

**Reference
Guide**



Integrated Library System

InfoStation[®]
Serials Reports

VIRTUA ILS – INTEGRATED LIBRARY SYSTEM

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

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

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

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

- [Bindery Pull List Report](#)
- [Canceled Serials Report](#)
- [Serials Acquisitions Report](#)
- [Serials List Report](#)
- [Serials Snapshot Report](#)
- [Serials Without Holdings Report](#)

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

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

- *InfoStation User's Guide* - Provides step-by-step instructions for logging in to InfoStation, creating report configurations, running reports, scheduling reports, and customizing reports.
- *InfoStation Reference Guide* - Provides detailed descriptions of Report-specific Parameters and details on the InfoStation directory structure.
- *InfoStation/Circulation Reports Reference Guide* - Provides details on the reports that belong by default to the Circulation Report Group.
- *InfoStation/Acquisitions Reports Reference Guide* - Provides details on InfoStation reports related to the Acquisitions subsystem.
- *InfoStation/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.
- A description of the Virtua settings that the report uses to generate results.
- Descriptions of the data elements that a report retrieves by default. In this guide, data elements are identified by their default labels and listed in alphabetical order.

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

- A list of the variables that you can use to edit output templates. Where appropriate, we include variables for data elements included by default in the MARC Tag List.
- Descriptions of the output templates that are available for the report, including each template's . . .
 - ◆ Name as it appears on the Configuration screen.
 - ◆ Location in the `/usr/vtls/virtua/web rpt_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. Bindery Pull List Report

The Bindery Pull List report generates a list of received serials issues that meet the holdings location criteria and are “Ready for Binding” at the time the report is run. In Figure 2-1, we show an example of HTML output from the Bindery Pull List report.

Bindery Pull List				
Virtua Library				
1 Library Street				
Your Town, State or Province Postal Code				
Your Country				
Holdings Location	Title	Issue	Holdings Call Number	Bibliographic Call Number
Brussels Library	NASPA.	v. 104 no. 7 July 2006		
Brussels Library	NASPA.	v. 104 no. 6 June 2006		
Brussels Library	NASPA.	v. 104 no. 5 May 2006		
Brussels Library	NASPA.	v. 104 no. 4 April 2006		
Brussels Library	NASPA.	v. 104 no. 3 March 2006		
Brussels Library	NASPA.	v. 104 no. 2 February 2006		
Brussels Library	NASPA.	v. 104 no. 1 January 2006		
Brussels Library	NASPA.	v. 103 no. 9 September 2005		
Brussels Library	NASPA.	v. 103 no. 8 August 2005		
Brussels Library	NASPA.	v. 103 no. 7 July 2005		
Brussels Library	NASPA.	v. 103 no. 6 June 2005		
Brussels Library	NASPA.	v. 103 no. 5 May 2005		
Brussels Library	NASPA.	v. 103 no. 4 April 2005		
Brussels Library	NASPA.	v. 103 no. 3 March 2005		

Figure 2-1. Bindery Pull List HTML Output

2.1 Parameters Available for the Bindery Pull List Report

The Bindery Pull List report offers the following Report-specific Parameters:

- **Holdings Locations** (*required*) - Lets you limit your results to one or more holdings locations. For a holdings record to appear in the output, its 852 tag, subfield \$b, must contain one of the locations you select for the report configuration.
- **Sort Parameters** (*required*) - Let you sort report output on the following values:
 - ◆ Holdings Call Number
 - ◆ Bibliographic Call Number
 - ◆ Holdings 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 not configured to retrieve any bibliographic information.

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

2.2 Virtua Settings Related to the Bindery Pull List Report

The Bindery Pull List report generates a list of received serials issues that are assigned the status “Ready for Binding.” This status appears on the Received tab of the Serials Check-in window in the Virtua client (*Figure 2-2*).

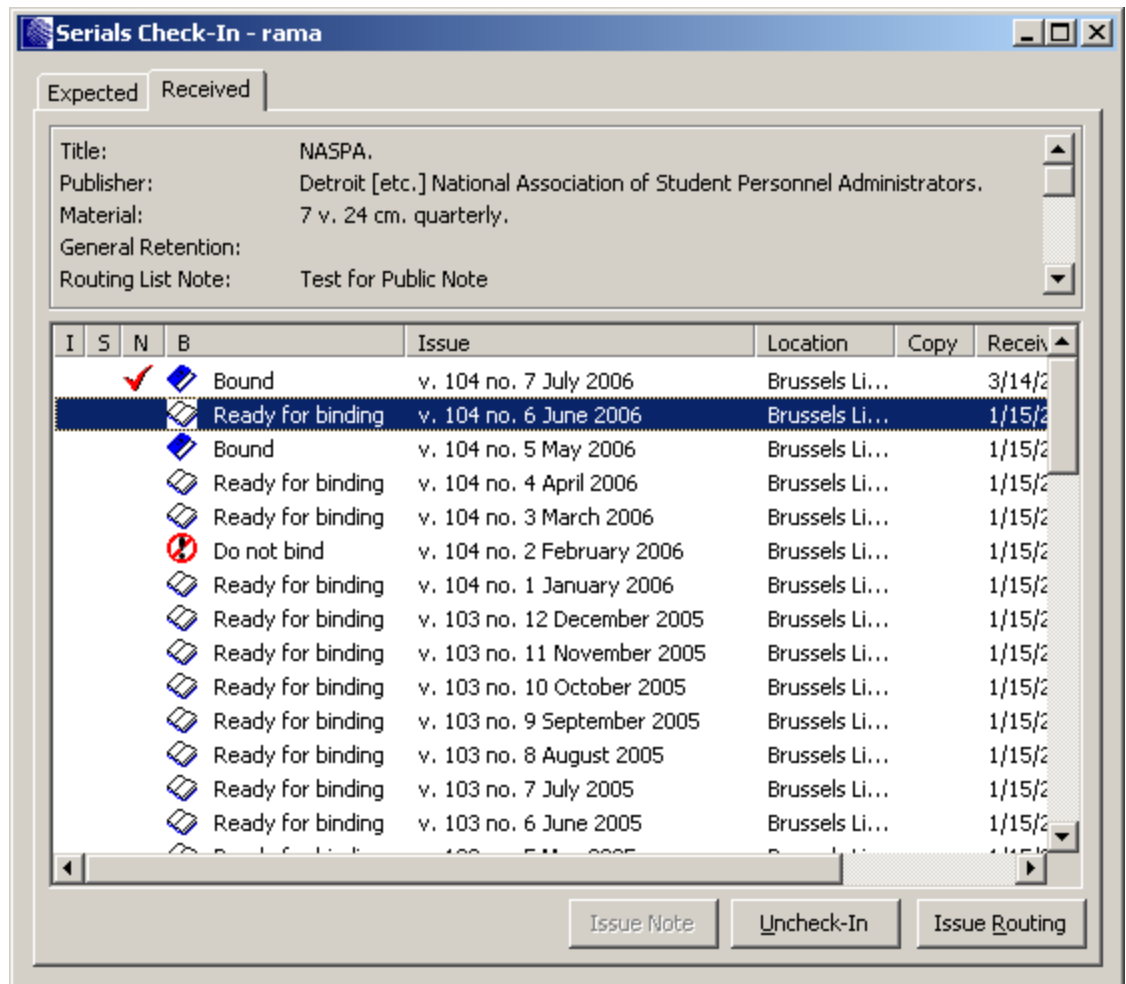


Figure 2-2. Serials Check-in Window - Received Tab

The Bindery Pull List report includes in the output all issues that are “Ready for Binding” and the time the report is run.

2.3 Data Elements and Variables for the Bindery Pull List Report

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

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

Data Element	Variable	Description and Source
Bibliographic Call Number	bib_call_number	The bibliographic-level call number of the holdings record.
Holdings Call Number	holdings_call_number	The holdings-level call number, taken from the 852 tag, subfields \$h-\$j, of the holdings record.
Holdings Location	holdings_location	The location associated with the serial, taken from the 852 tag, subfield \$b of the holdings record.
Issue	issue	The information associated with the serial issue, taken from the appropriate occurrence of the 863 tag in the bibliographic record.
Title	title	The title of the serial, taken from the 245 tag, subfield \$a of the bibliographic record.

2.4 Output Templates for the Bindery Pull List Report

Location: /usr/vtls/virtua/webprt_XX_x/Ser/Ser_5/[filename].tem

Template	Contribution to Output
html_page.tem	Provides the overall framework of the HTML output, including the labels for each column in the table of output.
html_row.tem	Returns information related to a single serials issue.
email_page.tem	Provides the overall framework of the e-mail output.
email_row.tem	Returns information related to a single serials issue, including both labels and data elements.

3. Canceled Serials Report

The Canceled Serials report generates a list of serials subscriptions that have been canceled. In Figure 3-1, we show an example of HTML output from the Canceled Serials report.

Canceled Serials							
Virtua Library 1 Library Street Your Town, State or Province Postal Code Your Country							
Canceled Serials Matching the Report Criteria: 14							
Bib ID	790544	Call Number	P/17234/IMECC	Title	Annual reviews in control	ISSN	1367-5788
Holdings ID	1069	Location	AM Akademia Muzyczna, Katowice	Other Classification			
Vendor Name		Acquisition Date	011213	Cancel Date	0112	Acquisition Method	p
Bib ID	118297	Call Number	BF1 .J67	Title	The Journal of psychology.	ISSN	0022-3980
Holdings ID	655	Location	BS Biblioteka Slaska, Katowice	Other Classification			
Vendor Name		Acquisition Date	980930	Cancel Date		Acquisition Method	c

Figure 3-1. Canceled Serials HTML Output

To qualify for inclusion in the report output, a holdings record must contain at least one of the following values in the 008 fixed fields:

- A cancel date in positions 08-11.
- A 5 (five) in position 06.

In the Canceled Serials report, Holdings Locations, Vendors, and Acquisition Methods are required parameters. In this way, the output contains the list of canceled serials that meet the location, vendor, and acquisition method criteria set for the report configuration.

3.1 Parameters Available for the Canceled Serials Report

The Canceled Serials report offers the following Report-specific Parameters:

- **Holdings Locations** (*required*) - Lets you limit your results to one or more holdings locations. For a holdings record to appear in the output, its 852 tag, subfield \$b, must contain one of the locations you select for the report configuration.
- **Vendors** (*required*) - Lets you limit your results to holdings associated with one or more vendors. For a holdings record to appear in the output, the 941 tag, subfield \$a, must contain the vendor ID of one of the vendors you select for the report configuration.
- **Acquisition Methods** (*required*) - Lets you limit your results to one or more acquisition methods. For a holdings record to appear in the output, position 07 of the 008 fixed fields must contain one of the acquisition methods you select for the report configuration.
- **Sort Parameters** (*required*) - Let you sort report output on the following values:
 - ◆ Acquisitions Date
 - ◆ Acquisition Method
 - ◆ Call Number
 - ◆ Cancel Date
 - ◆ Holdings Location
 - ◆ Title
 - ◆ Vendor 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 ISSN (022 tag) and Other Classification (084 tag) information.

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

3.2 Data Elements and Variables for the Canceled Serials Report

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

Some of the following data elements are defined in the default MARC Tag List. For details on editing the MARC Tag List, see the *InfoStation User's Guide*.

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

Data Element	Variable	Description and Source
Acquisitions Date	acquisition_method	The date the serial was acquired (format <i>yymmdd</i>), taken from the 008/00-05 of the holdings record.
Acquisition Method	acquisition_date	The acquisition method associated with the holdings record, taken from the 008/07 of the holdings record.
Bib-ID	bib_id	The system-assigned Bib-ID of the bibliographic record associated with the holdings record, stored in the 001 tag of the bibliographic record.
Call Number	call_number	The bibliographic-level call number of the holdings record.
Cancel Date	cancel_date	The cancel date associated with the holdings record (format <i>yymmdd</i>), stored in the 008/08-11 of the holdings record.
Holdings ID	holdings_id	The Holdings-ID of the serial, taken from the 001 tag of the holdings record.
ISSN	tag_022	The ISSN of the bibliographic record associated with the serial, taken from the 022 tag of the bibliographic record.
Holdings Location	location	The location of the serial, taken from the 852, subfield \$b of the holdings record.
Other Classification	tag_084	The other call number associated with the serial, stored in 084 tag of the bibliographic record.

Data Element	Variable	Description and Source
Title	title	The title of the serial, taken from the 245 tag, subfield \$a of the bibliographic record.
Vendor Name	vendor_name	The vendor associated with the serial, taken from the 941 tag, subfield \$a of the holdings record.

3.3 Output Templates for the Canceled Serials Report

Location: /usr/vtls/virtua/webprt_XX_x/Ser/Ser_3/[filename].tem

Template	Contribution to Output
html_page	Provides the overall framework of the HTML output.
html_row	Returns information related to a single holdings record.
email_page	Provides the overall framework of the e-mail output.
email_row	Returns information related to a single holdings record.

4. Serials Acquisitions Report

The Serials Acquisitions report generates a list of recently acquired serials that meet the criteria set in the report configuration. In Figure 4-1 we show a portion of the default HTML output from the Serials Acquisitions report.

Bib ID	2923	Call Number	Fic Alfred A5	Title	Alfred Hitchcock's mystery magazine	ISSN	1046-2317
Holdings ID	Location	Holdings	Call Number	Other Classification	Vendor Name	Acquisition Date	Acquisition Method
9	MBELBH					990812	

Figure 4-1. Serials Acquisitions HTML Output

The Serials Acquisitions report determines which records qualify for inclusion in the output using a serial's *entered* date, which is stored in the holdings record in positions 00-05 of the 008 fixed fields. To be included in the output, a serial's entered date must fall within the date range specified for the report configuration.

4.1 Parameters Available for the Serials Acquisitions Report

The Serials Acquisitions report offers the following Report-specific Parameters:

- **Holdings Locations** (*required*) - Lets you limit your results to one or more holdings locations. For a holdings record to appear in the output, the 852 tag, subfield \$b, must contain one of the locations you select for the report configuration.
- **Vendors** (*required*) - Lets you limit your results to holdings associated with one or more vendors. For a holdings record to appear in the output, the 941 tag, subfield \$a, must contain one of the vendors you select for the report configuration.
- **Acquisition Methods** (*required*) - Lets you limit your results to one or more acquisition methods. For a holdings record to appear in the output, position 07 of the 008 fixed fields must contain one of the acquisition methods you select for the report configuration.
- **Sort Parameters** (*required*) - Let you sort your results on the following values:
 - ◆ Acquisitions Date
 - ◆ Acquisition Method
 - ◆ Call Number
 - ◆ Holdings Location
 - ◆ Title
 - ◆ Vendor Name
- **Start Date and End Date** (*required*) - Lets you limit the results to a particular date range. To appear in the output, a serial must have been entered into the database during the date range that you specify for the report configuration. The entered date is stored in positions 00-05 of the holdings record.

Note: If your database contains one or more holdings records with the entered date **000000**, when you run the report, you will receive the error message “Invalid date format: Month: -1.” Before you can run the report, you must edit these dates manually.

- **Call Number Type** (*required*) - Lets you choose the type of call number to be used by the Call Number Ranges parameter. You can choose . . .

- ◆ **Bibliographic** - The Call Number Ranges parameter uses bibliographic-level call numbers.
- ◆ **Holdings** - The Call Number Ranges parameter uses holdings-level call numbers.
- **Call Number Ranges** (*optional*) - Lets you configure the report to retrieve records from one or more specific call number ranges. To appear in your results, records must fall within one of the Call Number Ranges that you specify for the report configuration.

Note: The Call Number Ranges parameter looks at the Call Number Type setting to determine whether to use bibliographic call numbers or holdings call numbers.

- **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 ISSN (022 tag) and Other Classification (084 tag) information.

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

4.2 Data Elements and Variables for the Serials Acquisitions Report

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

Some of the following data elements are defined in the default MARC Tag List. For details on editing the MARC Tag List, see the *InfoStation User's Guide*.

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

Data Element	Variable	Description and Source
Acquisitions Date	acquisition_method	The date the serial was acquired (format <i>yyymmdd</i>), taken from the 008/00-05 of the holdings record.
Acquisition Method	acquisition_date	The acquisition method associated with the holdings record, taken from the 008/07 of the holdings record.
Bib-ID	bib_id	The system-assigned Bib-ID of the bibliographic record associated with the holdings record, stored in the 001 tag of the bibliographic record.
Call Number	call_number	The bibliographic-level call number of the holdings record.
Holdings Call Number	holdings_call_number	The holdings-level call number, taken from the 852 tag, subfields \$h-\$j, of the holdings record.
Holdings ID	holdings_id	The Holdings-ID of the serial, taken from the 001 tag of the holdings record.
ISSN	tag_022	The ISSN of the bibliographic record associated with the serial, taken from the 022 tag of the bibliographic record.
Holdings Location	location	The location of the serial, taken from the 852 tag, subfield \$b of the holdings record.
Other Classification	tag_084	The other call number associated with the serial, stored in the 084 tag of the bibliographic record.
Title	title	The title of the serial, taken from the 245 tag, subfield \$a of the bibliographic record.
Vendor Name	vendor_name	The vendor associated with the serial, taken from the 941 tag, subfield \$a of the holdings record.

4.3 Output Templates for the Serials Acquisitions Report

Location: /usr/vtls/virtua/webprpt_XX_x/Ser/Ser_4/[filename].tem

Template	Contribution to Output
html_page.tem	Provides the overall framework of the HTML output, including library name and address information, your report criteria, a count of the total number of serials found by the report, and a count of the number of serials matching your date range criteria.
html_row 1.tem	Returns the labels for all data elements returned for a given holdings record.
html_row 2.tem	Returns information related to a single holdings record.
email_page.tem	Provides the overall framework of the e-mail output, as well as library name and address information, your report criteria, a count of the total number of serials found by the report, and a count of the number of serials matching your date range criteria.
email_row 1.tem	Returns labels for data elements related to a single holdings record.
email_row 2.tem	Returns data elements related to a single holdings record.

5. Serials List Report

The Serials List report generates a list of all serial bibliographic records that meet the location, vendor, acquisition method, date range, language code, and completeness criteria specified in the report configuration. In Figure 5-1, we show a portion of the default HTML output for the Serials List report.

Serials List	
Virtua Library 1 Library Street Your Town, State or Province Postal Code Your Country	
Bibliographic Start Year	1900
Bibliographic End Year	2002
Holdings Start Date	01-JUL-2002 00:00:00
Holdings End Date	31-JUL-2002 23:59:59
Language Code	
Completeness	
Bibliographic Records	587
Holdings Records	13
Item Records	0
IEEE power engineering review.	
New York, NY : IEEE Power Engineering Society, The Institute of Electrical and Electronics Engineers, Inc., c1981-	Bib ID 22
Business expectations.	
New York, Dun Bradstreet, Business Economics Division.	Bib ID 28

Figure 5-1. Serials List HTML Output

Additionally, for bibliographic records that have attached holdings, the holdings information is appended to the bibliographic information in the output (Figure 5-2).

Rural and environmental engineering		P/17256/BAE	Bib ID 790511
Tokyo : Japanese Society of Irrigation, Drainage and Reclamation Engineering, [19--]			
Luxembourg Library			
		Acquisition Date	30-JUL-2002
		Cancel Date	
		Last Issue Received Date	
		Last Issue Received	vol. 12 no. 13
		Acquisition Status	Blank
		Acquisition Method	Blank
		General Retention Policy	Blank
		Specific Retention Policy	Blank
		Vendor Name	

Figure 5-2. Serials List HTML Output Displaying Holdings Information

At the top of the list of serials, the output displays various configuration criteria (e.g., date range, language, and completeness information) and counts of number of bibliographic, holdings, and item records included in the output.

5.1 Parameters Available for the Serials List Report

The Serials List report offers one Report-specific Parameter:

Note: Some of the Report-specific Parameters in the Serials List report apply to holdings records. Others apply to bibliographic records. Even if a holdings record does not meet a configuration's holdings criteria, its parent bibliographic record will appear in the output as long as the record meets the bibliographic configuration criteria. The holdings information will simply be omitted.

- **Holdings Locations** (*required*) - Lets you limit your results to one or more holdings locations. For a holdings record to appear in the output, the 852 tag, subfield \$b, must contain one of the locations you select for the report configuration.

Note: If you choose to include items in the report output, InfoStation will report all items at *any* location.

- **Vendors** (*required*) - Lets you limit your results to holdings associated with one or more vendors. For a holdings record to appear in the output, the 941 tag, subfield \$a, must contain one of the vendors you select for the report configuration.
- **Acquisition Methods** (*required*) - Lets you limit your results to one or more acquisition methods. For a holdings record to appear in the output, position 07 of the 008 fixed fields must contain one of the acquisition methods that you select for the report configuration.
- **Acquisitions Statuses** (*required*) - Lets you limit your results to one or more acquisition statuses. For a holdings record to appear in the output, position 06 of the 008 fixed fields must contain one of the acquisition statuses that you select for the report configuration.
- **Sort Parameters** (*required*) - Let you specify how records will be sorted in the output. The Serials List report offers two types of Sort parameters:
 - ◆ **Bibliographic Primary Sort** (*required*) - Lets you specify how bibliographic records will be sorted in the output. You can choose to sort bibliographic records on . . .
 - Bibliographic Creation Date
 - Bib-ID
 - Bibliographic Call Number
 - ◆ **Holdings Sort Parameters** (*required*) - Let you determine how holdings records will be sorted when more than one holdings record is attached to a bibliographic record. You can choose to sort holdings records on . . .
 - Author
 - Acquisition Date
 - Acquisition Method
 - Bibliographic Call Number
 - Holdings Call Number
 - Holdings Location
 - Title
 - Vendor Name
- **Bibliographic Start Year** and **Bibliographic End Year** (*required*) - Let you limit your results to a particular bibliographic date range. To appear in the output, a bibliographic record must have been entered into the database during between the Bibliographic Start Year and the Bibliographic End Year, according to the values in positions 00-05 of the 008 fixed field.

- **Holdings Date Range** (*required*) - Lets you limit your results to holdings records that entered into the database during a particular date range. To be included in the output, a record must have entered the database during the date range that you specify for the configuration, according to the value in positions 00-05 of the 008 fixed field.
- **Language Code** (*optional*) - Lets you limit the results to records associated with a particular language. For a bibliographic record to appear in the output, it must contain the specified language code in positions 35-37 of the 008 fixed field. For a list of valid language codes, go to: <http://lcweb.loc.gov/marc/languages/>.
- **Completeness** (*optional*) - Lets you limit the results to holdings records associated with a particular level of completeness. For a holdings record to appear in the output, it must contain the specified level of completeness in positions 16 of the 008 fixed field.
- **Show Records with Holdings** (*optional*) - Lets you specify which serials to include in the output.
 - ◆ If you select this check box, the report will generate a list of *only* the serial bibliographic records that have holdings attached.
 - ◆ If you do NOT select this check box, the report will generate a list of ALL of the serial bibliographic records database, regardless of whether or not they have holdings attached.

Note: While the output will display ALL bibliographic records that have holdings records attached, the holdings information will appear in the output only if it satisfies the other configuration criteria.

- **Show Holdings Items** (*optional*) - Lets you specify whether or not to display item information in the output.
 - ◆ If you select this check box, InfoStation will include in the output a list of items that are attached to *holdings* records.
 - ◆ If you do NOT select this check box, InfoStation will NOT display items in the output.

Note: If you want holdings items to appear in the output, you must select *both* the Show Records With Holdings AND the Show Holdings Items check boxes.

- **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 publisher information (260 tag).

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

5.2 Data Elements and Variables for the Serials List Report

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

Some of the following data elements are defined in the default MARC Tag List. For details on editing the MARC Tag List, see the *InfoStation User's Guide*.

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

Data Element	Variable	Description and Source
Acquisitions Date	acquisition_method	The date the serial was acquired (format <i>yyymmdd</i>), taken from the 008/00-05 of the holdings record.
Acquisition Number Of Units	acquisition_number_of_units	The acquisition number of units associated with the serial, taken from the 008/14 of the holdings record.
Acquisition Method	acquisition_method	The acquisition method associated with the serial, taken from the 008/07 of the holdings record.
Acquisition Policy Type	acquisition_policy_type	The acquisition policy type associated with the holdings record, taken from the 008/13 of the holdings record.
Acquisition Status	acquisition_status	The acquisition status associated with the holdings record, taken from the 008/06 of the holdings record.
Acquisition Unit Type	acquisition_unit_type	The acquisition unit type associated with the holdings record, taken from the 008/15 of the holdings record.

Data Element	Variable	Description and Source
Author	author	The author of the serial, taken from the . . . <ul style="list-style-type: none"> • 100 \$a of the bibliographic record. • 110 \$a of the bibliographic record.
Bib ID	bib_id	The system-assigned Bib-ID of the holdings record, taken from the 001 tag of the bibliographic record.
Bibliographic Call Number	bib_call_number	The call number associated with the serial.
Cancel Date	cancel_date	The cancel date associated with the holdings record (format <i>yyymmdd</i>), taken from the 008/08-11 of the holdings record.
General Retention Policy	general_retention_policy	The general retention policy associated with the holdings record, taken from the 008/12 of the holdings record.
Holdings Call Number	holdings_call_number	The holdings-level call number, taken from the 852 tag, subfields \$h-\$j, of the holdings record.
Holdings Copy	holdings_copy	The copy number associated with the holdings record, taken from the 852 tag, subfield \$t of the holdings record.
Holdings ID	holdings_id	The Holdings-ID of the serial, taken from the 001 tag of the holdings record.
Holdings Location	holdings_location	The location of the holding, taken from the 852 tag, subfield \$b of the holdings record.
Textual Holdings	holdings_textual	The textual description of the holdings record, taken from the 866 tag, subfield \$a of the holdings record.
Item Barcode	item_barcode	The barcode associated with the item record.
Item Call Number	item_call_number	The call number associated with the item record.
Item Copy	item_copy	The copy number associated with the item record.
Item Location	item_location	The shelving location of the item.

Data Element	Variable	Description and Source
Item Units	item_units	The number of units associated with a multivolume work.
Last Issue Received	last_issue_received	The last issue of the serial that the library has received, taken from the last occurrence of the 863 tag in the holdings record.
Last Issue Received Date	last_issue_received_date	The date the last serial issue was received by the library, taken from the last occurrence of the 863 tag in the holdings record.
Specific Retention Policy	specific_retention_policy	The specific retention policy associated with the holdings record, taken from the 008/13-15 of the holdings record.
Title	title	The title of the serial, taken from the 245 tag, subfield \$a of the bibliographic record.
Vendor Name	vendor_name	The vendor associated with the serial, taken from the 941 tag, subfield \$a of the holdings record.

5.3 Output Templates for the Serials List Report

Location: /usr/vtls/virtua/webrpt_XX_x/Ser/Ser_1/[filename].tem

Template	Contribution to Output
html_page.tem	Provides the overall framework of the HTML output, including the labels for each column of data.
html_row_bib.tem	Returns information related to a single bibliographic record.
html_row_holdings.tem	Returns information related to a single holdings record.
html_row_item.tem	Returns information related to a single item record.
email_page.tem	Provides the overall framework of the e-mail output.
email_row_bib.tem	Returns information related to a single bibliographic record.
email_row_holdings.tem	Returns information related to a single holdings record.
email_row_item.tem	Returns information related to a single item record.

6. Serials Snapshot Report

The Serials Snapshot report generates a summary of the serials statistics that exist in the database at the time you run the report. In Figure 6-1 we show a portion of the default HTML output from the Serials Snapshot report. When you run the Serials Snapshot report to produce e-mail output or to produce a delimited file, InfoStation sends only ONE spreadsheet in the e-mail or one attached file.

Serials Snapshot						
Virtua Library 1 Library Street Your Town, State or Province Postal Code Your Country						
Total Serials						
Total Serials						381
Serials with Coded Holdings						197
Ceased Serials with Coded Holdings						0
Total Serials By Acquisitions Method						
Deposit Serials	Exchange Serials	Free Serials	Gift Serials	Purchase Serials	Other Serials	Unknown Serials
2	0	0	2	331	0	
Current Serials by Country						
Country		Number				
Blank		269				
Australia		2				
France		3				
Germany		3				
Greece		1				
India		1				
Italy		1				
Netherlands		4				

Figure 6-1. Serials Snapshot HTML Output

Note: The Serials Snapshot report returns a “snapshot” of the Serials subsystem. It returns the counts that exist in the database at the *exact* time you run the report. The report does NOT return statistics gathered over a period of time. For example, if you run the report at 8:00 a.m. on May 31, 2002, Total Serial is the total number of serials that exist in the database at 8:00 a.m. on May 31, 2002.

6.1 Data Elements and Variables for the Serials Snapshot Report

Below we describe the data elements and counts returned by the Serials Snapshot report. Using the Field Labels on the Configuration screen, you can specify the label for each data element and table. Additionally, for each data element, we list the corresponding variable, which you can use to edit the output templates.

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

- **Total Serials** (total_serials) - The total number of holdings records in the database that contain a **4** (four) in position 06 of the 008 fixed fields.
- **Serials with Coded Holdings** (coded_holdings_serials) - Of the Total Serials, the number of holdings records that contain one or more 853 tags.
- **Ceased Serials with Coded Holdings** (coded_holdings_ceased_serials) - Of the Serials with Coded Holdings, the number of holdings that have a cancel date in positions 08-11 of the 008 fixed fields.
- **Total Serials by Acquisitions Method** - Of the Total Serials, the number of holdings records associated with each of the following acquisition methods, according to the value in position 07 of the 008 fixed fields:
 - ◆ **Deposit Serials** (deposit_serials) - 008 position 07 contains a **d**.
 - ◆ **Exchange Serials** - 008 position 07 contains an **e**.
 - ◆ **Free Serials** (exchange_serials) - 008 position 07 contains an **f**.
 - ◆ **Gift Serials** (gift_serials) - 008 position 07 contains a **g**.
 - ◆ **Purchase Serials** (purchase_serials) - 008 position 07 contains a **p**.
 - ◆ **Other Serials** (other_serials) - 008 position 07 contains a **z**.
 - ◆ **Unknown Serials** (unknown_serials) - 008 position 07 contains a **u**.
- **Current Serials by Country** - The number of serials associated with any given country, according to the value in positions 15-17 of the 008 fixed fields in the *bibliographic* record.
- **Current Serials by Language** - The number of serials associated with any given language, according to the value in positions 35-37 of the 008 fixed fields in the *bibliographic* record.

Note: To appear in the Current Serials by Country and Current Serials by Language tables, a country or language *must* exist in one or more serial bibliographic records (i.e., bibliographic records where position 07 of the Leader contains an s).

6.2 Output Templates for the Serials Snapshot Report

Location: /usr/vtls/virtua/webprt_XX_x/Ser/Ser_2/[filename].tem

Template	Contribution to Output
html_page.tem	Provides the overall framework of the HTML output, including all data elements and labels included in the output.
email_page.tem	Provides the overall framework of the e-mail output, including all data elements and labels included in the output.

7. Serials Without Holdings Report

The Serials Without Holdings report generates a list of all serial bibliographic records that do NOT have holdings records attached. In Figure 7-1, we show a portion of the default HTML output for the Serials Without Holdings report.

Serials Without Holdings			
Virtua Library 1 Library Street Your Town, State or Province Postal Code Your Country			
Bib ID	Call Number	Title	ISSN
316416	BF1 .P675	Psychological inquiry	1047-840X
314795	BF173 .A2	American imago	1085-7931
59960	BF205.M6 M67	Motor development : current selected research	
330103	BF309 .C62	Cognitive psychology	1095-5623 0010-0285
330106	BF309 .C66	Consciousness and cognition	1090-2376 1053-8100
73721	BF311 .K6385	Knowledge and development	0272-9687
331022	BF353 .J68	Journal of environmental psychology	0272-4944

Figure 7-1. Serials Without Holdings HTML Output

Note: The Serials Without Holdings report does NOT offer parameters that let you limit results. It returns a list of ALL serial records in the database that do NOT have holdings attached.

7.1 Parameters Available for the Serials Without Holdings Report

The Serials Without Holdings report offers the following Report-specific Parameters:

- **Primary Sort** (required) - Lets you specify how serial records will be sorted in the output. By default, records will be sorted by Call Number.
- **MARC Tag List** (*optional*) - Lets you configure the report to return specific bibliographic information for each record included in the output. By default, the MARC Tag List is configured to retrieve the ISSN (022 tag).

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

7.2 Data Elements and Variables for the Serials Without Holdings Report

In the following table, we list the name, variable, description, and source of each data element that is retrieved by default by the Serials Without Holdings report. You can edit the output templates to include or exclude any data element listed below.

Some of the following data elements are defined in the default MARC Tag List. For details on editing the MARC Tag List, see the *InfoStation User's Guide*.

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

Data Element	Variable	Description and Source
Bib-ID	bib_id	The system-assigned Bib-ID of the bibliographic serial record, taken from the 001 tag of the bibliographic record.
Call Number	call_number	The bibliographic-level call number of the serial record.
ISSN	tag_022	The ISSN from the serial record, taken from the 022 tag of the bibliographic record.
Title	title	The title of the serial record, taken from the 245 tag, subfield \$a of the bibliographic record.

7.3 Output Templates for the Serials Without Holdings Report

Location: /usr/vtls/virtua/web rpt_XX_x/Ser/Ser_1/[filename].tem

Template	Contribution to Output
html_page.tem	Provides the overall framework of the HTML output, including the labels for each column of data.
html_row.tem	Returns information related to a single holdings record. By default, this template contains only Variables. The html_page template provides labels for the information returned by the html_row template, which is formatted into columns.
email_page.tem	Provides the overall framework of the e-mail output.
email_row.tem	Returns information related to a single holdings record, including data elements and their corresponding labels.

8. Appendix A - Changes in this Guide

8.1 Changes for Version 16.1

No changes were made.

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