

# Reference Guide



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Integrated Library System

# InfoStation®

VIRTUA ILS – INTEGRATED LIBRARY SYSTEM

# InfoStation® Reference Guide

Version 16.1

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# 1. Introduction

**I**nfoStation®, the Web-reporting subsystem of 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 general reference material about InfoStation, including descriptions of report parameters and information about the InfoStation directory structure.

**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.

This introduction covers the following topics:

- ⇒ [Using this Guide](#)
- ⇒ [About Required and Optional Parameters](#)

## 1.1 Using this Guide

The *InfoStation 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/ Circulation Reports Reference Guide* - Provides details on the reports related to the Circulation Control 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.
- *InfoStation/ Serials Reports Reference Guide* - Provides details on InfoStation reports related to the Serials Control 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.

This guide is intended to be used in conjunction with one of the other InfoStation reference guides to provide you with all the information you need to configure a particular report.

You can use the list below and the [Table of Contents](#) to locate specific information in this guide. For your easy reference, this guide also contains a [Table of Figures](#) and an [Index](#). In addition, each chapter in this guide begins with a list of hyperlinks to the reports discussed in the chapter.

For . . .	See . . .
Descriptions of Report-specific parameters	<a href="#">Chapter 2</a>
Information about the InfoStation directory structure	<a href="#">Chapter 3</a>
A list of all available InfoStation reports	<a href="#">Appendix A</a>
Information on the changes that were made to this guide to update it from the last version.	<a href="#">Appendix B</a>

## 1.2 About Required and Optional Parameters

Report parameters help you limit your output to a specific set of results. InfoStation offers two types of parameter:

- **Required parameters** - Values that a report *always* uses to limit the output. Required parameters supply InfoStation with the information that it needs to collect data from the database. Some required parameters are standard for ALL reports. Others are specific to certain reports.

**Note:** For a given report configuration, you must set ALL the required parameters before you can save and run the configuration.

- **Optional parameters** - Values that you are NOT required to set before you can save and run your report configurations. Optional parameters give you additional flexibility in creating more precise report configurations. When you save a configuration in which an optional parameter is not set, InfoStation will not generate error messages.

### **1.2.1 Identifying Required and Optional Parameters**

In most cases, required parameters have default settings, which are selected automatically when you access the Configuration screen for a report template (i.e., when you are adding a new report configuration). In this way, if a parameter has a default setting, you can assume that it is required for that report. InfoStation will use the default setting unless you change it manually.

For example, Sort parameters are required for every report that offers them. Whenever a report offers one or more Sort parameters, InfoStation sorts your results using the selected values. Sort parameters *always* have default settings. Therefore, if you create a new configuration without changing the Sort parameter settings, InfoStation sorts your output using the default sort values.

Some required parameters do not have default settings and require that you type or select a value in the appropriate field. If you try to save a configuration in which one or more required parameters are NOT set, InfoStation will generate an error message, indicating which value is missing. You can click your browser's Back button to return to the configuration and supply the missing value.

Optional parameters, on the other hand, do NOT have default settings. Before InfoStation will use an optional parameter to limit your results, you will need to define a setting for the parameter.

To help you identify required and optional parameters more easily, throughout this and the other InfoStation reference guides, we note for each report that parameters are required and which ones are optional.

### **1.2.2 About the All or Any Option**

Most multiselectable, required parameters offer the *All or Any* option. When you select the *All or Any* option, the parameter is essentially ignored. For example, [Figure 1-1](#) shows the Cities parameter for the Patron List report.

#### 4 InfoStation Reference (v. 16.1)



Figure 1-1. Cities Parameter

The Cities parameters let you limit your results to patrons whose address contain one or more particular cities. If you set the Cities parameter to *All or Any*, the report finds ALL patrons, *regardless* of the city stored in their patron record.

Selecting *All or Any* is not always the same as selecting all the values in the list box. If you select all the values in the list box, your results include *only* the records that contain one of those values. If you select *All or Any*, your results may also include records that contain NO value (e.g., patron records with no city specified).

**Note:** The *All or Any* option is not available for all multiselectable parameters. If a parameter does not offer the *All or Any* option, you will need to select all the values in the list box to generate all possible results.

## 2. Report-specific Parameter Descriptions

In this chapter, we provide expanded descriptions of InfoStation's Report-specific parameters and examples that you can use to set each parameter correctly. This chapter does not contain descriptions of ALL Report-specific Parameters. Rather, in this chapter, we limit our discussion to parameters that are used by more than one report and parameters that are particularly complex. Additionally, not all the parameters described here are available for each report. For a list of the parameters that are available for each report, see the appropriate InfoStation reference guide.

This chapter covers the following topics:

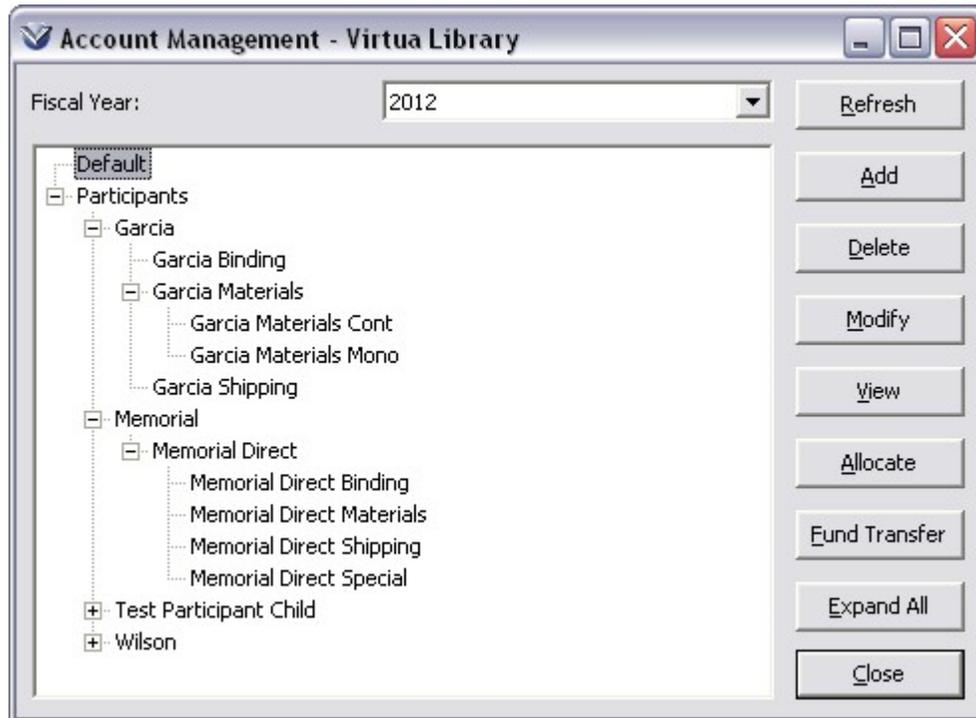
- ⇒ [Accounts Parameter](#)
- ⇒ [Address Preferences Parameter](#)
- ⇒ [Check-out Type Parameter](#)
- ⇒ [Call Number Ranges Parameter](#)
- ⇒ [Courses Parameter](#)
- ⇒ [Date Format Parameter](#)
- ⇒ [Date Range Parameter](#)
- ⇒ [Delimiter Parameter](#)
- ⇒ [E-mail Column Width Parameter](#)
- ⇒ [E-mail Content-type Parameter](#)
- ⇒ [Honor Language and Address Preference Parameters](#)
- ⇒ [Instructors Parameter](#)
- ⇒ [Item Classes Parameter](#)
- ⇒ [Library Name and Address Parameters](#)
- ⇒ [Locations Parameter](#)
- ⇒ [MARC Tag List](#)
- ⇒ [Notice Number to Generate Parameter](#)
- ⇒ [Order Types Parameter](#)
- ⇒ [Patron Types Parameter](#)
- ⇒ [Sort Parameters](#)
- ⇒ [Transaction Types Parameter](#)
- ⇒ [Update Database Parameter](#)
- ⇒ [Vendors Parameter](#)

- ⇒ [Virtua Users Parameter](#)
- ⇒ [Patron's Registering Library For Notices Parameter](#)

## 2.1 Accounts Parameter

The Accounts parameter lets you limit report output to transactions associated with one or more Acquisitions fund accounts. The Accounts parameter is required for every report that offers it.

In InfoStation, the Accounts list box is populated with fund accounts that you set up via the Account Management window in the Virtua client (*Figure 2-1*).



*Figure 2-1. Account Management Window*

Whereas the Account Management window displays the accounts for the selected fiscal year only, the Accounts parameter makes available ALL fund accounts for all fiscal years.

The Accounts parameter displays account *numbers* rather than account names. From the Account Management window in the client, you can view an account number by highlighting an account name and then clicking the View button. The View Account

window then appears, displaying the account number in the Account Number field. For additional information on fund accounts, see the *Virtua Acquisitions User's Guide*.

**To set the Accounts parameter,**

- If you want to generate results for one or more specific fund accounts, select those account numbers in the list box.

**Hint:** You can use the CTRL and SHIFT keys to multiselect values in the list box.

-OR-

- If you want to generate ALL results, regardless of which accounts are related, select *All or Any* in the list box.

**Note:** For each report that offers the Accounts parameter, you must select at least one value from the list box before you can save a configuration.

The Accounts parameter is available in the following reports:

- Account Summaries
- Acquisitions Audit Trail
- Titles on Order
- Vouchers

## 2.2 Address Preferences Parameter

The Address Preferences parameter lets you configure a report to return results according to the address preference set in position 10 of the 008 fixed fields in the patron record. The Address Preferences parameter is *required* for every report that offers it.

The Address Preferences parameter offers two options:

- **E-mail** - The report returns a list of 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 returns a list of 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).
- OR-

- ◆ NO address preference is specified (i.e., position 10 of the 008 fixed fields is blank).

If you select *both* options, the report generates a list of ALL patron records, regardless of address preference.

**Note:** The Address Preference parameter, which is available in non-notice-generating reports, is NOT the same as the Honor Address Preference parameter, which is available in notice-generating reports and uses the report Output Format to determine which patrons appear in your results. Rather, when a report offers the Address Preference parameter, the output includes a list of ALL patrons with the selected address preference, regardless of Output Format.

The Address Preferences parameter is available for the following reports:

- Patron List
- Blocked Patrons
- E-mail Validation
- Expiring Patrons

## 2.3 Check-out Type Parameter

The Check-out Type parameter lets you choose the check-out type that you want to include in your output. The Check-out Type parameter is *required* for every report that offers it. It lets you choose from the following options:

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

For example, for an Overdues report configuration, if you want to generate a list of *only* the in-house check-outs that are overdue, you would select In-house Check-out from the Check-out Type drop-down list.

The Check-out Type parameter is available for the following reports:

- Bills
- Overdues
- Recalls

- Recalled Bills
- Recalled Overdues

## 2.4 Call Number Ranges Parameter

The Call Number Ranges parameter lets you limit your results to records associated with one or more specific call number ranges. The Call Number Ranges parameter can be either required or optional, depending on the report.

The Call Number Ranges parameter limits results using either the bibliographic- or item-level call number, depending on the report.

InfoStation uses **callNumberKey.exe** to normalize the values that you enter as Call Number Ranges. You can use the following guidelines for specifying call number ranges.

- Call numbers are NOT case sensitive.
- You must separate cutters with a period, a space, or a period and a space. For example, type,
  - ◆ **PS1744 .G57** (period)
  - OR-
  - ◆ **PS1744 G57** (space)
  - OR-
  - ◆ **PS1744 .G57** (space and period)
- InfoStation pads abbreviated call numbers with zeros between letters and numbers. For example,
  - ◆ **PR9** is interpreted as **PR0009**
  - ◆ **PS555** is interpreted as **PS0555**
- InfoStation does NOT pad cutters with zeros. For example,
  - ◆ **.G5** is interpreted as **.G5** NOT as **.G005**
  - ◆ **.Z12** is interpreted as **.Z12** NOT as **.Z012**
- You can enter as little or as much of the call number as you like. For example,
  - ◆ To return all P's, type, **p - q**.
  - ◆ To return all PRs, type, **pr - ps**.
  - ◆ To return a more specific range of records, type, **pr1700 .A1 - pr1750 .A1**.

The Call Number Ranges parameter is available for the following reports:

- Bibliographic Record List
- Circulation by Call Number Range
- Serials Acquisitions

## 2.5 Courses Parameter

The Courses parameter lets you limit your results to items associated with one or more courses. The Courses parameter is *required* for every report that offers it.

In InfoStation, the Courses list box is populated with the names of courses that have one or more items on active or scheduled reserve. The Courses list box displays the name of the course as it appears in the reserve list.

**To set the Courses parameter,**

- If you want to generate results for one or more specific courses, select those courses in the list box.

**Hint:** You can use the CTRL and SHIFT keys to multiselect values in the list box.

-OR-

- If you want to generate ALL results regardless of course, select *All or Any* in the Courses list box.

**Note:** For each report that offers the Courses parameter, you must select at least one value from the list box before you can save a configuration.

The Courses parameter is available for the following reports:

- Reserves Activate List
- Reserves Current Active List
- Reserves Pull List
- Reserves Remove List

## 2.6 Date Format Parameter

The Date Format parameter lets you choose how dates will be formatted in the output. The Date Format parameter is *required* for every report that offers it, meaning that you cannot save a configuration in which the Date Format text box is empty.

InfoStation recognizes date formats defined in Oracle. For more information, see NLS DATE FORMAT in your Oracle documentation.

The default date format is DD-MON-YYYY, where . . .

- **DD** is the day of the month, expressed as two digits, such as 01, 12, or 30.
- **MON** is the month, expressed in three characters, such as JAN, APR, or DEC.
- **YYYY** is the year, expressed as four digits, such as 1999 or 2000.

In this way, dates will be formatted in the output as DD-MON-YYYY. For example, January 1, 2013 would be 01-JAN-2013.

**To set the Date Format parameter,**

- In the Date Format text box, type the desired date format. You can specify any date format recognized by Oracle, for example . . .
  - ◆ DD/MON/YYYY
  - ◆ DD-MON-RR
  - ◆ DD-MON-YY

The Date Format parameter is available for the following reports:

- Availability
- Bills
- Expired Requests
- Overdues
- Recalls
- Recalled Bills
- Recalled Overdues
- Review Notices

## 2.7 Date Range Parameter

The Date Range parameter (*Figure 2-2*) lets you limit your result set to a particular time and/or date range.

Figure 2-2. Date Range Parameter

For some reports, the Date Range parameter is required. For other reports, it is optional. When the Date Range parameter is optional, it is labeled as such on the Configuration screen.

The Date Range parameter lets you limit results using the date on which a specific transaction occurred or a change was made to the database, as appropriate to each report.

For example, in the Acquisitions Audit Trail report, the Date Range lets you limit the results to Acquisitions transactions performed within a particular date range. In the Broad Cataloging Statistics report, the Date Range lets you limit the results to Cataloging functions performed within a particular date range.

**Important:** Regardless of whether a date range is required or optional, if you specify a Start Date you must also specify an End Date and vice versa.

The Date Range parameter offers the following options:

- **Relative Date Range** - A date range that will change depending on when the report is run.
- **Fixed Date Range** - An unchanging date range indicated by a begin date and an end date.

## 2.7.1 About Setting a Relative Date Range

When you select a relative date range for a report configuration, the configuration determines which specific date range to use depending on when you run the report (i.e., the date range is determined relative to the run date). The relative date range options appear in the upper portion of the Date Range parameter (*Figure 2-2*) and consist of . . .

- Two radio buttons: Previous and Current.
- A drop-down list box that contains the following periods of time: Day, Week, Month, Quarter, Year, and Fiscal Year.

**Note:** In reports where the Date Range parameter is optional, this list box also contains the option *None*. You can select this option if you do NOT want to limit the output to a particular date range.

By selecting a radio button and a period of time, you can determine how a report will determine the date range at run time. Below, we describe each period of time:

- **Day** - Midnight until 23:59:59 of the current or previous day, as appropriate.
- **Week** - Midnight on Monday until 23:59:59 on Sunday of the current or previous week, as appropriate.
- **Month** - Midnight of the first day of the current or previous calendar month until 23:59:59 of the last day of the current or previous calendar month. For example, if you configure the Basic Circulation Statistics report gather results for the Current Month, when you run the configuration in September, the output will include results for circulation transactions performed from midnight on September 1<sup>st</sup> until 23:59:59 on September 30<sup>th</sup>.
- **Quarter** - Midnight of the first day of the calendar quarter until 23:59:59 of the last day of the calendar quarter. InfoStation divides the year into four calendar quarters: January - March, April - June, July - September, and October - December. For example, if you configure the Basic Circulation Statistics report gather results for the Previous Quarter, when you run the report in January, the output will include results for circulation transactions performed from midnight on October 1<sup>st</sup> until 23:59:59 on December 31<sup>st</sup>.
- **Year** - Midnight on January 1<sup>st</sup> until 23:59:59 on December 31<sup>st</sup> of the current or previous year, as appropriate.

- **Fiscal Year** - Midnight of the first day of the fiscal year until 23:59:59 of the last day of the fiscal year.
  - ◆ When you configure a report to use the Current Fiscal Year, InfoStation uses the current fiscal year defined in the Fiscal Years parameter in the Virtua Profiler.
  - ◆ When you configure a report to use the Previous Fiscal Year, InfoStation uses the date range defined for the current fiscal year in the Fiscal Years parameter in the Virtua Profiler but adjusts the year to one year earlier. For example, if the current fiscal year is April 1, 2012 - March 31, 2013, then the previous fiscal year is April 1, 2011 - March 31, 2012.

**Hint:** Relative date ranges are useful in report configurations that you want to schedule to run automatically. Each time InfoStation runs the report automatically, the date range that is used will depend on the run date. In this way, you can, for example, automatically generate weekly statistics without manually having to update the date range every week.

**To set a relative date range,**

1. Select a radio button, either Previous or Current.
2. In the drop-down list, select a period of time: Day, Week, Month, Quarter, Year, Fiscal Year, or None (if available).

## **2.7.2 About Setting a Fixed Date Range**

The fixed date range options let you define a date range that will always be used when you run a report configuration. The fixed date range options appear in the lower portion of the Date Range parameter ([Figure 2-2](#)) and consist of a Start Date and an End Date.

The Start Date and End Date use the format **DD-MON-YYYY HH:MM:SS** (i.e., day, month, year, hours, minutes, seconds), where HH:MM:SS is optional. For example, 11:00 a.m. on January 31, 2012 is 31-JAN-2012 11:00:00. If you omit the hours, minutes, and seconds, you would simply type 31-JAN-2012.

**Note:** When you omit the hours, minutes, and seconds, InfoStation interprets the date as DD-MON-YYYY 00:00:00. Therefore, 01-JAN-2012 to 01-JAN-2013 is midnight on January 1, 2012 until midnight on January 1, 2013.

Even if you have translated InfoStation into a language other than English, wherever the date format requires a three-character month, you will need to use the English

abbreviations for the months of the year. For your easy reference, we list the abbreviations below:

- January - JAN
- February - FEB
- March - MAR
- April - APR
- May - MAY
- June - JUN
- July - JUL
- August -AUG
- September - SEP
- October - OCT
- November - NOV
- December - DEC

**To set a fixed Date Range,**

1. In the Start Date text box, type the start date of the date range you want to use.
2. In the End Date text box, type the end date of the date range you want to use.

**Note:** If you set a fixed date range, it overrides any relative date range that you have selected.

### ***2.7.3 Availability of the Date Range Parameter***

In the following table, we list the reports that offer the Date Range parameter. For each report, we specify the type of date on which the Date Range parameter lets you limit the results.

**Important:** The input format for the Date Ranges parameter is not necessarily the same as the date format stored in records and in the database. The type of date listed in the table below does NOT indicate the format in which you should enter the date range. Instead, the Date Range parameter always uses the same input format regardless of the type of date on which it filters.

<b>Report</b>	<b>Type of Date</b>
Acquisitions Audit Trail	Transaction date
Authorities List	Record Creation date (039 \$y of authority record)
Basic Circulation Statistics	Circulation transaction date
Bibliographic Record List	Creation date (039 \$y of bibliographic record)
Broad Cataloging Statistics	Cataloged date
Cataloging Errors	Cataloging error date
Circulation by Call Number Range	Circulation transaction date
Delinquent Patron Accounts	Fine or fee assessment date
Items Received List	Item barcode date
Journal Circulation	Circulation date
New Books List	Acquisition date
OPAC Search Statistics	Search date
Order Status	Purchase order creation date
Patron Account Statement	Fine or fee assessment date
Patron List	Library privileges date
Patron Statistics	Circulation date
Records by State	Date record state was assigned
Serials Acquisitions	Acquisitions date
Serials List	Holdings acquisition date
Shelving Pull List	Shelving location expiration date
Titles on Order	Purchase order creation date
Vendor Performance	Acquisitions transaction date
Vouchers	Payment date

## 2.8 Delimiter Parameter

The Delimiter parameter, which is available in notice-generating reports, lets you specify the character that separates data on a line of delimited output. The Delimiter parameter is required *only* when E-mail with Delimited File Attachment is selected as the Output Format for the report configuration. For all other Output Formats, the Delimiter parameter is ignored.

The Delimiter parameter lets you choose from the following delimiters:

- <Tab>
- \$\$
- !!
- ||

For example, below we show a small portion of a line of data returned by the Overdues report, where the delimiter is, subfield \$\$.

```
Patron Start Flag$$Overdue Items Found$$Report Date$$Due Date$$Notice Count
```

The Delimiter parameter is available for the following reports:

- Availability
- Bills
- Expired Requests
- Overdues
- Recalls
- Recalled Bills
- Recalled Overdues

## 2.9 E-mail Column Width Parameter

The E-mail Column Width parameter is available in reports where e-mail output is formatted into a table. While the E-mail Column Width parameter affects the appearance of only e-mail output, it is *required* for ALL configurations, regardless of output format. You cannot save a configuration where the E-mail Column Width text box is empty.

The E-mail Column Width parameter lets you specify the width *in characters* of each column in the e-mail data table. For example, if you set the E-mail Column Width parameter to 15 each column in the e-mail output will be 15 characters wide.

Within the table of output, all data and labels are truncated OR expanded to this width, as appropriate.

**Note:** While the E-mail Column Width parameter is required for all configurations, it is used *only* when you generate **plain text e-mail output**. Other output formats use other formatting methods.

The E-mail Column Width parameter requires a two-digit number. To use numbers one through nine, you must include a zero. For example, you would enter nine as **09**.

The E-mail Column Width parameter is available for the following reports:

- Basic Circulation Statistics
- Circulation by Call Number Range
- Circulation Snapshot
- OPAC Search Statistics

## 2.10 E-mail Content-type Parameter

The E-mail Content-type parameter (*Figure 2-3*) appears on the Configuration screen at the bottom of the Report-specific Parameters area and lets you specify the format in which InfoStation will generate e-mail output.

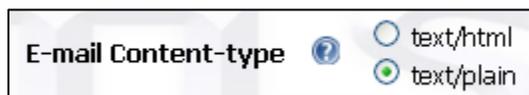


Figure 2-3. E-mail Content-type Parameter

The E-mail Content-type parameter is available for ALL InfoStation reports.

**Note:** The E-mail Content-type parameter is used *only* by report configurations that generate e-mail output. It is ignored by configurations that generate HTML or delimited output. For details on setting the Output Format, see the *InfoStation User's Guide*.

By default, InfoStation's e-mail output templates are formatted for plain text e-mail output. You have the option, however, of generating e-mail output in HTML format so that you can add HTML elements, such as graphics and links, to your e-mails.

The E-mail Content-type parameter offers two options:

- **text/html** - Causes the report configuration to generate e-mail output in HTML format.
- **text/plain** - Causes the report configuration to generate e-mail output in plain text format.

**Important:** If you choose to generate e-mail output in HTML format, you will need to add HTML tags to your e-mail output templates for proper formatting. For details on editing your output templates, see the *InfoStation User's Guide*.

**To set the E-mail Content-type parameter,**

- Select the desired e-mail format, either text/html or text/plain.

## 2.11 Honor Language and Honor Patron Communication Preferences Parameters

The Honor Language Preference and Honor Patron Communication Preferences parameters let you specify which patrons to include in the output, according to their language and communication preference.

## 2.11.1 Honor Patron Communication Preferences Parameter

The Honor Patron Communication Preferences parameter lets you configure notice-generating reports and the Patron Account Statement to produce results based on the communication preference specified for each patron in the Patron Editor or in the patron 2709 format record (tag 008 position 10). The Honor Patron Communication Preferences parameter is *optional*.

**Note:** The Honor Patron Communication Preferences parameter relies on the following elements in patron 2709 format records:

- Address preference (008 fixed fields, position 10)
- Primary e-mail address (tag 271 \$a, where *first* indicator is 1)
- Cell, or specialized telephone number (tag 270 \$j)
- Primary postal address (tag 270 \$a, where *first* indicator is 1)

You can use the following guidelines to set the Honor Patron Communication Preferences parameter:

- If you select the Honor Patron Communication Preferences *E-mail Only*, *Text Message Only*, or *Text and E-mail* check box AND you select Electronic Delivery as the Output Format, InfoStation will send electronic notices to patrons *only* if . . .
  - ◆ Their address preference is e-mail, text message, or text and e-mail (tag 008, position 10 is **1, 2, or 3**).
  - AND-
  - ◆ A valid e-mail address exists in the 271 tag of the patron record and/or a valid cell phone number exists in the 270 tag subfield \$j.

**Note:** In order for text message notices to be sent to a patron with a text messaging communication preference, the patron records *must* have a cell phone number populated in the Patron Primary Specialized Telephone field (patron MARC tag 270 \$j).

- If you select the Honor Patron Communication Preferences Paper check box AND you select E-mail with Delimited File Attachment as the Output Format, InfoStation will generate results for . . .
  - ◆ Patrons whose address preference is set to paper (008, position 10 is **0**).
  - AND-
  - ◆ Patrons whose address preference is e-mail but whose patron record does NOT contain a valid e-mail address.

- If you do NOT select an Honor Patron Communication Preferences check box AND you select Electronic Delivery as the Output Format, InfoStation will send e-mail notices to ALL patrons who have a valid e-mail address in their patron record, regardless of their address preference.
- If you do NOT select an Honor Patron Communication Preferences check box AND you select E-mail with Delimited File Attachment as the Output Format, InfoStation will generate a list of ALL patrons with qualifying items, regardless of address preference.
- If you select HTML as the Output Format, InfoStation will produce a list of ALL qualifying items, regardless of the address preference specified within the related patron record.

For details on setting the Honor Patron Communication Preferences parameter in conjunction with the Honor Language Preference parameter, see the section “[Setting the Honor Language and Honor Patron Communication Preferences Parameters](#)” in this guide.

## 2.11.2 Honor Language Preference Parameter

The Honor Language Preference parameter is *optional* and 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.

**Note:** This parameter applies to patron-related results *only* if a language preference is specified within the corresponding patron records.

- The language preference code is stored in the patron record in the 100 tag, subfield \$1.
- The language code must match the standard language codes that indicate languages used in HTML documents defined in RFC 3066, which based on ISO 639-1 and ISO 639-2 specifications.

The Honor Language Preference parameter does not affect report results that pertain to patron records *without* a specified language preference. Such report results are always included in the report output.

You can use the following guidelines to set the Honor Language Preference parameter:

- If you select the Honor Language Preference check box AND you select E-mail, Primary as the Output Format, InfoStation will send notices to patrons *only* if . . .
  - ◆ Their language preference is the same as the language of the report configuration.
  - AND-
  - ◆ Their address preference is e-mail.
- If you select the Honor Language Preference check box AND you select HTML OR E-mail with Delimited File Attachment as the Output Format, InfoStation will retrieve results *only* for patrons whose language preference is the same as the language of the report configuration.
- If you do NOT select the Honor Language Preference check box, InfoStation will produce a list of all qualifying results, regardless of the patrons' language preference.

For details on setting the Honor Language Preference parameter in conjunction with the Honor Patron Communication Preferences parameter, see the section “[Setting the Honor Language and Honor Patron Communication Preferences Parameters](#)” in this guide.

### **2.11.3 Setting the Honor Language and Honor Patron Communication Preferences Parameters**

The following table can help you choose appropriate settings for the Honor Language Preference and Honor Patron Communication Preferences parameters.

**Note:** This table provides a summary of the information that we discuss in detail in the previous sections. We recommend that you read those sections before you use this table to set the Honor Language Preference and Honor Patron Communication Preferences parameters.

#### **To use the table,**

1. Select a Desired Result from the column on the left.
2. Use the next four columns to choose appropriate settings for the Output Format, Output E-mail, Honor Language Preference, Honor Patron Communication Preferences parameters.

Desired Result	Output Format	Specify Output E-mail Address?	Select Honor Lang. Pref.?	Select Honor Patron Comm. Pref.?
<p>InfoStation will generate e-mail notices for patrons who meet ALL the following conditions:</p> <ul style="list-style-type: none"> <li>• Their language preference matches the language of the report configuration, or they have no language preference.</li> </ul> <p>-AND-</p> <ul style="list-style-type: none"> <li>• Their address preference is set to E-mail.</li> </ul> <p>-AND-</p> <ul style="list-style-type: none"> <li>• Their patron record contains a <i>valid</i> e-mail address.</li> </ul>	<b>Electronic Delivery</b>	No	Yes	Yes
<p>InfoStation will generate electronic notices for patrons who meet ALL the following conditions, regardless of their language preference:</p> <ul style="list-style-type: none"> <li>• Their address preference is set to E-mail Only, Text Message Only, or Text and E-mail.</li> </ul> <p>-AND-</p> <ul style="list-style-type: none"> <li>• Their patron record contains a <i>valid</i> e-mail address and/or specialized telephone number (cell).</li> </ul>	<b>Electronic Delivery</b>	No	No	Yes
<p>InfoStation will generate e-mail notices for ALL patrons who have a <i>valid</i> e-mail address regardless of their language or address preference.</p>	<b>Electronic Delivery</b>	No	No	No

Desired Result	Output Format	Specify Output E-mail Address?	Select Honor Lang. Pref.?	Select Honor Patron Comm. Pref.?
<p>InfoStation will retrieve and display on your screen a list of items associated with patrons who meet ALL the following conditions:</p> <ul style="list-style-type: none"> <li>• Their language preference matches the language of the report configuration, or they have no language preference.</li> </ul> <p>-AND-</p> <ul style="list-style-type: none"> <li>• Their address preference is either paper OR e-mail.</li> </ul>	<b>HTML</b>	<b>No</b>	<b>Yes</b>	<b>No</b>
<p>InfoStation will generate and display on your screen a list of ALL qualifying items associated with <i>any</i> patron, regardless of their language or address preference.</p>	<b>HTML</b>	<b>No</b>	<b>No</b>	<b>No</b>
<p>InfoStation will generate a list of items associated with patrons who meet ALL the following conditions and send the list as an attachment to address(es) specified in the Output E-mail Address text box.</p> <ul style="list-style-type: none"> <li>• Their language preference matches the language of the report configuration, or they have no language preference.</li> </ul> <p>-AND-</p> <ul style="list-style-type: none"> <li>• Their address preference is set to <i>paper</i>.</li> </ul>	<b>Delimited</b>	<b>Yes</b>	<b>Yes</b>	<b>Yes</b>
<p>InfoStation will generate a list of items associated with patrons who have a <i>paper</i> address preference, regardless of their language preference, and will send the list as an attachment to the address(es) specified in the Output E-mail Address text box.</p>	<b>Delimited</b>	<b>Yes</b>	<b>No</b>	<b>Yes</b>

Desired Result	Output Format	Specify Output E-mail Address?	Select Honor Lang. Pref.?	Select Honor Patron Comm. Pref.?
InfoStation will generate a list of ALL qualifying items, regardless of the associated patron's address or language preference and send the list as an e-mail attachment to address(es) that you type in the Output E-mail Address text box.	<b>Delimited</b>	<b>Yes</b>	<b>No</b>	<b>No</b>

### ***2.11.4 Availability of the Honor Language Preference and Honor Patron Communication Preferences Parameters***

The Honor Language Preference and Honor Patron Communication Preferences parameters are available for the following reports:

- Availability
- Bills
- Expired Requests
- Overdues
- Patron Account Statement
- Recalls
- Recalled Bills
- Recalled Overdues
- Review Notices

## 2.12 Instructors Parameter

The Instructors parameter lets you limit your results to items associated with one or more instructors. The Instructors parameter *required* for every report that offers it.

In InfoStation, the Instructors list box is populated with the names of instructors who have one or more active or scheduled reserve lists. The Instructors list box displays the name from the 100 tag, subfield \$a or the 110 tag, subfield \$a of the instructor's patron record.

**To set the Instructors parameter,**

- If you want to generate results for one or more specific instructors, select those names in the Instructors list box.

**Hint:** You can use the CTRL and SHIFT keys to multiselect values in the list box.

-OR-

- If you want to generate ALL results regardless of instructor, select *All or Any* in the Instructors list box.

**Note:** For each report that offers the Instructors parameter, you must select at least one value from the list box before you can save a configuration.

The Instructors parameter is available for the following reports:

- Reserves Activate List
- Reserves Current Active List
- Reserves Pull List
- Reserves Remove List

## 2.13 Item Classes Parameter

The Item Classes lets you limit your results to one or more particular item classes. The Item Classes parameter is *required* for every report that offers it. To appear in your results, an item must have one of the item classes you select for the report configuration.

In InfoStation, the Item Classes list box is populated with item classes defined via the Item Class Definitions parameter ([Figure 2-4](#)), which appears under System Parameters on the Circulation tab in the Virtua Profiler.

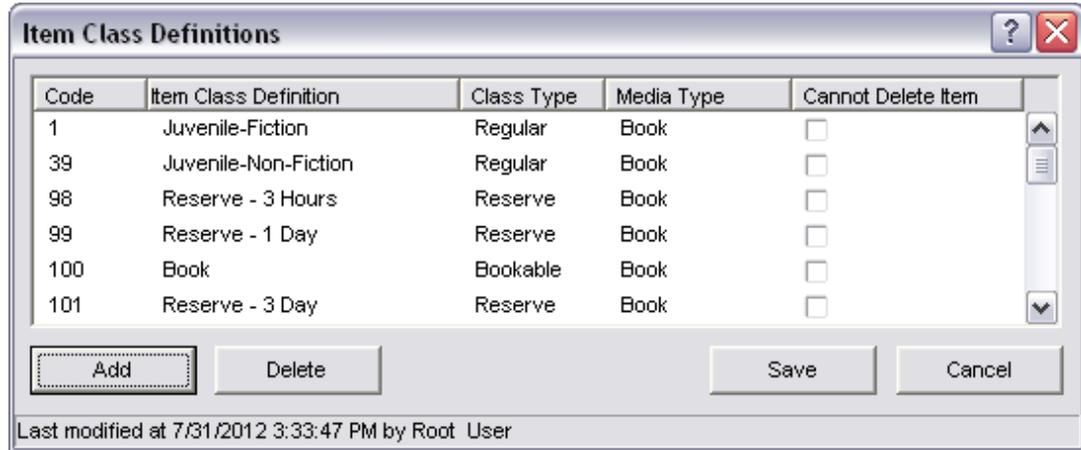


Figure 2-4. Item Class Definitions Window

In InfoStation, the Item Classes list box displays the Item Class Definition (in the second column from the left in [Figure 2-4](#)) for ALL the item classes that are defined for the database.

#### To set the Item Classes parameter in InfoStation,

- If you want to generate results for one or more specific item classes, select those item classes in the list box.

**Hint:** You can use the CTRL and SHIFT keys to multiselect values in the list box.

-OR-

- If you want to generate ALL results regardless of item class, select *All or Any* in the list box.

**Note:** For each report that offers the Item Classes parameter, you must select at least one value from the list box before you can save a configuration.

The Item Classes parameter is available for the following reports:

- Basic Circulation Statistics
- Circulation by Call Number Range

- Journal Circulation
- New Books List

## 2.14 Library Name and Address Parameters

The Library Name and Address fields (*Figure 2-5*) let you make the report configuration library-specific.

<b>Library Name</b>	<input type="text" value="Virtua Library"/>
<b>Library Alternate Name</b>	<input type="text"/>
<b>Library Address 1</b>	<input type="text" value="1 Library Street"/>
<b>Library Address 2</b>	<input type="text" value="Your Town, State or Province Postal Code"/>
<b>Library Address 3</b>	<input type="text" value="Your Country"/>

*Figure 2-5. Library Name and Address Parameters*

By default, the library name and address that you specify will appear at the top of your report output. The Library Name and Address parameters are available for ALL InfoStation reports.

### To specify your library name,

- In the Library Name text box, type the name of your library.

**Note:** If the configuration generates notices for patrons, this is the library responsible for sending the notice.

### To specify your library address,

- In the Library Address text boxes, type your library's address.

**Note:** If the configuration generates notices for patrons, this is the address of the library responsible for generating the notice.

## 2.15 Locations Parameter

The Locations parameter is *required* for all Circulation reports that offer it and lets you limit your results to items associated with one or more locations. For most Circulation reports, the Locations parameter is labeled Shelving, or Shelf, Locations, and lets you limit your results according to shelving location.

The Locations list box is populated with location *names* defined in the Location Names parameter in the Virtua Profiler (*Figure 2-6*).

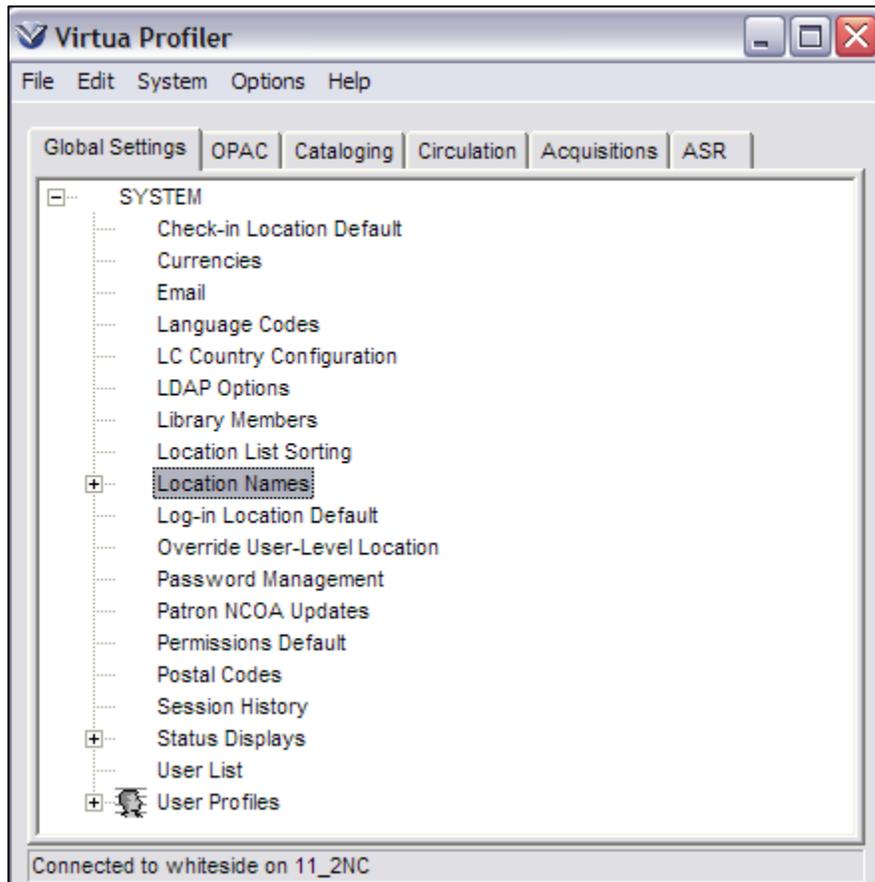


Figure 2-6. Location Names Parameter

For details on the Location Names parameter, see the *Virtua Profiler/Global Settings User's Guide*.

To determine how to sort locations in the Locations list box on report configuration screens, InfoStation uses the setting of either Code or Name in the Location List Sorting parameter on the Global Settings tab of the Virtua Profiler.

**To set the Locations parameter,**

- If you want to generate results for one or more specific locations, select those locations in the list box.

**Hint:** You can use the CTRL or SHIFT key to multiselect values in the list box.

-OR-

- If you want to generate ALL results regardless of shelving location, select *All or Any* in the list box.

You must select at least one value from the list box before you can save a configuration.

**Note:** In a consortium environment, choosing *All or Any* returns results for only the institution of the logged-in user.

In the following table, we list most of the reports in which the Locations parameter is available, and we indicate the type of location on which the parameter allows you to filter each report.

Report	Type of Location
Account Summaries	Log-in location
Acquisitions Audit Trail	Log-in location
Availability	Shelf location
Basic Circulation Statistics	Choice of log-in, shelving, or owning location
Bibliographic Record List	Shelf location
Bills	Shelf location
Broad Cataloging Statistics	Log-in location
Canceled Serials	Holdings Location
Circulation by Call Number Range	Shelf location
Expired Requests	Shelf location
Items by Status	Shelf location
Items Received List	Item's owning location
Journal Circulation	Shelf location
New Books List	Shelf location
OPAC Search Statistics	Log-in Location
Order Status	Log-in Location
Overdues	Shelf location

Report	Type of Location
Patron Account Statement	Log-in location
Recalls	Shelf location
Recalled Bills	Shelf location
Recalled Overdues	Shelf location
Reserves Activate List	Shelf location, reserve location
Reserves Current Active List	Shelf location, reserve location
Reserves Pull List	Shelf location, reserve location
Reserves Remove List	Shelf location, reserve location
Review Notices	Shelf location
Serials Acquisitions	Holdings location
Serials List	Holdings location
Shelving Pull List	Shelf location, owning location
Titles on Order	Log-in location
Vendor Performance	Log-in location

## 2.16 MARC Tag List

**Note:** In this section, we *briefly* discuss the MARC Tag List. For a detailed description of the MARC Tag List and for step-by-step instructions on configuring the list, see the *InfoStation User's Guide*.

The MARC Tag List is an *optional* parameter, which lets you customize the bibliographic information returned by a report. Using the MARC Tag List, you can configure a report to return the bibliographic information of your choice.

Each MARC Tag List is configured to retrieve a specific set of bibliographic tags by default. You can add tags to and delete tags from the default MARC Tag List. For details on the default tag list available for a report, see the description of that report in this guide.

### 2.16.1 Editing the MARC Tag List

**To edit the MARC Tag List,**

1. On the Reports List screen, select the radio button for the report template or configuration whose MARC Tag List you want to edit.

2. Click the Edit button.

The Configuration screen appears.

3. In the Report-specific Parameter, find the MARC Tag List.
4. Click the MARC Tag List icon .

The Current MARC Tag List screen appears (*Figure 2-7*).



*Figure 2-7. Current MARC Tag List Screen*

The Current MARC Tag List screen displays a list of all the MARC tags that the MARC Tag List is currently set to retrieve.

5. Add, edit, and delete tags as needed. For details, see the *InfoStation User's Guide*.
6. When you are finished editing the MARC Tag List, click the Close button.

The Current MARC Tag List screen closes.

7. On the Configuration screen, using the Template icons, access and edit the appropriate output templates to include or exclude the desired tags.
8. On the Configuration screen, click the Save button.

The report configuration is saved.

**Important:** The MARC Tag List does not directly affect the output. It simply tells a report what to *retrieve* from the database. For a report to *return* the information retrieved by the MARC Tag List, the output templates must contain the appropriate variables. For details on editing output templates, see the *InfoStation User's Guide*.

## 2.16.2 Availability of the MARC Tag List

You can configure a MARC Tag List for the following reports:

- Authorities List
- Bibliographic Record List
- Bindery Pull List
- Canceled Serials
- Excessive Requests
- Highest Circulating Titles
- Items by Status
- Journal Circulation
- New Books List
- New Title List
- Reserves Activate List
- Reserves Current Active List
- Reserves Pull List
- Reserves Remove List
- Serials Acquisitions
- Serials List
- Serials Without Holdings

- Shelving Pull List
- Subject Bibliography
- URL Checker

## 2.17 Notice Number to Generate Parameter

The Notice Number to Generate parameter lets you specify which patrons should be included in the output, based upon the overdue notice count stored in the database. The Notice Number to Generate parameter is *required* for every report that offers it.

Using the Location + Patron + Item Matrix in the Virtua Profiler, you can set the notice-generation schedules for overdue items. As you generate notices, Virtua keeps track of the number of notices that have been sent to a patron for a particular item. Together, the notice count and the notice generation schedule determine which patrons are eligible to receive the output from a given notice-generating report configuration.

### For example,

- If you want an Overdues report configuration to generate notices for patrons who have *not yet* received an overdue notice, choose **1** (one) from the Notice Number to Generate list box. The report configuration will then send notices to all patrons who are eligible to receive their *first* notice.
- If you want the report configuration to send overdue notices to patrons who have *already* received one notice, choose **2** from the Notice Number to Generate list box. The report configuration will then send notices to all patrons who are eligible to receive a *second* notice.
- If you want to produce a list of ALL results regardless of notice number, choose **All** from the Notice Number to Generate drop-down list.

**Note:** Notice-generating reports that do not offer a Notice Number to Generate parameter produce only ONE patron notice per item. When you run these reports, they generate notices for eligible patrons who have not yet received a notice for a given item.

You can use the Update Database parameter to determine whether the notice count is incremented when you run a report configuration. For details, see the section “[Update Database Parameter](#)” in this appendix.

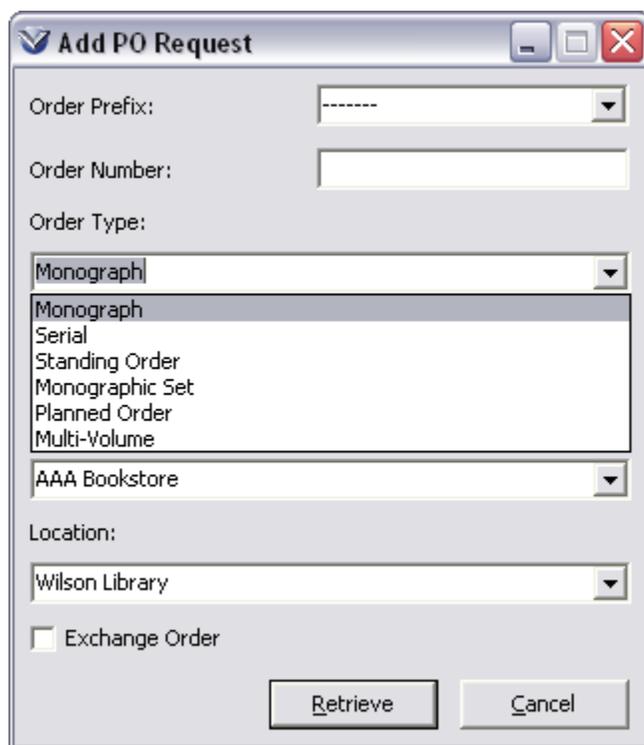
The Notice Number to Generate parameter is available for the following reports:

- Overdues
- Recalled Overdues

## 2.18 Order Types Parameter

The Order Types parameter lets you limit your results to purchase order line items that belong to orders of one or more particular types. The Order Types parameter is *required* for every report that offers it.

In InfoStation, the Order Types list box is populated with the order types that you can select when you create a new purchase order. Note that the options that appear in the Order Types list box are the same as the options that appear in the Order Type drop-down list on the Add PO Request window in the Virtua client ([Figure 2-8](#)).



The screenshot shows a window titled "Add PO Request" with the following fields and controls:

- Order Prefix: [-----] (dropdown)
- Order Number: [ ] (text)
- Order Type: [Monograph] (list box with dropdown arrow)
- AAA Bookstore: [AAA Bookstore] (dropdown)
- Location: [Wilson Library] (dropdown)
- Exchange Order (checkbox)
- Retrieve (button)
- Cancel (button)

Figure 2-8. Add PO Request Window

By setting the Order Types parameter, you can instruct InfoStation to retrieve only the line items that belong to purchase orders of a particular order type.

The Order Types parameter is available in the following reports:

- Order Status
- Titles on Order

## 2.19 Patron Types Parameter

The Patron Types parameter lets you limit report output to results associated with one or more patron types. The Patron Types parameter is *required* for every report that offers it.

When you limit a report by patron type, the results are associated with patrons of a type you select for the report configuration. For example,

- In the Overdues report, the output contains a list of overdue items checked out to patrons of a particular type.
- In the Patron List report, the output contains patron information associated with patrons of a particular type.

Reports that offer the Patron Types Report-specific Parameter limit report output using the patron type code stored in the 030 tag, subfield \$a of the patron record. You can provide descriptions for these codes via the Patron Types parameter in the Virtua Profiler.

In InfoStation, the Patron Types list box is populated with . . .

- *Descriptions* of all patron type codes that are defined in the Virtua Profiler via the Patron Types parameter (e.g., Student).  
-AND-
- *Codes* that exist in one or more patron records but are NOT defined in the Profiler (e.g., ST).

### To set the Patron Types parameter,

- If you want to generate results for one or more specific patron types, select those patron types in the list box.

**Hint:** You can use the CTRL and SHIFT keys to multiselect values in the list box.

-OR-

- If you want to generate ALL results regardless of patron type, select *All or Any* in the Patron Types list box.

**Note:** For each report that offers the Patron Types parameter, you must select at least one value from the list box before you can save a configuration.

The Patron Types parameter is available for the following reports:

- Availability
- Basic Circulation Statistics
- Bills
- Blocked Patrons
- Circulation by Call Number Range
- Delinquent Patron Accounts
- E-mail Validation
- Expired Requests
- Expiring Patrons
- Journal Circulation
- Overdues
- Patron Account Statement
- Patron List
- Recalls
- Recalled Bills
- Recalled Overdues
- Review Notices

## 2.20 Sort Parameters

Sort parameters let you determine how your results are sorted in the output. Sort parameters are *required* for every report that offers them. Whenever a report offers Sort parameters, the output is sorted according to the values selected for the report configuration. Depending on the report, Sort parameters offer either two or three levels of sorting.

Sorting works by grouping results *first* by your Primary Sort parameter. For example, if you select Author as the Primary Sort, results will be grouped *first* by author.

The Secondary Sort parameter sorts results within the group established by the Primary Sort parameter. For example, if you select Author as the Primary Sort and Title as the Secondary Sort, results will be grouped *first* by author, and then, within each author group, sorted by title.

Some reports offer a Tertiary Sort (or third sort) parameter. It sorts results within the group established by the Secondary Sort.

Generally, you will want to use the broadest value as your Primary Sort. The Secondary Sort should then be narrower than the Primary Sort, and so forth. In other words, usually you want *more* items to be associated with your Primary Sort than with your Secondary Sort. However, InfoStation gives you the flexibility to sort data however you prefer.

**Note:** For some reports, results are grouped independently of Sort parameters. For reports that group results automatically, Sort parameters organize results within the established groups.

### 2.20.1 How Sort Parameters Affect Your Results

For non-notice-generating reports, the primary purpose of Sort parameters is to let you organize the output in a way that is appropriate for your library. Because the output of most non-notice-generating reports is used in-house, you can set the Sort parameters in the way that best suits your library's needs.

For notice-generating reports, it is important to consider how Sort parameters will affect patron notices. In some cases, you may need to modify the e-mail output templates to accommodate different sorting combinations.

We recommend that you test your output before generating patron notices. You can test the output for notice-generating reports in the following ways:

- Choose HTML as the Output Format. When you run the report, you can review the output that is returned to the screen.  
-OR-
- Choose E-mail, Primary as the Output Format AND specify an address in the Output E-mail text box. When you run the report, ALL notices are sent to a single address, allowing you to review the output before sending notices to patrons.

**Note:** When testing report configurations, do NOT select the Update Database parameter.

Below we provide some examples of how Sort parameters can affect the output for the Overdues report.

### Example 1

**Primary Sort:** Shelving Location Code

**Secondary Sort:** Patron ID

**Tertiary Sort:** Call Number

This sort order sorts items *first* by shelving location. Then, within each shelving location group, items are sorted by patron. Finally, items are sorted by call number. According to this sort order, patrons receive ONE notice for *each* unique shelving location.

For example, if a patron has overdue items at both the Main Library and the Branch Library, that patron would receive TWO notices: one notice for the items belonging to the Main Library AND one notice for the items belonging to the Branch Library.

For this example, it would be appropriate to use the default Overdues **patron\_email\_page** template, where the last lines of the template file read:

**If there is a mistake, please direct inquiries to the  
%(&item\_location\_name)% circulation desk . . .**

For Example 1, Branch Library or Main Library would be inserted for **%(&item\_location\_name)%** in the appropriate notice. The notice would direct the patron to the circulation desk at the item's shelving location.

## **Example 2**

**Primary Sort:** Patron ID  
**Secondary Sort:** Shelving Location Code  
**Tertiary Sort:** Call Number

This sort order sorts items *first* by patron ID. Then, within each patron grouping, items are sorted by shelving location. Finally, items are sorted by call number. According to this sort order, patrons receive ONE overdue notice that contains a list of ALL overdue items, regardless of shelving location.

For example, if a patron has items checked out from both the Main Library and the Branch Library, that patron receives ONE notice. The notice includes items belonging to either the Main Library or the Branch Library.

For this example, it would NOT be appropriate to use the default Overdues **patron\_email\_page** template, where the last lines of the template file read:

**If there is a mistake, please direct inquiries to the  
%(&item\_location\_name)% circulation desk . . .**

For Example 2, you might want to remove **%(&item\_location\_name)%**, because, in this case, the list of overdue items is NOT location specific.

For details on editing output templates, see *InfoStation User's Guide*.

## **2.20.2 Availability of Sort Parameters**

Sort parameters are available in the following reports:

- Account Summaries
- Acquisitions Audit Trail
- Availability
- Bibliographic Record List
- Bills
- Blocked Patrons
- Canceled Serials
- E-mail Validation
- Excessive Requests
- Expired Requests
- Expiring Patrons
- Items by Status

- Items Received List
- Journal Circulation
- New Books List
- Order Status
- Overdues
- Patron List
- Recalls
- Records by State
- Recalled Bills
- Recalled Overdues
- Reserves Activate List
- Reserves Current Active List
- Reserves Pull List
- Reserves Remove List
- Serials Acquisitions
- Serials Without Holdings
- Shelving Pull List
- Titles on Order
- Vendor List

## 2.21 Transaction Types Parameter

The Transaction Types parameter lets you specify one or more check-out types to include in the output. The Transaction Types parameter is *required* for every report that offers it.

The report returns statistics only for the transaction types you select for the report configuration. You can generate results for the following check-out types:

- Regular Check-outs
- Regular Check-outs Renewals
- In-house Check-outs
- In-house Check-outs Renewals
- Fixed Date Check-outs
- Fixed Date Check-outs Renewals
- Selected Date Check-outs
- Selected Date Check-outs Renewals
- Materials Booking Check-outs
- Materials Booking Check-outs Renewals

The Transaction Types parameter is available for the following reports:

- Basic Circulation Statistics
- Circulation by Call Number Range

## 2.22 Update Database Parameter

The Update Database parameter lets you determine whether InfoStation updates the database when you run the report configuration. The Update Database parameter is *optional* for every report that offers it.

- If you select the Update Database check box, when you run the report configuration, a change is made to the database. Different reports update the database in different ways.
- If you do NOT select the Update Database check box, running the report configuration does not affect the database.

**Hint:** To verify that a report will have the desired effect on the database, test your report configurations before you run them in update mode.

For notice-generating reports, the Update Database parameter is particularly important because it impacts a patron's notice-generating schedule.

- You will want to select this parameter *only* for configurations that actually generate patron notices.
- If you select the Update Database check box for a report configuration that does NOT generate notices for patrons (e.g., an HTML configuration), the database will be updated to indicate that a notice has actually been sent.
- If you do NOT select the Update Database check box, the database will not be updated when you run the report configuration.

**Important:** You will NOT want to update the database when producing results for in-house use, when testing report output, or in any situations when notices are not sent to patrons. Otherwise, the database will be updated to indicate that patrons have received notices when they have not.

When you run a notice-generating report in update mode, InfoStation passes an appropriate username and password to the Circulation Transaction Log. This is either . . .

- ◆ The username and log-in location of the user who is currently logged in to InfoStation and running the report.  
-OR-
- ◆ If the report is running as a scheduled job, the username and password of the user who last saved the configuration.

In the following table, we list the reports that offer the Update Database parameter and a brief explanation of the effect of updating the database.

Report	Effect on Database
Availability	InfoStation updates the database to indicate that an availability notice has been sent to eligible patrons. These patrons will no longer be eligible to receive an availability notice.
Bills	InfoStation . . . <ul style="list-style-type: none"> <li>◆ Updates the database to indicate that a bill has been sent to eligible patrons. These patrons will no longer be eligible to receive a bill.</li> <li>◆ Adds the Billed for Replacement (4600) item status to items included in the output.</li> <li>◆ Adds the processing fee and item price to the account of each patron who receives a bill.</li> </ul>
Expired Requests	InfoStation updates the database to indicate that an expired request notice has been sent to eligible patrons. These patrons will no longer be eligible to receive an expired request. In addition, the expired request is deleted from the request queue.
New Books List	Records that appear in the output are <i>removed</i> from the New Books List if they have been on the list for <i>more</i> than the number of days specified in the Age to Update (Days) text box.
Overdues	InfoStation updates the database indicate that overdue notices have been sent to the appropriate patrons, whose notice counts are incremented.
Recalls	InfoStation updates the database to indicate that a recall notice has been sent to eligible patrons. These patrons will no longer be eligible to receive a recall notice.

Report	Effect on Database
Recalled Bills	InfoStation . . . <ul style="list-style-type: none"> <li>◆ Updates the database to indicate that a bill has been sent to eligible patrons. These patrons will no longer be eligible to receive a bill.</li> <li>◆ Adds the Billed for Replacement (4600) item status to items included in the output.</li> <li>◆ Adds the processing fee and item price to the account of each patron who receives a bill.</li> </ul>
Recalled Overdues	InfoStation updates the database to indicate that recalled overdue notices have been sent to eligible patrons, whose notice counts are incremented.
Reserves Activate List	Reserve items included in the output are activated.
Reserves Remove List	Reserve items included in the output are archived.
Review Notices	InfoStation updates the database to indicate that review notices have been sent to the appropriate patrons. These will next become eligible to receive overdue notices.

## 2.23 Vendors Parameter

The Vendors parameter lets you limit your output to results associated with one or more vendors. The Vendors parameter is required for every report that offers it.

**To set the Vendors parameter,**

- If you want to generate results for one or more specific vendors, select those vendors in the list box.

**Hint:** You can use the CTRL and SHIFT keys to multiselect values in the list box.

-OR-

- If the *All or Any* option is available and you want to generate ALL results, regardless of vendor, select *All or Any*.

-OR-

- If the *All or Any* option is NOT available (i.e., in the Vendor Performance report) and you want to generate results for ALL available vendors, select all the vendors in the list box.

**Note:** For each report that offers the Vendors parameter, you must select at least one value from the list box before you can save a configuration.

The Vendors parameters is available in the following reports:

- Canceled Serials
- Order Status
- Serials Acquisitions
- Serials List
- Titles on Order
- Vendor Performance
- Vouchers

## 2.24 Virtua Users Parameter

The Virtua Users parameter lets you limit you results to transactions associated with one or more Virtua users. The Virtua Users parameter is *required* for every report that offers it.

The values that appear in the Virtua Users list box come from the users defined via the User Profiles parameter, which appears on the Global Settings tab in the Virtua Profiler (*Figure 2-9*).

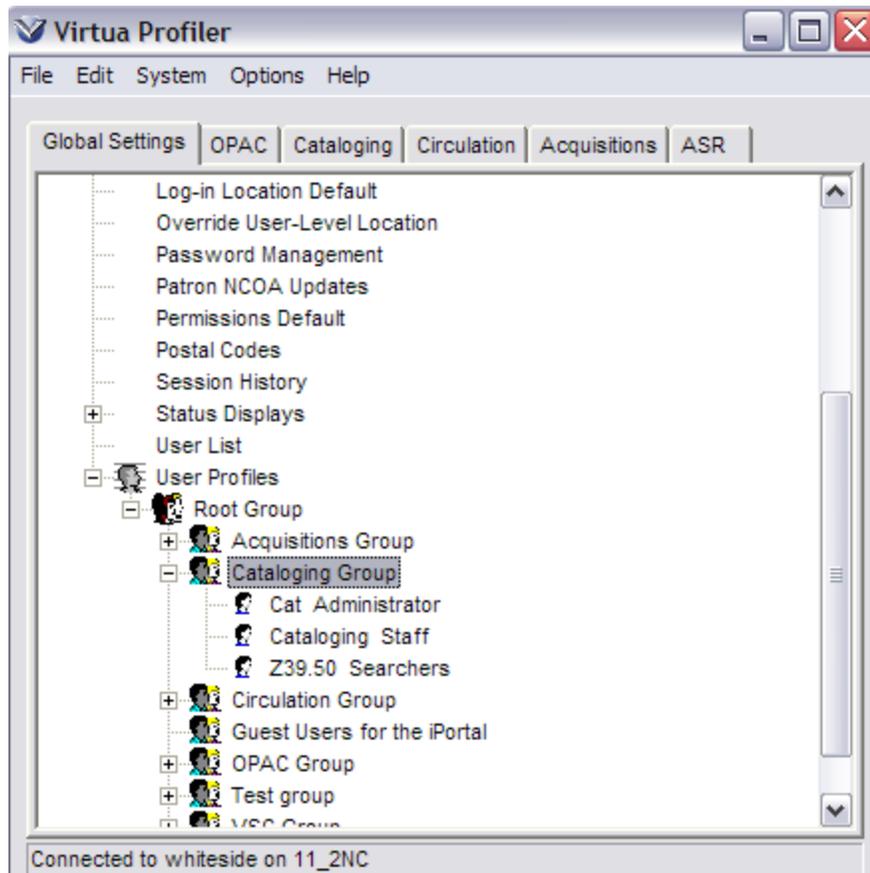


Figure 2-9. User Profiles Parameter

Users are linked to records via various subfields of the 039 tag.

- Subfield \$b stores the username of the Virtua user to *last* modify a record.
- Subfield \$d stores the username of the next to last Virtua user to modify a record.
- Subfield \$z stores the username of the Virtua user who *first* entered the record into the database.

Depending on the report, the Virtua Users parameter limits your results using different subfields of the 039 tag. For details, see the chapter that discusses the report in detail in this reference guide.

**To set the Virtua Users parameter,**

- If you want to generate results for one or more specific users, select those users in the Virtua Users list box.

**Hint:** You can use the CTRL and SHIFT keys to multiselect values in the list box.

-OR-

- If you want to generate ALL results regardless of Virtua user, select *All or Any* in the Virtua Users list box.

**Note:** In a consortium environment, choosing *All or Any* returns results for only the set of users belonging to the institution of the logged-in user.

The Virtua Users parameter is available in the following reports:

- Acquisitions Transaction Counts by User
- Broad Cataloging Statistics
- Cataloging Errors
- Check-outs by Swiss Book Classes
- OPAC Search Statistics
- Production of Records by User
- Records by State
- Stack Requested Items Received by Reading Room
- Stack Requested Items Received by Closed Stack

## 2.25 Use Patron's Registering Library For Notices Parameter

The Use Patron's Registering Library For Notices parameter lets you configure notice-generating reports (except the Availability report) and the Patron Account Statement to generate e-mail notices or delimited output that includes the following data elements:

- Notice Library Name
- Notice Library Alternate Name
- Notice Library Address 1
- Notice Library Address 2
- Notice Library Address 3
- Notice Library Address 4
- Notice Library Address 5
- Notice Library Telephone

For a given notice-generating report, if the Use Patron's Registering Library For Notices parameter is selected and the Output Format of the report is Electronic Delivery or Delimited File, InfoStation will produce a report using the "Notice Library" data in place of the data specified in the "Library" report-specific parameters on the Configuration screen. The Notice Library data comes from the patron's registering library location.

## 3. About InfoStation Files

In this appendix we provide information to help you locate and understand the files in your InfoStation `/usr/vtls/virtua/web rpt_XX_x` directory. Additionally, this appendix contains details on how you can copy and move report files.

This appendix covers the following topics:

- ⇒ [InfoStation Directory Structure](#)
- ⇒ [About Report Files](#)
- ⇒ [Moving Reports to Different Report Groups](#)

### 3.1 InfoStation Directory Structure

By default, InfoStation files are stored in the `/usr/vtls/virtua/web rpt_XX_x` directory, where `XX_x` is the version of InfoStation that you are using.

**Note:** You can redefine the path of the `/usr/vtls/virtua/web rpt_XX_x` directory at installation. In this guide, however, we discuss InfoStation in terms of the default directory structure.

Below we describe the InfoStation directory structure within the `/usr/vtls/virtua/web rpt_XX_x` directory.

<b>/usr/vtls/virtua/webrpt_XX_x</b>	<ul style="list-style-type: none"><li>• The highest level in the InfoStation directory.</li></ul>
<b>/backup</b>	<ul style="list-style-type: none"><li>• Contains files of backup records generated by running the Record Modification Utility report.</li></ul>
<b>/extracted</b>	<ul style="list-style-type: none"><li>• Empty by default, but can be used to hold files of records extracted by the Record Extraction Utility report.</li></ul>
<b>/modified</b>	<ul style="list-style-type: none"><li>• Empty by default, but can be used to hold files of records modified by the Record Modification Utility report.</li></ul>
<b>/Acq</b>	<ul style="list-style-type: none"><li>• Contains files for reports that belong to the Acquisitions Report Group.</li></ul>
<b>/Acq_1</b>	<ul style="list-style-type: none"><li>• Contains files for the Titles on Order report.</li></ul>
<b>/Acq_2</b>	<ul style="list-style-type: none"><li>• Contains files for the New Books List report.</li></ul>
<b>/Acq_3</b>	<ul style="list-style-type: none"><li>• Contains files for the Account Summaries report.</li></ul>
<b>/Acq_4</b>	<ul style="list-style-type: none"><li>• Contains files for the Acquisitions Audit Trail report.</li></ul>
<b>/Acq_5</b>	<ul style="list-style-type: none"><li>• Contains files for the Order Status report.</li></ul>
<b>/Acq_6</b>	<ul style="list-style-type: none"><li>• Contains no files.</li></ul>
<b>/Acq_7</b>	<ul style="list-style-type: none"><li>• Contains files for the Vouchers report.</li></ul>
<b>/Acq_8</b>	<ul style="list-style-type: none"><li>• Contains files for the Vendor List report.</li></ul>
<b>/Acq_9</b>	<ul style="list-style-type: none"><li>• Contains files for the Vendor Performance report.</li></ul>
<b>/Acq_10</b>	<ul style="list-style-type: none"><li>• Contains files for the Items Received by Month report.</li></ul>
<b>/Acq_11</b>	<ul style="list-style-type: none"><li>• Contains files for the Received Items List report.</li></ul>
<b>/Acq_12</b>	<ul style="list-style-type: none"><li>• Contains files for the Gifts Received By Month report.</li></ul>
<b>/Acq_13</b>	<ul style="list-style-type: none"><li>• Contains files for the Received Gifts List report.</li></ul>
<b>/Acq_14</b>	<ul style="list-style-type: none"><li>• Contains files for the Acquisitions Transaction Counts by User report.</li></ul>

<b>/Acq_15</b>	<ul style="list-style-type: none"> <li>• Contains files for the Canceled Orders Summary report.</li> </ul>
<b>/Acq_16</b>	<ul style="list-style-type: none"> <li>• Contains files for the Cost Export report.</li> </ul>
<b>/Acq_17</b>	<ul style="list-style-type: none"> <li>• Contains files for the Purchase Requests report.</li> </ul>
<b>/Acq_18</b>	<ul style="list-style-type: none"> <li>• Contains files for the Credits report.</li> </ul>
<b>/Adm</b>	<ul style="list-style-type: none"> <li>• Contains files for reports that belong to the Administrative Report Group.</li> </ul>
<b>/Adm_1</b>	<ul style="list-style-type: none"> <li>• Contains files for the Patron Record Load and Extract report.</li> </ul>
<b>/Adm_3</b>	<ul style="list-style-type: none"> <li>• Contains files for the Bibliographic Record Load and Extract report.</li> </ul>
<b>/Adm_4</b>	<ul style="list-style-type: none"> <li>• Contains files for the Update Probationary Patrons report.</li> </ul>
<b>/Adm_1000</b>	<ul style="list-style-type: none"> <li>• Contains files for the ISSN Simultaneous Session Notification report.</li> </ul>
<b>/Adm_1001</b>	<ul style="list-style-type: none"> <li>• Contains files for the ISSN User Account Statistics report.</li> </ul>
<b>/Cat</b>	<ul style="list-style-type: none"> <li>• Contains files for reports that belong to the Cataloging Report Group.</li> </ul>
<b>/Cat_1</b>	<ul style="list-style-type: none"> <li>• Contains files for the Broad Cataloging Statistics report.</li> </ul>
<b>/Cat_2</b>	<ul style="list-style-type: none"> <li>• Contains files for the Cataloging Errors report.</li> </ul>
<b>/Cat_3</b>	<ul style="list-style-type: none"> <li>• Contains files for the Bibliographic Record List report.</li> </ul>
<b>/Cat_4</b>	<ul style="list-style-type: none"> <li>• Contains files for the Records By State report.</li> </ul>
<b>/Cat_5</b>	<ul style="list-style-type: none"> <li>• Contains files for the Cataloger Productivity report.</li> </ul>
<b>/Cat_6</b>	<ul style="list-style-type: none"> <li>• Contains files for the Authorities List report.</li> </ul>
<b>/Cat_7</b>	<ul style="list-style-type: none"> <li>• Contains files for the Subject Bibliography report.</li> </ul>
<b>/Cat_8</b>	<ul style="list-style-type: none"> <li>• Contains files for the URL Checker report.</li> </ul>

<b>/Cat_9</b>	<ul style="list-style-type: none"><li>• Contains files for the Record Extraction Utility report.</li></ul>
<b>/Cat_10</b>	<ul style="list-style-type: none"><li>• Contains files for the Record Modification Utility report.</li></ul>
<b>/Cat_11</b>	<ul style="list-style-type: none"><li>• Contains files for the Indexed Words report.</li></ul>
<b>/Cat_12</b>	<ul style="list-style-type: none"><li>• Contains files for the Production of Records by User report.</li></ul>
<b>/Cat_13</b>	<ul style="list-style-type: none"><li>• Contains files for the Number of Records in Database report.</li></ul>
<b>/Cat_14</b>	<ul style="list-style-type: none"><li>• Contains files for the Items Created List report.</li></ul>
<b>/Cat_15</b>	<ul style="list-style-type: none"><li>• Contains files for the Item Barcode List report.</li></ul>
<b>/Cat_16</b>	<ul style="list-style-type: none"><li>• Contains files for the Change Item Location by Call Number Range report.</li></ul>
<b>/Cat_17</b>	<ul style="list-style-type: none"><li>• Contains files for the Legal Deposit Statistics report</li></ul>
<b>/Cat_18</b>	<ul style="list-style-type: none"><li>• Contains files for the Items Received List report.</li></ul>
<b>/Cat_19</b>	<ul style="list-style-type: none"><li>• Contains files for the Item Data Integrity report.</li></ul>
<b>/Cat_20</b>	<ul style="list-style-type: none"><li>• Contains files for the New Title List report.</li></ul>
<b>/Cat_1000</b> ↓ <b>/Cat_1019</b>	<ul style="list-style-type: none"><li>• Contains files for reports specific to the ISSN Centre.</li></ul>
<b>/Cat_1200</b>	<ul style="list-style-type: none"><li>• Contains files for the US Forest Service New Materials by Subject report.</li></ul>
<b>/Cat_2000</b> ↓ <b>/Cat_2017</b>	<ul style="list-style-type: none"><li>• Contains files for reports specific to the BRO.</li></ul>

<b>/cgi-bin</b>	<ul style="list-style-type: none"> <li>• Contains the <b>.cgi</b> files for your InfoStation reports and other utilities that InfoStation needs to run reports. We recommend that you do NOT edit these files.</li> </ul>
<b>/VTLS</b>	<ul style="list-style-type: none"> <li>• Contains various template files and Perl modules used by InfoStation. Most of these files should NOT be edited.</li> </ul>
<b>/Common</b>	<ul style="list-style-type: none"> <li>• Contains template files common to a variety of reports.</li> </ul>
<b>/Cir</b>	<ul style="list-style-type: none"> <li>• Contains files for reports that belong to the Circulation Report Group.</li> </ul>
<b>/Cir_2</b>	<ul style="list-style-type: none"> <li>• Contains files for the Items by Status report.</li> </ul>
<b>/Cir_3</b>	<ul style="list-style-type: none"> <li>• Contains files for the Overdues report.</li> </ul>
<b>/Cir_4</b>	<ul style="list-style-type: none"> <li>• Contains files for the Bills report.</li> </ul>
<b>/Cir_5</b>	<ul style="list-style-type: none"> <li>• Contains files for the Recalls report.</li> </ul>
<b>/Cir_6</b>	<ul style="list-style-type: none"> <li>• Contains files for the Availability report.</li> </ul>
<b>/Cir_7</b>	<ul style="list-style-type: none"> <li>• Contains files for the Recalled Overdues report.</li> </ul>
<b>/Cir_8</b>	<ul style="list-style-type: none"> <li>• Contains files for the Recalled Bills report.</li> </ul>
<b>/Cir_9</b>	<ul style="list-style-type: none"> <li>• Contains files for the Basic Circulation Statistics report.</li> </ul>
<b>/Cir_10</b>	<ul style="list-style-type: none"> <li>• Contains files for the Circulation Snapshot report.</li> </ul>
<b>/Cir_11</b>	<ul style="list-style-type: none"> <li>• Contains files for the Patron Statistics report.</li> </ul>
<b>/Cir_12</b>	<ul style="list-style-type: none"> <li>• Contains files for the Patron List report.</li> </ul>
<b>/Cir_13</b>	<ul style="list-style-type: none"> <li>• Contains files for the Expired Requests report.</li> </ul>
<b>/Cir_14</b>	<ul style="list-style-type: none"> <li>• Contains files for the E-mail Validation report.</li> </ul>
<b>/Cir_15</b>	<ul style="list-style-type: none"> <li>• Contains files for the Circulation by Call Number Range report.</li> </ul>
<b>/Cir_16</b>	<ul style="list-style-type: none"> <li>• Contains files for the Patron Account Statement report.</li> </ul>
<b>/Cir_17</b>	<ul style="list-style-type: none"> <li>• Contains files for the Excessive Requests report.</li> </ul>

- /Cir\_18** • Contains files for the Shelving Pull List report.
- /Cir\_19** • Contains files for the Reserves Pull List report.
- /Cir\_20** • Contains files for the Reserves Activate List report.
- /Cir\_21** • Contains files for the Reserves Remove List report.
- /Cir\_22** • Contains files for the Reserves Current Active List report.
- /Cir\_23** • Contains files for the Unsatisfied Requests report.
- /Cir\_24** • Contains files for the Review Notices report.
- /Cir\_25** • Contains files for the Expiring Patrons report.
- /Cir\_26** • Contains files for the Blocked Patrons report.
- /Cir\_27** • Contains files for the Journal Circulation report.
- /Cir\_28** • Contains files for the Delinquent Patron Accounts report.
- /Cir\_29** • Contains files for the Unique Management report.
- /Cir\_30** • Contains files for the Overdues (i-tiva) report.
- /Cir\_31** • Contains files for the Bills (i-tiva) report.
- /Cir\_32** • Contains files for the Recalls (i-tiva) report.
- /Cir\_33** • Contains files for the Availability (i-tiva) report.
- /Cir\_34** • Contains files for the Recalled Overdues (i-tiva) report.
- /Cir\_35** • Contains files for the Recalled Bills (i-tiva) report.
- /Cir\_36** • Contains files for the Expired Requests (i-tiva) report.

- /Cir\_37
  - Contains files for the Transition Disputed Items report.
- /Cir\_38
  - Contains files for the Expired Bookings report.
- /Cir\_39
  - Contains files for the Media Booking Pull List report.
- /Cir\_40
  - Contains files for the Number of Patrons report.
- /Cir\_41
  - Contains files for the Check-outs by Swiss Book Classes report.
- /Cir\_42
  - Contains files for the Patron Barcode List report.
- /Cir\_43
  - Contains files for the Collected Fines report.
- /Cir\_44
  - Contains files for the Collected Fines report.
- /Cir\_45
  - Contains files for reports specific to the ASR system .
- ↓
- /Cir\_50
- /Cir\_51
  - Contains files for the Expired Agency Request Items report.
- /Cir\_52
  - Contains files for the Last Copy Items report.
- /Cir\_53
  - Contains files for the Unsatisfied Request Cancellation report.
- /Cir\_54
  - Contains files for the Renewal Statistics report.
- /Cir\_55
  - Contains files for the Undelivered Notices report.
- /Cir\_56
  - Contains files for the Failed Notices report.
- /Cir\_57
  - Contains files for the Inventory Control Utility report.
- /Cir\_58
  - Contains files for the Calculating Overdue Fines Before Check-In report.

<b>/Cir_59</b>	<ul style="list-style-type: none"><li>• Contains files for the Change Request Pickup Location report.</li></ul>
<b>/Cir_60</b>	<ul style="list-style-type: none"><li>• Contains files for the Request Expiration Notification and Extension report.</li></ul>
<b>/Cir_61</b>	<ul style="list-style-type: none"><li>• Contains files for the Highest Circulating Titles report.</li></ul>
<b>/Cir_62</b>	<ul style="list-style-type: none"><li>• Contains files for the Availability Reminder report.</li></ul>
<b>/Cir_63</b>	<ul style="list-style-type: none"><li>• Contains files for the Patron Expiration Reminders report.</li></ul>
<b>/config</b>	<ul style="list-style-type: none"><li>• Contains the configuration files for default report templates and customized report configurations.</li></ul>
<b>/constants.cfg</b>	<ul style="list-style-type: none"><li>• Contains the constants that you defined at installation.</li></ul>
<b>/databases.cfg</b>	<ul style="list-style-type: none"><li>• Contains the values for the databases that you configured at installation.</li></ul>
<b>/help</b>	<ul style="list-style-type: none"><li>• Contains global help files for report configuration screens.</li></ul>
<b>/images</b>	<ul style="list-style-type: none"><li>• Contains the image files for the images that appear throughout InfoStation.</li></ul>
<b>/indexes.xx</b>	<ul style="list-style-type: none"><li>• Contains language strings for the search categories that appear in the OPAC Search Statistics report, where <b>xx</b> is the language of the file.</li></ul>
<b>/languages.cfg</b>	<ul style="list-style-type: none"><li>• Contains the code values for the languages supported by InfoStation.</li></ul>
<b>/log</b>	<ul style="list-style-type: none"><li>• Contains the InfoStation error log.</li></ul>
<b>/Opa</b>	<ul style="list-style-type: none"><li>• Contains files for reports that belong to the OPAC Report Group.</li></ul>
<b>/Opa_2</b>	<ul style="list-style-type: none"><li>• Contains files for the OPAC Search Statistics report.</li></ul>
<b>/Opa_7</b>	<ul style="list-style-type: none"><li>• Contains files for reports that belong to the Server Response Times report</li></ul>
<b>/Opa_10</b>	<ul style="list-style-type: none"><li>• Contains files for reports that belong to the Electronic Resource Access Statistics report.</li></ul>

- /Pat**
  - Empty by default, but can be used to hold files for reports that belong to the Patron Report Group. You can move report files to this directory via the **move\_report.pl** utility.
- /Racq**
  - Contains files for reports that belong to the *Restricted* Acquisitions Report Group. By default, this directory does not contain any files. You can move report files to this directory via the **move\_report.pl** utility.
- /Rcat**
  - Contains files for reports that belong to the *Restricted* Cataloging Report Group. By default, this directory does not contain any files. You can move report files to this directory via the **move\_report.pl** utility.
- /Rcir**
  - Contains files for reports that belong to the *Restricted* Circulation Report Group. By default, this directory does not contain any files. You can move report files to this directory via the **move\_report.pl** utility.
- /Ropa**
  - Contains files for reports that belong to the *Restricted* OPAC Report Group. By default, this directory does not contain any files. You can move report files to this directory via the **move\_report.pl** utility.
- /Rser**
  - Contains files for reports that belong to the *Restricted* Serials Report Group. By default, this directory does not contain any files. You can move report files to this directory via the **move\_report.pl** utility.
- /Ser**
  - Contains files for reports that belong to the Serials Report Group.
- /Ser\_1**
  - Contains files for the Serials Without Holdings report.
- /Ser\_2**
  - Contains files for the Serials Snapshot report.
- /Ser\_3**
  - Contains files for the Canceled Serials report.
- /Ser\_4**
  - Contains files for the Serials Acquisitions report.

<code>/Ser_5</code>	<ul style="list-style-type: none"> <li>• Contains files for the Bindery Pull List report.</li> </ul>
<code>/Ser_6</code>	<ul style="list-style-type: none"> <li>• Contains files for the Serials List report.</li> </ul>
<code>/web_reports_strings.xx</code>	<ul style="list-style-type: none"> <li>• Contain global language strings, where <b>xx</b> is the language of the strings file.</li> </ul>

## 3.2 About Report Files

In the section “[InfoStation Directory Structure](#),” you will note that the files associated with specific InfoStation reports reside within the following Report Group directories:

```

/usr/vtls/virtua/webprt_XX_x/Acq
/usr/vtls/virtua/webprt_XX_x/Cat
/usr/vtls/virtua/webprt_XX_x/Cir
/usr/vtls/virtua/webprt_XX_x/Opa
/usr/vtls/virtua/webprt_XX_x/Ser

```

Each of these directories contains subdirectories, which contain the files associated with specific reports. For example, **Ser\_6** is a subdirectory of the `/usr/vtls/virtua/webprt_XX_x/Ser` directory and contains all the files related to the Serials List report.

In this section, we provide a general description of the files that exist within each report directory. Note that each report directory contains different files that are specific to that report. The information provided here is intended only as a guideline that you can use to identify similar files in other directories.

For our example, we will use the `/usr/vtls/virtua/webprt_XX_x/Cir/Cir_3` directory, which contains all the files related to the Overdues report. Below we show and describe the contents of the **Cir\_3** directory.

<code>/Cir_3</code>	<ul style="list-style-type: none"> <li>• The report directory for the Overdues report. This directory contains all the files associated with the overdues report.</li> </ul>
<code>/Cir_3_strings.xx</code>	<ul style="list-style-type: none"> <li>• The language strings files for the Overdues report, where <b>xx</b> is the language of the file.</li> </ul>
<code>/help</code>	<ul style="list-style-type: none"> <li>• Contains the help files for the Overdues report.</li> </ul>
<code>/config.tem</code>	<ul style="list-style-type: none"> <li>• The template file that generates the</li> </ul>

	Configuration screen for the Overdues report.
<b>/html_header.tem</b>	• The template file that generates the header in HTML output.
<b>/html_page.tem</b>	• The template file that generates the overall framework of HTML output.
<b>/html_row.tem</b>	• The template file that generates information for a single overdue item in HTML output.
<b>/patron_email_page.tem</b>	• The template file that generates the overall framework of patron e-mail notices.
<b>/patron_email_row.tem</b>	• The template file that generates information for a single overdue item in patron e-mail notices. .

You can edit the output template files via the Configuration screen. For a list of output template files that are available for each report, see the appropriate InfoStation reference guide.

You should NOT edit the configuration template (**config.tem**) as it may affect your ability to create report configurations that work properly.

## 3.3 Moving Reports to Different Report Groups

InfoStation supplies the utility **move\_report.pl**, which lets you move and copy reports to different Report Groups. The **move\_report.pl** utility moves all the files associated with a given report, including both report templates and report configurations. You can find the **move\_report.pl** utility in the `/usr/vtls/virtua/web rpt_XX_x/cgi-bin` directory.

**Notes:** Since “moved” reports do not follow the default InfoStation directory structure, in older versions of InfoStation, these reports will not be updated automatically when you upgrade your InfoStation installation.

- If you are upgrading to version 50.0 or higher from an earlier version of InfoStation, you will need to upgrade these files manually. You will also need to update any configurations associated with a report template. To do this,
  - Run **move\_report.pl** again for each report that you had moved before the upgrade.
  - Once you have moved or copied a report, update any report configurations by opening them and then saving them again.
- If your current version of InfoStation is version 50.0 or above, “moved” reports are updated automatically as part of the installation process.

Regardless of InfoStation version, if the Item Barcode List report has been moved or copied using **move\_report.pl**, you must follow these steps to insure that it is upgraded properly when you install a newer version of InfoStation. Before beginning the installation,

- Navigate to the new location of the **.cgi** file for the moved report. For instance, if you have used **move\_report.pl** to move the Cat\_15 report to the Restricted Cataloging Report Group and you have assigned the moved report a new report number of Rcat\_100, then navigate to the `/usr/vtls/virtua/web rpt_XX_x/Rcat/Rcat_100` directory to view the **RCat\_report\_100.cgi** file.
- Edit the Filename line of the **.cgi** file so that it reflects the *original* file name of the Item Barcode List report. To continue the example above, edit the Filename line so that it appears exactly as follows: **# Filename: Cat\_report\_15.cgi**
- Save the **.cgi** file and continue the installation.

The following reports, which are for use only by ISSN Centre users, should be upgraded by following the above instructions for upgrading the Item Barcode List report:

- ISSN-L History Data Extraction report

- Bib ID ISSN Association report
- Compact CD Index report
- Canceled Link Check report
- Family Link Generation report

The **move\_report.pl** utility uses the following syntax:

**./move\_report.pl -r (report) -g (group) -n (number) -c (y or n)**, where . . .

- **-r [report]** is the name the **.cgi** file for the report that you want to move. For example, the Acquisitions Audit Trail **.cgi** file is **Acq\_report\_4.cgi**.
- **-g [group]** is the code for the Report Group to which you want to copy or move the report. The Restricted Acquisitions Report Group code is **Racq**.
- **-n [number]** is the new report number of the report.

**Note:** If you are copying reports, be sure NOT to duplicate any Innovative-assigned report number that is already in use. To avoid using a report number that may be scheduled for a future build, use a number greater than 100 but less than 1000.

- **-c [y or n]** specifies whether to copy (**y**) or move (**n**) the report to the new Report Group. If you specify . . .
  - ♦ **y** (for Yes) - The report is *copied* to the new Report Group. This means that there are two copies of the report files—one in the original Report Group and one in the new Report Group.
  - **n** (for No) - The report is *moved* to the new Report Group. This means that the report files are deleted from the original Report Group and moved to the new Report Group.

**For example, to move the Acquisitions Audit Trail report from the Acquisitions Report Group to the Restricted Acquisitions Report Group,**

1. Navigate to the **/usr/vtls/virtua/web rpt\_XX\_x/cgi-bin** directory.
2. Type:

```
./move_report.pl -r Acq_report_4.cgi -g Racq -n 100 -c n
```

The Acquisitions Audit Trail report and all associated template, configuration, and strings files are moved to the Restricted Acquisitions Report Group. You can navigate to the **/usr/vtls/virtua/web rpt\_XX\_x/Racq/Racq\_100** directory to view the files.

For your reference, below is a complete list of Report Group abbreviations:

- **Acq** - The Acquisitions Report Group.
- **Adm** - The Administrative Report Group.
- **Cat** - The Cataloging Report Group.
- **Cir** - The Circulation Report Group.
- **Opa** - The OPAC Report Group.
- **Pat** - The Patron Report Group.
- **Racq** - The Restricted Acquisitions Report Group.
- **Rcat** - The Restricted Cataloging Report Group.
- **Rcir** - The Restricted Circulation Report Group.
- **Ropa** - The Restricted OPAC Report Group.
- **Rser** - The Restricted Serials Report Group.
- **Ser** - The Serials Report Group.

## 4. Appendix A - List of Available InfoStation Reports

Administrative Report Group	Notice	Update Database	Function
Bibliographic Record Load and Extract	N	Y (Upload only)	Allows you to . . . <ul style="list-style-type: none"> <li>• Upload to the database a fixed-format or delimited file of bibliographic information and specify options to process the file and save the data in the MARC bibliographic record format.</li> <li>-OR-</li> <li>• Download bibliographic records from the database and specify options to convert the data from the MARC record format to a fixed-format or delimited file.</li> </ul>
Patron Load and Extract	N	N	Allow you to read patron records from a delimited or fixed length format input file and upload them to the Virtua database. Users may also download patron MARC records that have changed in a given period and output them to a delimited or fixed length format file.
Update Probationary Patrons	Y	Y	Update patron type of probationary patrons who are in good standing.

Acquisitions Report Group	Notice	Update Database	Function
Account Summaries	N	N	Produce a summary of acquisitions accounts. Users can filter by location, fiscal year, and/or account.
Acquisitions Audit Trail	N	N	Produce a summary of acquisitions account activity that meets a date criteria set in the report configuration parameters.
Acquisitions Transaction Counts By User	N	N	Generate counts of all Acquisitions transactions that meet the Virtua user and date range criteria specified in the report configuration.
Canceled Orders Summary	N	N	Generate a list of purchase order lines that were successfully/unsuccesfully canceled and a summary count of orders and order lines that were canceled/not canceled.
Cost Export	N	N	Export Acquisitions data from purchase orders, invoices, and payments to be used by Electronic Resource Management systems.

<b>Acquisitions Report Group</b>	<b>Notice</b>	<b>Update Database</b>	<b>Function</b>
Credits	N	N	List of credits that meet the currency, date range, fiscal year, and account criteria specified in the report configuration.
Gifts Received by Month	N	N	Count and calculate all gifts received in the specified date range sorted by month.
Items Received by Month	N	N	Count and calculate all items <i>received through the Acquisitions subsystem</i> in the specified date range.
New Books List	N	Y	List books currently marked “new.” Results can be sorted by subject code.
Order Status	N	N	List orders with a specified order status. Users can filter the order status by vendor and order date.
Purchase Requests	N	N	Provide statistical information about requests for purchase submitted by library patrons and users.
Received Gifts List	N	N	List all gifts received in the specified date range.
Received Items List	N	N	List all items received, invoiced, and paid <i>through the Acquisitions subsystem</i> that fall within the specified date range.
Titles on Order	N	N	List titles currently on order. Users can filter by location, vendor, order type, and order date.
Vendor List	N	N	List vendors sorted by parameter set in report configuration.
Vendor Performance	N	N	Display statistics on vendor performance such as fill rate, claim rate, and average price.
Vouchers	N	N	Produce a summary of all vouchers for a specified vendor(s) and date range set in report configuration. Users can filter by location.

<b>Cataloging Report Group</b>	<b>Notice</b>	<b>Update Database</b>	<b>Function</b>
Authorities List	N	N	List all permanent authority records created by specified home library code(s).
Bibliographic Record List	N	N	List records based on report configuration. Users may specify what circulation count or counts are used in the filter criteria.
Broad Cataloging Statistics	N	N	Produce a summary of cataloging statistics for the date range set in the report configuration parameters.
Cataloger Productivity	N	N	Produce a summary of new original records added to the database by user, cataloging source, and material type.
Cataloging Errors	N	N	Produce a summary of cataloging errors for bibliographic and authority records for a specified date range. Users can filter on specific error messages.

<b>Cataloging Report Group</b>	<b>Notice</b>	<b>Update Database</b>	<b>Function</b>
Change Item Location By Call Number Range	N	Y	Change the location and shelf location in item records identified by the item-level call number range specified in the report configuration.
Indexed Words	N	N	List indexed words in the bibliographic records in the database.
Item Barcode List	N	N	Generate a list of items identified by barcodes that fall within a barcode range specified in the report configuration.
Item Data Integrity	N	N	Generate a list of items that do not validate against Item Data Elements as configured by location in the Virtua Profiler.
Items Created List	N	N	Generate a list of items that were created within a specified date range OR that have a barcode that falls within a specified barcode range.
Items Received List	N	N	Generate statistics about received items, and the purchase orders and invoices associated with those items.
Legal Deposit Statistics	N	N	Generate a list of holdings records in the database that are legal deposits.
New Title List	N	Y	Generate a list of titles (bibliographic records) that have recently been added to the collection.
Number of Records in Database	N	N	Generate counts of the bibliographic, item, holdings, and authority records that exist in the database.
Production of Records By User	N	N	Generate, for each user specified, counts of bibliographic, item, holdings, and authority records in the database that have been created, modified, and deleted and that meet the criteria that set in the report configuration.
Records by State	N	N	List state records that meet the record type, bibliographic level, and date range criteria set. Users can choose to report out data for records in states other than error state, i.e., Review 1 or Overnight.
Record Extraction Utility	N	N	Allow you to extract records in ISO-2709 format from a Virtua MARC 21 database. The utility lets you extract the entire database or a subset of the database based on specified filtering criteria.
Record Modification Utility	N	Y (But you have to commit the modifications manually)	Allow you to make global changes to records in the database. It lets you specify criteria for record selection and define the modifications that you want to make to the selected records.

<b>Cataloging Report Group</b>	<b>Notice</b>	<b>Update Database</b>	<b>Function</b>
Subject Bibliography	N	N	Generate a bibliography of records in your database that are associated with selected subject headings.
URL Checker	N	N	Check the viability of URLs in bibliographic, item, and holdings records in your database.
<b>HKPL: Book Registration Office (BRO)-related reports - Cataloging Report Group on BRO database only</b>	<b>Notice</b>	<b>Update Database</b>	<b>Function</b>
Acknowledgement of Periodicals Deposited	Y	N	Generate letters to publishers to acknowledge periodicals that have been received at optionally-specified locations within an optionally-specified date range.
Canceled Serials	N	N	Generate a list of serials subscriptions that have been canceled and meet the location, vendor, acquisition method, and canceled date range criteria specified by the user.
Government Gazette Author List	N	N	Generate author data to be used for the production of HKPL's yearly reports. The report generates an index of either English authors or Chinese authors who are associated with titles that contain a BRO Number within a BRO Number range specified by the user.
Government Gazette Chinese Books and Periodicals	N	Y	Generate a code file of bibliographic data used for the generation of HKPL's quarterly reports.
Government Gazette English Books and Periodicals	N	Y	Generate a code file of bibliographic data used for the generation of HKPL's quarterly reports.
Government Gazette Printer List	N	N	Generate a code file of printer data used for the production of HKPL's yearly reports.
Government Gazette Publisher List	N	N	Generate a code file of publisher data used for the production of HKPL's yearly reports.
Government Gazette Yearly Periodicals Deposited	N	N	Generates a list of periodical titles along with the publisher, frequency, language, and price as well as the issues that have been received within the date range specified by the user.
Monthly Item Record Statistics	N	N	Generate statistics relating to the creation and deletion of item records based on the criteria that is set in the report configuration. The report can produce results by Collection Code or BRO Year and the results can be restricted by date range.

<b>Cataloging Report Group</b>	<b>Notice</b>	<b>Update Database</b>	<b>Function</b>
Monthly Statistics of Serials Publications	N	N	Generate statistics about the titles added, titles deleted, issues added, and issues deleted during the month specified in the report configuration, broken down by language and government publication. The report also returns monthly and year-to-date check-in totals for the current and previous year, along with the percentage of change in these totals.
Number of Issued Publisher Prefixes and ISBNs	N	N	Generate statistics relating to publisher prefixes in the database based on the criteria specified by the user. The report can also give the total number of ISBNs issued for the date range specified by the user.
Number of New Periodical Titles Registered	N	N	Generate a list of periodical titles that were created within the BRO Number range specified by the user.
Number of Publications Deposited	N	N	Generate statistics by month or quarter about books and periodicals registered at the BRO, based on the Report Type, Serials Check-In Month, and BRO Number Range parameters specified by the user. The statistics are broken down by language and government publication, with a total for all titles and a total for all issues.
Periodical Holdings List	N	N	Generates a list of periodical titles along with the publisher, frequency, language, and price as well as the issues that have been received within the date range specified by the user.
Print Publisher's Registered Books	N	N	Generate a list of registered books that have been assigned a publisher's prefix as specified in the report configuration. The report output is sorted by ISBN and includes the total number of books registered and the total number of ISBNs allocated.
Publisher and Printer Statistics	N	N	Generate statistics on the number of Publishers and Printers that registered books within a particular BRO Number range. The counts are reported by the language of the publications with a total for all publications registered by Publishers and a separate total for all publications registered by Printers.
Publishers International ISBN Directory	N	N	Generate a list of publishers and publisher information. The contents of the list are based on a specified date range and one of three filters that you set in the report configuration.

Cataloging Report Group	Notice	Update Database	Function
Registered Books and Periodicals	N	N	Generates statistics by year about books and periodicals that have been registered at the BRO and about the number of ISBN Publisher Prefixes that have been issued. The years that are included in the output are determined by a range of consecutive years specified by the user.

Circulation Report Group	Notice	Update Database	Function
Availability	Y	Y	List requested items that are currently available.
Availability Reminder	Y and N	Y	Remind patrons who have already received an Availability notice regarding their requested items. List available requests expiring soon for in-house use.
Basic Circulation Statistics	N	N	Produce Circulation statistics by patron type and item type.
Bills	Y	Y	List patrons with and/or generates notices for billable items.
Blocked Patrons	N	N	List patrons that have one or more blocks; user can filter and sort by block type.
Calculating Overdue Fines Before Check-in	N	N	List estimated overdue fines for overdue items that are not yet checked in.
Change Request Pickup Location	Y		Generate notices for patrons to inform them that the pickup location of their request has changed.
Circulation by Call Number Range	N	N	Produce Circulation statistics by user-defined call number ranges.
Circulation Snapshot	N	N	Produce a summary of <i>current</i> circulation statistics
Collected Fines	N	N	List fine and fee transactions that meet the criteria that you set in the report configuration.
Delinquent Patron Accounts	N	N	List fines and fees belonging to the patrons whose accounts are considered to be delinquent according to the criteria that you specify in the report configuration.
E-mail Validation			Check patron e-mail addresses for valid (not correct) e-mail structure, e.g., the @ sign is part of the address.
Excessive Requests	N	N	List items with excessive requests against them.
Expired Agency Request Items	N	Y	List 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
Expired Bookings	Y	Y	List expired bookings that meet the location and patron type criteria that you set in the report configuration.

<b>Circulation Report Group</b>	<b>Notice</b>	<b>Update Database</b>	<b>Function</b>
Expired Requests	Y	Y	List Available Requests with expired Hold times and Unavailable Requests with expired Expiration dates.
Expiring Patrons	N	N	List patrons with patron accounts due to expire.
Failed Notices	N	N	Identify patrons whose notices failed to be delivered.
Highest Circulating Titles	N	N	List bibliographic records with items attached that meet the criteria specified in the report configuration.
Inventory Control Utility	N	Y	Generate an inventory report that lists only those items that have an error condition associated with them or for which there is an inventory or shelving problem.
Items by Status	N	N	List items with the status set in the report configuration parameters.
Journal Circulation	N	N	Produce a summary of Circulation statistics for serial titles in the database.
Last Copy Items	N	N	List 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.
Media Booking Pull List	N	N	List items that need to be prepared for scheduled item bookings, according to the booking Prep Start Time specified for a booked item.
Number of Patrons	N	N	Produce a total count of patrons in the database, and a count of selected patrons based on criteria such as ZIP code, year of patron’s birth, and patron prefix, as specified in the report configuration.
Overdues	Y	Y	List overdue items meeting the criteria set in the report configuration parameters.
Patron Account Statement	Y	N	List all transactions related to fine and fee assessments for patrons during a specified date range.
Patron Barcode List	N	N	List patrons identified by barcodes that fall within a barcode range specified in the report configuration.
Patron List	N	N	List patrons meeting criteria set in report configuration. Users can a) specify a date range that will return only those patrons who were actually valid during the period specified and b) filter on patrons who have edited their records with the Patron Self-Registration function of Chamo.
Patron Statistics	N	N	Produce Circulation statistics based on patron type
Recalls	Y	Y	List items for which recall requests have been placed.
Recalled Bills	Y	Y	List billable items recalled by other patrons.
Recalled Overdues	Y	Y	List overdue items recalled by other patrons.

<b>Circulation Report Group</b>	<b>Notice</b>	<b>Update Database</b>	<b>Function</b>
Renewal Statistics	N	N	Produce a count of successful and unsuccessful renewals based on the type of client and type of log-in (e.g., the Internet, telephone, Fastrac, etc.) used when the patron performed the renewal.
Request Expiration Notification and Extension Report	Y	Y	Generate notices for patrons whose requests are about to expire.
Reserves Activate List	N	Y	List items that qualify for activation, according to their scheduled Active Period and parameters set in the report configuration.
Reserves Current Active List	N	N	List items that are currently on active reserve and meet the criteria for location, course, and instructor.
Reserves Pull List	N	N	List scheduled reserve items that need to be pulled from the shelves and moved to the reserve area.
Reserves Remove List	N	Y	List active reserve items that have expired and need to be deleted or archived.
Review Notices	Y	Y	List items that will soon be overdue. The Location + Patron + Item matrix determines if review notices are generated.
Shelving Pull List	N	N	List items that need to be returned from their current shelving locations to their owning locations.
Transition Disputed Items	N	Y	Allow you to change items in dispute to billable status after a user-defined number of days. Changing an item to billable status will also reinstate all fines.
Undelivered Notices	N	N	Produce a list of notices and patron information that have previously been recorded as failed to be delivered.
Unique Management	N	Y	Generate information about delinquent patron accounts and send it to Unique Management Services, Inc.
Unsatisfied Request Cancellation	Y	Y	List items with request queues that should be cleared because the items carry a status for which requests are not allowed.
Unsatisfied Requests	N	N	List all unsatisfied requests, such as holds, that could be satisfied by available items.
<b>OPAC Report Group</b>	<b>Notice</b>	<b>Update Database</b>	<b>Function</b>
Electronic Resource Access Statistics	N	N	Generate statistics on how many times electronic resources were accessed from each library branch within a given period of time.
OPAC Search Statistics	N	N	Produce OPAC statistics by search type, patron type, and command.

<b>OPAC Report Group</b>	<b>Notice</b>	<b>Update Database</b>	<b>Function</b>
Server Response Times	N	N	Produce a summary of the response times of the Virtua server to all Z39.50 search requests.

<b>Serials Report Group</b>	<b>Notice</b>	<b>Update Database</b>	<b>Function</b>
Bindery Pull List	N	N	List all serial issues at the <i>ready for binding</i> status.
Canceled Serials	N	N	List serials subscriptions that have been canceled.
Serials Acquisitions	N	N	List recently acquired serials that meet the criteria set in the report configuration.
Serials List	N	N	List serials filtered by location, vendor, acquisition method, or acquisitions status. This report can return information from the bibliographic, item, holdings, and vendor records.
Serials Snapshot	N	N	Produce a summary of the serials statistics that exist in the database at the time you run the report.
Serials Without Holdings	N	N	List serials without holdings record sorted by call number or title.

## **5. Appendix B - Changes in this Guide**

### **5.1 Changes for Version 16.1**

No changes were made.

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