's institution. Also, if no shelf location is chosen, **CircReport.exe** will generate results for only the current user's institution.

- **Bibliographic Level?** - Lets you choose whether you want to include bibliographic-level requests in your output.
  - If you select this check box, InfoStation will include in your output information about bibliographic-level requests.
  - If you do NOT select this check box, your output will include information about item-level requests only.

- **Request Types** - Lets you choose the type(s) of requests to include in the report output. To be included in the output, a request must be of a type selected in the drop-down list.

- **Item Statuses** - Lets you choose one or more item statuses to include in the report output. To be included in the output, an item must be at one of the statuses that you select for the report configuration. Note that this filter will limit only item-level requests.

Note: The Item Statuses list box contains item statuses you define via the Status Displays parameter in the Virtua Profiler. The Statuses list box displays ALL the items statuses defined for the database, regardless of whether they are assigned to items.

- **Sort Parameters** (*required*) - Let you use the following values to specify a primary sort and a secondary sort for the report output:
  - Author
  - Call Number
  - Item Copy
  - Pickup Location
  - Shelf Location
  - Title

For additional information on these parameters, see the *InfoStation/Report Parameters Reference Guide* or view the InfoStation online help.

3.33.2 Data Elements and Variables for the Unsatisfied Requests Report

The following table liststhe name, variable, description, and source for each data element that is retrieved by default by the Unsatisfied Requests report. You can edit the output templates to include or exclude any data element listed below.

Hint: Within an output template, you can easily identify the field label variable that corresponds to the variable (i.e., value). The field label variable simply adds the prefix **u_** and suffix **_label** to the variable. For example:
%($u_item_class_name_label)%: %($item_class_name)%
For more information on variables and field label variables, see the *InfoStation User's Guide*.

Data Element	Variable	Description and Source
Author	author	The author of the requested item, taken from tag 100, subfield $a or tag 110, subfield $a of the bibliographic record.
Bib ID	bib_id	The Bib-ID of the requested item, taken from the 001 tag of the bibliographic record.
Call Number	call_number	The item-level call number of the requested item.
Item Accession Number	item_accession_number	The accession number assigned to the item
Item Barcode	item_barcode	The item barcode of the requested item.
Item Copy	item_copy	The copy number of the requested item.
Item Units	item_units	The units associated with the requested item.
Library Alternate Name	library_alternate_name	An alternate (e.g., Chinese) name for the library.
Library Telephone	library_telephone	The telephone number of the library.
Owning Location	owning_location	The owning location of the requested item.

Data Element	Variable	Description and Source
Patron Barcode	patron_barcode	The barcode of the patron who requested the item, taken from tag 015, subfield $a of the patron record.
Patron Other Name	other_name	The patron's other (e.g., Chinese) name, stored in tag 111, subfield $a of the patron record.
Patron Other Name Suffix	other_name_suffix	The suffix associated with the patron's other name stored in tag 111, subfield $f of the patron record.
Patron Name	patron_name	The name of the patron who requested the item, taken from . . . • tag 100, subfield $a of the patron record (all text) -OR- • tag 110, subfield $a of the patron record (all text)
Pickup Location	pickup_location	The location at which the requested item is to be picked up.
Report Date	report_date	The date the report was run.
Request Type	request_type	The type of request (i.e., hold, recall, loan, or page).
Shelf Location	shelf_location	The current shelf location of the requested item.

Data Element	Variable	Description and Source
Street Address 1	street_address_1	The first line of the patron's street address, taken from the *first* occurrence of tag 270, subfield $a with a first indicator of 1.
Street Address 2	street_address_2	The second line of the patron's street address, taken from the *second* occurrence of tag 270, subfield $a with a first indicator of 1.
Street Address 3	street_address_3	The third line of the patron's street address, taken from the *third* occurrence of tag 270, subfield $a with a first indicator of 1.
Street Address 4	street_address_4	The fourth line of the patron's street address, taken from the *fourth* occurrence of tag 270, subfield $a with a first indicator of 1.
Street Address 5	street_address_5	The fifth line of the patron's street address, taken from the *fifth* occurrence of tag 270, subfield $a with a first indicator of 1.
Title	title	The title of the requested item, taken from tag 245, subfield $a of the bibliographic record.

3.33.3 Output Templates for the Unsatisfied Requests Report

Location of files: /usr/vtls/virtua/webrpt_XX_x/Cir/Cir_23

Template	Contribution to Output
html_page.tem	Provides the overall framework of the HTML output.
html_row.tem	Within HTML output, generates the information for each unsatisfied request.

Template	Contribution to Output
email_page.tem	Provides the overall framework for e-mail output.
email_row.tem	Within the e-mail output, returns the information for a single item. This template is repeated for each unsatisfied request, generating a list.

4. Appendix A - Tips on Generating Patron Notices

This appendix provides tips on configuring notice-generating reports to generate notices. For additional information on output formats and for details on customizing your output, see the *InfoStation User's Guide*.

This appendix covers the following topics:

4.1 Ensuring that ALL Eligible Patrons Receive Notices

When you configure notice-generating reports to send e-mail notices (i.e., you choose E-mail, Primary as the Output Format), eligible patrons receive a notice *only* if they have a valid e-mail address in their patron record.

Important: By *valid* we mean that the e-mail address uses the correct format (e.g., user@host.domain). We recommend that you run the E-mail Validation report periodically to find any invalid e-mail addresses in your database and correct them prior to generating notices. For details, see the section "E-mail Validation Report" in this reference guide.

When you choose E-mail, Primary as the Output Format AND you run the report in update mode, InfoStation updates the database to indicate that ALL patrons whose patron record contains *any* e-mail address (either valid or invalid) have received a notice. In other words, if a patron has an *invalid* e-mail address, and the patron does NOT actually receive a notice, the database will be updated to indicate that the patron has received a notice.

You can avoid this problem by creating TWO configurations for each notice generating report. Below we explain the procedure for doing so.

Important:

- For each configuration, set the *same* parameters, *except* for Output Format and Update Database.
- If you are generating notices in multiple languages, perform the following steps for *each* language.

To create two configurations for e-mailing notices,

1. For the FIRST configuration . . .
   - Set the Output Format to E-mail, Primary.
   - Select the Honor Address Preference check box.
   - Select the Update Database check box.
2. For the SECOND configuration . . .
   - Set the Output Format to E-mail with Delimited File Attachment.
   - Select the Honor Address Preference check box.
   - Select the Update Database check box.
3. Run the FIRST configuration.

   InfoStation will send e-mail notices to ALL patrons who have a both a *valid* e-mail address AND an *e-mail* address preference. The database is updated to indicate that notices have been sent (i.e., the notice count is incremented).
4. Run the SECOND configuration.

   The configuration produces a list of results that you can use to send paper notices to patrons. The output includes results for . . .
   - Patrons with a paper address preference.
     -AND-
   - Patrons with NO address preference.
     -AND-
   - Patrons with an e-mail address preference but a missing OR *invalid* e-mail address.

   In other words, the configuration generates a notice for ALL patrons who did not receive a notice from the FIRST configuration. The database is updated to indicate that notices have been sent (i.e., the notice count is incremented).

Important: You can run the two configurations manually, OR you can schedule them to run automatically. If you schedule the configurations to run automatically, schedule them to run in the order described here.

4.2 Sending Patrons Both an E-mail Notice AND a Paper Notice

In some cases, you may want to send patrons two notices for the same item: an e-mail notice and a paper notice. For example, a patron can receive only one bill for each overdue item. To ensure that the patron actually receives the bill, you may want to send a notice for the same item to the patron's paper address and to the patron's e-mail address.

Below we provide two examples for generating two notices for each eligible patron.

4.2.1 Generating Two Notices for Patrons Whose Address Preference is E-mail

You can use the following guidelines to produce two notices for each patron who has both an e-mail address preference AND a *valid* e-mail address.

Hint: You can use the Patron List report to determine which patrons have their address preference set to e-mail.

To generate two notices for patrons whose address preference is set to e-mail, you must create two configurations for each notice-generating report. Below we provide the procedure for doing so.

Important:

- For each configuration, choose the *same* parameters, *except* for Output Format and Update Database.
- If you are generating notices in multiple languages, perform the following steps for *each* language.

To create two configurations for producing two notices,

1. For the FIRST configuration . . .

   - Set the Output Format to E-mail, Primary.
   - Select the Honor Address Preference check box.
   - Do NOT select the Update Database check box.

2. For the SECOND configuration . . .

   - Set the Output Format to E-mail with Delimited File Attachment.
   - Do NOT select the Honor Address Preference check box.
   - Select the Update Database check box.

3. Run the FIRST configuration.

   InfoStation will send e-mail notices to ALL patrons who have a *valid* e-mail address AND whose Address Preference is e-mail. The database is NOT updated to indicate that notices have been sent (i.e., the notice count is NOT incremented).

4. Run the SECOND configuration.

   - The configuration produces a list of results that you can use to send notices to patrons. The list includes results for ALL patrons, regardless of address preference.

     Note: For patrons with an e-mail address preference, this configuration generates a notice in addition to the e-mail notice they received from the FIRST configuration. This is NOT the second notice in terms of notice count.

   - The configuration updates the database to indicate that ONE notice has been sent to each eligible patron.

Important: You can run the two configurations manually, or you can schedule them to run automatically. If you run the configurations automatically, schedule them to run in order. Do NOT schedule both configurations to run at the same time.

4.2.2 Generating Two Notices for All Patrons with a Valid E-mail Address

You can use the following guidelines to generate two notices for ALL patrons who have a *valid* e-mail address.

Hint: You can use the E-mail Validation report to determine which patrons have a valid e-mail address.

To generate two notices for each patron who has a valid e-mail address, you must create two configurations for each notice-generating report. Below we describe the procedure for doing so.

Important:
- For each configuration, choose the *same* parameters, *except* for Output Format and Update Database.
- If you are generating notices in multiple languages, perform the following steps for *each* language.

To create two configurations that will produce two notices for all patrons with a valid e-mail notice,

1. For the FIRST configuration . . .
   - Set the Output Format to E-mail, Primary.
   - Do NOT select the Honor Address Preference check box.
   - Do NOT select the Update Database check box.
2. For the SECOND configuration . . .
   - Set the Output Format to E-mail with Delimited File Attachment.
   - Do NOT select the Honor Address Preference check box.
   - Select the Update Database check box.
3. Run the FIRST configuration.

   InfoStation will send e-mail notices to ALL patrons who have a *valid* e-mail address, regardless of address preference. The database is NOT updated to indicate that notices have been sent (i.e., the notice count is NOT incremented).

4. Run the SECOND configuration.

    - The configuration produces a list of results that you can use to send paper notices to patrons. The list includes results for ALL eligible patrons, regardless of address preference.

      Note: For patrons with a valid e-mail address, this configuration generates a notice in addition to the e-mail notice they received from the FIRST configuration. This is NOT the second notice in terms of notice count.

    - This configuration updates the database to indicate that ONE notice has been sent to each eligible patron.

Important: You can run the two configurations manually, or you can schedule them to run automatically. If you run the configurations automatically, schedule them to run in order. Do NOT schedule both configurations to run at the same time.

5. Appendix B - Using Microsoft Word to Generate Notices

The tab-delimited output from InfoStation reports can be used as data files for mail merges in many word processing programs. InfoStation uses the **.utx** file extension to designate these data files, which are sent as e-mail attachments. You can use the instructions in this appendix with templates created by your library to produce paper notices using Microsoft Word® programs such as Word 2010. Once you have set up your templates, be aware that you may have to modify them for each new version of InfoStation.

Disclaimer: Innovative does not provide support for Microsoft Word or any other third-party word processing program. These instructions are not a complete guide to doing a mail merge in Word (for more information, see the Word help files).

This appendix covers the following topics:

When you use Microsoft Word to create a mail merge, you may wish to create a template for each type of notice that you want to produce. The template will hold the generic information that will be included in each notice. For details about creating templates, see the Microsoft Word documentation.

Hint: To keep the mail merge program from printing a notice for every item checked out instead of for every patron, you need to include an if…, then… statement in the template.

5.1 Using Microsoft Word for Notices

5.1.1 Step 1: Set Up a Template Folder

1. Create a folder named Notices under the Virtua directory or in another location such as My Data Sources.

Note: The mail merge feature defaults to My Data Sources for data files; therefore, you might want to place the templates in the Virtua directory and the **.utx** files in My Data Sources.

2. Copy your templates and sample **.utx** files into this directory. The sample **.utx** files serve as placeholders to prevent Word from generating error messages. They will be replaced by "real"**.utx** files generated when you run reports.

Note: Each template should have a filename that includes the letters **TMP_XP** at the end to denote that it is a Word XP template. For example, the Word document OVERDUE_TMP_XP.DOC is the mail merge template used with the data file OVERDUE.UTX to generate Overdue notices

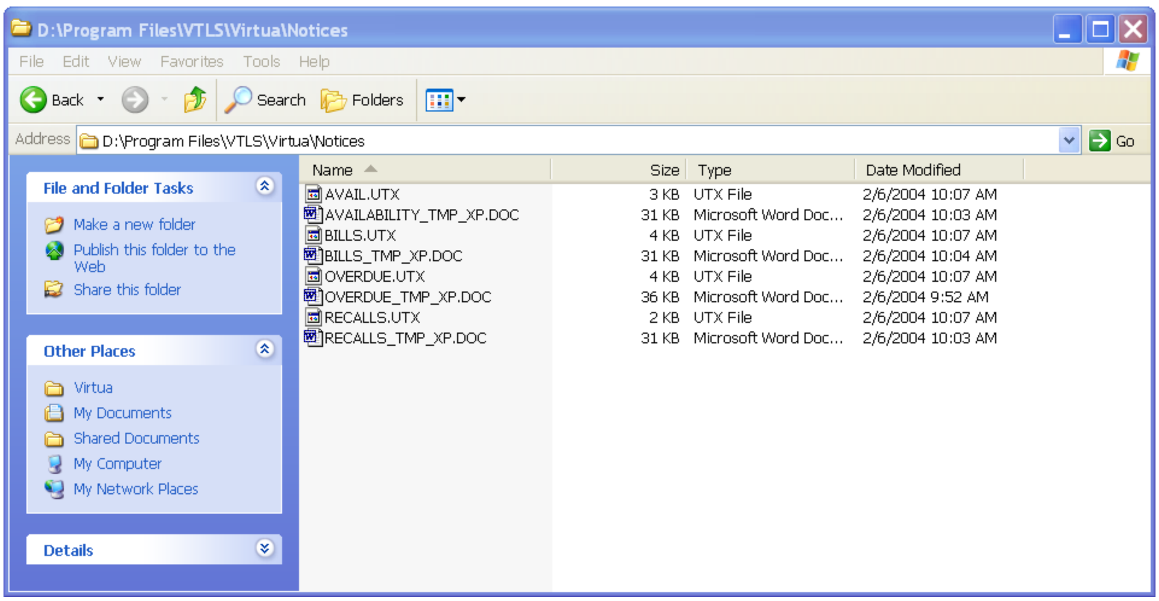


Figure 5-1. Sample Directory of Microsoft Word Templates

5.1.2 Step 2: Save Tab-delimited Output

When you receive a new report as an e-mail attachment, save it in the Virtua Notices directory, where it will overwrite the existing **.utx** file

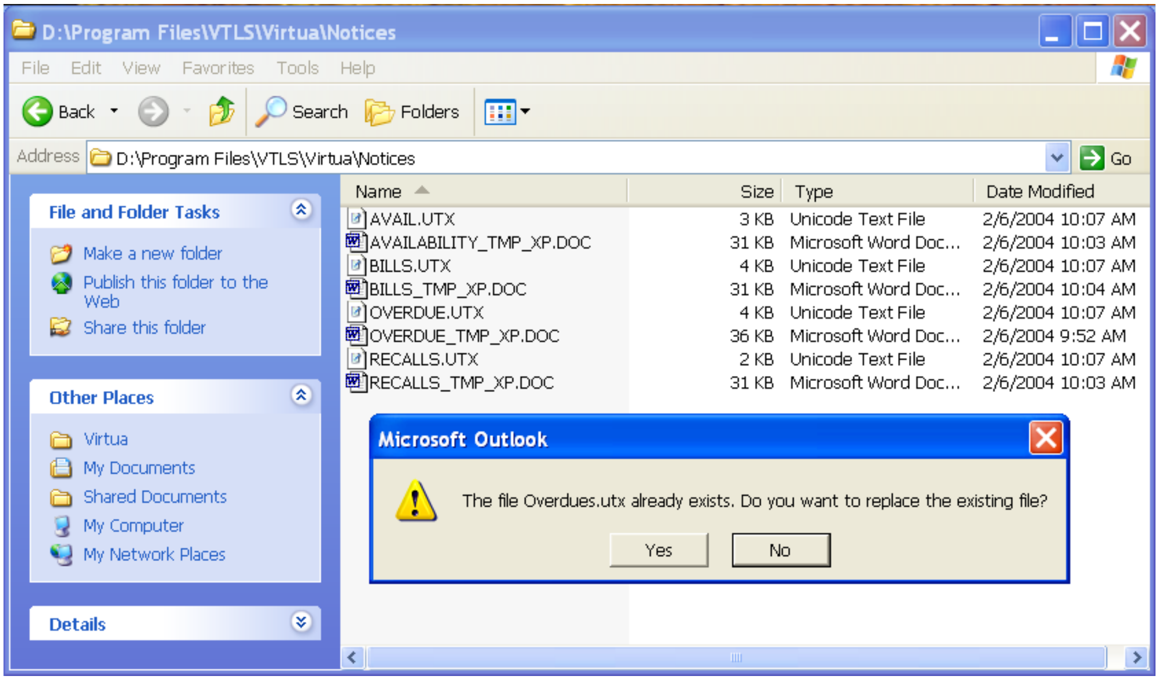


Figure 5-2. Saving a New InfoStation Data File in Windows

5.1.3 Step 3: Modify Templates

1. Launch Microsoft Word.

2. Open the Template for the notices you want to generate. Word refers to this file as the *Main Document*.

   The file conversion window appears.

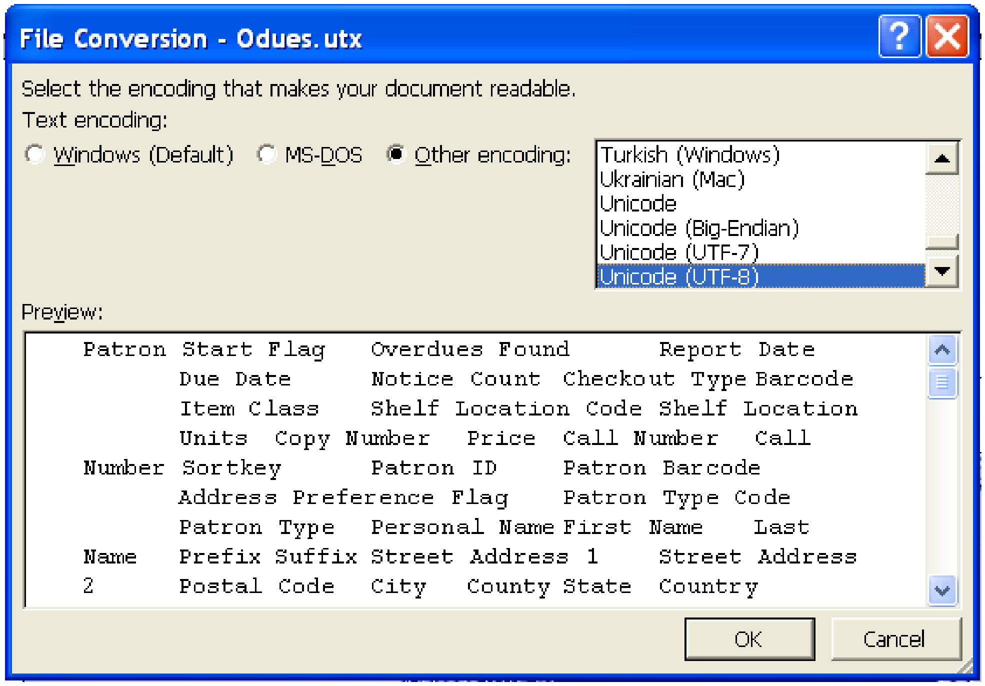


Figure 5-3. Microsoft Word File Conversion Window

3. Accept the default setting (Unicode (UTF-8)) and click OK.

   Word prompts you to set the Field and Record Delimiter types.

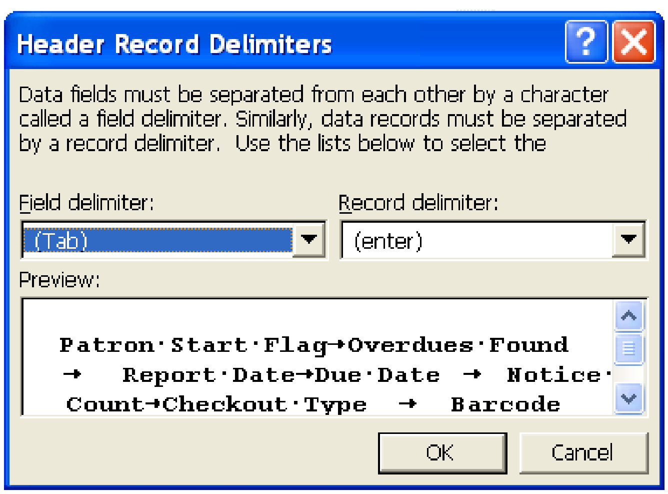


Figure 5-4. Defining Header Record Delimiters in Microsoft Word

4. Set the Field Delimiter to (Tab).

5. Set the Record Delimiter to (enter). Click OK.

   The mail merge template appears.

Virtua Library
1701 Kraft Dr.
Blacksburg, VA 24060
(540) 557-1200

«AddressBlock»

«GreetingLine»

Our records indicate that the following items are overdue. Please return these items as soon as possible. You may be fined and/or have your library privileges revoked if the items are not returned in a timely manner.

If you believe our records are in error, please contact our Circulation Desk immediately at circulation@library.vtls.com.

Thank you.

Title	Author	Item Barcode	Due Date	Replacement Cost
«Title»	«Author»	«Item_Barcode»	«Due_Date»	«Estimated_PriceReplacement_Cost»

Figure 5-5. Sample Mail Merge Template for Overdue Notices

Note: The text of the first row of data may appear in the non-repeating fields instead of the field names.

6. To see the field names of the non-repeating fields, do the following:
   - Select Tools → Options.
     The Options window appears (*Figure 5-6*).

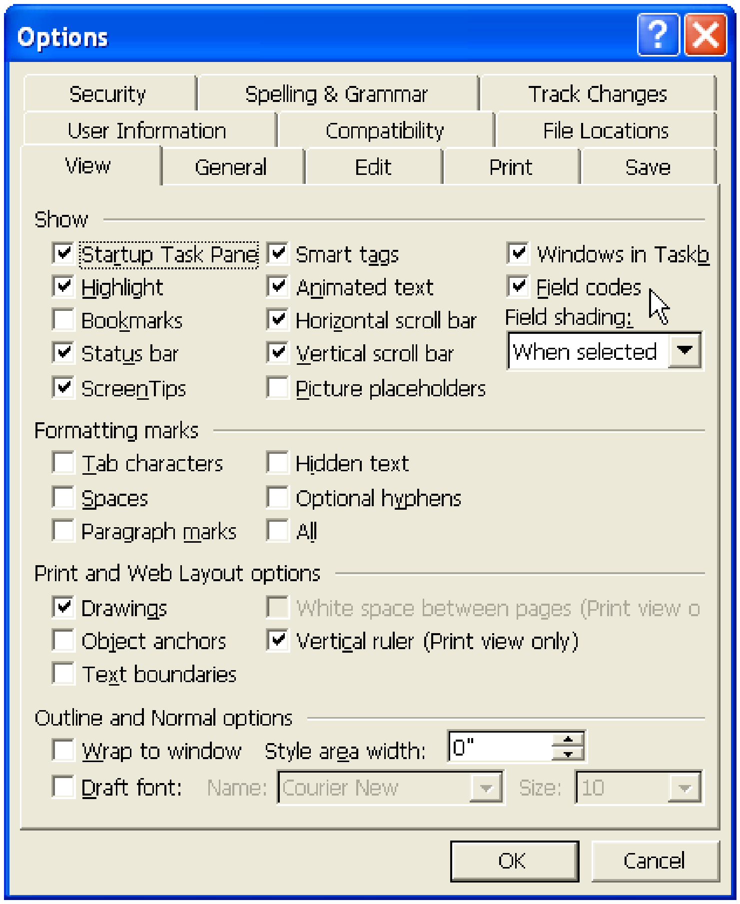
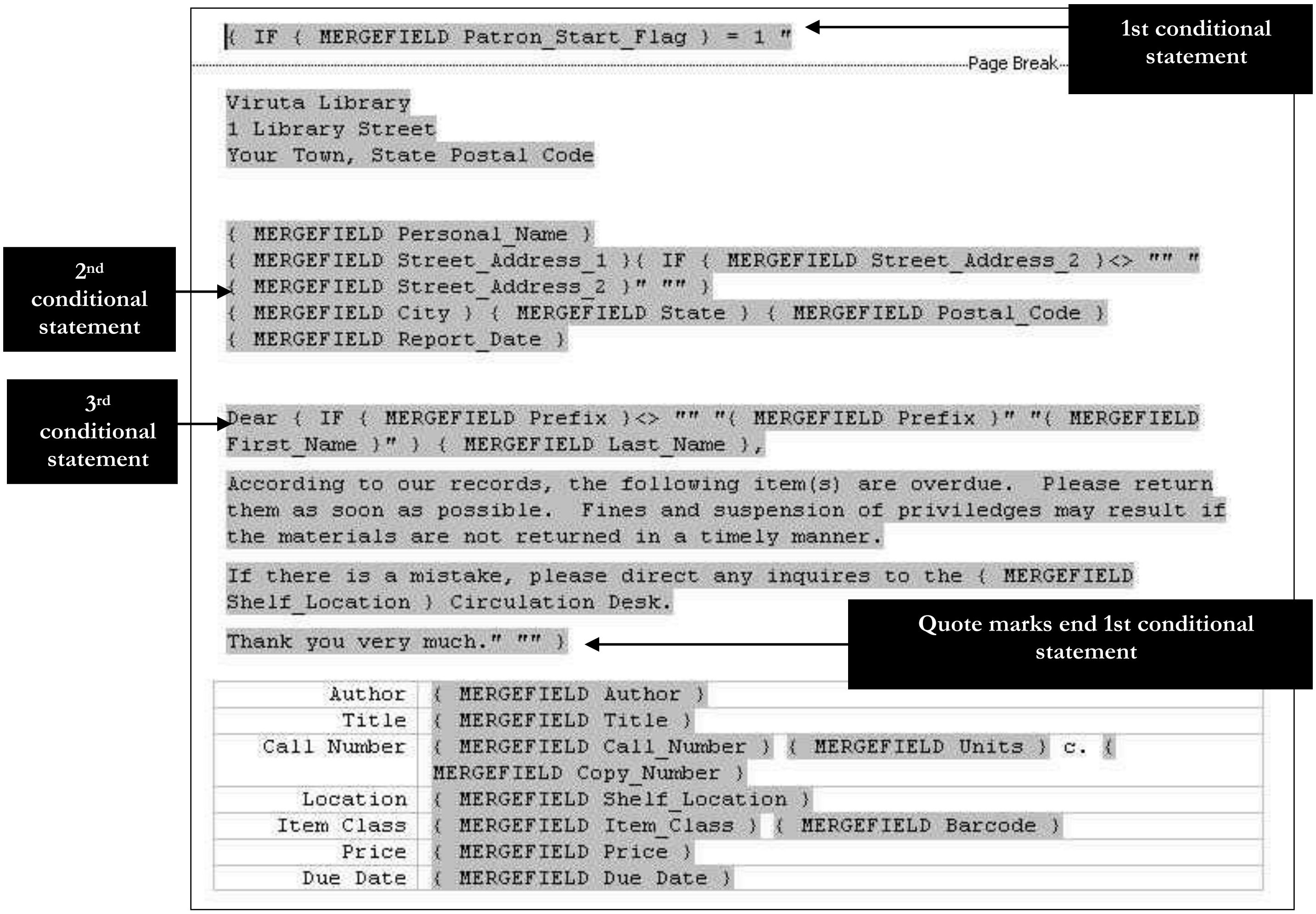


Figure 5-6. Microsoft Word XP Options

- Click the View Tab, and then check the Field Codes box. This will show the field codes in the non-repeating fields.

Note: To edit the template, the field names option must be turned on. This setting is persistent; it will remain on and affect other documents. After editing the template, remember to turn it off.



{ IF { MERGEFIELD Patron_Start_Flag } = 1 "

Viruta Library
1 Library Street
Your Town, State Postal Code

{ MERGEFIELD Personal_Name }
{ MERGEFIELD Street_Address_1 }{ IF { MERGEFIELD Street_Address_2 }<> "" "
{ MERGEFIELD Street_Address_2 }" "" }
{ MERGEFIELD City } { MERGEFIELD State } { MERGEFIELD Postal_Code }
{ MERGEFIELD Report_Date }

Dear { IF { MERGEFIELD Prefix }<> "" "{ MERGEFIELD Prefix }" "{ MERGEFIELD First_Name }" } { MERGEFIELD Last_Name },

According to our records, the following item(s) are overdue. Please return them as soon as possible. Fines and suspension of priviledges may result if the materials are not returned in a timely manner.

If there is a mistake, please direct any inquires to the { MERGEFIELD Shelf_Location } Circulation Desk.

Thank you very much." "" }

Author	{ MERGEFIELD Author }
Title	{ MERGEFIELD Title }
Call Number	{ MERGEFIELD Call_Number } { MERGEFIELD Units } c. { MERGEFIELD Copy_Number }
Location	{ MERGEFIELD Shelf_Location }
Item Class	{ MERGEFIELD Item_Class } { MERGEFIELD Barcode }
Price	{ MERGEFIELD Price }
Due Date	{ MERGEFIELD Due_Date }

Figure 5-7. Elements of a Microsoft Word Template

1. Edit the text of the notice, making sure that you do not delete any parts of the *first conditional statement* used to append multiple records to one letter. You can edit the other two conditional statements if desired.

2. If you want your letters to include fields that are not in the default template but are in the report output, you will need to insert them. To do this, click the Insert Merge Field icon on the Mail Merge toolbar.

Figure 5-8. Mail Merge Toolbar in Microsoft Word XP

A list of all available fields appears on the Insert Merge Field menu in Word (*Figure 5-9*).

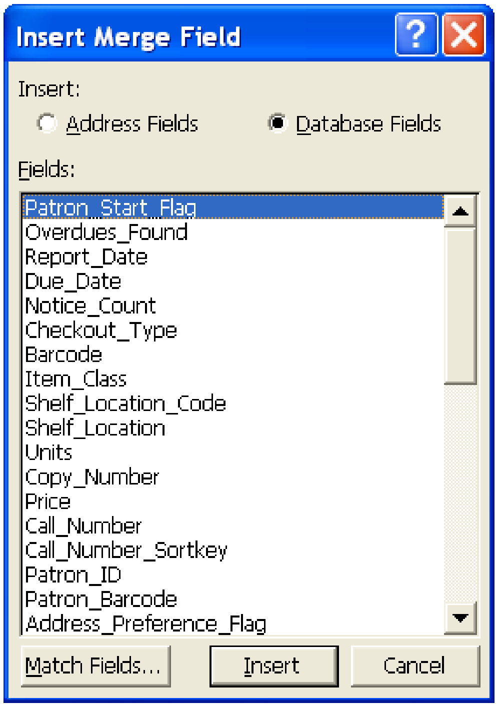


Figure 5-9. Insert Merge Field Window in Microsoft Word

5.1.4 Step 4: Begin the Mail Merge

1. Select Tools → Letters and Mailings → Mail Merge Wizard from the main menu in Word (*Figure 5-10*).

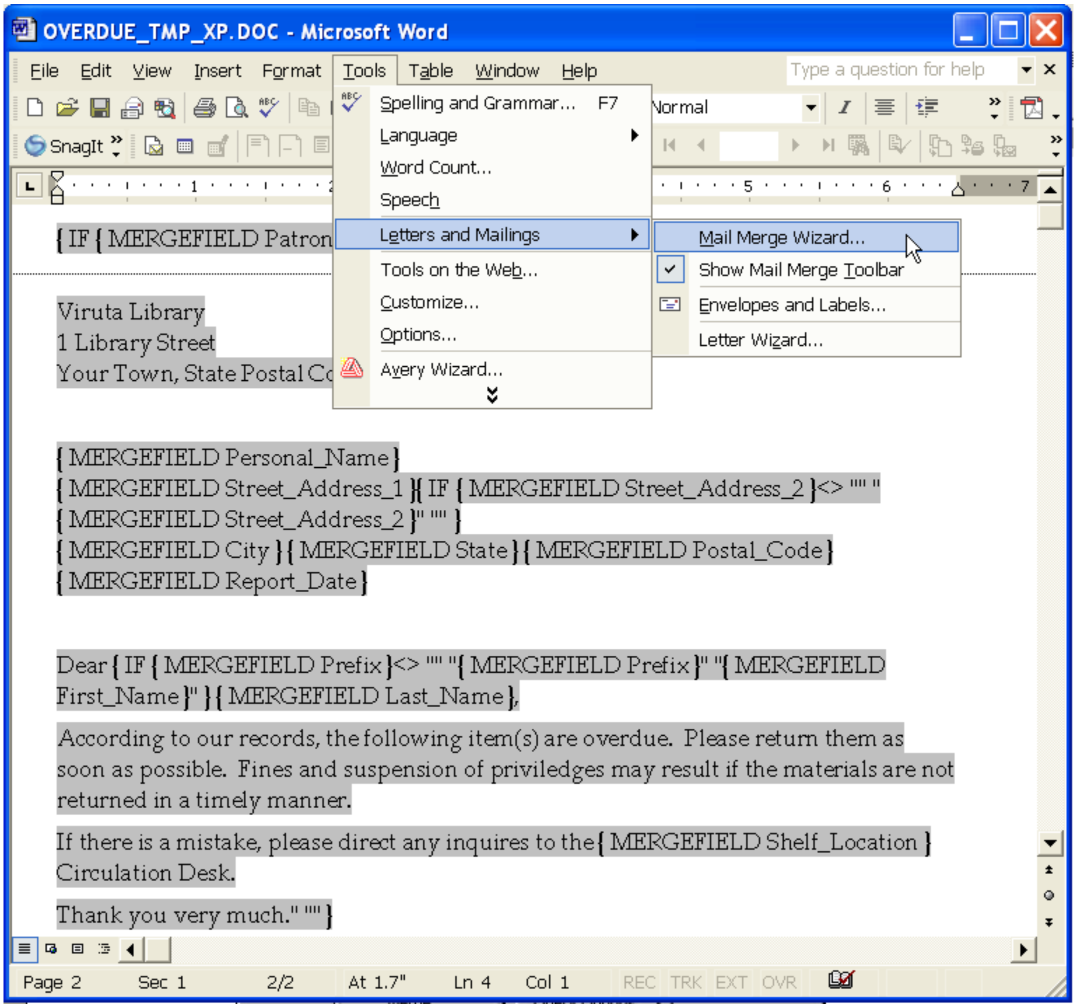


Figure 5-10. Starting the Mail Merge Wizard in Microsoft Word XP

The Mail Merge Menu appears to the right of the template.

2. If it is not the default, select Directory from the list of document types. This document type allows multiple records (e.g., multiple overdue items associated with one patron) to be appended to a single letter.

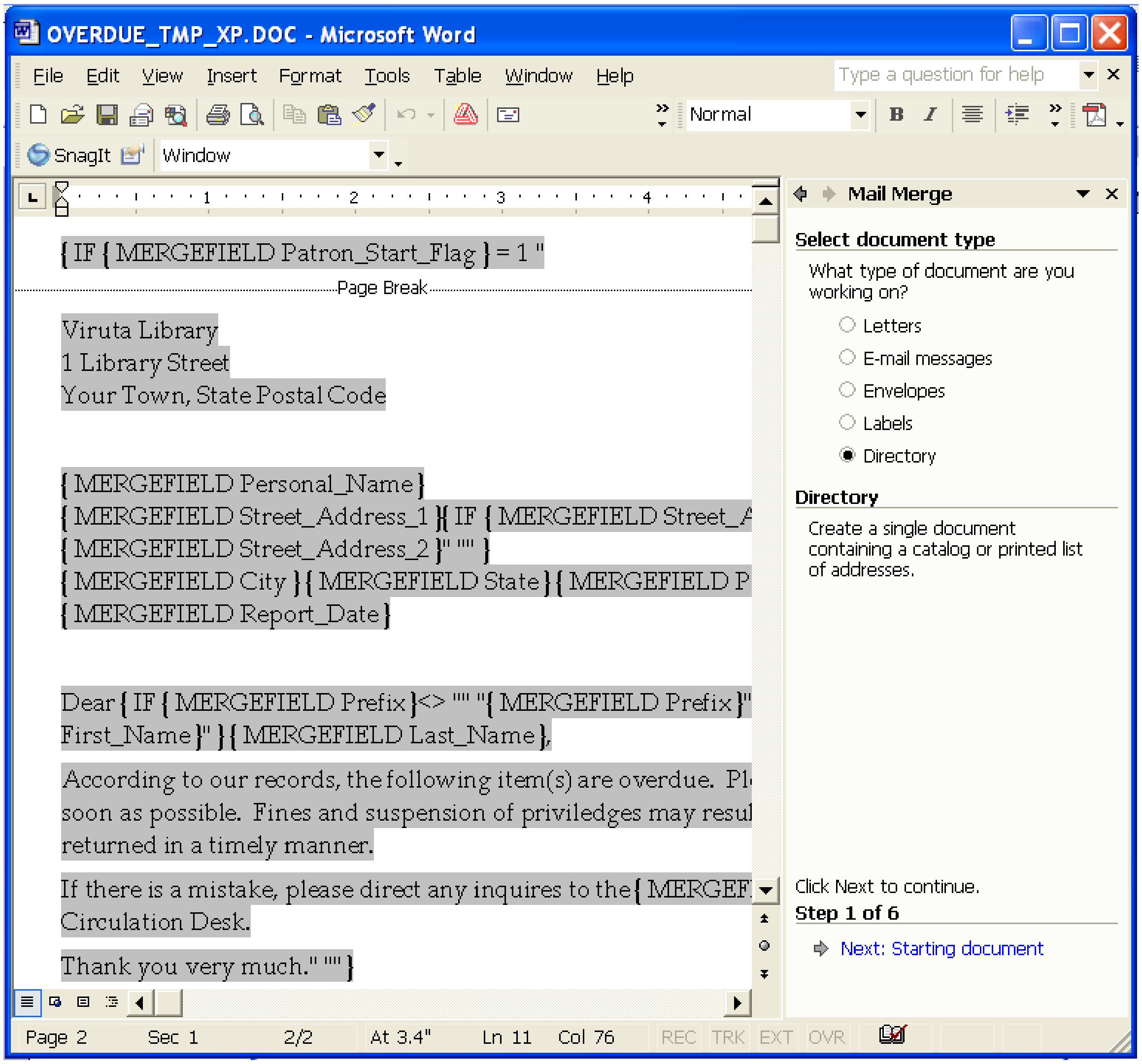


Figure 5-11. Mail Merge Wizard in Microsoft Word XP - Step 1

3. At the bottom of the Mail Merge Wizard, you will see that you are on **Step 1 of 6**. (*Figure 5-11*) Click Next to continue.

The screen for **Step 2: Starting document** of the Mail Merge Wizard appears (*Figure 5-12*).

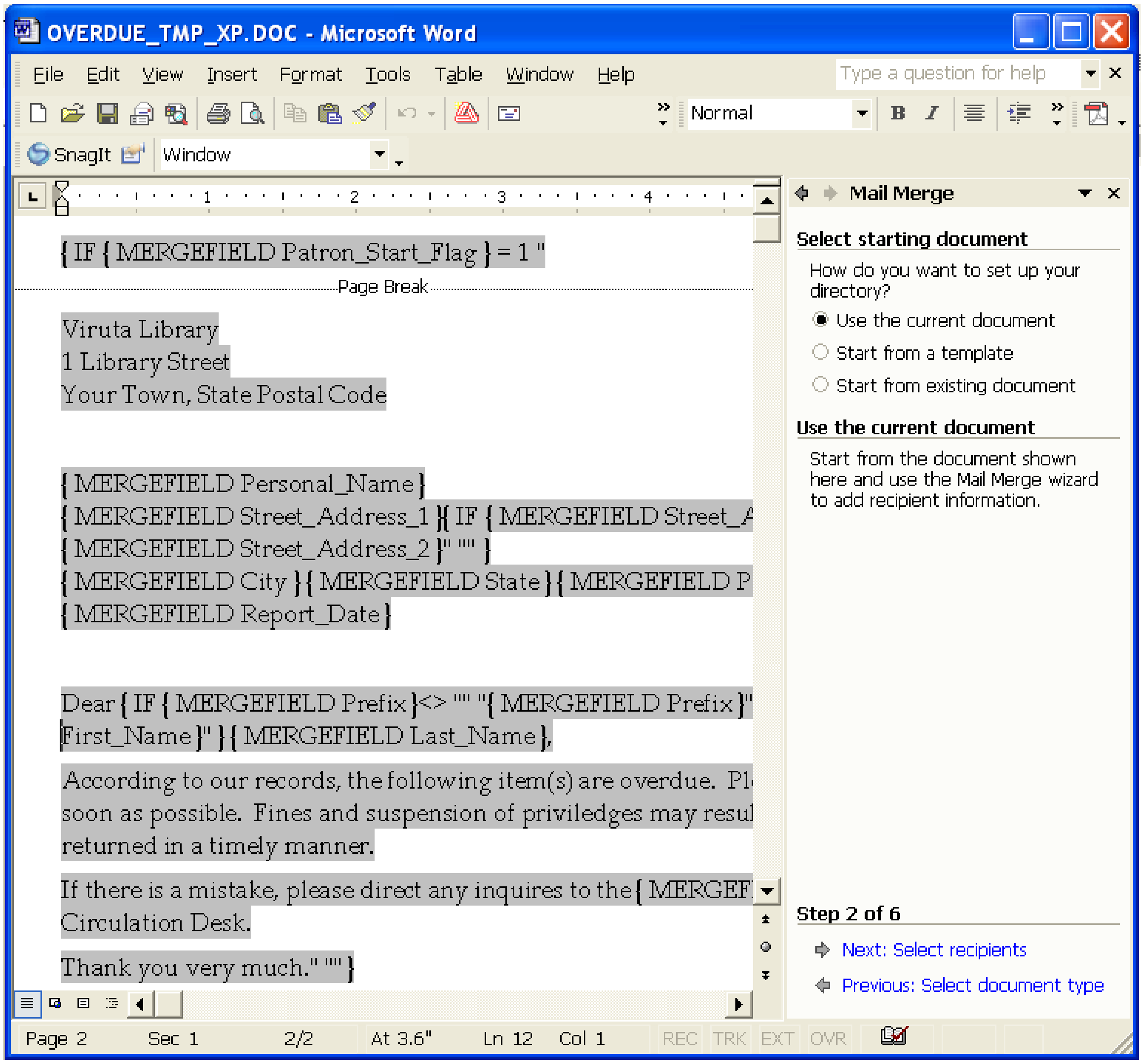


Figure 5-12. Mail Merge Wizard in Microsoft Word XP - Step 2

4. If it is not the default, select Use the Current Document from the menu of options.

5. At the bottom of the Mail Merge Wizard, you will see that you are on **Step 2 of 6**. Click Next to continue.

The screen for **Step 3: Select Recipients** of the Mail Merge Wizard appears (*Figure 5-13*).

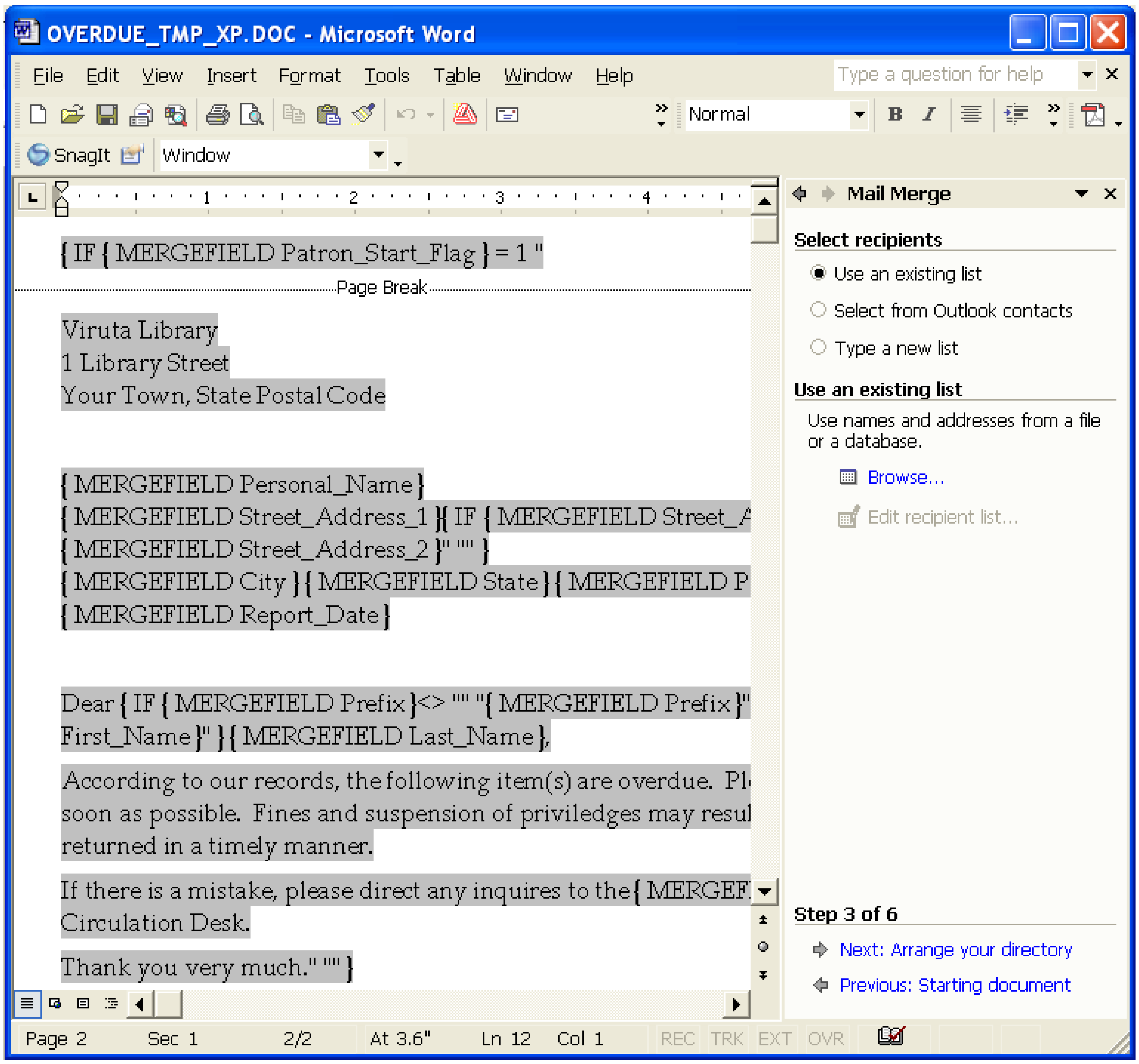


Figure 5-13. Mail Merge Wizard in Microsoft Word XP - Step 3

6. If it is not the default, select Use an Existing List from the menu of options.

7. At the bottom of the Mail Merge Wizard, you will see that you are on **Step 3 of 6**. Click Next to continue.

The screen for **Step 4: Arrange your directory** of the Mail Merge Wizard appears (*Figure 5-14*).

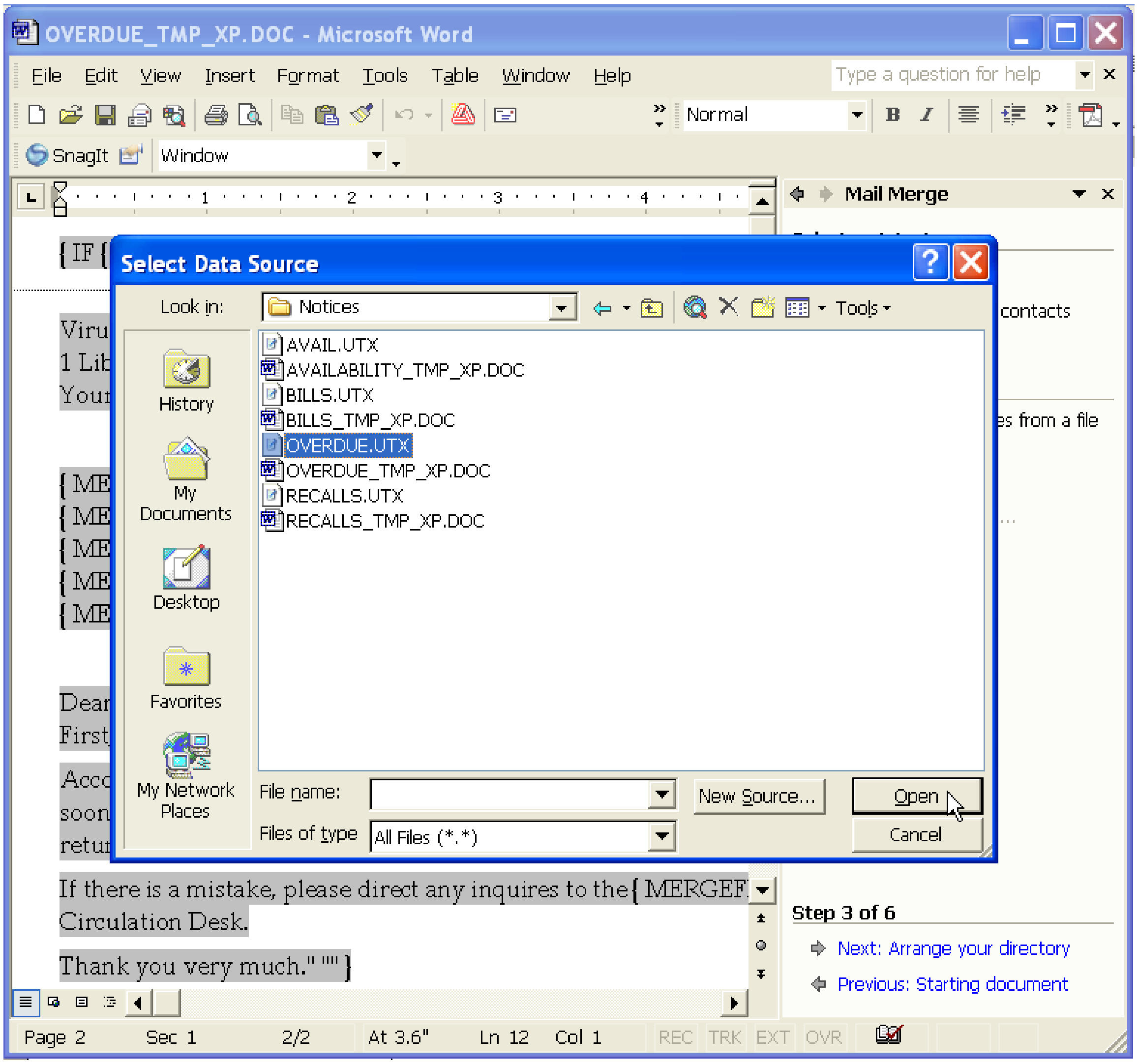


Figure 5-14. Mail Merge Wizard in Microsoft Word XP - Selecting a Data Source

8. Navigate to the directory that contains the **.utx** output from the InfoStation report.

9. Select the **.utx** file and click Open.

> **Note:** To see the **.utx** files, you may need to set the Files of Type field to All Files (*.*).

The File Conversion window appears (*Figure 5-15*).

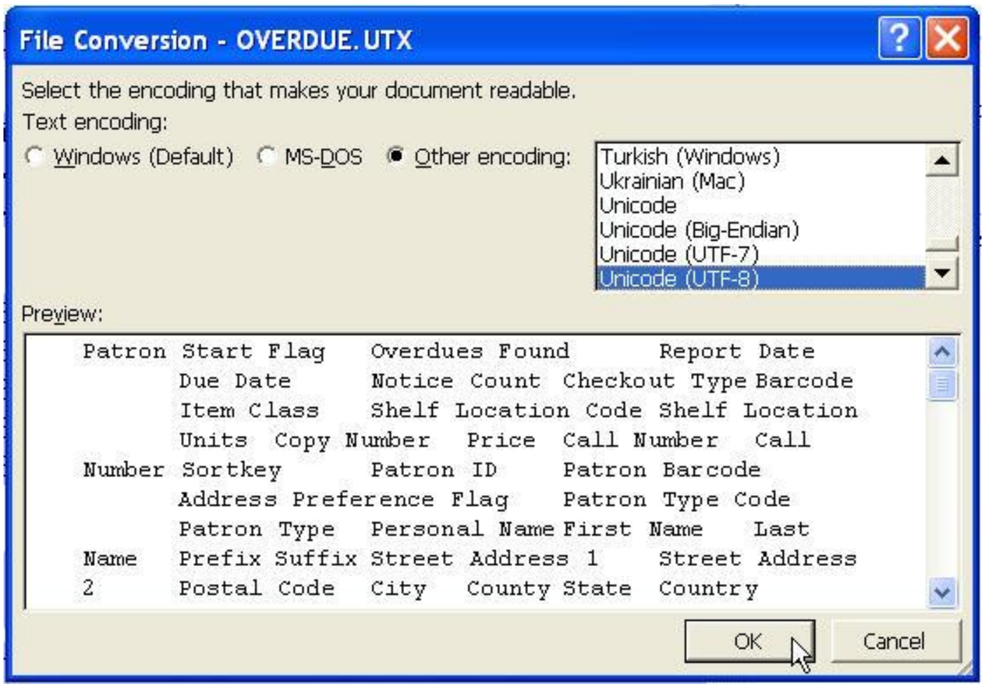


Figure 5-15. File Conversion Window in Microsoft Word

10. Set the Text Encoding to Unicode (UTF-8) if it is not the default. Click OK

The Header Record Delimiters window appears (*Figure 5-16*).

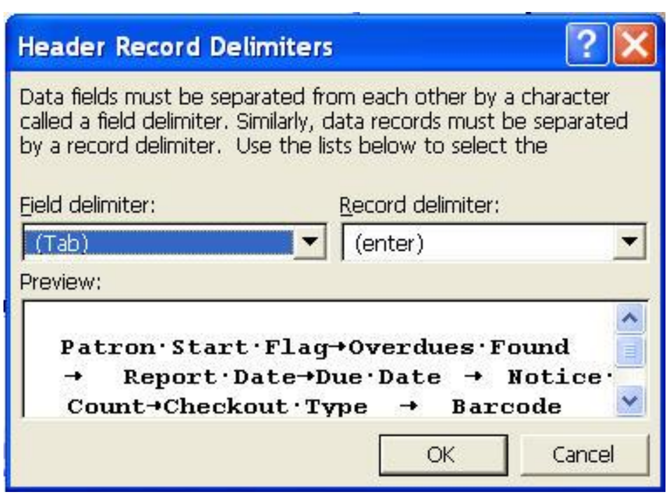


Figure 5-16. Header Record Delimiters Window in Microsoft Word

11. Set the Field Delimiter (Tab).

12. Set the Record Delimiter to (enter). Click OK.

    The Mail Merge Recipients window appears (*Figure 5-17*).

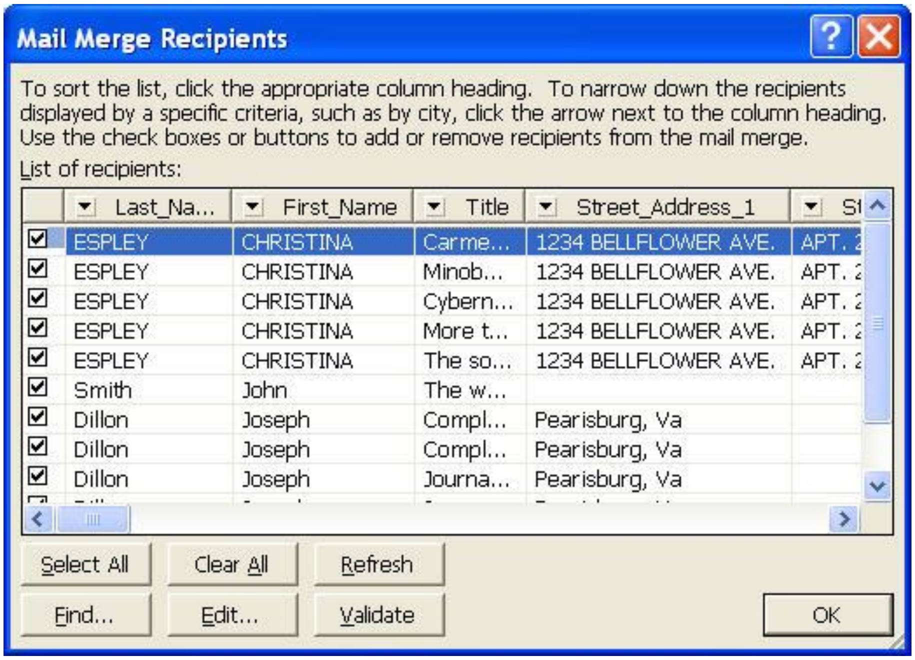


Figure 5-17. Viewing Mail Merge Recipients in Microsoft Word XP

Note: Before generating the **.utx** file, you set sort options in InfoStation reports. Re-setting your sort options is NOT recommended as it can cause the notices to generate incorrectly.

13. Click OK to accept the default sort.

The screen for **Step 5: Preview your directory** of the Mail Merge Wizard appears (*Figure 5-18*).

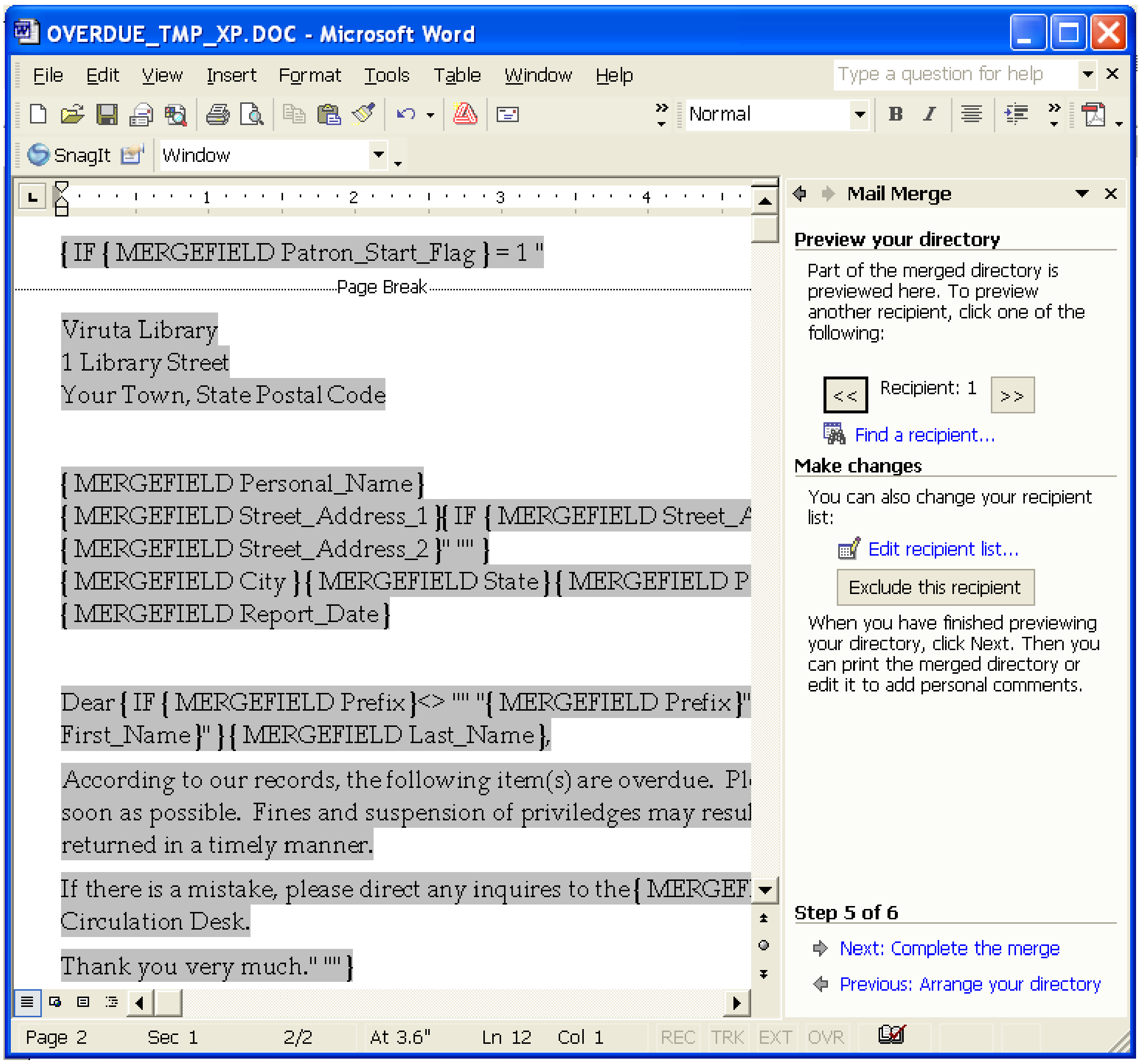


Figure 5-18. Mail Merge Wizard in Microsoft Word XP - Step 5

Note: From this screen you can preview and edit (not recommended) your **.utx** data file.

14. At the bottom of the Mail Merge Wizard, you will see that you are on **Step 5 of 6**. Click Next to continue.

The screen for **Step 6: Complete the merge** of the Mail Merge Wizard appears (*Figure 5-19*).

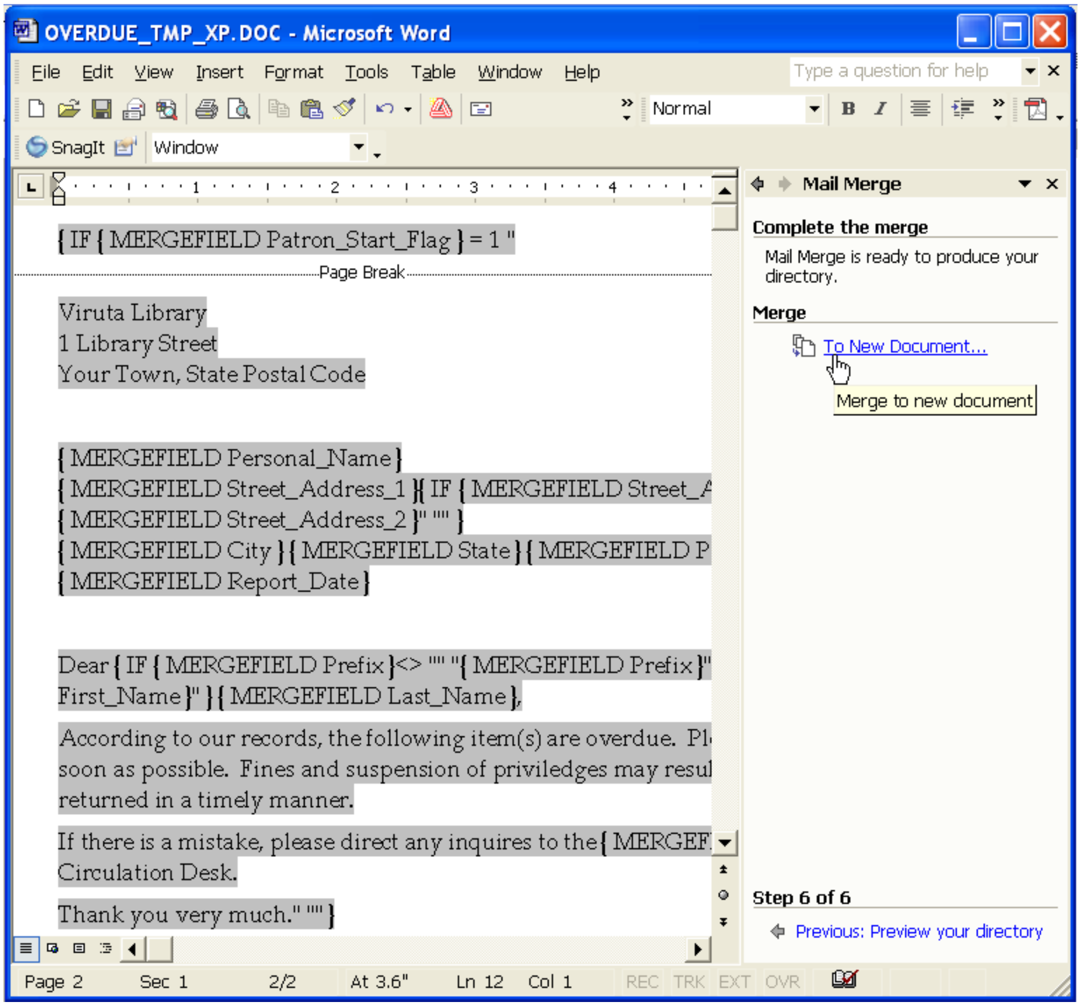


Figure 5-19. Mail Merge Wizard in Microsoft Word XP - Step 6

15. Click the To New Document link.

    The Merge to New Document window appears (**Error! Reference source not ound.**).

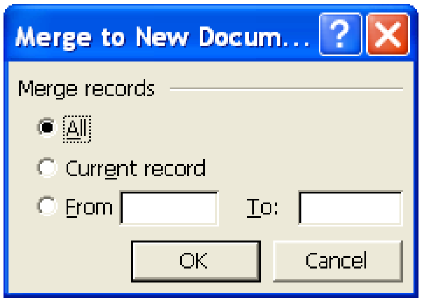


Figure 5-20. Merge to New Document Window in Microsoft Word XP

16. Select the records to merge.

- To test your template with a small number of records, click the From radio button and enter a range of record numbers.

  Note: To make sure everything is working correctly, you will want to select a small set of records. For every incorrect record, Word generates an error message that must be cleared, so running a small sample first is usually a good idea.

- To run the final notices, select an output option. Then select the All radio button from the Merge Records option, and click OK.

6. Appendix C - Troubleshooting Circulation Reports

Sometimes, your report configurations may not produce the results that you expect. This appendix provides solutions to some of the most commonly encountered InfoStation problems.

This appendix covers the following topics:

6.1 About Database Requirements for Notice-generating Reports

For your notice-generating Circulation reports to work properly, your patron records must contain the following information:

- Primary E-mail Address (tag 271 first indicator 1, subfield $a)
- Primary Postal Address (tag 270 first indicator 1)
- Address Preference (008 fixed fields, position 10)
- Language Preference (tag 100, subfield $l OR tag 110, subfield $l)

If this information does NOT exist in your patron records . . .

- Patron notices may be generated improperly.
- Patron information may NOT appear in the output.

6.2 A Note about Address Blocks and Patron Notices

You can enter manual blocks in the 043 tag and in the 007 fixed fields of the patron record. Manual blocks lets you block patrons from certain circulation transactions due to conditions that cannot be predicted by the system.

An *address* block indicates that a problem exists with the patron's address and that Circulation notices should NOT be generated for the patron because they might be undeliverable.

When you run an InfoStation report that would normally generate a notice for a patron who has an address block, the information from the notice is instead written to a file named **[report type]blockFile**, where **[report type]** represents the notice type code (e.g., overdue, recall, etc.). Notice type codes are defined by **CircReport.exe** as follows:

- **1** - Review notice
- **2** - Overdue notice
- **3** - Recalled overdue notice
- **6** - Bill notice
- **7** - Recalled bill notice
- **8** - Recall notice
- **a** - Availability notice
- **x** - Expired request notice

So, for example, the file **8blockFile** will include information about blocked patrons who qualify for recall notices.

Each block file is written to the directory specified by the VTLS_TEMP setting, which is defined in the **constants.cfg** file of your InfoStation installation.

6.3 When Notice-generating Reports Generate "No Records Found"

InfoStation generates results for notice-generating reports using **CircReport.exe**, an executable that extracts data from and modifies data in the database. When you run a configuration of a notice-generating Circulation report, InfoStation sends the options specified in the configuration file to **CircReport.exe**, which uses those options to query the database. **CircReport.exe** then returns the information to InfoStation, which displays or sends the results to you.

When you run a notice-generating report, InfoStation looks for **CircReport.exe** in the directory defined for the **exe_dir** variable in the **databases.cfg** file. **CircReport.exe** must exist in the correct directory so that InfoStation can find the executable at run time.

Note: Each database that you configure for InfoStation has its own **exe_dir** variable, which you define at installation.

If InfoStation cannot find **CircReport.exe** in the specified directory, it returns the message “No records found” to your screen. If this happens, you should check to make sure that **CircReport.exe** exists in your **exe_dir** directory.

- If you do not have **CircReport.exe**, contact Innovative Customer Services to obtain the executable.
- If the **exe_dir** setting is pointing to the wrong directory, edit the **databases.cfg** file to specify the correct path.

Important: If you discover that you need to update the **exe_dir** setting in the **databases.cfg** file, do so by running the InfoStation installation script. In this way, the **exe_dir** setting will automatically be updated for all existing report configurations. If you update the **exe_dir** setting by editing the **databases.cfg** file directly, your existing report configurations will continue to point to the OLD directory.

For additional information on **CircReport.exe**, see the *Virtua System Management: Reporting User’s Guide.*

6.4 When You Get Different Results for Different Output Formats

For notice-generating reports, you will usually get different results depending on the Output Format you use. **This is normal.**

Note: *Non*-notice-generating reports should produce the same results in ALL Output Formats.

To be included in HTML output, an item must be eligible for inclusion in the report AND it must meet the configuration criteria. For example, to be included in the HTML output of the Availability report, a requested item must be . . .

- On Hold (status 4705)
- Shelved at one of the locations selected in the Locations parameter.
- Requested by a patron whose patron type matches one of those selected in the Patron Types parameter.

For an item to be included in e-mail output, it must meet the criteria described above AND the associated patron record must contain a *valid* primary e-mail address (tag 271, first indicator 1, subfield $a). If a valid e-mail address does not exist for the patron, that record is omitted from the output.

This requirement for e-mail output means that some results that appear in HTML output may NOT appear in e-mail output. You can use the E-mail Validation report to check patron records for valid e-mail addresses. For details, see the section "E-mail Validation Report" in this guide.

Note: The Honor Address Preference parameter can also determine which items appear in e-mail output.

6.5 When the Bills Report Does Not Generate Results

Items become eligible for billing after ALL overdue notices have been sent. This means that before the Bills report will generate results, a patron must have received the Max Number Of Notices, as specified in the Location + Patron + Item Matrix in the Profiler.

Important: For a patron's notice count to be incremented, you *must* run reports in *update mode*. If you run the report without updating the database, the notices are not recorded as having been sent.

6.6 When Patron Information Does Not Appear In the Output

Provided that your reports AND output templates are configured properly, if the expected patron information (e.g., address and telephone number) does not appear in your report output, your patron records may be set up incorrectly.

To generate patron information, InfoStation requires that all the appropriate tags, indicators, and subfields exist in your patron records. If they do NOT exist, InfoStation may not return the requested information.

For example, if you configure a report to return a patron's primary telephone number, InfoStation returns the information it finds in 270 tag first indicator 1, subfield $k. If subfield, subfield $k does not exist, or if the first indicator of the 270 tag is not **1** (one), InfoStation will NOT return any information.

For a complete list of the patron record tags that InfoStation uses to return results, see the section "Data Elements and Variables for Notice-generating Reports" in this guide.

6.7 When Recall Notices Are Not Generated

If you cannot generate recall notices for patrons who have overdue items, make sure that the Long Loan Flag is turned OFF in the Virtua Profiler.

When a request is placed on an overdue item, the Long Loan Flag determines whether the borrowing patron becomes eligible to receive a *recall* notice. If the Long Loan Flag is set turned ON, the notice-generation schedule is uninterrupted and the patron does NOT receive a recall notice.

Note: The Long Loan Flag does not affect the generation of recall notices for non-overdue items.

For additional information on the Long Loan Flag, see the *Virtua Profiler/Circulation Parameters User's Guide.*

6.8 When Electronic Notices Are Undeliverable

You can use the E-mail Validation report to find invalid e-mail addresses in the database. When you find an invalid e-mail address, you should . . .

- Set the patron's address preference to *postal* so that InfoStation will generate paper notices until the patron supplies you with the correct e-mail address.
- Contact the patron to get the correct e-mail address.

While the E-mail Validation report will help you make sure that your patron records contain valid e-mail addresses, the report considers addresses valid or invalid based *only* on format. A valid e-mail address has the format x@y.z (e.g., smith@iii.com) or w@x.y.x (e.g., smith@mail.iii.com). As long as an e-mail address uses a valid format, it is considered "valid" by InfoStation, even if the address cannot actually receive mail (e.g., if the e-mail account has been canceled).

Whenever InfoStation sends an electronic notice to an e-mail address that uses a valid format, InfoStation considers the message both sent AND received. This means that when you run a notice-generating report in update mode the patron's notice count is incremented even if an electronic notice is undeliverable.

Undeliverable e-mail notices are returned to the **mail_from_address** that you specified at installation. This address is stored in the **constants.cfg** file. Whenever an undeliverable notice is returned to this address, you should print it out and send in to the patron's postal address.

Note that until the patron supplies you with the correct address, electronic notices will continue to be undeliverable to that patron. So in addition to mailing the patron's notice, you may also want to change the patron's address preference to postal. After the patron supplies you with a valid e-mail address, you can change the address preference back to e-mail.

7. Appendix D – Tips for Using Inventory Control

Although every library will have its own way of doing inventory control, the Virtua Inventory Control Utility will work the same way regardless of the workflow.

7.1 Preparing to Take Inventory

The most important part of the inventory process is preparing for it. Here are some questions to ask yourself before doing an inventory.

Do I want to weed the collection first?

Weeding out items that have not circulated for some time is not necessary, but some libraries find it useful. You may want to review your collection to see which items have not circulated for a library-specified amount of time, say, for five to seven years, and remove them from the collection. Using the InfoStation Bibliographic Record List report, you can retrieve a list of books that have never circulated or that have circulated infrequently during a specific time period.

Are our shelved books in order?

The InfoStation Inventory Control Utility works with call number ranges. To make sure each of your book sections is in call number order, alphabetical order, etc., your staff needs to complete a shelf reading.

What kind of scanner should I use?

You can use a hand-held scanner, an optical scanner connected to a laptop, a light pen connected to a laptop, or a smart phone. In other words, you can use any device that can read a barcode and create a text file of item barcodes.

After scanning a section of books, do I need to isolate the area?

After you scan a book range, you must keep that section off limits until the inventory file is processed. If you allow check outs or re-shelving of returned items in this section, the inventory file that was created will be void and your inventory report will be incorrect when you run it the second time.

7.2 Taking Inventory

When you have your plan in place for taking inventory, the next step is to start the inventory process. Here are some guidelines to follow.

1. First, scan the collection.

   Innovative recommends that you scan manageable sections at a time, keeping the materials in call number order. For example, you might choose to scan only two or three complete call number ranges, or you might scan an entire row of shelving. Either way, this number of items will produce a report that is manageable in size. On the other hand, if you choose to do half of your library, the report will take a significant amount of time to run.

   After you scan an area, the scanner or computer will have a file of item barcodes.

2. Use the file of item barcodes as input for the InfoStation Inventory Control Utility.

3. Run the utility and create a report.

4. Take the report to the scanned area and reconcile any issues that the report shows.

5. After reconciliation, repeat steps 1-4 using an updated list of item barcodes. Repeat this step until you are satisfied with the results of the report.

6. As a last step, run the utility again with the Update Database option enabled. In this way, InfoStation will automatically update the statuses of those items that are lost or missing.

7. Move on to the next section of books and repeat the process.

8. Appendix E - Changes in this Guide

8.1 Changes for Version 16.1

No changes were made.

8.2 Changes for Version 15.2

"Parameters Available for the Excessive Requests Report" - Updated to add two new report-specific parameters (Item Class and Collection Code) to the list of parameters available for the Excessive Requests report.

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