

User's Guide



Integrated Library System

Virtua Profiler

Cataloging Parameters

VIRTUA ILS – INTEGRATED LIBRARY SYSTEM

Virtua Profiler
Cataloging Parameters
Version 16.1
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Table of Contents

TABLE OF CONTENTS	I
TABLE OF FIGURES	VI
TABLE OF FIGURES	VI
1. INTRODUCTION	1
1.1 USING THIS GUIDE	1
1.2 ACCESSING CATALOGING PARAMETERS	3
2. CREATING ADDITIONAL ACCESS POINTS	8
2.1 OVERVIEW OF ADDITIONAL ACCESS POINTS	8
2.2 SETTING THE ADDITIONAL ACCESS POINTS PARAMETER	10
3. DEFINING ARABIC STOPWORD EXCEPTIONS	12
4. WORKING WITH AUTHORITY MESSAGES	14
4.1 SETTING THE AUTHORITY MESSAGE PARAMETER	14
4.2 SETTING THE HEADING REPLACEMENT FLAG	16
4.3 SETTING THE MARC HEADING CONFLICT FLAG	17
4.4 SETTING THE NEW HEADING MESSAGE PARAMETER	18
5. SETTING CALL NUMBER PARAMETERS	20
5.1 CONFIGURING CALL NUMBER INDEXING AND PRIORITY RULES	20
5.1.1 WORKING WITH THE CALL NUMBER INDEX AND PRIORITY PARAMETER	22
5.1.1.1 Determining Whether One or All Call Numbers are Indexed	23
5.1.1.2 Adding a Call Number Definition to the Call Number Index and Priority List Box	23
5.1.1.3 Deleting a Call Number Definition from the Call Number Index and Priority List Box	25
5.1.1.4 Changing the Priority Order of Call Number Indexing	25
5.2 SPECIFYING A CALL NUMBER INDEXING TYPE	26
5.3 CONFIGURING INCREMENT SETTINGS FOR HOLDING-LEVEL CALL NUMBERS	27
5.3.1 ADDING INCREMENT SETTINGS FOR A PREFIX	28
5.3.2 DELETING INCREMENT SETTINGS FOR A PREFIX	30
5.4 ENABLING ITEM-LEVEL CALL NUMBERS	30

5.5 CONFIGURING INCREMENT SETTINGS FOR ITEM-LEVEL CALL NUMBERS	31
5.5.1 ADDING INCREMENT SETTINGS FOR A PREFIX	32
5.5.2 DELETING INCREMENT SETTINGS FOR A PREFIX	33
6. SETTING THE CATALOGING BASIC OPTIONS PARAMETER	34
6.1 SETTING THE CATALOGING BASIC OPTIONS: AN OVERVIEW	34
6.2 DETAILS ABOUT THE CATALOGING BASIC OPTIONS	39
6.2.1 ABOUT THE BARCODE TYPE SETTING	39
6.2.2 ABOUT THE VALUE FOR 003 SETTING	39
6.2.3 ABOUT THE GENERATE ITEM BARCODE USING PREFIX SETTING	40
6.2.4 ABOUT DUPLICATE CHECKS FOR PATRON RECORDS	40
6.2.5 ABOUT THE MARC FORMAT OPTIONS SETTINGS	41
6.2.6 ABOUT THE CONTROL NUMBER OPTIONS	42
6.2.7 ABOUT THE AUTOMATIC GENERATION OF 035 SETTINGS	43
6.2.8 ABOUT THE REQUIRE UNITS FOR SERIAL BIBS/HOLDINGS ITEMS SETTING	43
6.2.9 ABOUT THE USE CODABAR 39 MOD 10 VALIDATION FOR ITEM/PATRON BARCODES SETTING	43
6.2.10 ABOUT THE ADD PRICE TO NEW ITEMS USING ISBN \$C SETTING	44
6.2.11 ABOUT THE INDEX \$E IN 100, 400, 600, 700, AND 800 TAGS SETTING	44
6.2.12 ABOUT THE INDEX \$E IN 110, 410, 610, 710, AND 810 TAGS SETTING	45
6.2.13 ABOUT ARCHIVING BIBLIOGRAPHIC RECORDS	45
6.2.14 ABOUT THE GATHER CATALOGING STATISTICS SETTING	46
6.2.15 ABOUT THE INDEX OTHER STANDARD IDENTIFIER SETTING	46
6.2.16 ABOUT THE INDEX PUBLISHER NUMBER SETTING	47
6.2.17 ABOUT THE INDEX PUBLISHER FOR BROWSE SETTING	47
6.2.18 ABOUT THE MAINTAIN ITEM BARCODE HISTORY SETTING	48
6.2.19 ABOUT THE ALLOW UNDELETE FOR MARC RECORDS SETTING	48
6.2.20 ABOUT THE UPDATE TAGS AND INDICATOR NUMBERS OF BIBLIOGRAPHIC RECORDS ATTACHED TO AUTHORITY RECORDS SETTING	49
6.2.21 ABOUT THE ALWAYS USE THE INCOMING 005 TAG WHEN UPDATING/LOADING LC/NACO AUTHORITY RECORDS SETTING	50
6.2.22 ABOUT THE FOR ITEMS WITH NO ITEM-LEVEL CALL NUMBER, RETAIN OLD CALL NUMBER WHEN RELINKING SETTING	50
6.2.23 ABOUT THE INDEX NATIONAL BIBLIOGRAPHY NUMBER SETTING	51
6.2.24 ABOUT THE DO NOT SUPPORT SINGLE AUTHORITY RECORD SETTING	51
6.2.25 ABOUT THE MARC EDITOR TAG PASTING SETTINGS	52
6.2.26 ABOUT THE PRICE THRESHOLD SETTING	52
6.2.27 ABOUT THE DISPLAY ROUTING LIST SETTING	53
7. CONFIGURING COLLECTION CODES	54
8. CONFIGURING COLLECTION CODE GROUPS	57
9. CONFIGURING KEYWORD SEARCHING	62

9.1 UNDERSTANDING KEYWORD SEARCHING	62
9.1.1 UNDERSTANDING THE WORKFLOW	63
9.2 EVALUATING SEARCH CATEGORIES	64
9.2.1 UNDERSTANDING SEARCH CATEGORIES	64
9.2.2 LIST OF KEYWORD SEARCH CATEGORIES	65
9.2.3 LIMITATIONS ON CONFIGURING SEARCH CATEGORIES	70
9.2.3.1 Fixed Field Categories	71
9.2.3.2 Restricted Categories	72
9.2.4 OTHER LIMITATIONS ON INDEX CATEGORIES	74
9.2.4.1 Limitations on Indexing Control Numbers	74
9.2.4.2 Limitations on Indexing Call Numbers and Classification Data	75
9.3 SETTING ITEM BARCODE VALIDATION RULES	75
9.4 SETTING KEYWORD INDEXING RULES	77
9.4.1 ACCESSING THE KEYWORD INDEXING CONFIGURATION EDITOR	78
9.4.2 ASPECTS OF THE KEYWORD INDEXING CONFIGURATION EDITOR	80
9.4.2.1 Keyword Index Tab	81
9.4.2.2 Search Order Tab	81
9.4.3 MODIFYING THE INDEXES SECTION	81
9.4.3.1 Defining Category Codes	82
9.4.4 SETTING INDEXING RULES FOR A SEARCH CATEGORY	83
9.4.4.1 Setting Keyword Indexing Rules for Variable Fields	84
9.4.4.2 Setting Keyword Indexing Rules for Fields in an 008 Tag	86
9.4.4.3 Setting Keyword Indexing Rules for Fields in an 006 or 007 Tag	88
9.4.4.4 Setting Keyword Indexing Rules for Fields in the Leader	90
9.4.5 DETERMINING THE ORDER IN WHICH SEARCH CATEGORIES APPEAR	92
9.5 AFTER YOU SET KEYWORD INDEXING RULES . . .	94
 <u>10. SETTING THE PARAMETER FOR MULTIPLE SUBJECT HEADINGS</u>	 <u>96</u>
 10.1 OVERVIEW OF STEPS FOR ENABLING MULTIPLE SUBJECT HEADINGS	 96
10.2 INTRODUCTION TO MULTIPLE SUBJECT HEADINGS	97
10.3 ENABLING MULTIPLE SUBJECT HEADING FUNCTIONALITY	99
10.4 WORKING WITH LIBRARY-DEFINED HEADINGS	100
10.4.1 ADDING LIBRARY-DEFINED HEADING TYPES	101
10.4.2 DELETING LIBRARY-DEFINED HEADING TYPES	103
10.5 WORKING WITH STANDARD HEADINGS	105
 <u>11. SETTING NON-PARAMETERIZED SHELF LOCATIONS</u>	 <u>107</u>
 <u>12. CONFIGURING PATRON CATALOGING OPTIONS</u>	 <u>109</u>
 <u>13. CONFIGURING PAC CODES</u>	 <u>116</u>
 <u>14. CONFIGURING RECORD STATES</u>	 <u>118</u>

14.1 ACCESSING THE RECORD STATES PARAMETER	118
14.2 ASPECTS OF THE RECORD STATES WINDOW	119
14.2.1 ABOUT PRESET RECORD STATES	119
14.3 WORKING WITH THE RECORD STATES PARAMETER	120
14.3.1 DEFINING NEW RECORD STATES	121
14.3.2 DELETING RECORD STATES	121
14.3.3 EDITING RECORD STATES	122
<u>15. CONFIGURING RECORD VALIDATION RULES</u>	<u>123</u>
<u>16. DEFINING STOPWORDS</u>	<u>125</u>
16.1 INTRODUCTION TO STOPWORDS	125
16.2 VIEWING STOPWORDS	126
16.3 ADDING STOPWORDS	128
16.4 DELETING STOPWORDS	130
<u>17. SETTING THE SUBJECT HEADINGS TO INDEX PARAMETER</u>	<u>132</u>
<u>18. DEFINING TAGS INDEXED FOR THE UDC SEARCH</u>	<u>134</u>
<u>19. DEFINING TAGS INDEXED FOR USER DEFINED SEARCHES</u>	<u>136</u>
<u>20. DEFINING TAGS TO BE ADDED</u>	<u>139</u>
20.1 ADDING A TAG DEFINITION TO THE TAGS TO BE ADDED PARAMETER	139
20.2 REMOVING A TAG DEFINITION FROM THE TAGS TO BE ADDED PARAMETER	140
20.3 ACTIVATING OR DEACTIVATING TAG DEFINITIONS ON THE TAGS TO BE ADDED PARAMETER	141
<u>21. DEFINING TAGS TO BE DELETED</u>	<u>142</u>
21.1 ADDING A TAG DEFINITION TO THE TAGS TO BE DELETED PARAMETER	142
21.2 REMOVING A TAG DEFINITION TO THE TAGS TO BE DELETED PARAMETER	145
<u>22. APPENDIX A - DEFAULT KEYWORD INDEXING RULES</u>	<u>146</u>
22.1 DEFAULT VARIABLE FIELD INDEXING RULES	146
22.2 DEFAULT 008 INDEXING RULES	148
22.3 DEFAULT LEADER INDEXING RULES	151
<u>23. APPENDIX B - CALL NUMBER INDEXING TYPES</u>	<u>152</u>

<u>24. APPENDIX C - USING CALL NUMBER INCREMENTING IN THE CLIENT</u>	<u>153</u>
<u>25. APPENDIX D - LIST OF TYPES AND BIB LEVELS</u>	<u>158</u>
25.1 FOR MARC 21 BIB TYPE CLASS	158
25.2 FOR CATMARC BIB TYPE CLASS	159
<u>26. APPENDIX E - LIST OF MARC 21 RECORD FORMATS</u>	<u>160</u>
<u>27. APPENDIX F - DEFINING KEYWORD INDEXING FOR UNIMARC DATABASES</u>	<u>162</u>
27.1 DEFINING INDEX SETTINGS FOR AN ATTRIBUTE IN A UNIMARC DATABASE	162
27.1.1 SETTING KEYWORD INDEXING RULES FOR VARIABLE FIELDS	164
27.1.2 SETTING KEYWORD INDEXING RULES FOR FIELDS IN THE LEADER	165
27.1.3 SETTING KEYWORD INDEXING RULES FOR FIELDS IN THE UNIMARC TAG	167
<u>28. APPENDIX G - PARAMETERS SPECIFIC TO THE HONG KONG PUBLIC LIBRARY</u>	<u>170</u>
28.1 READING PROGRAM NOMINATORS PARAMETER	170
28.2 PATRON CATALOGING OPTIONS PARAMETER	171
28.3 PUBLISHER PREFIX CONFIGURATION	172
<u>29. APPENDIX H - CHANGES IN THIS GUIDE</u>	<u>175</u>
29.1 CHANGES FOR VERSION 16.1	175
29.2 CHANGES FOR VERSION 16.0 SP1	175
<u>INDEX</u>	<u>177</u>
<u>INDEX</u>	<u>177</u>

Table of Figures

Figure 1-1. Virtua Profiler	4
Figure 1-2. Virtua Profiler - Cataloging Tab	5
Figure 1-3. Virtua Profiler - Cataloging Parameters	6
Figure 2-1. Browse Results Window	9
Figure 2-2. Additional Access Points Window	10
Figure 3-1. Arabic Stop Words Window	12
Figure 4-1. Cataloging Tab - Authority Messages Expanded	15
Figure 4-2. Authority Message Dialog Box	16
Figure 4-3. Heading Replacement Flag Dialog Box	17
Figure 4-4. MARC Heading Conflict Flag Dialog Box	18
Figure 4-5. New Heading Message Window	19
Figure 5-1. Virtua Profiler - Call Number Parameters	21
Figure 5-2. Call Number Index and Priority Window	22
Figure 5-3. Call Number Index and Priority Window - New Row Added	24
Figure 5-4. Call Number Indexing Type Dialog Box	27
Figure 5-5. Holdings Call Number Increment Window	28
Figure 5-6. Holdings Call Number Increment Window - New Row Added	29
Figure 5-7. Item Call Number Flag	31
Figure 5-8. Item Call Number Increment Window	32
Figure 5-9. Item Call Number Increment Window - New Row Added	33
Figure 6-1. Cataloging Basic Options Window	35
Figure 7-1. Collection Code Definitions Parameter	54
Figure 8-1. Creating a New Collection Code Group	58
Figure 8-2. Add Collection Code Group Window	59
Figure 8-3. Adding a Collection Code to a New Collection Code Group	59
Figure 8-4. Collection Groups Filter Window in the Virtua Client	60
Figure 8-5. Selecting Collection Groups to Filter Chamo Search Results - Admin Filter Configuration Screen	61
Figure 9-1. Item Barcode Validation Window	76
Figure 9-2. Virtua Profiler - Cataloging Tab	78
Figure 9-3. Virtua Profiler - Cataloging Tab	79
Figure 9-4. Keyword Indexing Configuration Editor	80
Figure 9-5. Keyword Indexing Configuration Editor - Indexes Section	82
Figure 9-6. Keyword Indexing Configuration Editor	83
Figure 9-7. Keyword Indexing Configuration Editor - Variable Fields	85
Figure 9-8. Keyword Indexing Configuration Editor - Fixed Field (008)	87
Figure 9-9. Keyword Indexing Configuration Editor - Other Fixed Field (006/007)	89
Figure 9-10. Keyword Indexing Configuration Editor - Leader Field	91
Figure 9-11. Keyword Indexing Configuration Editor - Search Order Tab	93
Figure 9-12. Virtua Client - Keyword Search Help Window	95
Figure 10-1. Multiple Subject Headings Window	98
Figure 10-2. Multiple Subject Headings Window - Library-defined Headings Section	100
Figure 10-3. Multiple Subject Headings Warning Message	101
Figure 10-4. Multiple Subject Headings Window - New Row Added	102
Figure 10-5. Multiple Subject Headings Window	104
Figure 11-1. Non-Parameterized Shelf Locations Window	108
Figure 12-1. Patron Editor Window	109

Figure 12-2. Patron Cataloging Options Window	111
Figure 13-1. Preservation and Conservation Codes (PAC) Window	116
Figure 14-1. Record States Window	119
Figure 14-2. Record States Window - New Row Added	121
Figure 15-1. Record Validation Rules Window	123
Figure 16-1. Stopwords Window - Displaying Stopwords for Bibliographic Keyword Searches	127
Figure 16-2. Stopwords Window - Displaying a New Line	129
Figure 16-3. Stopwords Confirmation Message	130
Figure 17-1. Subject Headings to Index Window	133
Figure 18-1. Tags Indexed For UDC Search Window	134
Figure 18-2. Tags Indexed for UDC Search Window	135
Figure 19-1. Tags Indexed For User Defined Window	137
Figure 19-2. Tags Indexed For User Defined Search Window	137
Figure 20-1. Tags to Be Added Window	140
Figure 21-1. Tags to Be Deleted Window	143
Figure 21-2. Tags to Be Deleted Window	143
Figure 24-1. Item Call Number Increment Window	154
Figure 24-2. View Bibliographic Record Window - Items Tab	154
Figure 24-3. Item Information Window	155
Figure 24-4. View Bibliographic Record window - Items Tab	156
Figure 24-5. Item Call Number Increment Window	157
Figure 27-1. Keyword Indexing Configuration Editor	163
Figure 27-2. Keyword Indexing Configuration Editor - Variable Fields	164
Figure 27-3. Keyword Indexing Configuration Editor - Leader Field	166
Figure 27-4. Keyword Indexing Configuration Editor - UNIMARC Fixed Field	168
Figure 28-1. Reading Program Nominators Window	170
Figure 28-2. Publisher Prefix Configuration	173

1. Introduction

You can use the Virtua Profiler to customize various aspects of the Virtua™ ILS – Integrated Library System. This user's guide describes how you can use the Virtua Profiler to set parameters related to the Cataloging subsystem.

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

Most Cataloging parameters determine how records are processed during cataloging and indexing activity. **Generally, you should set these parameters ONCE and NOT change them unless absolutely necessary.** If you do decide to change a cataloging parameter, do so with caution. If you are unsure about whether you need to modify a parameter on the Cataloging tab of the Virtua Profiler, contact Innovative Customer Services.

For some parameters, changes you make will not be applied until you run a script or executable. Where appropriate, we list the steps you need to take to apply changes.

This chapter covers the following topics:

- ⇒ [Using this Guide](#)
- ⇒ [Accessing Cataloging Parameters](#)

1.1 Using this Guide

The *Virtua Profiler/Cataloging Parameters User's Guide* contains a description of the parameters available from the Cataloging tab of the Virtua Profiler. For an overview of using the Virtua Profiler, see the *Virtua Profiler Getting Started Primer*.

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 offers a [Table of Figures](#), an [Index](#), and a reference section consisting of appendices.

For . . .	See . . .
Details on accessing Cataloging parameters and a brief description of each	Section 1.2
Instructions for creating Additional Access Points	Chapter 2
Instructions for defining exceptions to Arabic stopwords	Chapter 3
Information about Authority Message parameters	Chapter 4
Instructions for setting call number parameters	Chapter 5
Instructions for setting basic cataloging parameters	Chapter 6
Instructions for adding and managing collection codes	Chapter 7
Instructions for adding and managing collection code groups	Chapter 8
Instructions for configuring keyword searching, including instructions for setting keyword indexing rules	Chapter 9
Information about configuring multiple subject heading functionality	Chapter 10
Details on configuring non-parameterized shelf locations	Chapter 11
Details on configuring options for the Patron Editor	Chapter 12
Details on defining Preservation and Conservation (PAC) codes	Chapter 13
Instructions for defining record states	Chapter 14
Instructions for configuring record validation rules	Chapter 15
Instructions for defining stopwords	Chapter 16
Details about determining which subject headings are indexed	Chapter 17
Details about determining which fields are indexed for the UDC search	Chapter 18

Information about indexing tags for the library-defined browse	Chapter 19
Instructions for defining tags to be added to incoming records	Chapter 20
Instructions for defining tags to be deleted from incoming records	Chapter 21
A list of default keyword indexing rules	Appendix A
A list of call number indexing types	Appendix B
Details on using call number incrementing in the Virtua client	Appendix C
A list of Types and Bib Levels	Appendix D
A list of record formats	Appendix E
Instructions for configuring keyword indexing rules for a UNIMARC database	Appendix F
Describes parameters that are specific to the Hong Kong Public Library	Appendix G
A list of changes that were made to this user's guide since the last version	Appendix H

1.2 Accessing Cataloging Parameters

Cataloging parameters are located on the Cataloging tab of the Virtua Profiler. This section provides instructions for accessing Cataloging parameters and provides a brief description of each one. For details on setting these parameters, see the following chapters in this guide.

To access Cataloging parameters,

1. Open the Virtua Profiler to the initial window and connect to a Virtua database (*Figure 1-1*). For details on establishing a connection, see the *Virtua Profiler Getting Started Primer*.

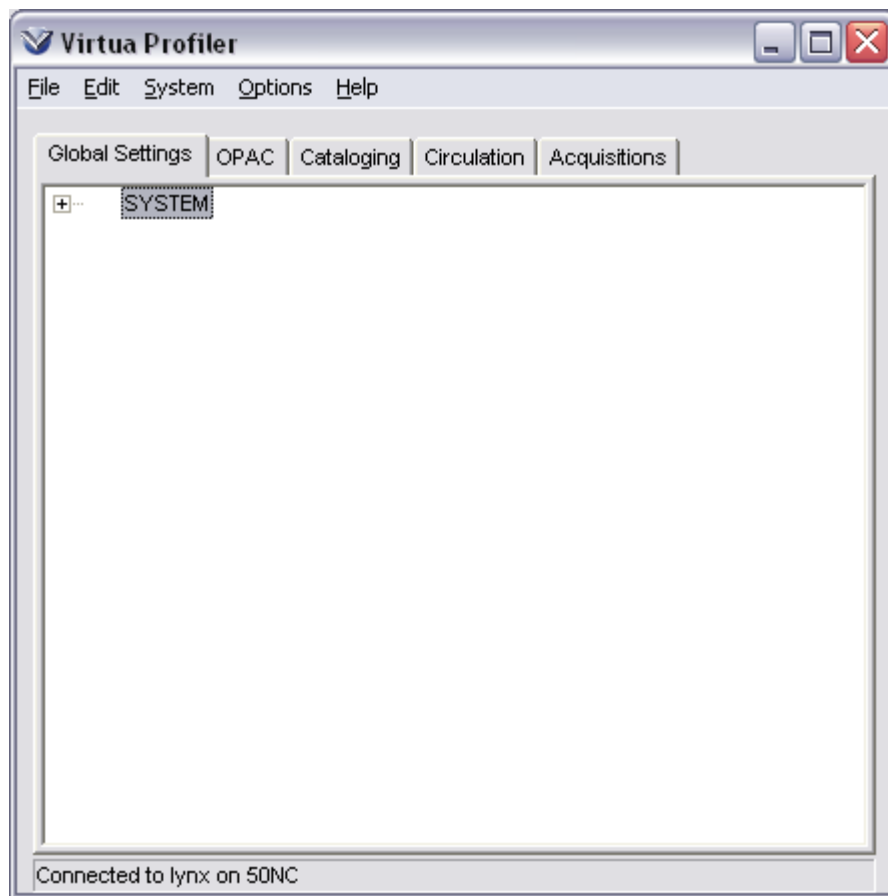


Figure 1-1. Virtua Profiler

2. Click the Cataloging tab to view the Cataloging parameters tree ([Figure 1-2](#)).

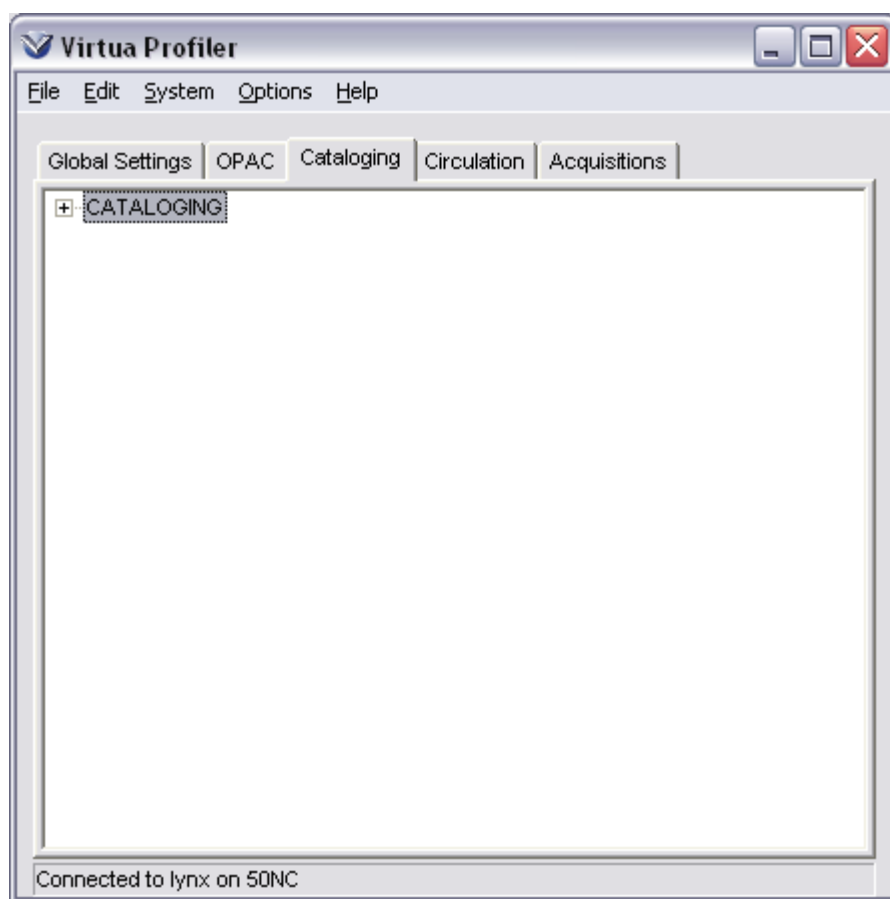


Figure 1-2. Virtua Profiler - Cataloging Tab

3. Double-click CATALOGING to expand the list of Cataloging parameters ([Figure 1-3](#)).

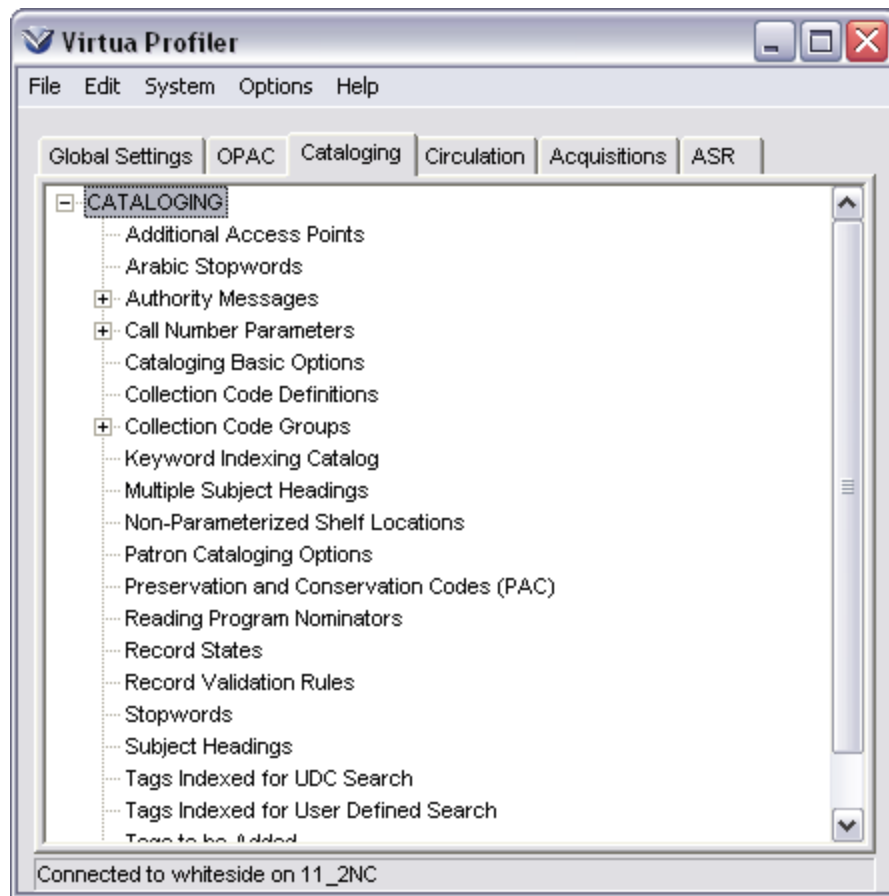


Figure 1-3. Virtua Profiler - Cataloging Parameters

4. Double-click the parameter that you want to access. The following options are available:
 - **Additional Access Points** - Lets you specify additional access points from the Browse window of the Virtua client.
 - **Arabic Stopwords** - Lets you define Arabic words that Virtua should NOT treat as stopwords.
 - **Authority Messages** - Determines how Virtua handles authority heading conflicts.
 - **Call Number Parameters** - Determines how Virtua handles call numbers.
 - **Cataloging Basic Options** - Contains a number of parameters related to basic cataloging functions.
 - **Collection Code Definitions** - Defines collection codes that can be used to categorize item records.
 - **Collection Code Groups** - Defines groups of records to which collection codes apply.

- **Keyword Indexing Configuration** - Defines indexing rules for your database.
- **Multiple Subject Headings** - Defines settings for multiple subject heading functionality.
- **Non-Parameterized Shelf Locations** - Lets you specify a list of shelf locations that are not parameterized (i.e., that are not a part of Virtua's parameterized shelving location functionality).
- **Patron Cataloging Options** - Lets you configure options that apply to patron cataloging and to the Patron Editor window in the client.
- **Preservation and Conservation Codes (PAC)** - Lets you define PAC codes for use with your item records.
- **Record States** - Defines the record states available in Virtua.
- **Record Validation Rules** - Determines the actions triggered by rules that are used to verify the contents of records (MARC format and text).
- **Stopwords** - Defines the words that the system will omit from the keyword indexes.
- **Subject Headings to Index** - Determines which subject headings are indexed in your database.
- **Tags Indexed for UDC Search** - Determines the fields that are indexed for the UDC search.
- **Tags Indexed for User Defined Search** - Defines the fields that are indexed for the library-defined browse search.
- **Tags to Be Added** - Determines which tags are automatically added to records as they are loaded into your database.
- **Tags to Be Deleted** - Determines which tags are automatically deleted from records as they are loaded into your database.

2. Creating Additional Access Points

You can use the Additional Access Points parameters to determine how Virtua treats Additional Access Points (AAPs) in the browse list. This chapter provides an overview of AAPs and explains how to configure the Additional Access Points parameter.

This chapter covers the following topics:

- ⇒ [Overview of Additional Access Points](#)
- ⇒ [Setting the Additional Access Points Parameter](#)

2.1 Overview of Additional Access Points

Additional access points (AAPs) provide an additional link to a record on the Browse window. Often, AAPs will provide a link to a specific record when the main heading has several associated bibliographic records.

For example, if you want to provide additional access points for certain titles to appear as separate entries from the author's listing in an author browse, you would set up a 7xx\$a\$t additional access point. This way, any record with a 7xx tag that has subfields \$a (author) and \$t (title) will have a dual entry in the author browse list: one entry within the list of the author's works and one entry for the author/title combination.

For example, [Figure 2-1](#) shows the Browse window displaying entries for *Twain, Mark*.

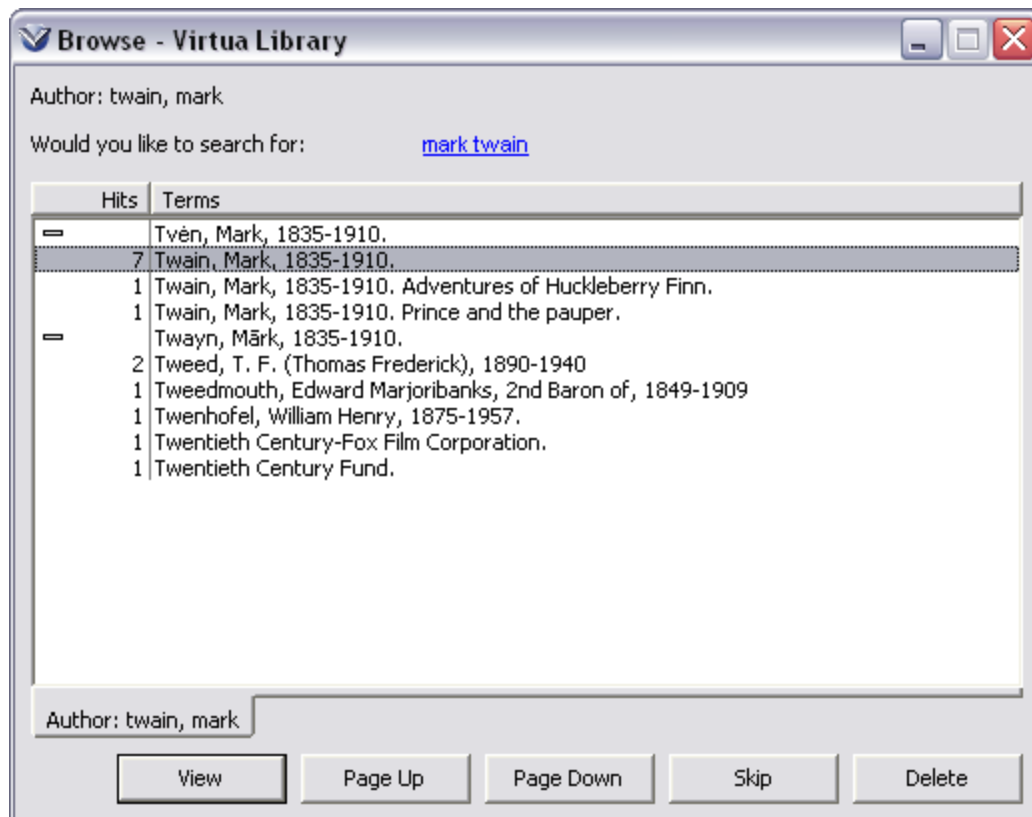


Figure 2-1. Browse Results Window

The main entry for *Twain, Mark* has 7 associated records. However, there are two additional access points providing links to records in this list. The following example shows the tag in one of these records that provides the additional access point in the browse list.

700 \$a Twain, Mark \$d 1835-1910. \$t Adventures of Huckleberry Finn.

There are five types of additional access points:

- **1xx\$a\$t tag** - Creates access points to a record for 1xx tags with subfields \$a and \$t.
- **7xx\$a\$t tag** - Creates access points to a record for 7xx tags with subfields \$a and \$t.
- **4xx/8xx\$a\$t tag** - Creates access points to a record for 4xx and 8xx tags with subfields \$a and \$t.
- **Uniform Title** - Determines whether or not the 130 \$a tag is used as an additional access point.

- **1xx/240 tag** - Creates additional access points to a record for records with 1xx and 240 tags.

For the first three types of additional access points, you can decide whether you want to create access points in the author browse list or in both the author AND title browse lists.

2.2 Setting the Additional Access Points Parameter

To set the Additional Access Points parameter,

1. On the Cataloging tab of the Virtua Profiler, double-click CATALOGING.
2. Double-click Additional Access Points.

The Additional Access Points window appears ([Figure 2-2](#)).

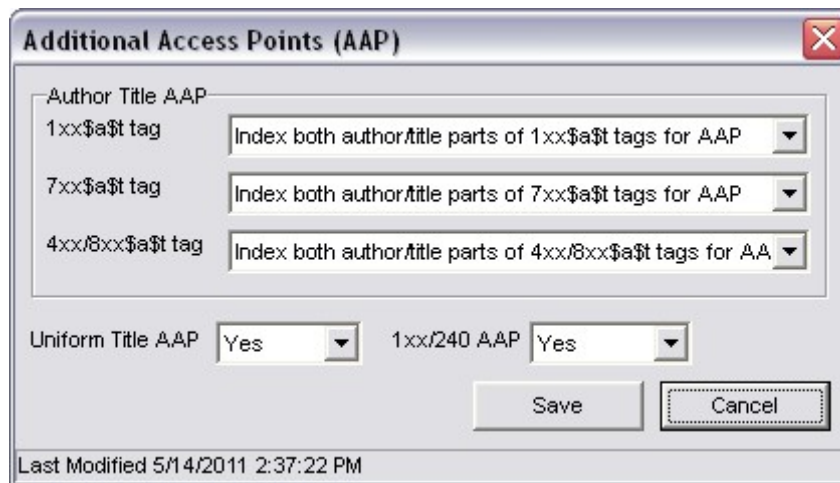


Figure 2-2. Additional Access Points Window

3. In the 1xx\$a\$t tag drop-down list, choose whether you want to index the author or both the author and title parts of the 1xx tag.
4. In the 7xx\$a\$t tag drop-down list, choose whether you want to index the author or both the author and title parts of the 7xx tag.

5. In the 4xx/8xx\$a\$t tag drop-down list, choose whether you want to index the author or both the author and title parts of the 4xx/8xx tag.
6. In the Uniform Title AAP drop-down list, choose whether or not you want to provide an additional access point via the 130 \$a tag.
7. In the 1xx/240 AAP drop-down list, choose whether or not you want to provide an additional access point via the 1xx/240 tags.
8. Click the Save button.

Your changes are saved to the database.

If you make changes to this parameter, you will need to run **ReProcessBibs.ksh** to apply the changes to the browse index. For information about this program see the *Virtua System Management: Cataloging User's Guide*.

3. Defining Arabic Stopword Exceptions

Some words in Arabic begin with characters that Virtua would normally treat as stopwords, but should not do so, during the keyword indexing process. To ensure that Virtua handles these words correctly, Virtua includes a default list that contains words that are exceptions to the stopwords rules; i.e., words that Virtua knows NOT to strip of their initial characters when indexing and searching. You can view and modify this list using the Arabic Stop Words parameter.

Notes:

- The name of the Arabic Stop Words parameter is misleading; this parameter actually tells Virtua to make an *exception* to Arabic stopwords.
- For information about stopwords and how Virtua uses them, see the section “[Introduction to Stopwords](#)” in this guide.

To modify the Arabic Stop Words exception list,

1. On the Cataloging tab of the Virtua Profiler, double-click CATALOGING.
2. Double-click Arabic Stopwords to display the list of Arabic words that begin with characters that are defined as stopwords.

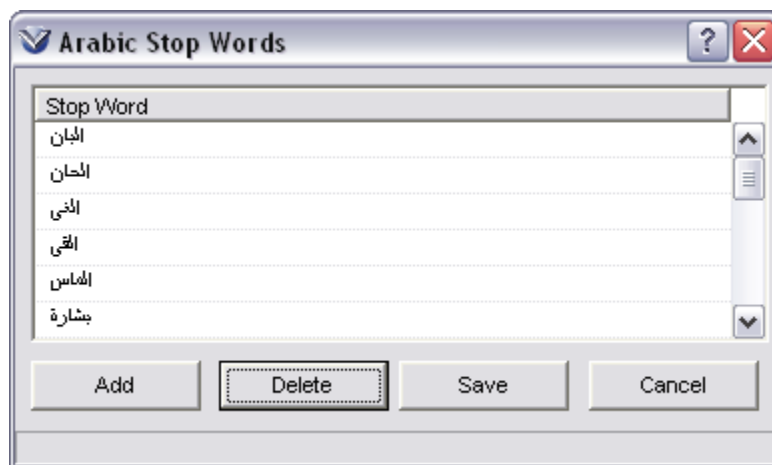


Figure 3-1. Arabic Stop Words Window

3. To add an Arabic stopword exception, click the Add button, and type your desired stopword exception into the new field.

Note: To enter Arabic words, your Windows settings must be configured to allow Arabic input from your keyboard.

-OR-

To delete an Arabic stopword exception, highlight the word you would like to delete, and click the Delete button.

4. Click the Save button.

Your changes are saved to the database.

4. Working with Authority Messages

By configuring settings in the Authority Messages parameters, you can determine how Virtua behaves when it encounters conflicts in authority headings. The Authority Messages parameters include . . .

- **Authority Message** - Determines whether or not a message should display when you create or edit a bibliographic record with authority headings that do not have a corresponding permanent authority record.
- **Heading Replacement Flag** - Determines how Virtua responds when MARC record headings are detected that are similar but not identical.
- **MARC Heading Conflict Flag** - Determines how Virtua responds when encountering MARC records with invalid record headings.
- **New Heading Message** - Determines which tags trigger an error message when no authority record exists.

This chapter covers the following topics:

- ⇒ [Setting the Authority Message Parameter](#)
- ⇒ [Setting the Heading Replacement Flag](#)
- ⇒ [Setting the MARC Heading Conflict Flag](#)
- ⇒ [Setting the New Headings Message Parameter](#)

4.1 Setting the Authority Message Parameter

The Authority Message parameter determines whether or not a message should be sent when Virtua processes a bibliographic record with authority headings that do not have a corresponding permanent authority record. If this parameter is set to . . .

- **On** - If you create or modify a bibliographic record with an authority heading that does not have a permanent authority record, Virtua will display a diagnostic message.
- **Off** - Virtua will process the record without sending a diagnostic message.

To set the Authority Message flag,

1. On the Cataloging tab of the Virtua Profiler, double-click CATALOGING.
2. Double-click Authority Messages to display the list of Authority related parameters. (*Figure 4-1*).

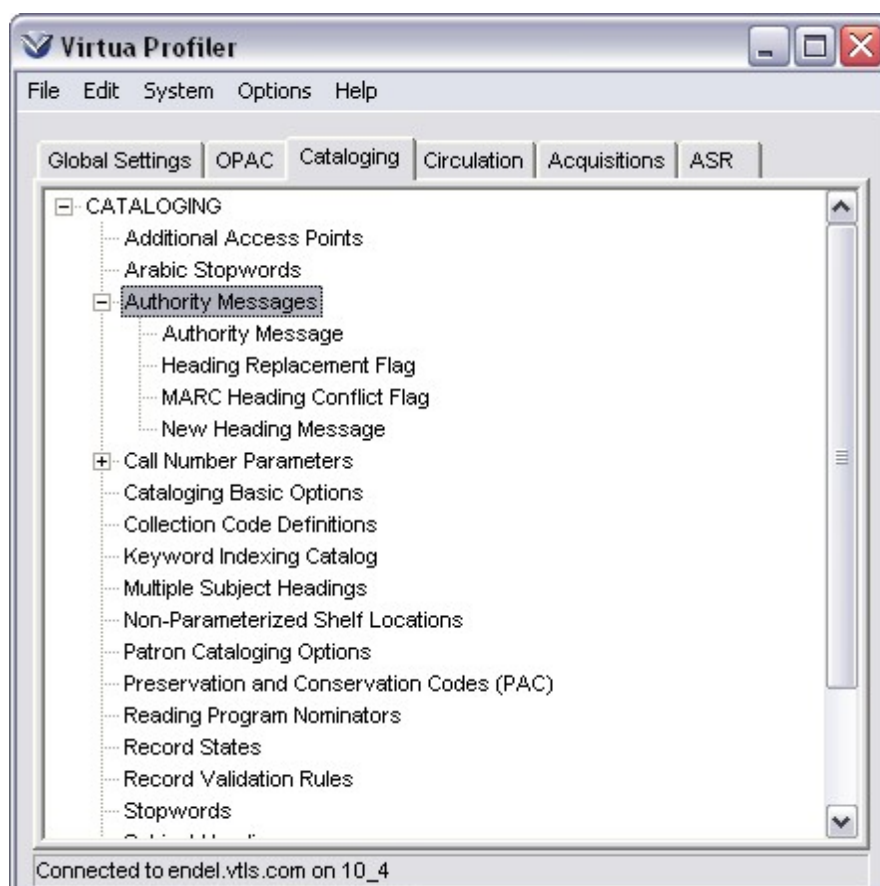


Figure 4-1. Cataloging Tab - Authority Messages Expanded

3. Double-click Authority Message.

The Authority Message dialog box appears (*Figure 4-2*).



Figure 4-2. Authority Message Dialog Box

4. From the drop-down list, choose On or Off as desired.
5. Click the Save button.

Your setting is saved to the database.

4.2 Setting the Heading Replacement Flag

The Heading Replacement Flag determines how Virtua handles bibliographic MARC record headings that are similar to permanent authority headings in the database. The options for this flag are as follows:

- **Yes** - All bibliographic headings that are similar to an existing permanent authority heading will be replaced by the permanent authority heading. A message will appear notifying the user that a change has been made.
- **No** – Bibliographic headings that are similar to an existing permanent authority heading will NOT be replaced by the permanent authority heading. Instead, Virtua will only warn you (“Possible duplicate found”) that there is a similar existing permanent authority heading in the database.

Note: A bibliographic record heading can differ from the authority heading in terms of capitalization, punctuation and subfields and still be considered similar.

To set the Heading Replacement Flag,

1. On the Cataloging tab of the Virtua Profiler, double-click CATALOGING.
2. Double-click Authority Messages to display the list of Authority-related parameters (*Figure 4-1*).
3. Double-click Heading Replacement Flag.

The Heading Replacement Flag dialog box appears (*Figure 4-3*).



Figure 4-3. Heading Replacement Flag Dialog Box

4. From the drop-down list, choose Yes or No as desired.
5. Click the Save button.

Your changes are saved to the database.

Important: Even if the Heading Replacement Flag is set to **No**, the following behavior will always occur:

- If a new MARC bibliographic record is added with an *author*, *subject*, or *user-defined* heading that differs in capitalization **ONLY** from an existing heading, the two headings will be considered **identical**, and the heading in the database will replace the bibliographic heading in the bibliographic record.

4.3 Setting the MARC Heading Conflict Flag

The MARC Heading Conflict Flag determines what happens when a heading in a bibliographic record matches the 4xx heading on an authority record. If you attempt to catalog a record, where the 1xx heading matches the 4xx heading of the authority record, and the MARC Heading Conflict Flag is set to . . .

- **Yes** - Virtua will automatically replace the bibliographic record's 1xx heading with the 1xx heading in the conflicting authority record.
- **No** - Virtua will warn you of the conflict but will not replace the bibliographic 1xx tag.

To set the MARC Heading Conflict Flag,

1. On the Cataloging tab of the Virtua Profiler, double-click CATALOGING.
2. Double-click Authority Messages to display the list of authority-related parameters ([Figure 4-1](#)).
3. Double-click MARC Heading Conflict Flag.

The MARC Heading Conflict Flag dialog box appears ([Figure 4-4](#)).

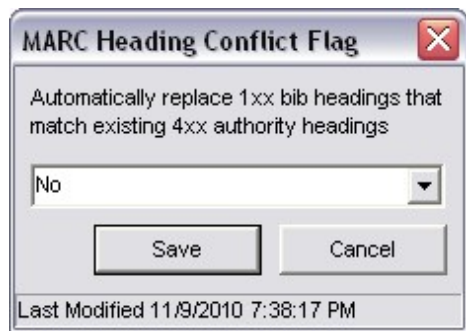


Figure 4-4. MARC Heading Conflict Flag Dialog Box

4. From the drop-down list, choose Yes or No as desired.
5. Click the Save button.

Your changes are saved to the database.

4.4 Setting the New Heading Message Parameter

The New Heading Message parameter stores a list of tags for which Virtua requires an existing authority heading. If a bibliographic record is cataloged with a tag listed in this parameter and the tag does not have a corresponding authority heading, a “new heading created” message will appear. The diagnostic ID of this message is 15720. The bibliographic record will be eligible for inclusion in the Cataloging Errors report, which you can filter using the ID Filter/Filter Mode parameter in the report configuration.

Note: For information on the Cataloging Errors report, see the *InfoStation/Cataloging Reports Reference Guide*.

To set the New Heading Message Parameter,

1. On the Cataloging tab of the Virtua Profiler, double-click CATALOGING.
2. Double-click Authority Messages to display the list of Authority-related parameters (*Figure 4-1*).
3. Double-click New Heading Message to open the New Heading Message window (*Figure 4-5*).



Figure 4-5. New Heading Message Window

4. Type each tag that you want to include in this parameter on a new line in the list box. **Hint:** Click the Add button to add a new row to the list. Click the Delete button to remove a row.

Note:

- With one exception, you can include in this list *only* tags that are under authority control. Additionally, you can include in this list the tag(s) that you indexed for the library-defined browse search. For details, see the chapter "[Defining Tags Indexed for User Defined Searches](#)" in this guide. Any non-authority tags that you define in this list will NOT generate new heading messages.
- You can define up to eight tags for this parameter.
- You can use X as a wildcard. For example, to specify all tags from 100 to 199, type **1XX**.

5. Click the Save button.

Your settings are saved to the database.

5. Setting Call Number Parameters

The Virtua Cataloging subsystem offers several configurable settings to adjust the system's call number settings to match your library's needs. By customizing Virtua's call number parameters on the Cataloging tab of the Virtua Profiler, you can . . .

- Set call number indexing and priority rules.
- Determine whether you want to create call numbers for an individual item.
- Specify your call number indexing type.
- Configure an auto-incrementing suffix for item-level call numbers.

This chapter covers the following topics:

- ⇒ [Configuring Call Number Indexing and Priority Rules](#)
- ⇒ [Specifying a Call Number Indexing Type](#)
- ⇒ [Configuring Increment Settings for Holdings Call Numbers](#)
- ⇒ [Enabling Item-level Call Numbers](#)
- ⇒ [Configuring Increment Settings for Item-level Call Numbers](#)

5.1 Configuring Call Number Indexing and Priority Rules

In the Call Number Index and Priority window, you can determine . . .

- The rules by which call numbers are indexed in Virtua.
- Which call number is inherited by item records that do not have item-specific call numbers.

Important: We recommend that you do not alter settings in this window on a production database. If you make changes to call number indexing and priority rules, you will need to re-index the call number browse list. For information on indexing the call number browse list, see the *Virtua System Management: OPAC User's Guide*.

To access the Call Number Index and Priority parameter,

1. On the Cataloging tab of the Virtua Profiler, double-click CATALOGING.
2. Double-click Call Number Parameters to display the list of call number-related parameters (*Figure 5-1*).

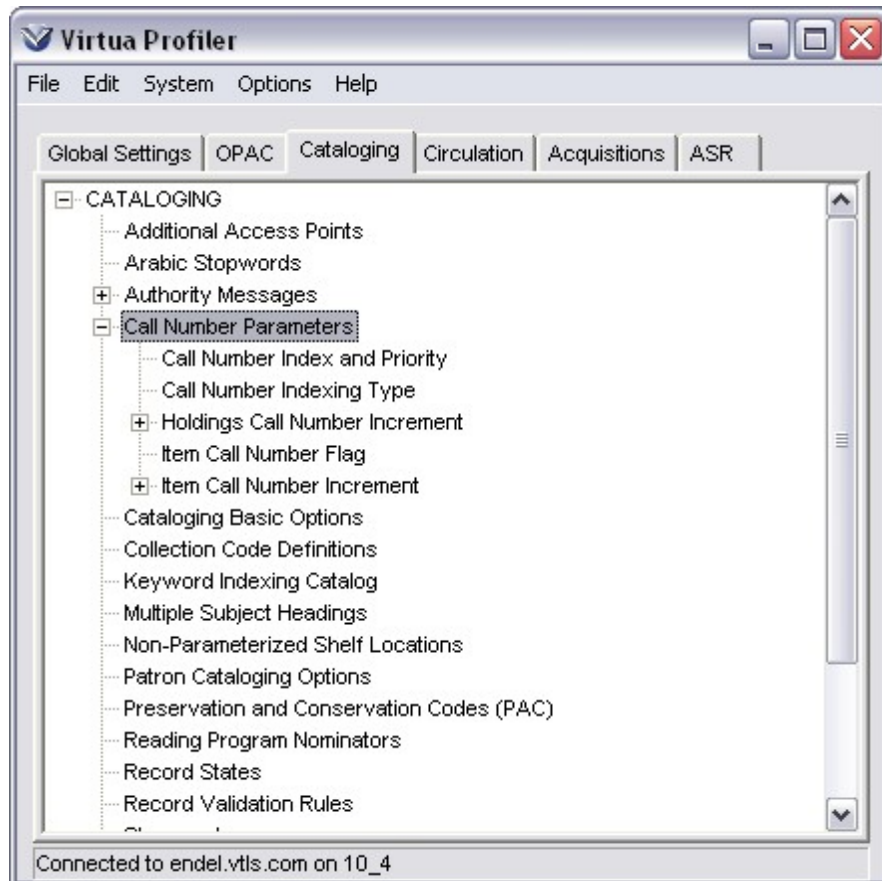


Figure 5-1. Virtua Profiler - Call Number Parameters

3. Double-click Call Number Index and Priority to open the Call Number Index and Priority window (*Figure 5-2*).

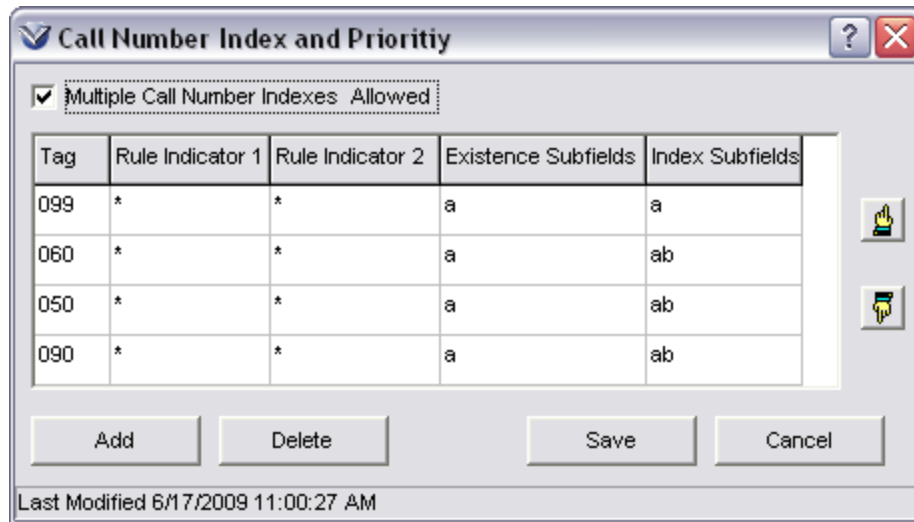


Figure 5-2. Call Number Index and Priority Window

5.1.1 Working with the Call Number Index and Priority Parameter

On the Call Number Index and Priority window, you can set a) rules for how Virtua indexes call numbers and b) which call numbers are inherited by new items. From this window, you can . . .

- Determine if one or all call numbers listed in the Call Number Index and Priority list box are indexed.
- Add a call number definition to the Call Number Index and Priority list box.
- Delete a call number definition from the Call Number Index and Priority list box.
- Change the priority order of the call number definitions in the Call Number Index and Priority list box.

Tags in the Call Number Index and Priority window are listed in *ascending* order, meaning that the tag listed first in the list is the first tag Virtua looks for in a MARC record when searching for a call number to index.

5.1.1.1 Determining Whether One or All Call Numbers are Indexed

The Multiple Call Number Indexes Allowed setting determines whether one or all call numbers defined in the Call Number Index and Priority list box are indexed for each record. If you choose to allow multiple call number indexes for a record, each call number in the record that matches an entry in the Call Number Index and Priority list box will be indexed. If you do not allow multiple call number indexes, only the call number with the highest priority in the Call Number Index and Priority list box will be indexed.

Note: If you choose to allow multiple call number indexes, the priority order will only be used to determine item call number inheritance in records without an explicitly defined item-level call number.

To determine whether Virtua indexes multiple call numbers for a record,

1. Open the Call Number Index and Priority window (*Figure 5-2*).
2. Select the Multiple Call Number Indexes Allowed check box to enable multiple call number indexing.
-OR-
Uncheck the Multiple Call Number Indexes Allowed check box to disable multiple call number indexing.
3. Click the Save button.

Your changes are saved to the database.

5.1.1.2 Adding a Call Number Definition to the Call Number Index and Priority List Box

To add a tag to the Call Number Index and Priority list box,

1. Open the Call Number Index and Priority window (*Figure 5-2*).
2. Click the Add button.

A new row appears in the table (*Figure 5-3*).

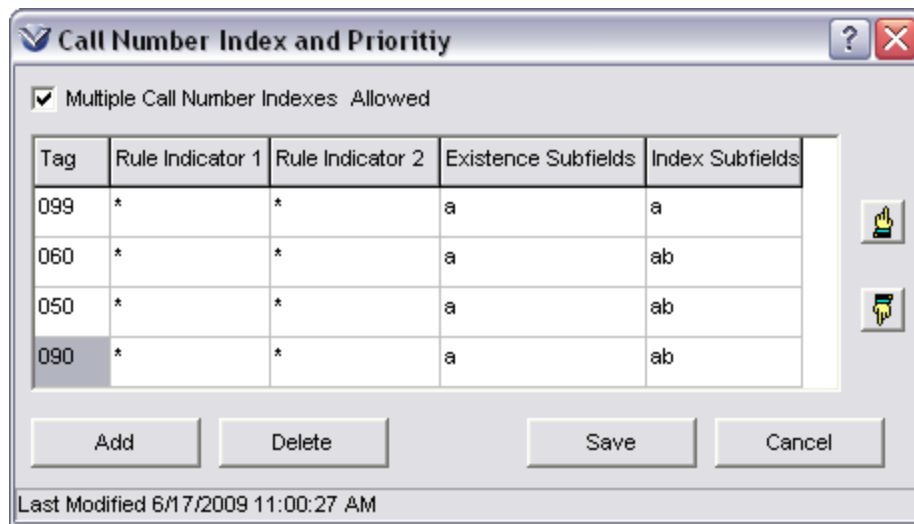


Figure 5-3. Call Number Index and Priority Window - New Row Added

3. In the **Tag** column, type the three-digit MARC tag of the call number.
4. In the **Rule Indicator 1** column, specify the first indicator of the indexed tag. Type the one-character indicator or type ***** to specify all indicators.
5. In the **Rule Indicator 2** column, specify the second indicator of the indexed tag. Type the one-character indicator or type ***** to specify all indicators.
6. In the **Existence Subfields** column, specify the subfields for which you want Virtua to check. If, in the specified tag, the given subfields exist, the subfields listed in the Index Subfields field will be indexed. Type one or more subfields. If you want to . . .
 - Specify multiple subfields, type the subfields without delimiters or spaces. For example, if you want to specify subfields *\$a*, *\$b*, and *\$c*, type **abc**
 - Specify that a subfield must occur *after* another subfield, type **[subfield 1]>[subfield 2]**. For example, if you want to specify that subfield *a* must occur after subfield *b*, type **a>b**
 - Specify that a subfield must occur *before* another subfield, type **[subfield 1]<[subfield 2]**. For example, if you want to specify that subfield *a* must occur before subfield *b*, type **a<b**
 - Specify that a subfield not appear in the tag, type **-[subfield]**. For example, if you do NOT want to index tags with a subfield of *b*, type **-b**
 - Specify no criteria for the Existence Subfields field, type *****
7. **Index Subfields** - The subfields for the specified tag that will be indexed. Type one or more subfields. If you want to . . .

- Specify multiple subfields, type the subfields without delimiters or spaces. For example, if you want to specify subfields *\$a*, *\$b*, and *\$c*, type **abc**
- Specify that a subfield not be indexed, type **-[subfield]**. For example, if you do NOT want to index subfield *b* of the specified tag, type **-b**
- Specify all subfields, type *****

8. Click the Save button.

Your changes are saved to the database.

5.1.1.3 Deleting a Call Number Definition from the Call Number Index and Priority List Box

To delete a call number from the Call Number Index and Priority list box,

1. Open the Call Number Index and Priority window (*Figure 5-2*).
2. Select the row that you want to delete.
3. Click the Delete button.
The row is deleted from the table.
4. Click the Save button.

Your deletion saved to the database.

5.1.1.4 Changing the Priority Order of Call Number Indexing

The order in which the call numbers are displayed in the Call Number Index and Priority list box determines which call numbers Virtua indexes for a record. When a record has multiple call numbers, Virtua indexes the one that is highest in the priority list.

Additionally, the call number priority list determines which call number is inherited by item records that do not have item-specific call numbers. An item that does not have an item-level call number will inherit from its parent record the call number with the highest priority as specified by this parameter.

You can change the priority order of this list by moving a tag up or down in the list.

To change the priority order,

1. Open the Call Number Index and Priority window (*Figure 5-2*).
2. Select the row that you want to move up or down in the priority list.

3. Click:
 - The  button to move the tag higher in the priority list.
 - The  button to move the tag lower in the priority list.
4. Click the Save button.

Your changes are saved to the database.

Note: If you make changes to this parameter, you will need to run **CallIndexForm.sh** to apply the changes to the call number browse index. For information about this script, see the *Virtua System Management: OPAC User's Guide*.

5.2 Specifying a Call Number Indexing Type

Virtua sorts call numbers in the Browse results window based on the call number format you choose in the Call Number Indexing Type parameter. Different call number types can have substantially different sort forms. Before you set this parameter, we recommend that you read the appendix “[Call Number Indexing Types](#)” in this user’s guide to determine the type of call number sort you want to use.

Important: If you modify the Call Number Indexing Type parameter setting, you must restart the **psdriver.exe** program before making any cataloging changes that involve call number data. Failing to restart **psdriver.exe** may cause problems with InfoStation reports that sort or filter on call numbers. For information on working with **psdriver.exe**, see the *Virtua System Management: Reference Guide*.

To choose a call number format,

1. On the Cataloging tab of the Virtua Profiler, double-click CATALOGING.
2. Double-click Call Number Parameters to display the list of call number-related parameters ([Figure 5-1](#)).
3. Double-click Call Number Indexing Type.

The Call Number Indexing Type dialog box appears ([Figure 5-4](#)).

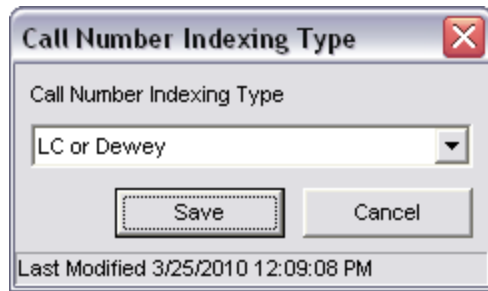


Figure 5-4. Call Number Indexing Type Dialog Box

4. Choose a call number format in the Call Number Indexing Type drop-down list. For a list and description of each call number indexing type, see the appendix “[Call Number Indexing Types](#)” in this user’s guide.
5. Click the Save button.

Your setting is saved to the database.

If you make changes to this parameter, you will need to run **CallIndexForm.sh** to apply the changes to the call number browse index. For information about this script, see the *Virtua System Management: OPAC User’s Guide*.

5.3 Configuring Increment Settings for Holding-level Call Numbers

You can configure Virtua to automatically increment a holding-level call number whose prefix is defined in the Holdings Call Number Increment window. You can do this for any one location or for ALL locations.

To access the Holdings Call Number Increment parameter,

1. On the Cataloging tab of the Virtua Profiler, double-click CATALOGING.
 2. Double-click Call Number Parameters to display the list of call number-related parameters ([Figure 5-1](#)).
 3. Double-click the Holdings Call Number Increment label to view a list of locations.
 4. Double-click the location for which you want to set the Holdings Call Number Increment parameter.
- OR-
- Double-click ALL LOCATIONS to configure increment settings for all locations.

The Holdings Call Number Increment window appears ([Figure 5-5](#)).

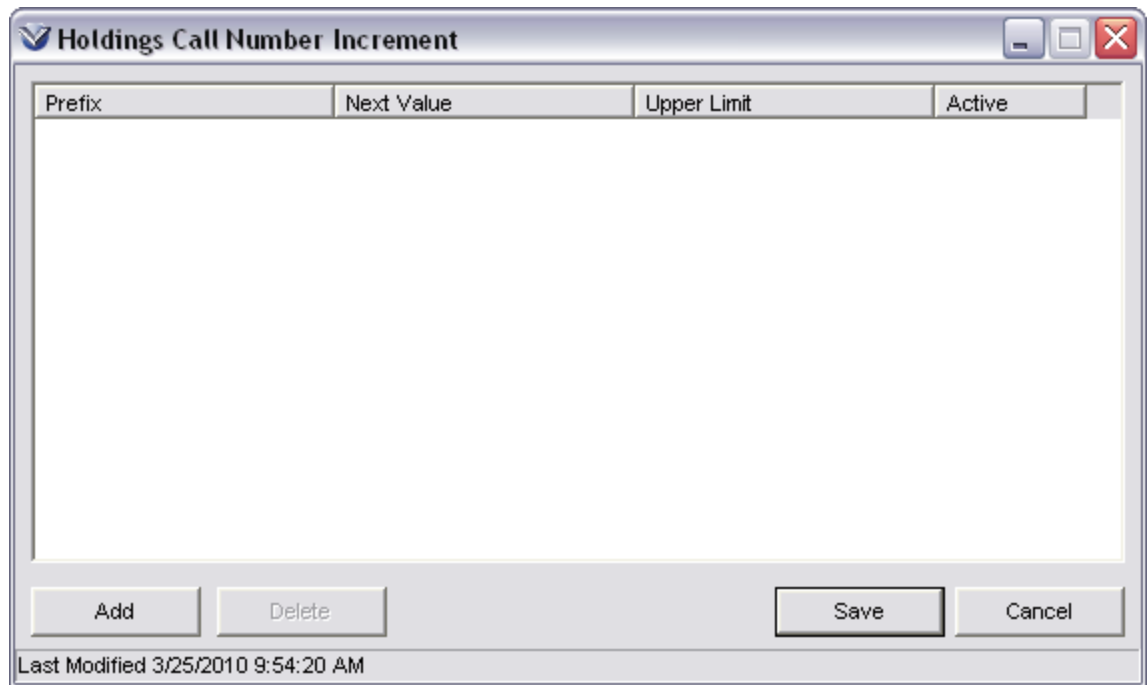


Figure 5-5. Holdings Call Number Increment Window

From the Holdings Call Number Increment window you can . . .

- Add increment settings.
- Delete increment settings.

5.3.1 Adding Increment Settings for a Prefix

To add increment settings for a prefix,

1. On the Holdings Call Number Increment window ([Figure 5-5](#)), click the Add button.

A new row appears ([Figure 5-6](#)).

Prefix	Next Value	Upper Limit	Active
	0	9999	☐

Add Delete Save Cancel

Last Modified 3/25/2010 9:54:20 AM

Figure 5-6. Holdings Call Number Increment Window - New Row Added

2. In the Prefix column, type the prefix (i.e., the holding-level call number) that you want to be incremented. The prefix can be no more than 12 characters.
3. In the Next Value column, type the first number in the incremental series. If you enter a number higher than the setting for the Upper Limit field, this line will not be active.
4. In the Upper Limit column, type the maximum number to which you want the “next value” to increment.
5. Select the check box in the Active column to enable this line item.
6. Click the Save button.

Your changes are saved to the database.

Note: Once you have defined the call number prefixes in this parameter, you can use any of the prefixes when you are cataloging holdings records. You can enter a prefix in any subfield of the 852 tag that is defined as a call number subfield for your system. Normally, these subfields are \$h-\$m. When you add a prefix in the holdings record, you must enter the prefix along with the pound (#) sign; for example, BF1.P855#. When you save the record, the value in the Next Value field of this parameter will replace the # sign and will automatically increment by one.

5.3.2 Deleting Increment Settings for a Prefix

To delete increment settings for a prefix,

1. On the Holdings Call Number Increment window ([Figure 5-6](#)), select the row that you want to delete.
2. Click the Delete button.

For more information on holding-level call numbers, see the *Basic Cataloging Workflow-based Reference Guide*.

5.4 Enabling Item-level Call Numbers

By setting the Item Call Number Flag, you can configure your system to . . .

- Allow one item-level call number.
- Allow two item-level call numbers.
- Not allow item-level call numbers.

The Item Call Number Flag directly controls access to item call number fields on the Item Information window in the Virtua client. If item-level call numbers are enabled, the call number fields on the Item Information window will be editable. If not, they will be disabled.

Note: Enabling or disabling item-level call numbers does not affect the inheritance of a call number from an item's parent record. It does, however, determine whether an inherited call number can be modified. If you disable item-level call numbers, call numbers inherited from parent records will appear on the Item Information window but will not be editable.

To set the Item Call Number Flag,

1. On the Cataloging tab of the Virtua Profiler, double-click CATALOGING.
2. Double-click Call Number Parameters to display the list of call number-related parameters ([Figure 5-1](#)).
3. Double-click Item Call Number Flag.

The Item Call Number Flag dialog box ([Figure 5-7](#)).

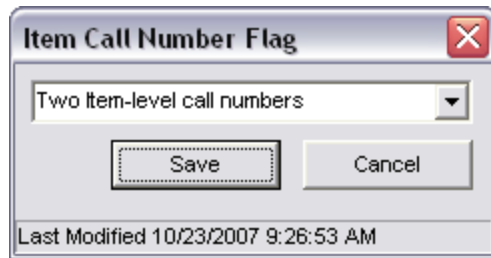


Figure 5-7. Item Call Number Flag

4. In the drop-down list box choose . . .
 - **No item-level call number** - On the Item Information window in the client, *both* item-level call number fields will be *disabled*.
 - **One item-level call number** - On the Item Information window in the client, the *first* item-level call number field will be *enabled*.
 - **Two item-level call numbers** - On the Item Information window in the client, *both* item-level call number fields will be *enabled*.
5. Click the Save button.

Your setting is saved to the database.

5.5 Configuring Increment Settings for Item-level Call Numbers

If your library uses item-level call numbers, you can configure Virtua to automatically increment a specified suffix of a call number whose prefix is defined in the Item Call Number Increment window. You can do this for any one location or for ALL locations. The functionality works whether items are created manually (see the *Basic Cataloging Workflow-based Reference Guide*) or via the 949 VIRTUAITEM tag (see the *Virtua Record Loading User's Guide*).

For details on how Virtua uses call number incrementing in the Virtua client, see the appendix "[Using Call Number Incrementing in the Virtua Client](#)."

To access the Item Call Number Increment parameter,

1. On the Cataloging tab of the Virtua Profiler, double-click CATALOGING.
2. Double-click Call Number Parameters to display the list of call number-related parameters ([Figure 5-1](#)).

3. Double-click the Item Call Number Increment label to view a list of locations.
 4. Double-click the location for which you want to set the Item Call Number Increment parameter.
- OR-
- Double-click ALL LOCATIONS to configure increment settings for all locations.

The Item Call Number Increment window appears ([Figure 5-8](#)).

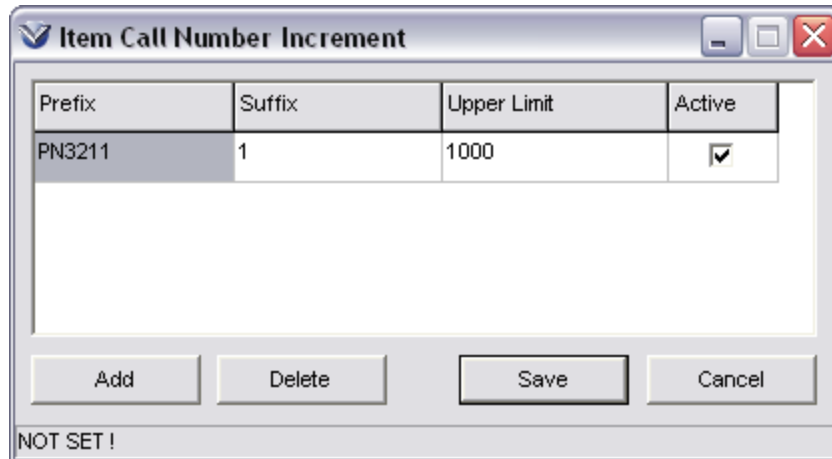


Figure 5-8. Item Call Number Increment Window

From the Item Call Number Increment window you can . . .

- Add increment settings.
- Delete increment settings.

5.5.1 Adding Increment Settings for a Prefix

To add increment settings for a prefix,

1. On the Item Call Number Increment window ([Figure 5-8](#)), click the Add button.

A new row appears ([Figure 5-9](#)).

Prefix	Suffix	Upper Limit	Active
PN3211	1	1000	☒
c	1	999999999	☐

NOT SET!

Figure 5-9. Item Call Number Increment Window - New Row Added

2. In the Prefix column, type the prefix (i.e. the item-level call number) for which you want this setting to apply. The prefix can be no more than 12 characters.
3. In the Suffix column, type the first number in the increment series. If you enter a number higher than the setting for the Upper Limit field, this line item will not be active.
4. In the Upper Limit column, type the maximum number to which you want the suffix to increment.
5. Select the check box in the Active column to enable this line item.
6. Click the Save button.

Your changes are saved to the database.

Note: When you use call number incrementing to add an item-level call number, the suffix field for this parameter increments by one for each item you create. For more information on adding items with an item-level call number, see the appendix “[Using Call Number Incrementing in the Virtua Client](#)” in this guide.

5.5.2 Deleting Increment Settings for a Prefix

To delete increment settings for a prefix,

1. On the Item Call Number Increment window ([Figure 5-9](#)), select the row that you want to delete.
2. Click the Delete button.

For more information on item-level call numbers, see the *Basic Cataloging Workflow-based Reference Guide*.

6. Setting the Cataloging Basic Options Parameter

The Cataloging Basic Options parameter contains options that let you customize various aspects of your Cataloging subsystem. This chapter describes the settings that you can define on the Cataloging Basic Options window in the Virtua Profiler.

This chapter covers the following topics:

- ⇒ [Setting the Cataloging Basic Options](#)
- ⇒ [Details about the Cataloging Basic Options](#)

6.1 Setting the Cataloging Basic Options: an Overview

Below are general instructions for setting the Cataloging Basic Options. For detailed information on these settings, click the hyperlinked setting name, or see the section “[Details about the Cataloging Basic Options](#).”

Important: If you make changes in the Cataloging Basic Options, you will need to restart the parent **psdriver.exe** program in order for those changes to take effect in the client.

To set the Basic Cataloging Options window,

1. On the Cataloging tab of the Virtua Profiler, double-click CATALOGING.
2. Double-click Cataloging Basic Options.

The Cataloging Basic Options window appears (*Figure 6-1*).

Cataloging Basic Options ? X

Barcode Type: **VRT - Virtua barcode type**

Value For 003: **LoC** Generate Item Barcode Using Prefix:

MARC Format Options

MARC Format: **Multiple**

MARC Auth Format: **MARC21 Authorities**

MARC 21 Format: **MARC21**

Control Number Options

☒ Index Duplicate LCCN

☒ Index Control Numbers

☐ Index Duplicate ASN

MARC Editor Tag Pasting

Tag Placement: **After Cursor**

☒ Prompt User

Automatic Generation of 035

Generate 035 for Bibs:

Generate 035 for Auths:

Indexing Options

☒ Index National Bibliography Number

☐ Index \$e in 100, 400, 600, 700, and 800 tags for MARC 21.

☒ Index Other Standard Identifier

☒ Index Publisher Number

☐ Index \$e in 110, 410, 610, 710, and 810 tags for MARC 21.

☐ Index publisher for browse

☒ Allow undelete for MARC records

☒ Update tag and indicator numbers of bibliographic records attached to authority records

☐ Always use the incoming 005 tag when updating/loading LC/NACO authority

☒ For items with no item-level call number, retain old call number when relinking.

☒ Do Not Support Single Authority Record

☐ Require units for serial bibs/holdings items

☐ Use Codabar 39 Mod 10 validation for item/patron barcodes

☐ Add price to new items using ISBN \$c

☐ Archive bibliographic records

☒ Gather cataloging statistics

☐ Maintain Item Barcode History

Price Threshold: **999999999**

☐ Display Routing List

Save **Cancel**

Last modified at 10/27/2011 2:45:54 PM by Root User

Figure 6-1. Cataloging Basic Options Window

3. In the **Barcode Type** drop-down list, make sure the VRT barcode format is selected, unless your library has been instructed to select a different barcode type.

4. The [Value for 003](#) setting is a read-only field. It defines the value stored in the 003 tag of records in your database; it cannot be edited.
 5. In the [Generate Item Barcode](#) Using Prefix text box,
 - Type the prefix you want to assign to item barcodes that Virtua will automatically generate on the Item Information window in the client.
 - OR-
 - Type the word *NONE* if you do not want to assign a prefix to item barcodes that Virtua will automatically generate.
 - OR-
 - Leave this field blank if you do not want Virtua to automatically generate item barcodes.
 6. If your library uses Patron Keyword searching and you want Virtua to check for possible duplicate patron records when a new patron record is saved, select the [Check for new duplicate patrons](#) check box.
 7. In the [MARC Format](#) drop-down list, choose your library's MARC format.
 - If you select MARC 21 in the MARC Format drop-down list, choose your specific version of MARC 21 in the **MARC 21 Format** drop-down list.
 - If you select UNIMARC in the MARC Format drop-down list, choose your authority record format in the **MARC Auth Format** drop-down list.
 - If you select Multiple in the MARC Format drop-down list, the MARC Auth Format and MARC 21 Format are configured automatically. This setting means that the database may contain both MARC21 and UNIMARC records.
- Important:** The MARC Format parameter is to be set ONE time only. Do NOT change the value of this parameter once you have set it.
8. If you want Virtua to index duplicate LCCN control numbers, select the [Index Duplicate LCCN](#) check box.
 9. If you want Virtua to index ISSN, LCCN, and ISBN control numbers, select the [Index Control Numbers](#) check box.
 10. If you want Virtua to index duplicate ASN control numbers, select the [Index Duplicate ASN](#) check box. This enables duplicate ASNs to exist in the database.
 11. In the [Generate 035 for Bibs](#) text box, type a value that will be added as the 035 tag for each bibliographic record that does not have an existing 035 tag.

-OR-

Leave this field blank if you do not want to add an 035 tag automatically to each bibliographic record.

12. In the [Generate 035 for Auths](#) text box, type a one- or two-character value that will be added as the 035 tag for each authority record that does not have an existing 035 tag.
-OR-
Leave this field blank if you do not want to add tag 035 automatically to each authority record.
13. In the [MARC Editor Tag Pasting](#) section, in the Tag Placement drop-down list, choose whether tags pasted in the MARC Editor will be placed after the cursor or in sorted order. The default value will be “After Cursor.”
14. If you want Virtua to prompt the user each time a tag is pasted in the MARC Editor in order to choose the placement of that tag, select the [Prompt User](#) check box.
15. If you want Virtua to index the 015 tag and offer duplicate checking for the 015 tag subfields \$a and \$2, select the [Index National Bibliography Number](#) check box.
16. If you want Virtua to index subfield \$e in MARC 21 tags 100, 400, 600, 700, and 800 for the author browse, select the [Index \\$e in 100, 400, 600, 700, and 800 Tags](#) check box.
17. If you want Virtua to index subfield \$e in MARC 21 tags 110, 410, 610, 710, and 810 for the corporate author browse, select the [Index \\$e in 110, 410, 610, 710, and 810 Tags](#) check box.
18. If you want Virtua to index tag 024 for duplicate checking purposes, select the [Index Other Standard Identifier](#) option.
19. If you want Virtua to index tag 028 for duplicate checking purposes, select the [Index Publisher Number](#) check box.
20. If you want Virtua to index publisher tag 260\$b or 264\$b for browse searching, select the [Index Publisher for Browse](#) check box.
21. If you want Virtua to allow users to restore deleted MARC records, select the [Allow undelete for MARC records](#) option.
22. If you want Virtua to automatically update tags and indicators in bibliographic records when changes are made to associated authority records, select the [Update](#)

tags and indicator numbers of bibliographic records attached to authority records check box.

23. If you do NOT want Virtua to update the 005 tag when a local field is edited or added to an LC/NACO authority record, select the [Always use the incoming 005 tag when updating/loading LC/NACO authority records](#) check box.
24. If you want Virtua to retain the call number of the OLD bibliographic record when relinking items with NO item-level call number, select the [For items with no item-level call number, retain old call number when relinking](#) check box.
25. If you want Virtua to save an authority record that has a value of **a** in tag 008 positions 14 and 15, as a name/title authority record only, select the [Do Not Support Single Authority Record](#) check box.
26. If you want items that are added to serials records to be required to contain Units information, select the [“Require units for serial bibs/holdings items”](#) check box.
27. If you want to enable validation of all new patron and item barcodes using Code 39 Mod 10 (aka Luhn algorithm) validation rules, select the [“Use Codabar 39 Mod 10 validation for item/patron barcodes”](#) check box.
28. If you want the Price field for new items to automatically be populated with the value from the ISBN tag subfield \$c, select the [“Add price to new items using ISBN \\$c”](#) check box.
29. If you want to archive bibliographic records, select the [Archive bibliographic records](#) check box.
30. If you want Virtua to log cataloging statistics, select the [Gather Cataloging Statistics](#) check box.
31. If you want Virtua to maintain a history of every barcode an item has had, select the [Maintain Item Barcode History](#) check box.
32. If you want Virtua to place a maximum threshold on the price a patron can be charged for a lost or damaged item, enter a value in the [Price Threshold](#) text box.
33. If you want Virtua to automatically display the routing list when you check in an issue for a title for which a routing list exists, select the [Display Routing List](#) check box.
34. When you have finished configuring your settings, click the Save button.

Your settings are saved to the database. The following section discusses each setting in detail.

6.2 Details about the Cataloging Basic Options

The following sections provide a detailed description of each option that you can set on the Cataloging Basic Options window (*Figure 6-1*).

6.2.1 About the Barcode Type Setting

The Barcode Type Setting is used to tell Virtua what format is used for item barcodes. Unless Innovative has created a barcode type specifically for your library, then this setting should always be VRT.

6.2.2 About the Value for 003 Setting

The value in the 003 tag of a MARC record is used to identify the institution associated with the control number in the 001 tag of the record. The Value for 003 setting defines the value stored in the 003 tag of records in your database; it cannot be edited. This value will be used to identify your records when they are exported from your database to another database.

Additionally, when a record is loaded into the Virtua database, Virtua checks the value in the 003 tag of the incoming record. If the value in the 003 tag does not match the value that you have set for the Value for 003 parameter, Virtua knows that the record is associated with another institution or database. The mismatch triggers Virtua to combine the value in the 001 tag with the value in the 003 tag and insert the resulting value into an 035 tag.

For example, if an incoming record contains the following values . . .

001	ocm2345678
003	OCoLC

when the record is loaded into the Virtua database, it will be assigned a new 001 and 003 value, and the following 035 tag will be created:

035 (OCoLC) ocm12345678

The creation of the 035 tag maintains a link between the record and its original institution. For additional information, see the *Basic Cataloging Workflow-based Reference Guide*.

6.2.3 About the Generate Item Barcode Using Prefix Setting

The Generate Item Barcode Using Prefix setting lets you determine whether Virtua will automatically generate barcodes for item records and whether the barcodes will have an alphanumeric prefix.

- If you specify an alphanumeric value for this setting, Virtua will automatically generate an item barcode using this value as a prefix whenever you save an item record that does not already have an item barcode. The item barcode will be created by combining the prefix with the system-generated item ID.
- If you specify *NONE* as the value for this setting, Virtua will automatically generate a numeric item barcode with no prefix whenever you save an item record that does not already have an item barcode. The item barcode will be the same as the item ID. **Note:** You must type the word *NONE* using all capital letters.
- If you do NOT specify a value for this setting, Virtua will NOT automatically generate an item barcode whenever you save an item record that does not already have an item barcode.

6.2.4 About Duplicate Checks for Patron Records

The *Check for new duplicate patrons* setting is associated with Patron Keyword indexing. If your library uses Patron Keyword searching, this setting will be available on the Cataloging Basic Options window.

The *Check for new duplicate patrons* setting allows you to enable duplicate checking for new patron records that are saved to the database. To enable duplicate checking,

- Select the *Check for new duplicate patrons* check box.

When duplicate checking is enabled, Virtua will launch a keyword search on the following fields in the patron record to check for duplicates each time a patron record is saved:

- **Patron Name** - The patron's first name AND last name must match, with right truncation applied to both fields. For example, attempting to save a new patron with the name **Will Jones** will result in a match with an existing patron with the name **William Jones**.
- **Street Address** - Right truncation is applied to the patron's address line. For example, attempting to save a new patron with the address line **89-11 Merrick Boulevard** will result in a match with an existing patron with the address line **89-11 Merr**.
- **Social Security Number** - A match is returned only if the full Social Security Number of the patron record being saved matches the full Social Security Number of an existing patron.
- **Driver's License Number** - A match is returned only if the full Driver's License Number of the patron record being saved matches the full Social Security Number of an existing patron.

If any of the above fields in the new patron record match a corresponding field in an existing patron record, the patron record will not be saved and Virtua will display the matching patron records on the Patron Search Results window. If no matches are found, the patron record will be saved as usual.

For details on working with patron record duplicate checking in the Virtua client, see the *Circulation Workflow-based Reference Guide*.

6.2.5 About the MARC Format Options Settings

The MARC Format Options consist of three settings. MARC Format, MARC Auth Format, and MARC 21 Format.

The MARC Format setting lets you specify the format of the MARC records in your database.

Important: This parameter is to be set ONE time only. Do NOT change the value of this parameter once you have set it.

You can choose from the following MARC format options:

- MARC21
- UNIMARC
- CATMARC
- Multiple

If you choose MARC21, you will also need to set the MARC 21 Format setting, which you can set to . . .

- MARC21
- Swiss Version
- HEBREW Version
- Swedish alternate 1 (GUL)
- Swedish alternate 2 (Lund)
- Swedish alternate 3 (Uppsala)
- ISSN version

If you choose UNIMARC, you will also need to set the MARC Auth Format setting, which you can set to . . .

- MARC21 Authorities
- UNIMARC Authorities

If you choose Multiple, the MARC Auth Format and MARC 21 Format settings will be set automatically:

- MARC Auth Format: MARC21 Authorities
- MARC 21 Format: MARC21

You cannot change these settings if you are using multiple MARC formats in your database. Setting the Multiple option means that the database can contain both UNIMARC and MARC21 records.

6.2.6 About the Control Number Options

The Control Number Options let you specify which control numbers you want to index. You can set three Control Number Options:

- **Index Duplicate LCCN** - Lets you specify whether you want to index duplicate LCCNs. If you select this check box, duplicate LCCNs (including prefixes) will be indexed.
- **Index Control Numbers** - Lets you specify whether you want to index ISBNs, ISSNs, and LCCNs. If you select this check box, ISBNs, ISSNs, and LCCNs will be indexed.
- **Index Duplicate ASN** - Lets you specify whether you want to index duplicate ASNs. If you select this check box, duplicate ASNs will be indexed.

Note: The ASN is a locally defined Agency Title number consisting of four leading zeros and 12-digits, with the final digit being a check digit.

If you make changes to this parameter, you will need to run **ReProcessBibs.ksh** to apply the changes to the control number index. For information about this program, see the *Virtua System Management: Cataloging User's Guide*.

6.2.7 About the Automatic Generation of 035 Settings

The Automatic Generation of 035 settings let you specify whether or not 035 tags will be generated for bibliographic and authority records.

If you specify a value for these either of these settings, Virtua will automatically generate 035 tags for bibliographic or authority records, as appropriate, if they do not already contain an 035 tag.

The values you specify for these settings may be up to 91 characters in length, and will serve as prefixes to the 035 tags that are generated. The prefix will be added to the value in the 001 tag and inserted in the 035 tag.

If you make changes to this parameter, you will need to run **ReProcessBibs.ksh** (for bibliographic records) and **ReProcessAuths.ksh** (for authority records) to apply the changes to records in your database that do not have 035 tags. For information about these programs, see the *Virtua System Management: Cataloging User's Guide*.

6.2.8 About the Require Units for Serial Bibs/Holdings Items Setting

When the *Require units for serial bibs/holdings items* check box is selected, you must have a value in the Units field in order to successfully save an item attached to a serials or holdings record in the Virtua client. If the item record contains no Units information, Virtua displays a message and prevents you from saving the item record.

When this check box is not selected, you will be able to save item records for holdings or serials records without populating the Units field.

6.2.9 About the Use Codabar 39 Mod 10 Validation for Item/Patron Barcodes Setting

This setting specifies whether Virtua requires that all new item and patron barcodes are valid according to Code 39 Mod 10 (aka Luhn algorithm) rules, and consist of 14 digits (where the final digit of the barcode serves as a check digit).

When the *Use Codabar 39 Mod 10 validation for item/patron barcodes* check box is selected, Virtua will not permit you to save item or patron barcodes that are not valid according to these rules.

When this check box is not selected, Virtua will not validate item and patron barcodes against the Code 39 Mod 10 validation rules.

6.2.10 About the Add Price to New Items Using ISBN \$c Setting

When the *Add price to new items using ISBN \$c* setting is enabled, Virtua will automatically populate the Price field on the Item Information window when a new item record is added. The value will be taken from the first occurrence of the 020 tag subfield \$c of the parent bibliographic record. This feature can help prevent new item records from having no price.

6.2.11 About the Index \$e in 100, 400, 600, 700, and 800 Tags Setting

The *Index \$e* settings lets you specify whether or not subfield \$e should be indexed in MARC 21 tags 100, 400, 600, 700 and 800 for the author browse.

Note: This parameter applies only to MARC 21 records. If your MARC Format setting is set to anything other than MARC 21, this check box is disabled.

If you make changes to this parameter, you will need to run **ReProcessBibs.ksh** to reprocess your bibliographic records to apply the changes to your author browse index. For information about this program, see the *Virtua System Management: Cataloging User's Guide*.

6.2.12 About the Index \$e in 110, 410, 610, 710, and 810 Tags Setting

The *Index \$e* settings lets you specify whether or not subfield \$e should be indexed in MARC 21 tags 110, 410, 610, 710 and 810 for the corporate author browse.

Note: This parameter applies only to MARC 21 records. If your MARC Format setting is set to anything other than MARC 21, this check box is disabled.

If you make changes to this parameter, you will need to run **ReProcessBibs.ksh** to reprocess your bibliographic records to apply the changes to your author browse index. For information about this program, see the *Virtua System Management: Cataloging User's Guide*.

6.2.13 About Archiving Bibliographic Records

The *Archive bibliographic records* setting lets you choose whether you want to enable the archiving of bibliographic records in your system. When archiving functionality is enabled, Virtua saves every version of a bibliographic record and stores it in a table in the database for future retrieval.

Warning: Archived records can take up a lot of space on your Virtua server. Before enabling the Archive Bibliographic Records setting, check with your systems administrator.

To enable archiving of bibliographic records,

- Select the *Archive bibliographic records* check box.

In the Virtua client, the View Bibliographic Record window will display a View Archive button. If archived records are available for the current record, the button will be active. Clicking the button will give you access to archived versions.

For more information about archived bibliographic records, see the *Basic Cataloging Workflow-based Reference Guide*.

6.2.14 About the Gather Cataloging Statistics Setting

The Gather Cataloging Statistics setting lets you choose whether your system will collect statistics on numbers and types of cataloging activities. If you want the Production of Records by User report to generate results, you must enable this setting.

To enable gathering of cataloging statistics,

- Select the *Gather cataloging statistics* check box.

Virtua will record statistics related to cataloging in the operation log.

For information on the operation log, see the *System Management: Reporting User's Guide*. For information on the Production of Records by User report, see the *InfoStation/Cataloging Reports Reference Guide*.

6.2.15 About the Index Other Standard Identifier Setting

The Index Other Standard Identifier setting controls whether Virtua will index tag 024 so that the tag, 1st indicator, and subfield \$a can serve as match points in the duplicate checking process. If the setting is enabled, you can configure the Record Validation Rules parameter and the Add Duplicate Test setup in the client to tell Virtua to use the 024 tag subfield \$a and 1st indicator for duplicate checking.

To enable indexing of Other Standard Identifier (024),

- Select the *Index Other Standard Identifier* check box.

Virtua will index the 024 tag.

If you enable this setting, you will need to run **PopulateBibOtherIdentifier.sh** to populate Virtua's control number index with tag 024.

Note: This setting along with the Index Publisher Number setting must be enabled in order for the music number to appear on records that are imported using the Import Records to Purchase Request List feature and on purchase orders.

6.2.16 About the Index Publisher Number Setting

The Index Publisher Number setting controls whether Virtua will index tag 028 so that the tag, 1st indicator, and subfield \$a can serve as match points in the duplicate checking process. If the setting is enabled, you can configure the Record Validation Rules parameter and the Add Duplicate Test setup in the client to tell Virtua to use the 028 tag subfield \$a and 1st indicator for duplicate checking.

To enable indexing of the Publisher Number (028),

- Select the *Index Publisher Number* check box.

Virtua will index the 028 tag.

If you enable this setting, you will need to run **PopulateBibPublisherNumber.sh** to populate Virtua's control number index with tag 028.

Note: This setting along with the Index Other Standard Identifier setting must be enabled in order for the music number to appear on records that are imported using the Import Records to Purchase Request List feature and on purchase orders.

6.2.17 About the Index Publisher for Browse Setting

The Index Publisher for Browse setting controls whether Virtua will index publisher tag 260 subfield \$b or tag 264 subfield \$b for browse searches.

To enable indexing of the publisher tag (260 or 264) for browse,

1. Select the *Index Publisher for Browse* check box.
2. Save your changes to the Cataloging Basic Options window.
3. Run **ReProcessForPublisherHeadings.sh** OR **ReProcessForPublisherUserHeadings.sh**.
 - **ReProcessForPublisherHeadings.sh** - Creates a file of Bib IDs that contain 260 \$b or 264 \$b and reprocesses them to index the publisher headings only without updating the bibliographic records. Run this script if you enable the Index Publisher for Browse setting and you have NOT previously indexed the 260 or 264 tags as a user-defined browse.

- **ReProcessForPublisherUserHeadings.sh** - Creates a file of Bib IDs that contain 260 \$b or 264 \$b and reprocesses them to index the publisher headings AND the user-defined headings without updating the bibliographic records. Run this script if you enable the Index Publisher for Browse setting and you HAVE previously indexed the 260 or 264 tags as a user-defined browse.

6.2.18 About the Maintain Item Barcode History Setting

The Maintain Item Barcode History setting controls whether Virtua maintains a history of the item barcodes that have been assigned to any given item.

To enable the maintenance of a history of item barcodes,

- Select the *Maintain Item Barcode History* check box.

If you select the Maintain Item Barcode History check box, Virtua will. . .

- Maintain a history of all previous barcodes that have been assigned to an item.
- Display an item's barcode history on the new Barcode History tab of the Item Information window.
- Prevent a new item barcode from being saved if it duplicates a barcode currently in use, an item barcode that was previously used, or a barcode of a deleted item.
- Allow you to search, including searching in the Circulation Audit Trail, on barcodes that were previously assigned to items and on barcodes of deleted items.

Note:

- You can report on deleted items by using the **Deleted_Item_v** Ad Hoc view.
- For fees to be kept in the patron account when items are deleted, run the following script with value=1: **SetKeepFeesOnDeletedItemsFlag.sh <value>**

6.2.19 About the Allow Undelete for MARC Records Setting

To enable the ability to undelete MARC records,

- Select the *Allow Undelete for MARC Records* check box.

In the Virtua client, deleted records will be in record state Deleted. The Edit button of the Search by State feature will let you bring a deleted record into the MARC Editor and resave it to the database.

Note: If the Allow Undelete for MARC Records option is turned off, records are deleted immediately from the database and CANNOT be recovered. The default setting is off.

6.2.20 About the Update Tags and Indicator Numbers of Bibliographic Records Attached to Authority Records Setting

To enable the automatic updating of tags and indicators in the bibliographic record when changes are made to the associated authority record,

- Select the *Update tag and indicator numbers of bibliographic records attached to authority records* check box.

In the Virtua client, records will be updated based on the following rules:

- If the authority record tag 100 is changed to 110 or 111, the associated bibliographic record tag is changed to x10 or x11.
- If the authority record tag 110 is changed to 100 or 111, the associated bibliographic record tag is changed to x00 or x11.
- If the authority record tag 111 is changed to 100 or 110, the associated bibliographic record tag is changed to x00 or x10.
- If the authority record tag 150 is changed to 151, the associated bibliographic record tag is changed to 651.
- If the authority record tag 151 is changed to 150, the associated bibliographic record tag is changed to 650.
- If the authority record tag 100 also exists in another authority record as tag 500, and the tag 100 is changed to 110 or 111, then the tag 500 is also changed (to 510 or 511).
- If the authority record tag 500 also exists in another authority record as tag 100, and tag 500 is changed to 510 or 511, then tag 100 is also changed (to 110 or 111).
- If the authority record tag 110 also exists in another authority record as tag 510, and tag 110 is changed to 100 or 111, then tag 510 is also changed (to 500 or 511).
- If the authority record tag 510 also exists in another authority record as tag 110, and tag 510 is changed to 150 or 511, then tag 110 is also changed (to 100 or 111).

- If the authority record tag 111 also exists in another authority record as tag 511, and tag 111 is changed to 100 or 110, then tag 511 is also changed (to 500 or 510).
- If the authority record tag 511 also exists in another authority record as tag 111, and tag 511 is changed to 500 or 510, then tag 111 is also changed (to 100 or 110).
- If the first indicator of an authority record tag 100, 110, or 111 is modified, then the first indicator of the associated bibliographic record tag is also modified to match.

For a complete list of authority tags and indicators and the associated changes to bibliographic tags and indicators, see the *Virtua Cataloging Reference Guide*.

6.2.21 About the Always Use the Incoming 005 Tag When Updating/Loading LC/NACO Authority Records Setting

By default, Virtua adds the current date into the 005 tag upon loading authority records. In LC/NACO authority records, the 005 tag indicates the date when the LC created/modified the authority record. Your library may not want Virtua to update this tag.

To specify that Virtua should keep the value of the incoming 005 tag upon updating/loading LC/NACO authority records,

- Select the *Always use the incoming 005 tag when updating/loading LC/NACO authority records* check box.

LC/NACO authority records are identified by the presence of tag 010.

6.2.22 About the For Items With No Item-level Call Number, Retain Old Call Number When Relinking Setting

Important: This setting applies only to items that have NO item-level call number. If the item has an item-level call number, the system will retain that call number when the item is relinked.

The *For items with no item-level call number, retain old call number when relinking* option allows you to specify what call number the system will assign when items with no item-level call number are relinked.

To retain the bibliographic-level call number from the old bibliographic record when items are relinked,

- Select the *For items with no item-level call number, retain old call number when relinking* check box.

In the Virtua client, the relinked item record will retain the bibliographic-level call number from the OLD bibliographic record.

Note: If the *For items with no item-level call number, retain old call number when relinking* option is NOT selected when the item is relinked, the system will assign to the relinked item a bibliographic-level call number based on the NEW bibliographic record's call number.

6.2.23 About the Index National Bibliography Number Setting

The *Index National Bibliography Number* setting lets you choose whether Virtua will index the 015 tag, subfields \$a and \$2, which are the National Bibliography Number and source of the number, respectively. Selecting this setting also enables the load option.

6.2.24 About the Do Not Support Single Authority Record Setting

The *Do Not Support Single Authority Record* setting lets you determine how Virtua will interpret the coding in tag 008, positions 14 and 15. This parameter tells Virtua how to index an authority record loaded into the database that has the values **aa** in tag 008, positions 14 and 15.

To index the authority record as a name/title authority *only*, regardless of how the record is cataloged,

- Select the *Do Not Support Single Authority Record* check box.

To index the authority record as both a name/title authority AND subject authority (as long as the record is cataloged correctly),

- Do NOT select the *Do Not Support Single Authority Record* check box.

Note: If your database already contains “single” authority records and if you select the Do Not Support Single Authority Record check box, then you must run the following script to fix the database: **ChangeToNoSingleAuthority.sh**.

6.2.25 About the MARC Editor Tag Pasting Settings

The MARC Editor Tag Pasting area of the Cataloging Basic Options window consists of two settings:

- Tag Placement drop-down list.
- Prompt User check box.

The Tag Placement setting lets you choose the placement of tags that are pasted in the MARC Editor. You can choose to have tags pasted...

After the Cursor (*default*)

-OR-

In Sorted Order

The Prompt User check box determines if, each time a user pastes a tag in the MARC Editor, the Virtua client will prompt the user to choose the placement of that tag, either after the cursor or in sorted order. The placement selected at the prompt will override the value of the Tag Placement setting. By default, Virtua will NOT prompt the user.

Note: This parameter affects the Paste Tag function in the MARC Editor. It does not affect the Paste To All function, which will always paste in sorted order since a cursor position for all records open in the Editor may not be available.

For details about the Paste Tag function, see the *Basic Cataloging Workflow-based Reference Guide*.

6.2.26 About the Price Threshold Setting

The Price Threshold setting lets you determine the maximum amount that a patron can be charged for a lost or damaged item.

If a staff user enters a fee greater than this amount in the Fine Adjustment Wizard or Account Payment Wizard in the Virtua client, Virtua displays a message stating that the fee exceeds this threshold. Depending on permissions, the staff user can override this threshold.

If you leave the default value of 999999999, there is effectively no maximum threshold for what a patron can be charged.

6.2.27 About the Display Routing List Setting

The Display Routing List setting lets you specify whether Virtua displays the routing list at check-in time. When this check box setting is enabled, Virtua will automatically display the routing list when you check in an issue for a title for which a routing list exists.

7. Configuring Collection Codes

The Collection Code Definitions parameter is an optional parameter that can be used to help you keep track of items in your collection. A collection code can be used at any of your locations and with items of any type.

The collection code descriptions you configure in this parameter will be available on the Item Information window and Batch Item Editor window in the Virtua client, where you can assign existing collection codes to items. See the *Basic Cataloging Workflow-based Reference Guide* for information about adding a collection code to one or multiple items. You can also add collection codes to collection code groups to use when filtering search results; see the section, “[Configuring Collection Code Groups](#)” in this guide for more information on collection code groups.

Once collection codes are assigned to items, you can view these collection codes via the Item_Detail_v Ad Hoc view. See the *Ad Hoc Reporting Reference Guide* for information on Ad Hoc views.

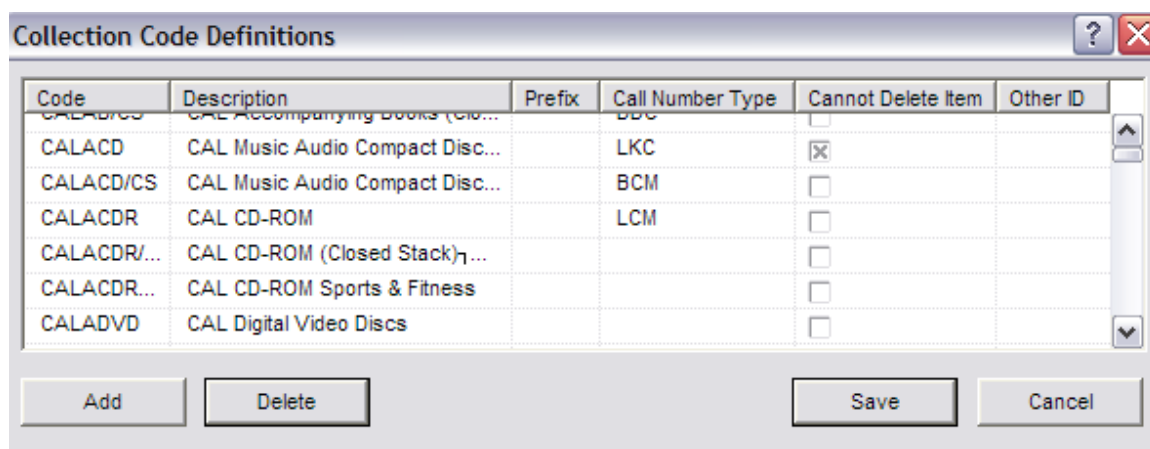


Figure 7-1. Collection Code Definitions Parameter

To add a collection code,

1. Click the Add button. A new line appears.
2. Type a collection code and a description. The collection code and description can be any combination of letters, numbers, and special characters.
3. (Optional) Type a Prefix for the code of up to 60 single-byte characters. This prefix can be configured to print on spine labels created in the Virtua client.

4. (*Optional*) Define a Call Number Type. This call number type can be used to filter searches in the Virtua client and in the Chamo/Chivas interface. The available call number types are:
 - **DDC** - Dewey Decimal for Chinese materials.
 - **LKC** - A variant form of Dewey Decimal for Chinese materials.
 - **BCM** - British Catalogue of Music classification (using alphabetical characters) for English musical materials.
 - **LCM** - Local Classification of Music (using Chinese characters) for Chinese musical materials.
5. (*Optional*) If you want items that belong to this collection code to be protected from deletion, select the Cannot Delete Item check box. Selecting this check box will prevent the item from being deleted via the Batch Item Editor.
6. (*Optional*) If your library uses the 360 Resource Manager from Serials Solutions®, type their 10-digit, system-generated Collection ID in the Other ID column. If a collection code is specified in the InfoStation Cost Export report, the corresponding “other ID” will appear in the report output.
7. Click the Save button. The Collection Code Definitions window closes, and your collection code definition is saved to the database.

To delete a collection code,

1. Select the collection code you want to delete. You can select either the Code or the Description field; both will be removed when you delete the collection code.
2. Click the Delete button. If the collection code is currently assigned to items in the catalog, an error message appears and you will be unable to delete the collection code.
3. Click the Save button. The Collection Code Definitions window closes, and the collection code definition you selected is removed from the database.

Note: After you click the Delete button, the collection code will be removed from the window. However, you *must* click the Save button for the collection code definition to be removed from the database.

To edit a collection code or description,

1. Click on the field you want to edit.
2. Make your desired changes.
3. Click the Save button. Your changes are saved to the database. In addition, any items with the collection code you modified will automatically be updated.

After making changes and clicking the Save button, your changes to the collection code and their descriptions will be available in the [Collection Code Groups](#) parameter, the Virtua client, Chamo, and via the Item_Detail_v Ad Hoc view.

8. Configuring Collection Code Groups

The Collection Code Groups parameter is an optional parameter that lets you create groups of collection codes. Once these groups are defined, you can filter keyword searches in the Virtua client or in the Chamo interface to contain only results that belong to one or more specific collection code groups.

The collection codes used in collection code groups are defined by the Collection Code Definitions parameter. See the section “[Configuring Collection Codes](#)” in this guide for information about this parameter.

To create a new collection code group,

1. Right-click on the Collection Code groups entry on the Cataloging tab of the Virtua Profiler, and select Add from the menu (*Figure 8-1*).

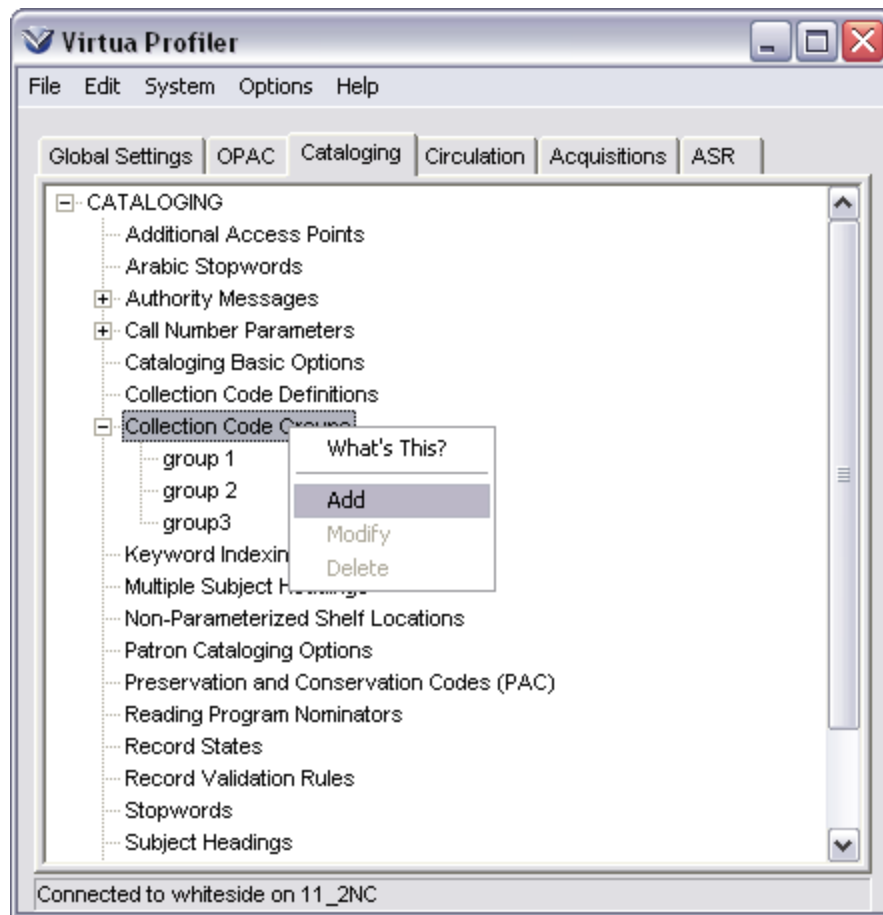


Figure 8-1. Creating a New Collection Code Group

2. In the resulting window, type the name of your new collection code group ([Figure 8-2](#)).



Figure 8-2. Add Collection Code Group Window

3. Select one or more collection codes from the list of available collection codes in the right list box, and click the left hand button. .

The collection code description(s) you selected will be moved to the Member Collection Codes list box ([Figure 8-3](#)).

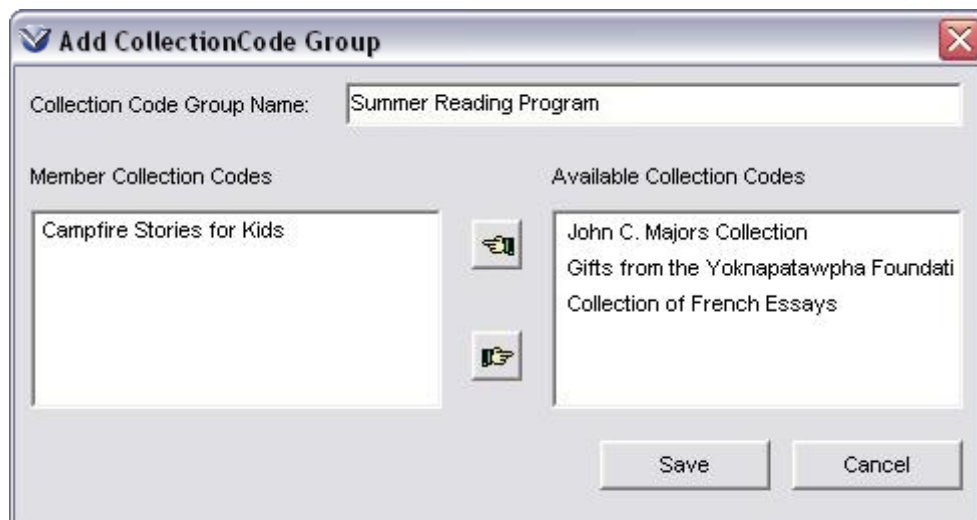


Figure 8-3. Adding a Collection Code to a New Collection Code Group

4. When you are finished making your changes, click the Save button.

The collection code group you created is now available for you to filter search results in the Virtua client ([Figure 8-4](#)) and in Chamo ([Figure 8-5](#)).

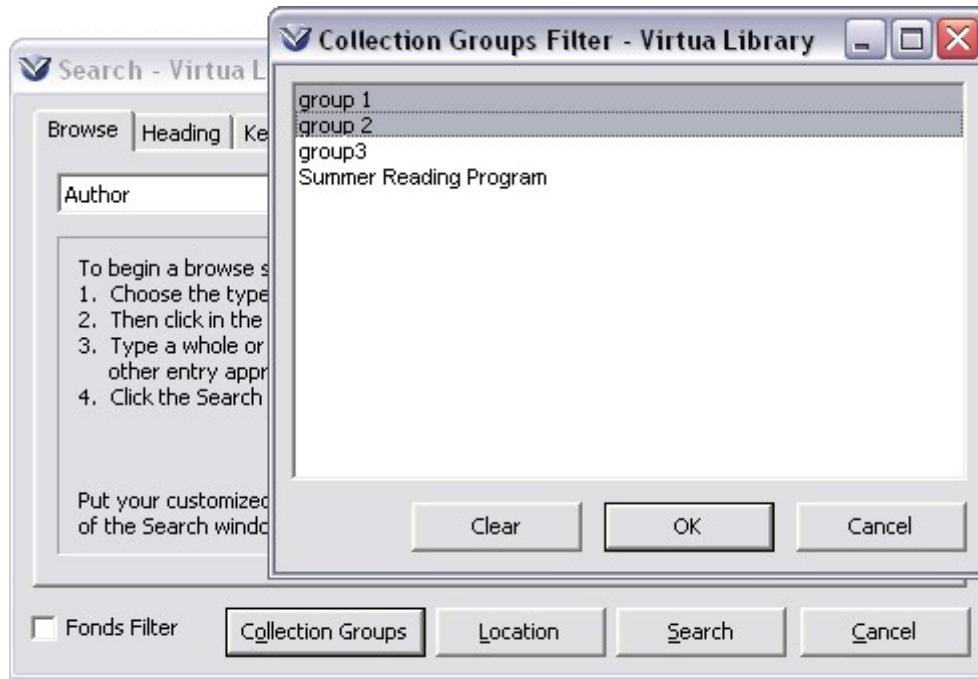


Figure 8-4. Collection Groups Filter Window in the Virtua Client

Filters

Select Theme

system

☐ Restrict all searches to filtered locations

Unfiltered locations

Central Catoclin Center
Central Children's Literature
Central Feature Films Collection
Central Key Ref. Copies
Central Law Library
Central New Reader
Central Nursing Collection
Central Nursing Video Collection
Central Oversize Books
Central Periodicals

Add

Filtered locations

All searches are restricted to filtered collection groups

Unfiltered collection groups

group 1
group 2
group3
Summer Reading Program

Add

Filtered collection groups

Figure 8-5. Selecting Collection Groups to Filter Chamo Search Results - Admin Filter Configuration Screen

9. Configuring Keyword Searching

When you load, process, save, or modify a bibliographic record, Virtua extracts elements of that record to include in the keyword search index. The keyword search index is the index of terms that the Virtua client access for keyword and precision searches. Virtua writes data to the keyword index based on the keyword indexing rules that you set in the Keyword Indexing Configuration Editor.

This chapter covers the following topics:

- ⇒ [Understanding Keyword Searching](#)
- ⇒ [Evaluating Search Categories](#)
- ⇒ [Setting Keyword Indexing Rules](#)
- ⇒ [After You Set Keyword Indexing Rules . . .](#)

9.1 Understanding Keyword Searching

Keyword indexing rules determine which fields, tags, and subfields of the bibliographic MARC record are indexed for a particular search category. Some examples of search categories are Author, Title, and Notes. For each search category that you want to configure, you must define indexing rules in the Keyword Indexing Configuration Editor. As each record is processed, Virtua writes the data in the fields you specified for each category to the keyword index.

If you make a change to your keyword indexing rules, the new rules immediately apply to new or modified records that are saved to the database. For information on applying the indexing rules to the records that existed in the database prior to the change, see the *Virtua System Management: OPAC User's Guide*.

The search categories that you configure in the Keyword Indexing Configuration Editor will be available for use in a keyword or precision search. When you do a keyword or precision search, Virtua returns a list of records that have entries in the keyword index that match your search criteria.

This chapter describes the procedures for configuring keyword indexing rules in the Keyword Indexing Configuration Editor. **We strongly recommend that you read the entire chapter before you configure or modify any keyword settings.**

9.1.1 Understanding the Workflow

There are five steps you need to follow to set up keyword searching on your database:

1. **Evaluate the list of keyword search categories** - Before you configure keyword indexing rules, you should determine which categories you want to add to the index and which fields you want to index for each category. The section [“Evaluating Search Categories”](#) provides a description of the available search categories.
2. **Set up your keyword indexing rules** - Keyword indexing rules are set in the Keyword Indexing Configuration Editor. For each search category you want to configure, you can determine . . .
 - The fields in a bibliographic record that you want to associate with the search category.
 - The category code that will be used in a precision search.

After you configure keyword indexing rules:

- The categories for which you set indexing rules are available immediately for searching via a precision search on the Keyword tab of the Search window in the Virtua client. An updated list of these categories appears on the Categories tab of the Keyword Search Help window in the Virtua client.
 - Any records you catalog or modify in this database will be indexed using the new keyword indexing rules. All other records remain indexed under the old indexing rules until you re-index your keyword tables.
 - Each category for which you set indexing rules appears in the list of allowed keyword search types in the Virtua Profiler Permissions list for every user profile in the database.
3. **Configure the order in which search categories appear in the Search Category drop-down list** - From the Search Order tab of the Keyword Indexing Configuration Editor, you can choose the order in which keyword categories appear in the Search Category drop-down list of the Virtua client.
 4. **Determine which categories are available via the Search Category drop-down list** - From the list of search categories in the Virtua Profiler Permissions, you can choose a set of categories that you want to display in the Search Category drop-down list. Additionally, using the Virtua Language Editor, you can translate or modify the strings of the search category to suit your library's needs. For information about how to make the search categories available in the Virtua client, see the *Virtua Profiler/Global Settings User's Guide*.

5. **Apply the keyword indexing rules to records in your database** - After you set your keyword indexing rules, you need to rebuild and re-index your keyword tables to reflect the changes you made. Until you re-index, the existing records in your database will reflect the old set of keyword indexing rules. For information on re-indexing your keyword tables, see the *Virtua System Management: OPAC User's Guide*.

9.2 Evaluating Search Categories

Before you make any kind of change to Virtua's keyword indexing rules, you need to determine which search categories you want to index. To help you evaluate available search categories, we . . .

- Discuss aspects of search categories.
- List all available search categories.
- Discuss restrictions on setting keyword indexing rules.

9.2.1 Understanding Search Categories

Search categories are used in keyword searches to tell Virtua which index should be searched. In addition to indexing rules, there are three parts to each search category:

1. **Search Attribute Number** - The number that identifies the search category to the Virtua server.
2. **Name** - The description of the category that appears in the Keyword Indexing Configuration Editor.
3. **Category Code** - The abbreviation you use when specifying the search category in a precision search.

For each category, you can assign bibliographic fields to be included in the keyword index. When you select a search category in the Virtua OPAC, Virtua searches the data in the fields you defined for that category. Virtua provides more than 180 search categories that you can configure for use in a keyword search. Search categories can be classified as:

- **Z39.50 Bib-1 use attributes** - Search attributes defined by the Z39.50 standard. These search categories consist of both fixed and variable field search categories.
- **Innovative fixed field categories** - Categories defined by Innovative to search fixed field values in the 006, 007, 008, or Leader fields. Each Innovative fixed field attribute corresponds to a MARC 21 fixed field.

Note: Some of the Innovative fixed field attributes correspond to obsolete MARC 21 fixed fields.

- **User-defined search categories** - A set of user-defined searches for either fixed or variable field tags.

You can determine the search category type by finding the search attribute number in the following list:

<u>Search Type</u>	<u>Attribute Number Range</u>
Z39.50 Bib-1	1 - 1999
User Defined	6000 - 6999
Innovative Fixed Fields	8000 - 8999

For example, the following is a search category in the default keyword index configuration:

Search Attribute Number: 1003

Name: Author

Category Code: a

In this example,

- The attribute number indicates that this is a Bib-1 use attribute.
- The search category is Author.
- The default category code is **a**, which you would use to do a precision search in the following format:

a:Shakespeare

Note: For more information on precision searching, see the *OPAC Workflow-based Reference Guide*.

9.2.2 List of Keyword Search Categories

The table below lists each keyword search category and its associated attribute number and default category code. This list is also available in the Indexes section of the Keyword Indexing Configuration Editor. We recommend that you evaluate this list to determine which attributes you want to use for keyword search categories and what bibliographic fields each category should search. Notice that this list is sorted by category name.

Attribute #	Category Name	Category Code
62	Abstract	abs
1035	Anywhere	aw
8012	Archival Control (Ldr 08)	ar
1003	Author	a
1013	Authority/Format Id	afi
1006	Author-Name Conference	ancf
1005	Author-Name Corporate	anc
1004	Author-Name Personal	anp
23	BDI Index Subject	bdi
1021	Bibliographic Level (Ldr 07)	bl
8204	Biography (008/34)	b
15	Bliss Classification*	bc
1010	Body of Text	bot
1019	Cataloging Source (008/39)	cs
55	Code--Geographic Area	cga
56	Code--Institution	ci
60	CODEN	coden
1037	Collection Subset	coll
1015	Concept-Reference	cr
1014	Concept-Text	cnt
8164	Conf Publication (008/29)	cp
3	Conference Name	cfa
2	Corporate Name	ca
30	Date	date
8112	Date 1 (008/07-10)	sd
8113	Date 2 (008/11-14)	edt
32	Date of Acquisition	da
1012	Date/Time Last Modified	dtlm
8014	Descriptive Cataloging Rules (Ldr 18)	d
13	Dewey Classification*	dc
1032	Doc-Id	di
1020	Editor	e
8013	Encoding Level (Ldr 17)	el
1011	Entered Date (008/00-05)	ed
8202	Festschrift (008/30)	fst
8100	Form of Item (008/23)	f
8501	Format of Music (008/20)	fm
1016	General	g
1022	Geographic-Class	gc
8163	Govt Publication (008/28)	gp

Attribute #	Category Name	Category Code
1033	Host-Item	hi
1007	Identifier--Standard	is
8200	Illustrations (008/18-21)	il
8165	Index (008/31)	i
1023	Indexed-By	ib
24	INSPEC Subject	ins
8700	ISSN Center (008/20)	ic
54	Language (008/35-37)	lang
16	LC Call Number*	lcln
27	LC Subject Heading	lclsh
8888	Library Symbol	sym
8015	Link Records (Ldr 19)	lr
8203	Literary Form (008/33)	fic
20	Local Classification*	lc
29	Local Subject Index	lsi
8999	Location	loc
8166	Main Entry Body	meb
1024	Map-Scale	ms
25	MESH Subject	mesh
61	Microform Generation	mg
8150	Modified Record (008/38)	mr
19	MOS Call Number*	mos
8403	MP Cartographic (008/25)	ct
8402	MP Prime Meridian (008/24)	pm
8401	MP Projection (008/22)	pj
8400	MP Relief (008/18-21)	rf
8404	MP Special Format (008/33)	sf
8502	MU Accompanying Material (008/24)	mm
8500	MU Form of Composition (008/18)	fc
8503	MU Literary Text SR (008/30)	lt
1025	Music-Key	mk
18	NAL Call Number*	nal
1002	Name	n
58	Name Geographic	ng
1034	Nature of Content (008/24-27)	nc
17	NLM Call Number*	nlm
50	No. Govt Pub.	ngp
49	No. Legal Deposit	nld
51	No. Music Publisher	nmp
48	No. National Biblio.	nnb
63	Notes	nt

Attribute #	Category Name	Category Code
52	Number Db	ndb
53	Number Local Call*	nlc
8903	Operator	o
26	PA Subject	pas
1	Personal Name	pa
59	Place of Publication (008/15-17)	pp
1018	Publisher	p
8011	Record Status (Ldr 05)	rs
1026	Related-Periodical	rp
1027	Report-Number	rn
28	RVM Subject Heading	rvm
8702	SE Form of Original Item (008/22)	foi
8160	SE Frequency (008/18)	fr
8703	SE Nature of Entire Work (008/24)	new
8705	SE Original Alphabet (008/33)	oa
8161	SE Regularity (008/19)	r
8706	SE Successive Entry (008/34)	sen
5	Series Title	tse
1028	Stock-Number	sn
21	Subject	s
1009	Subject Name -- Personal	snp
45	Subject Precis	sp
22	Subject Rameau	sr
46	Subject Rswk	rswk
47	Subject Subdivision	ss
1008	Subject--LC Childrens	slcc
8162	Target Audience (008/22)	ta
1030	Thematic-Number	tn
4	Title	t
43	Title Abbreviated	tab
37	Title Added Title Page	tat
38	Title Caption	tcp
34	Title Collective	tcl
36	Title Cover	tcv
44	Title Expanded	te
42	Title Former	tf
33	Title Key	tk
41	Title Other Variant	tov
35	Title Parallel	tp
39	Title Running	tr
40	Title Spine	tsp

Attribute #	Category Name	Category Code
6	Title Uniform	tu
1001	Type (Ldr 06)	ty
8300	Type of Computer File (008/26)	tc
8111	Type of Date (008/06)	td
8701	Type of Serial (008/21)	ts
14	UDC Classification*	udc
6000	User Defined Search 01	ud1
6001	User Defined Search 02	ud2
6002	User Defined Search 03	ud3
6003	User Defined Search 04	ud4
6004	User Defined Search 05	ud5
6005	User Defined Search 06	ud6
6006	User Defined Search 07	ud7
6007	User Defined Search 08	ud8
6008	User Defined Search 09	ud9
6009	User Defined Search 10	ud10
6010	User Defined Search 11	ud11
6011	User Defined Search 12	ud12
6012	User Defined Search 13	ud13
6013	User Defined Search 14	ud14
6014	User Defined Search 15	ud15
6015	User Defined Search 16	ud16
6016	User Defined Search 17	ud17
6017	User Defined Search 18	ud18
6018	User Defined Search 19	ud19
6019	User Defined Search 20	ud20
6020	User Defined Search 21	ud21
6021	User Defined Search 22	ud22
6022	User Defined Search 23	ud23
6023	User Defined Search 24	ud24
6024	User Defined Search 25	ud25
6025	User Defined Search 26	ud26
6026	User Defined Search 27	ud27
6027	User Defined Search 28	ud28
6028	User Defined Search 29	ud29
6029	User Defined Search 30	ud30
6030	User Defined Search 31	ud31
6031	User Defined Search 32	ud32
6032	User Defined Search 33	ud33
6033	User Defined Search 34	ud34
6034	User Defined Search 35	ud35

Attribute #	Category Name	Category Code
6035	User Defined Search 36	ud36
6036	User Defined Search 37	ud37
6037	User Defined Search 38	ud38
6038	User Defined Search 39	ud39
6039	User Defined Search 40	ud40
6040	User Defined Search 41	ud41
6041	User Defined Search 42	ud42
6042	User Defined Search 43	ud43
6043	User Defined Search 44	ud44
6044	User Defined Search 45	ud45
6045	User Defined Search 46	ud46
6046	User Defined Search 47	ud47
6047	User Defined Search 48	ud48
6048	User Defined Search 49	ud49
6049	User Defined Search 50	ud50
8601	VM Matter Visual (008/23)	mv
8600	VM Running Time (008/18-20)	tm
8603	VM Technique (008/34)	tq
1031	VM Type of Material (008/33)	tym

*Before using these keyword search categories, see the section “[Other Limitations on Index Categories](#).”

9.2.3 Limitations on Configuring Search Categories

For most keyword search categories, you can assign whatever indexing rules best suit the needs of your library. For the following types of search categories, however, your configuration options are limited:

- **Fixed field categories** - Search categories that are associated with fixed fields of a MARC record.
- **Restricted categories** - Search categories that have special properties in Virtua. For these categories, indexing rules are pre-defined and cannot be modified.

These category types are discussed in the following sections.

9.2.3.1 Fixed Field Categories

Some keyword search categories are commonly associated with either Bib-1 or Innovative fixed fields, such as Festschrift and Matter of Music. Although Virtua does not currently impose any restrictions on assigning fields to most of these search categories, we strongly recommend that you do not assign variable fields to the indexing rules for these categories.

Additionally, some fixed field search categories are used in search filters, such as Format and Language. If you assign non-fixed field values to these search categories, the filters will not function properly.

The following table lists search categories that are commonly associated with fixed fields. Shaded entries in this table are used in search filters.

Note: This list is a subset of the entire list of search categories in the section “[List of Keyword Search Categories](#).”

Name	Attribute Number	Category Code
Archival Control (Ldr 08)	8012	ar
Bibliographic Level (Ldr 07)	1021	bl
Biography (008/34)	8204	b
MP Cartographic (008/25)	8403	ct
Cataloging Source (008/39)	1019	cs
Conf Publication (008/29)	8164	cp
Date	30	date
Descriptive Cataloging Rules (Ldr 18)	8014	d
Encoding Level (Ldr 17)	8013	el
Date 2 (008/11-14)	8113	edt
Entered Date (008/00-05)	1011	ed
Festschrift (008/30)	8202	fst
Literary Form (008/33)	8203	fic
MU Form of Composition (008/18)	8500	fc
SE Form of Original Item (008/22)	8702	foi
Form of Item (008/23)	8100	f
Format of Music (008/20)	8501	fm
SE Frequency (008/18)	8160	fr
Govt Publication (008/28)	8163	gp
Illustrations (008/18-21)	8200	il

Name	Attribute Number	Category Code
Index (008/31)	8165	i
ISSN Center (008/20)	8700	ic
Language (008/35-37)	54	lang
Library Symbol	8888	sym
Link Records (Ldr 19)	8015	lr
MU Literary Text SR (008/30)	8503	lt
Main Entry Body	8166	meb
MU Accompanying Material (008/24)	8502	mm
VM Matter Visual (008/23)	8601	mv
Microform Generation	61	mg
Modified Record (008/38)	8150	mr
Nature of Content (008/24-27)	1034	nc
SE Nature of Entire Work (008/24)	8703	new
Operator	8903	o
SE Original Alphabet (008/33)	8705	oa
Place of Publication (008/15-17)	59	pp
MP Prime Meridian (008/24)	8402	pm
MP Projection (008/22)	8401	pj
Record Status (Ldr 05)	8011	rs
SE Regularity (008/19)	8161	r
MP Relief (008/18-21)	8400	rf
MP Special Format (008/33)	8404	sf
Date 1 (008/07-10)	8112	sd
SE Successive Entry (008/34)	8706	sen
Target Audience (008/22)	8162	ta
VM Technique (008/34)	8603	tq
VM Running Time (008/18-20)	8600	tm
Type (Ldr 06)	1001	ty
Type of Computer File (008/26)	8300	tc
Type of Date (008/06)	8111	td
VM Type of Material (008/33)	1031	tym
Type of Serial (008/21)	8701	ts

9.2.3.2 Restricted Categories

Virtua has three special categories that have hard-coded values. In the Keyword Indexing Configuration Editor, you CANNOT add, delete, or modify indexing rules for the following search categories:

- [Anywhere](#) (attribute 1035)
- [Location](#) (attribute 8999)
- [Full text](#) (attribute 8900)

9.2.3.2.1 Anywhere Search Category

The Anywhere search category is system-defined to search all search categories indexed with *variable* fields. Any search you do using the Anywhere category will search ALL variable fields included in the keyword table.

You cannot add, delete, or modify indexing rules for this category. However, you can modify the category code used to identify the Anywhere category in a precision search. For information on configuring category codes, see the section “[Setting Keyword Indexing Rules](#)” in this user’s guide.

9.2.3.2.2 Location Search Category

The Location search category is a system-defined category that searches the location of item records. Any search you do using the Location category will search all item records for the location *code* you entered.

Note: Unlike other search categories, the location category applies to the location of *items*. This means that if you use the location category to filter your search, records that are returned will show only attached items that are shelved at the location you specify.

For example, if a database includes the following locations and location codes:

Location	Location Code
Main Library	10000
Reference Collection	10001
Records Division	10003
County Branch	20000

You can search for items at a library by using the number in the Location Code column. If you want to search for items shelved at the Reference Collection location, type:

loc:10001

You cannot add, delete, or modify indexing rules for the Location category. However, you can modify the category code used to identify the Location category in a precision

search. For information on configuring category codes, see the section “[Setting Keyword Indexing Rules](#)” in this user’s guide.

Note: You can find the location code of a location in the Library Names parameter on the Global Settings tab of the Virtua Profiler.

After evaluating the search categories, the second step in the workflow is to use the Keyword Indexing Configuration Editor to set indexing rules.

9.2.3.2.3 Full Text Search Category

The full text search category is a system-defined category that lets you search the text of plain text files, PDF files, and Microsoft Word files that have been indexed in your system. Rather than searching selected fields from a MARC record, the full text search category searches the entire text of the indexed document.

You cannot add, delete, or modify indexing rules for the Full Text category. However, you can modify the category code used to identify the Full Text category in a precision search. For information on configuring category codes, see the section “[Setting Keyword Indexing Rules](#)” in this user’s guide.

For information on indexing documents for a Full Text search, see the *Virtua System Management: OPAC User’s Guide*.

9.2.4 Other Limitations on Index Categories

Virtua’s keyword system is designed to provide powerful indexing and searching features for text fields. As it was designed primarily for indexing text (words, sentences, and phrases), it has several limitations when attempting to index other types of data such as control numbers and call numbers. Innovative strongly recommends that you use the keyword index for *text indexing only*, as other types of data will impact both index performance and overall system performance.

9.2.4.1 Limitations on Indexing Control Numbers

The keyword indexing engine contains a list of ALL the words indexed in the record. If you choose to index fields containing control numbers, which are generally unique (or almost unique) for each bibliographic record, each control number will be treated as a unique word. This can greatly increase the number of words in the index, which can negatively impact performance, memory, and processor use of the index.

Innovative does not recommend configuring indexes on unique fields or control numbers. If such indexes fail to work or reduce performance, Innovative cannot provide support for them.

9.2.4.2 Limitations on Indexing Call Numbers and Classification Data

Call numbers and other classification fields such as shelfmarks often contain spaces and punctuation. Virtua's keyword indexing system considers spaces and punctuation as part of normal sentence structure and will not index them. This means that call numbers and other fields with spaces, decimal points, and other punctuation, will be indexed as sets of small words and not as a single data element. Searches against these fields will work the same way. Smaller components of a call number, such as a single character surrounded by spaces or punctuation, may be treated as a stopword and dropped. Wild card searches against call number or classification fields may cause a system error.

In many cases, a search on a call number with embedded spaces will appear to work, but in other cases it will return additional results since some data in the call number may be dropped as stopwords. In rare cases, it may fail to match the correct call number entirely.

Innovative does not recommend indexing call numbers, shelfmarks, and other non-text classification fields. If such indexes return erroneous results, Innovative cannot provide support for them.

9.3 Setting Item Barcode Validation Rules

Important: Item barcode validation rules let you configure rules for the VRT type of item barcodes *only*. The [Barcode Type](#) used at your library is defined in the [Cataloging Basic Options](#).

The Item Barcode Validation parameter lets you decide whether Virtua to validate item barcodes when item records are saved. You can choose whether barcodes can be alphanumeric, or whether they must be alphabetic or numeric only. You can also choose a minimum and/or maximum length for item barcodes.

If a staff user tries to save a new item to the database with a barcode that does not fit these parameters, Virtua will display an error message and prevent the record from being saved.

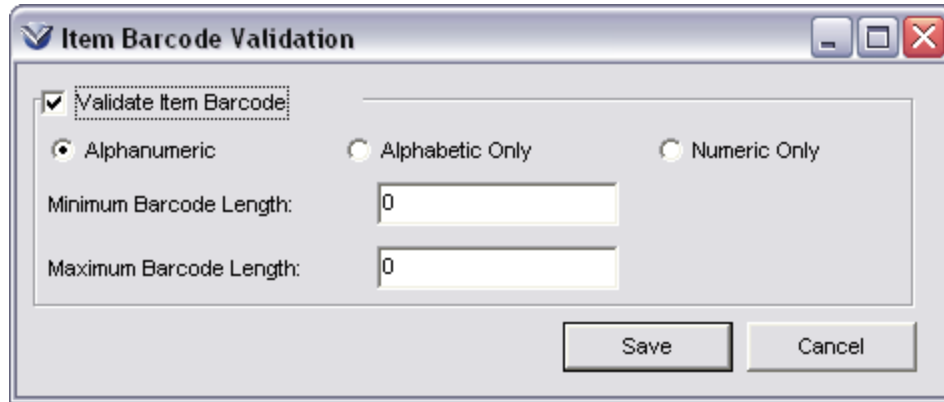


Figure 9-1. Item Barcode Validation Window

To configure Virtua to validate item barcodes,

1. Select the Validate Item Barcode check box to enable Virtua to check item barcodes before they are saved to the database.
2. Select a format for the barcodes:
 - Click the Alphanumeric radio button if you item barcodes in Virtua can consist of only letters and/or numbers.
 - Click the Alphabetic only radio button if all item barcodes in your collection must consist of only letters.
 - Click the Numeric only radio button if all item barcodes in your collection must consist of only numbers.
3. In the Minimum Barcode Length field, type the minimum number of digits item barcodes must contain. A value of zero (0) in this field means that there is no minimum length for item barcodes.
4. In the Maximum Barcode Length field, type the maximum number of digits item barcodes must contain. A value of zero (0) in this field means that there is no maximum length for item barcodes.
5. Click the Save button when you are finished making your changes.

9.4 Setting Keyword Indexing Rules

Important: Before you modify your keyword indexing rules, read the section “[Evaluating Search Categories](#)” in this user’s guide. It is important that you know which fields you want to assign to each category prior to modifying your keyword indexing rules.

Keyword indexing rules determine which fields are indexed for keyword searching when you load a record or index the database. If you have a new installation of Virtua or simply need to change the way your existing keyword tables are indexed, you need to modify the keyword indexing rules in the Keyword Indexing Configuration Editor.

Note: New installations of Virtua include a set of default keyword indexing rules. For a list of these rules, see the appendix “[Default Keyword Indexing Rules](#)” in this user’s guide.

When you make a change to your indexing rules, the following occurs:

- The categories for which you set indexing rules are available immediately for searching via a precision search. An updated list of these categories appears on the Categories tab of the Keyword Search Help window in the Virtua client.
- Any records you catalog or modify in this database will be indexed using the new keyword indexing rules. All other records remain indexed under the old indexing rules until you re-index your keyword tables.
- Each category for which you set indexing rules appears in the list of allowed keyword search categories in the Virtua Profiler Permissions list for every user profile in the database.

Keyword indexing rules are set in the Keyword Indexing Configuration Editor, which is accessible via the Virtua Profiler. After you set keyword indexing rules for a category, you can then determine the order in which the category appears Search Category drop-down list in the Virtua client.

Note: For instructions on configuring indexing rules for a UNIMARC database, see the appendix “[Defining Keyword Indexing Rules for a UNIMARC Database](#)” in this user’s guide.

9.4.1 Accessing the Keyword Indexing Configuration Editor

To access the Keyword Indexing Configuration Editor,

1. Open the Virtua Profiler to the Cataloging tab ([Figure 9-2](#)).

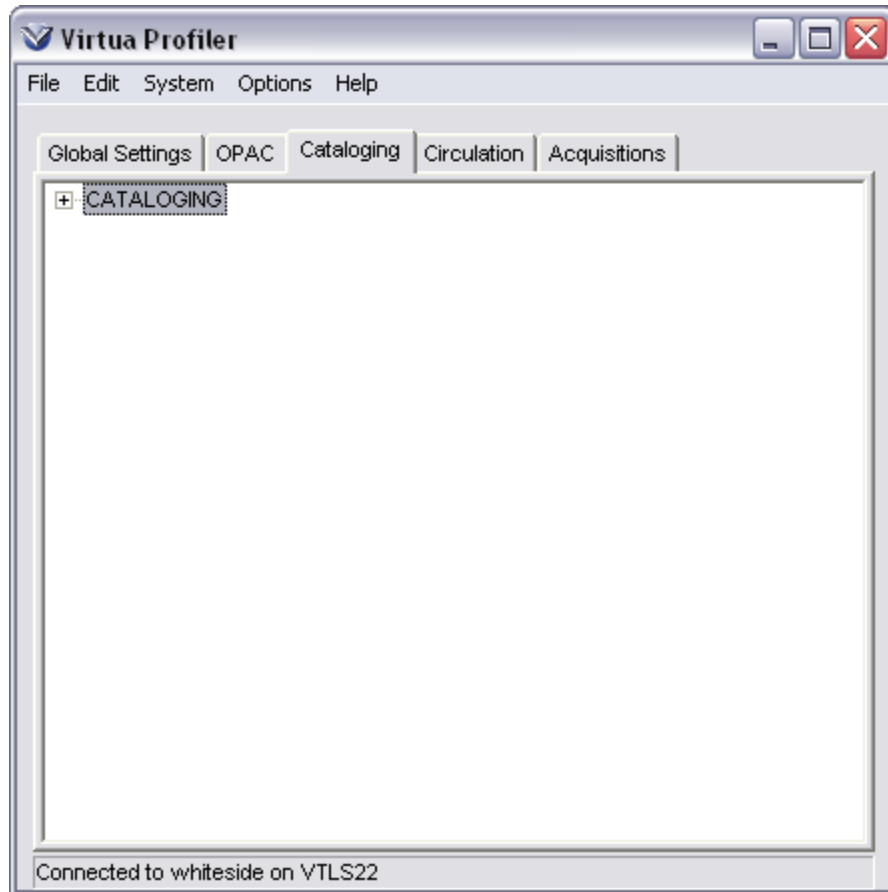


Figure 9-2. Virtua Profiler - Cataloging Tab

2. Double-click CATALOGING to expand the list of Cataloging parameters ([Figure 9-3](#)).

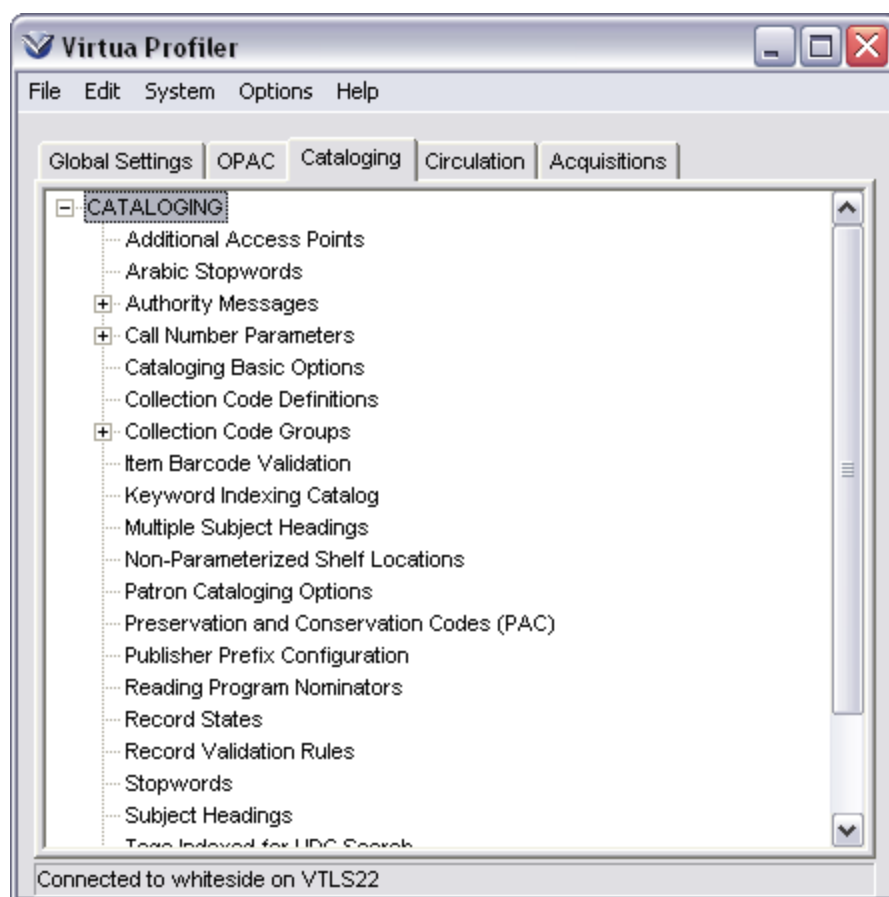


Figure 9-3. Virtua Profiler - Cataloging Tab

3. Double-click Keyword Indexing Catalog to open the Keyword Indexing Configuration Editor ([Figure 9-4](#)).

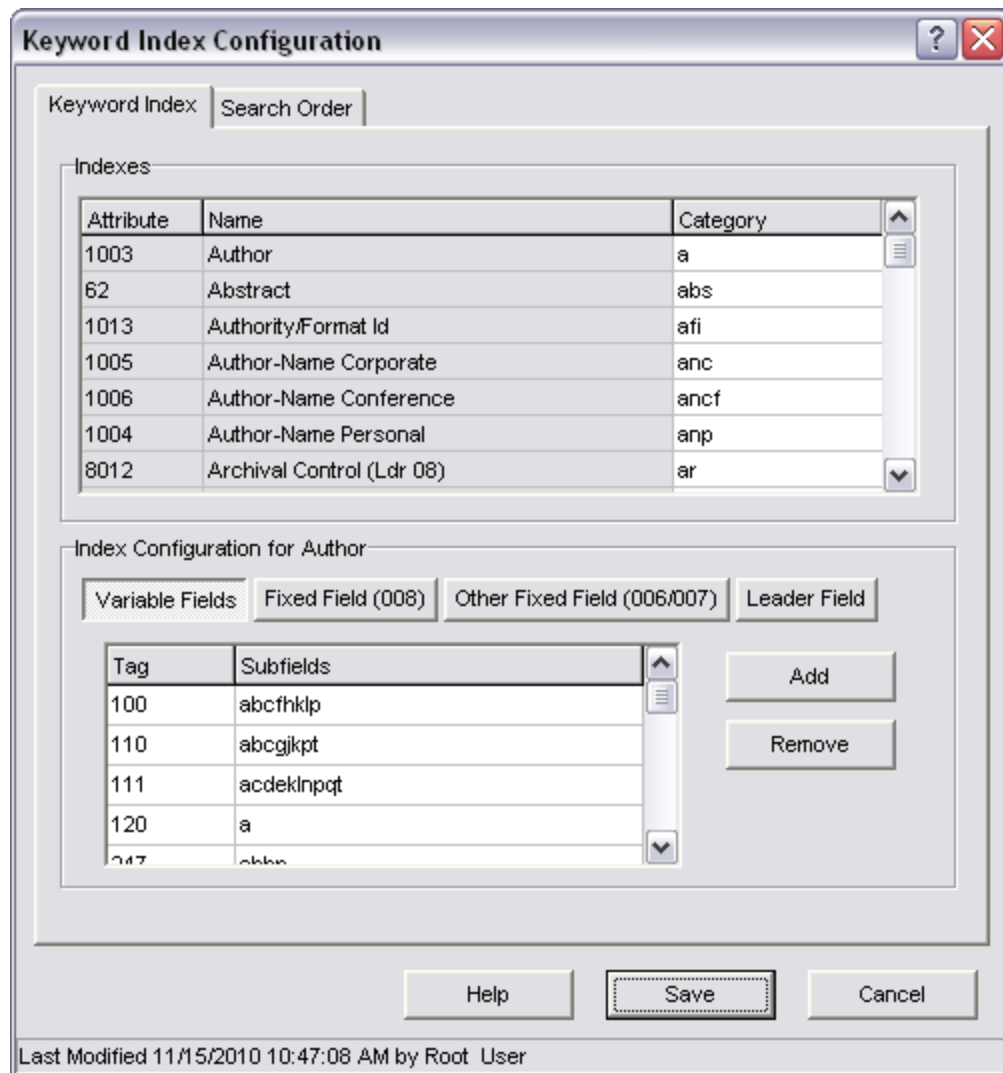


Figure 9-4. Keyword Indexing Configuration Editor

9.4.2 Aspects of the Keyword Indexing Configuration Editor

When the Keyword Indexing Configuration Editor window first opens, the Keyword Index tab appears. This is the tab on which you specify keyword indexing rules.

Also displayed on this window is the Search Order tab. This tab is the one on which you determine the order in which search categories appear in the Search Category drop-down list box.

9.4.2.1 Keyword Index Tab

The Keyword Index tab consists of two sections:

- **Indexes** - Lists each search category for which you can assign fields.
- **Index Configuration** - Displays a list of the fields stored in the selected category.

Indexes with defined values in the Keyword Index Configuration Editor are available for use in keyword searches. Additionally, ALL indexes with *variable* field values are available for use in keyword searches via the Anywhere search category (attribute 1035).

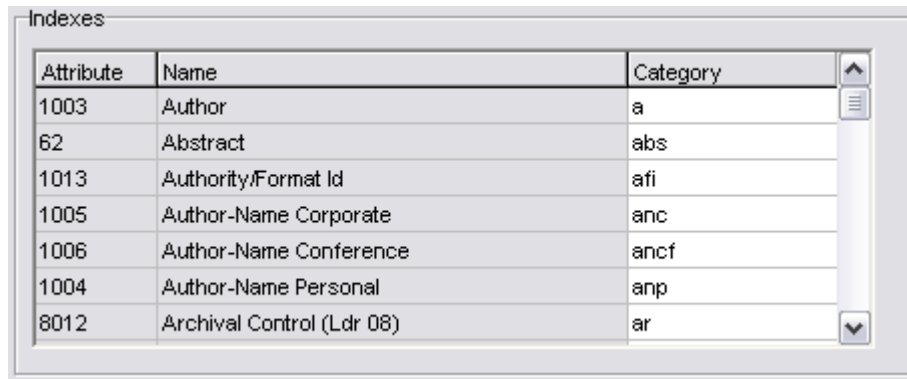
Note: For information on including an indexed category in the list of categories on the Keyword Search window, see the *Virtua Profiler/Global Settings User's Guide*.

9.4.2.2 Search Order Tab

On the Search Order tab, you can determine the order in which search categories appear in the Search Category drop-down list. All search categories for which you have defined indexing rules will appear on this tab. For information about working with the Search Order tab to determine the order of search categories, see the section [“Determining the Order in Which Search Categories Appear”](#) in this user's guide.

9.4.3 Modifying the Indexes Section

The Indexes section of the Keyword Indexing Configuration Editor ([Figure 9-5](#)) lists each search category that you can make available to use in a keyword search.



Attribute	Name	Category
1003	Author	a
62	Abstract	abs
1013	Authority/Format Id	afi
1005	Author-Name Corporate	anc
1006	Author-Name Conference	ancl
1004	Author-Name Personal	anp
8012	Archival Control (Ldr 08)	ar

Figure 9-5. Keyword Indexing Configuration Editor - Indexes Section

The indexes section consists of three columns:

- **Attribute** - The unique system number assigned to the category.
- **Name** - A descriptive name of the category.
- **Category** - A unique code that you can use to build a keyword search query. Notice that the list of attributes is sorted by this column.

In this section, you CANNOT modify . . .

- The attribute number of a category.
- The descriptive name of a category.

The *only* field you can modify in the Indexes section is the search category code in the Category column.

Note: For information on modifying or translating the name of a keyword search category, see the *Virtua Translation and String Customization Guide*.

9.4.3.1 Defining Category Codes

To define a category code for a search category,

1. Select the Category field of a search category.
2. Type the new code for the category. The code must be unique. If you type a code defined for another category, the server will not save your changes.

9.4.4 Setting Indexing Rules for a Search Category

Information stored in the keyword index for a search category depends on settings in the Index Configuration section of the Keyword Indexing Configuration Editor ([Figure 9-6](#)).

Keyword Index Configuration

Keyword Index | Search Order

Indexes

Attribute	Name	Category
1003	Author	a
62	Abstract	abs
1013	Authority/Format Id	afi
1005	Author-Name Corporate	anc
1006	Author-Name Conference	ancf
1004	Author-Name Personal	anp
8012	Archival Control (Ldr 08)	ar

Index Configuration for Author

Variable Fields | Fixed Field (008) | Other Fixed Field (006/007) | Leader Field

Tag	Subfields
100	abcfhkpl
110	abcgjkpt
111	acdeklnpqt
120	a
247	abkn

Add Remove

Help Save Cancel

Last Modified 11/15/2010 10:47:08 AM by Root User

Figure 9-6. Keyword Indexing Configuration Editor

For each index you can select ONE of the following field types:

- **Variable Fields** - Non-fixed fields for which you define tags and subfields to store in the index for the search category.

- **Fixed Field (008)** - Position(s) in the 008 tag of selected types of record and bib type combinations.
- **Other Fixed Field (006/007)** - Position(s) in the 006 or 007 tags of selected record formats.
- **Leader Field** - Position(s) in the Leader. You can define one or more positions to include in the index.

Important: For each search category, you can define indexing rules in only one of the above field types.

The following sections provide instructions for defining indexing rules.

Note: Throughout these instructions, keep in mind that you must explicitly define each tag, subfield, fixed field position, etc. that you want to index. There is no “shortcut” to specify “all” for any aspect of the indexing rules.

9.4.4.1 Setting Keyword Indexing Rules for Variable Fields

To assign variable fields (non-fixed fields) to the indexing rules of a search category,

1. Open the Keyword Indexing Configuration Editor.
2. In the Indexes section, select the search category to which you want to assign variable field(s).
3. Click the Variable Fields button.

The Variable Fields settings appear in the Index Configuration area ([Figure 9-7](#)).

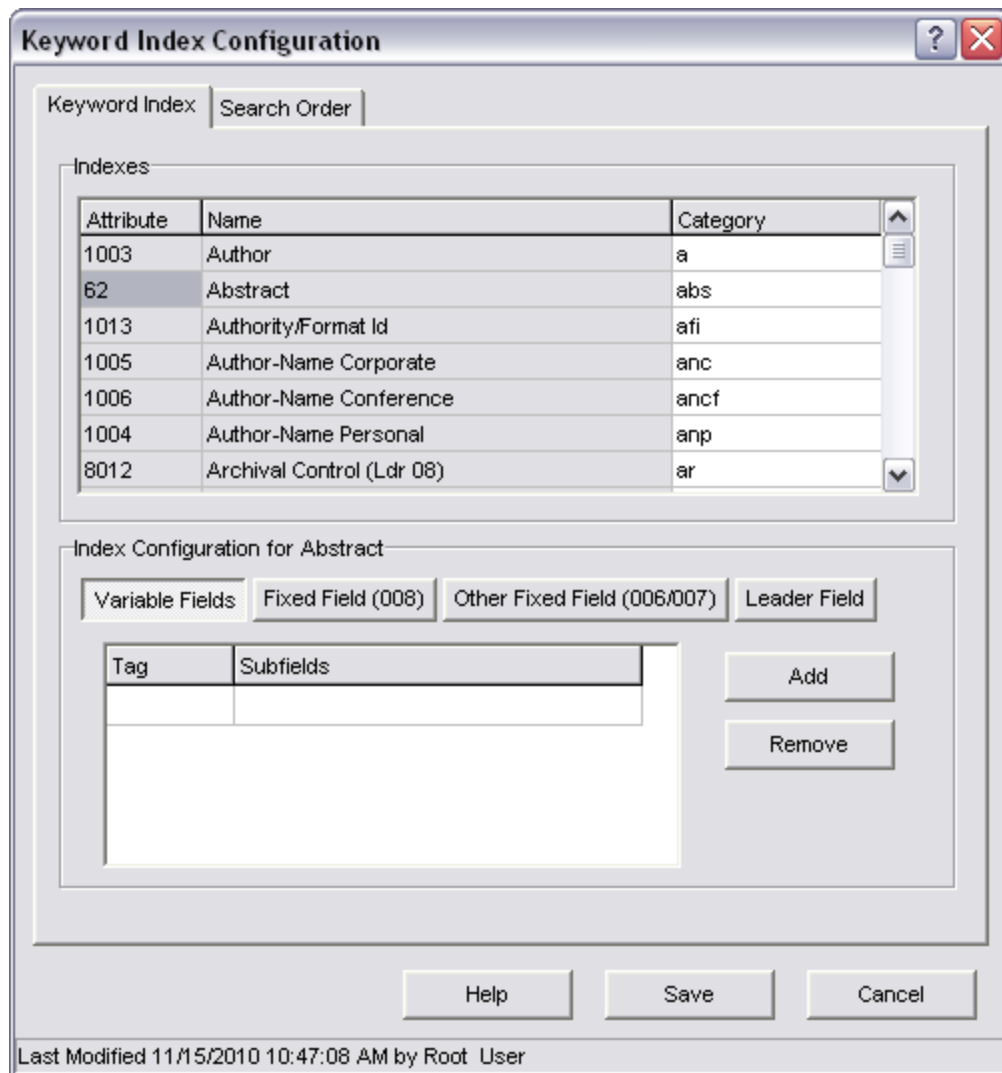


Figure 9-7. Keyword Indexing Configuration Editor - Variable Fields

-OR-

If 006, 007, 008, or Leader fields have already been assigned to this category, a diagnostic message asks, "WARNING: The current data will be lost. Continue?"

- To delete ALL settings for this category and continue to the Variable Fields settings, click the Yes button.
- To retain the current settings, click the No button.

4. Click the Add button to add a field.

5. In the Tag column, type the three-digit tag of the field you want to add to the index.
6. In the Subfields column, type one or more subfields that you want to add to the index. If you are specifying multiple subfields, do NOT include any delimiters or spaces. For example, if you want to specify subfields \$a, \$b, and \$c, type **abc**.
7. Repeat steps 4 - 6 to add additional fields to the keyword indexing rules for this category.
8. Click the Save button to save your changes and close the Keyword Indexing Configuration Editor.

To remove fields from a category,

1. Choose the category you want to change.
2. In the Index Configuration area, select the field you want to remove.
3. Click the Remove button.

9.4.4.2 Setting Keyword Indexing Rules for Fields in an 008 Tag

To assign fields in the 008 tag to the indexing rules of a search category,

1. Open the Keyword Indexing Configuration Editor.
2. In the Indexes section, select the category to which you want to assign the 008 field(s).
3. Click the Fixed Field (008) button.

The Fixed Field (008) settings appear in the Index Configuration area ([Figure 9-8](#)).

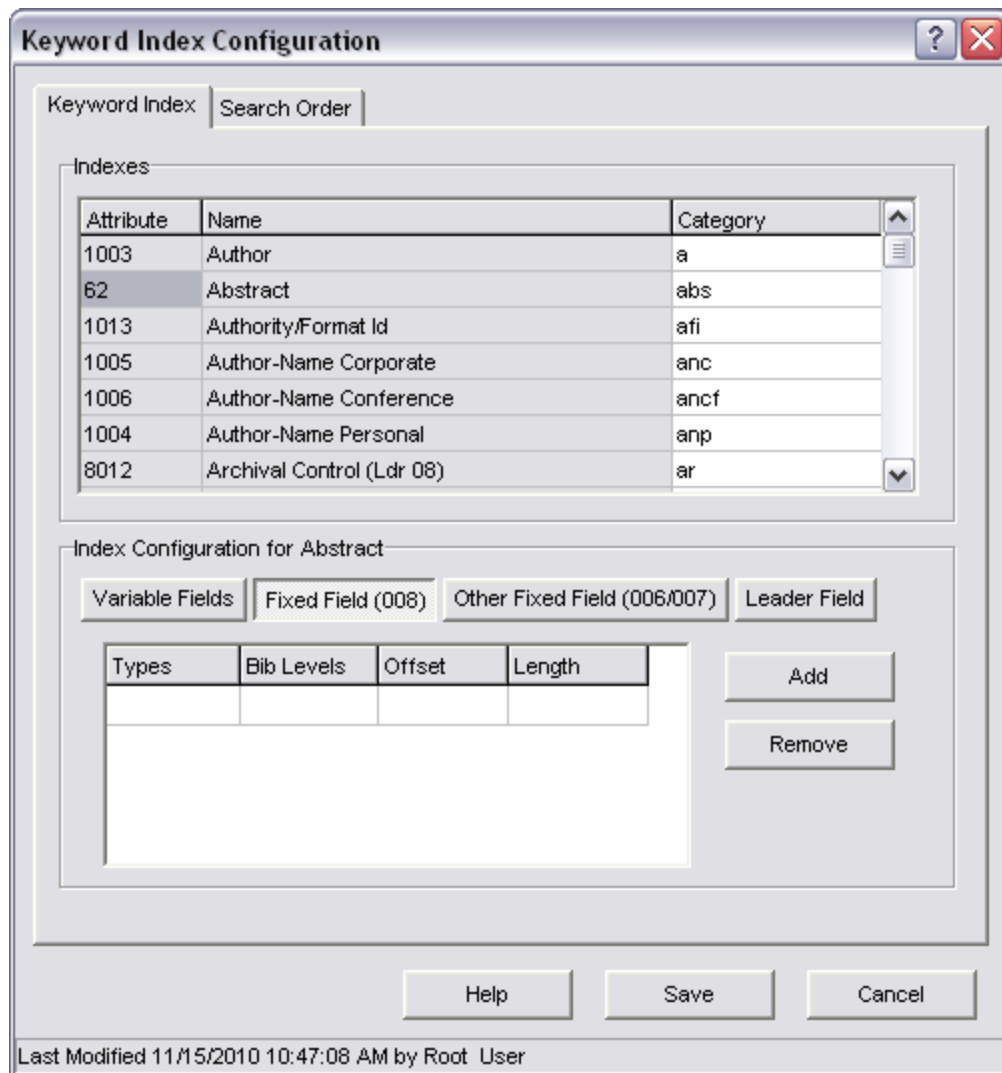


Figure 9-8. Keyword Indexing Configuration Editor - Fixed Field (008)

-OR-

If variable, 006, 007, or Leader fields have already been assigned to this category, a diagnostic message asks, “WARNING: The current data will be lost. Continue?”

- To delete ALL settings for this category and continue to the Fixed Field (008) settings, click the Yes button.
- To retain the current settings, click the No button.

4. Click the Add button to add a field.

5. In the Types column, type one or more Bib-type codes. If you are specifying multiple types, do NOT include any delimiters or spaces. For example, if you want to specify Bib-types *a*, *e*, and *i*, type **aei**.

Note: For a list of valid Bib-types, see the appendix “[List of Types and Bib Levels](#)” in this user’s guide.

6. In the Bib-levels column, type one or more Bib-level codes that you want to add to the index. If you are specifying multiple Bib-levels, do NOT include any delimiters or spaces. For example, if you want to specify Bib-level codes *c*, *m*, and *s*, type **cms**.

Note: For a list of valid Bib-levels, see the appendix “[List of Types and Bib Levels](#)” in this user’s guide.

7. In the Offset column, type the first position of the field(s) you want to specify. If you are defining a field with multiple positions, type only the FIRST position of the field.
8. In the Length column, type the number of positions in the field.
9. Repeat steps 4 - 8 to add additional fields to the keyword indexing rules for this category.
10. Click the Save button.

Your changes are saved to the database.

To remove fields from a category,

1. Choose the category you want to change.
2. In the Index Configuration area, select the field you want to remove.
3. Click the Remove button.

9.4.4.3 Setting Keyword Indexing Rules for Fields in an 006 or 007 Tag

To assign fields in the 006 or 007 tag to the indexing rules of a search category,

1. Open the Keyword Indexing Configuration Editor.
2. In the Indexes section, select the category to which you want to assign the 006 or 007 field(s).

- Click the Other Fixed Field (006/007) button.

The Other Fixed Field (006/007) settings appear in the Index Configuration area ([Figure 9-9](#)).

Keyword Index Configuration

Keyword Index | Search Order

Indexes

Attribute	Name	Category
1003	Author	a
62	Abstract	abs
1013	Authority/Format Id	afi
1005	Author-Name Corporate	anc
1006	Author-Name Conference	ancf
1004	Author-Name Personal	anp
8012	Archival Control (Ldr 08)	ar

Index Configuration for Abstract

Variable Fields | Fixed Field (008) | **Other Fixed Field (006/007)** | Leader Field

Tag	Formats	Offset	Length

Add

Remove

Help Save Cancel

Last Modified 11/15/2010 10:47:08 AM by Root User

Figure 9-9. Keyword Indexing Configuration Editor - Other Fixed Field (006/007)

-OR-

If variable, 008, or Leader fields have been assigned to this category, a diagnostic message asks, “WARNING: The current data will be lost. Continue?”

- To delete ALL settings for this category and continue to the Other Fixed Field (006/007) settings, click the Yes button.
 - To retain the current settings, click the No button.
4. Click the Add button to add a field.
 5. In the Tag column,
Type **006** to include fields from the 006 tag.
-OR-
Type **007** to include fields from the 007 tag.
 6. In the Formats column, type one or more Format codes that you want to add to the index. If you are specifying multiple Formats, do NOT include any delimiters or spaces. For example, if you want to specify Format codes *g*, *m*, and *n*, type **gm~~n~~**. For a list of available formats, see the appendix "[Appendix F - List of MARC 21 Record Formats](#)" in this guide.
 7. In the Offset column, type the first position of the field(s) you want to specify. If you are defining a field with multiple positions, type only the FIRST position of the field.
 8. In the Length column, type the number of positions in the field.
 9. Repeat steps 4 - 8 to add additional fields to the keyword indexing rules for this category.
 10. Click the Save button.

Your changes are saved to the database.

To remove fields from a category,

1. Choose the category you want to change.
2. In the Index Configuration area, select the field you want to remove.
3. Click the Remove button.

9.4.4.4 Setting Keyword Indexing Rules for Fields in the Leader

To assign fields in the Leader to the indexing rules of a search category,

1. Open the Keyword Indexing Configuration Editor.
2. In the Indexes section, select the category to which you want to assign the Leader field(s).

3. Click the Leader Field button.

The Leader Field settings appear in the Index Configuration area ([Figure 9-10](#)).

The screenshot shows the 'Keyword Index Configuration' dialog box. It has two tabs: 'Keyword Index' and 'Search Order'. The 'Keyword Index' tab is active. Inside, there is a table of indexes with columns 'Attribute', 'Name', and 'Category'. The 'Abstract' category is selected. Below the table, there is a section for 'Index Configuration for Abstract' with four buttons: 'Variable Fields', 'Fixed Field (008)', 'Other Fixed Field (006/007)', and 'Leader Field'. The 'Leader Field' button is selected. Below these buttons is a table with columns 'Field Offset' and 'Field Length'. At the bottom of the dialog are 'Help', 'Save', and 'Cancel' buttons. A status bar at the very bottom reads 'Last Modified 11/15/2010 10:47:08 AM by Root User'.

Attribute	Name	Category
1003	Author	a
62	Abstract	abs
1013	Authority/Format Id	afi
1005	Author-Name Corporate	anc
1006	Author-Name Conference	ancf
1004	Author-Name Personal	anp
8012	Archival Control (Ldr 08)	ar

Index Configuration for Abstract

Variable Fields Fixed Field (008) Other Fixed Field (006/007) Leader Field

Field Offset	Field Length

Help Save Cancel

Last Modified 11/15/2010 10:47:08 AM by Root User

Figure 9-10. Keyword Indexing Configuration Editor - Leader Field

-OR-

If variable, 006/007, or 008 fields have already been assigned to this category, a diagnostic message asks, “WARNING: The current data will be lost. Continue?”

- To delete ALL settings for this category and continue to the Leader Field settings, click the Yes button.

- To retain the current settings, click the No button.
4. Click the Add button to add a field.
 5. In the Field Offset column, type the first position of the field(s) you want to specify. If you are defining a field with multiple positions, type only the FIRST position of the field.
 6. In the Field Length column, type the number of positions in the field.
 7. Repeat steps 4 - 6 to add additional fields to the keyword indexing rules for this category.
 8. Click the Save button.

Your changes are saved to the database.

To remove fields from a category,

1. Choose the category you want to change.
2. In the Index Configuration area, select the field you want to remove.
3. Click the remove button.

9.4.5 Determining the Order in Which Search Categories Appear

On the Search Order tab of the Keyword Indexing Configuration Editor ([Figure 9-11](#)), you can determine the order in which search categories appear in the Search Category drop-down list in the Virtua client.

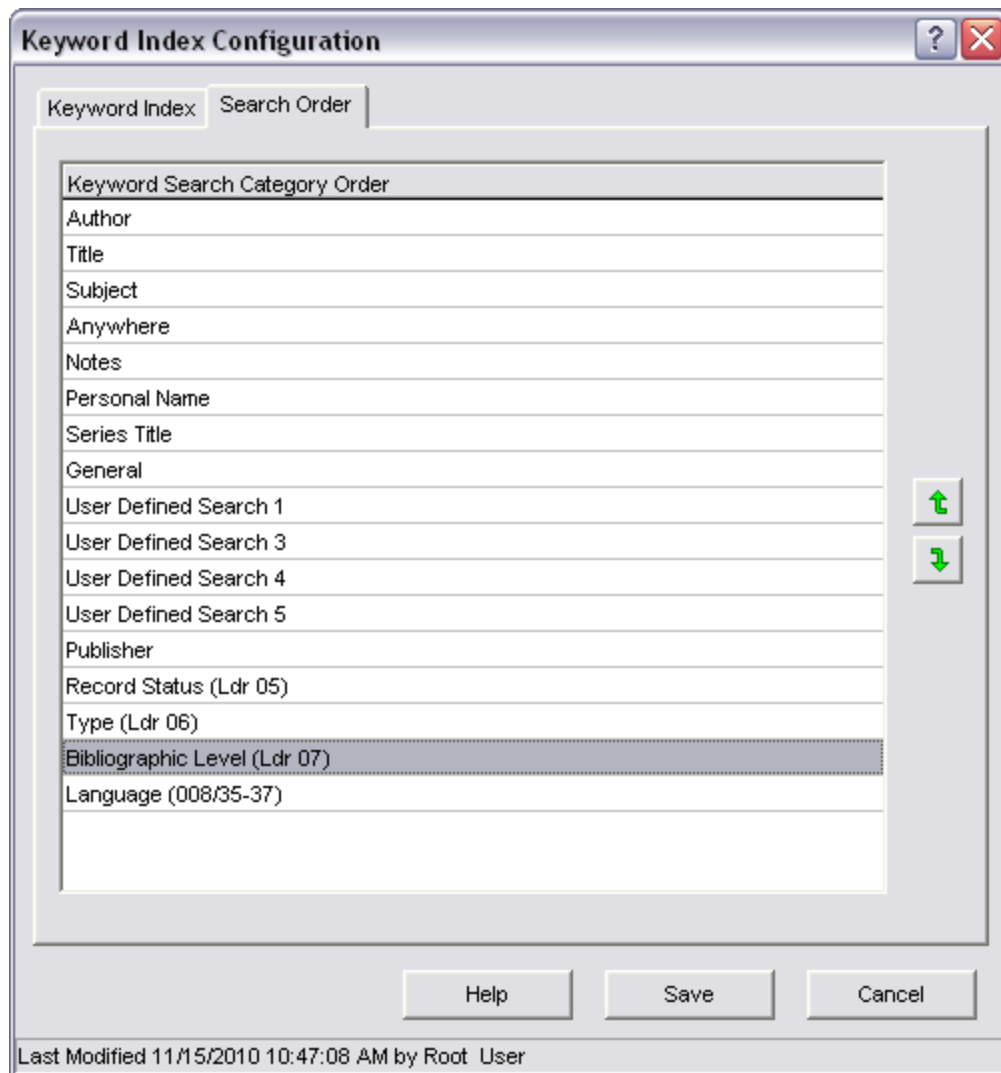


Figure 9-11. Keyword Indexing Configuration Editor - Search Order Tab

The Search Order tab lists all search indexes for which you have defined indexing rules on the Keyword Index tab. The categories are listed in the Keyword Search Category Order list box in the order in which they will appear in the Search Category drop-down list in the Virtua client. You can determine the placement of a search category by moving it up and down in the list box.

To move a search category *up* in the list of categories,

1. Select the search category you want to move.
2. Click  until the search category is in the desired position.

To move a search category *down* in the list of categories,

1. Select the search category you want to move.
2. Click  until the search category is in the desired position.

Note: Not all search categories on the Search Order tab will necessarily appear in the Search Category drop-down list in the Virtua client. For information on including an indexed category in the Search Category drop-down list, see the *Virtua Profiler/Global Settings User's Guide*.

9.5 After You Set Keyword Indexing Rules . . .

After you click the Save button in the Keyword Indexing Configuration Editor . . .

- The categories for which you set indexing rules are available immediately for searching via a precision search. An updated list of these categories appears on the Categories tab of the Keyword Search Help window ([Figure 9-12](#)), which is available via the Help button on the Keyword tab of the Virtua client Search window.

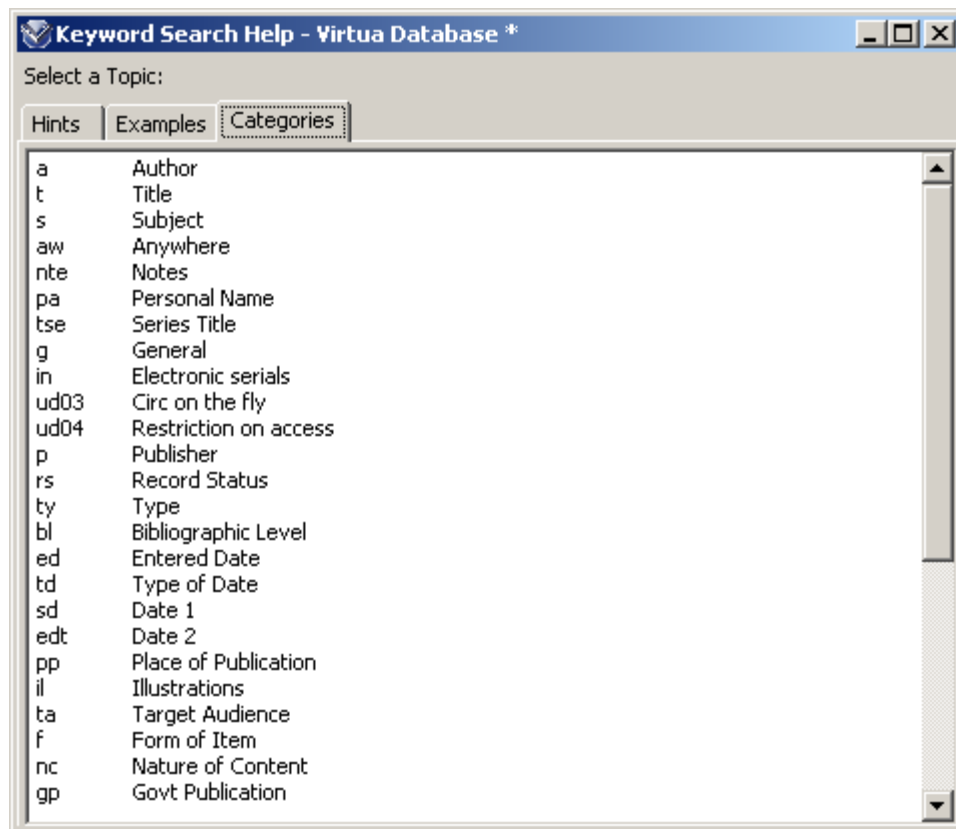


Figure 9-12. Virtua Client - Keyword Search Help Window

- Any records you catalog or modify in this database will be indexed using the new keyword indexing rules. All other records remain indexed under the old indexing rules until you re-index your keyword tables. For information on re-indexing your keyword tables, see the *Virtua System Management: OPAC User's Guide*.
- Each category for which you set indexing rules appears in the list of allowed keyword search categories in the Virtua Profiler Permissions list for every user profile in the database.

After you have set keyword indexing rules, you need to . . .

- Re-index the keyword table to apply the changes to existing records. For information on indexing the keyword table, see the *Virtua System Management: OPAC User's Guide*.
- Provide access to search categories (*optional*). For information on making search categories available in the Virtua client, see the *Virtua Profiler/Global Settings User's Guide*.
- Translate or modify the search category labels that appear in the Virtua client (*optional*). For details, see the *Virtua Translation and String Customization Guide*.

10. Setting the Parameter for Multiple Subject Headings

The Multiple Subject Heading parameter lets you enable functionality related to multiple subject headings. By enabling and configuring this parameter, you can index headings from multiple subject thesauri and make them available for searching in the OPAC.

Important: Multiple subject heading functionality requires that you complete a number of steps in a particular order.

- Before you even *access* the Multiple Subject Headings window, contact Innovative Customer Services. Some of the functions available on this window can damage your database if you have not made proper preparations.
- Simply clicking the Save button on the Multiple Subject Headings window will *irrevocably* enable multiple subject heading functionality.

This chapter covers the following topics:

- ⇒ [Overview of Steps for Enabling Multiple Subject Headings](#)
- ⇒ [Introduction to Multiple Subject Headings](#)
- ⇒ [Enabling Multiple Subject Heading Functionality](#)
- ⇒ [Working with Library-defined Headings](#)
- ⇒ [Working with Standard Headings](#)

10.1 Overview of Steps for Enabling Multiple Subject Headings

To enable multiple subject headings, you must configure settings in the Profiler AND run several scripts in a specified order against your server. Below, we discuss the steps for enabling multiple subject headings. The steps provide an overview of the required scripts. For detailed information about each script, see the *System Management: Cataloging User's Guide*.

Important: Before you try to enable multiple subject headings, we recommend that you contact Innovative Customer Services, especially if you have ANY questions about the proper process. If the process is not executed correctly, damage to your database can occur.

1. In the Profiler, define subject headings to be indexed as described in the section “[Setting the Subject Headings to Index Parameter](#)” of this guide.
2. On the server, run **CreateSubjectThesari_1.ksh** against the database. This script identifies any problems with the authority records.
3. On the server, run **UpdateAuthoritySubj.exe** to fix any problems with authority records.
4. In the Profiler, enable Multiple Subject Headings as described in this chapter.
5. On the server, run **CreateSubjectThesari_2.ksh** against the database. This script...
 - Uses the file of Bib IDs generated in **CreateSubjectThesari_1.ksh** to create duplicate subject headings for subject headings that exist in more than one thesaurus.
 - Creates indexes for each thesaurus.
6. In the Profiler, set the User Permissions parameter (OPAC>Allowed Search Types>Browse) to configure those subject heading(s) that will appear in the Browse search drop-down list in the OPAC.

10.2 Introduction to Multiple Subject Headings

The Multiple Subject Headings parameter is used by libraries that want to provide heading searching on multiple subject thesauri. Multiple subject thesauri are NOT enabled until you save settings on the Multiple Subject Headings window ([Figure 10-1](#)).

Multiple Subject Headings

Multiple Subject Headings

Library Defined Headings

Bib 6xx \$2 / Auth 040 \$f	Thesaurus Label	Description

Add Delete

Standard Headings

Index	2nd Indicator	008/11	Thesaurus	Thesaurus Label
☐	7	r	Art and Architecture Thesaurus	Art
☐	7	s	Sears List of Subject Headings	Sears
☐	8	8	Locally Defined 1	Local1
☐	9	9	Locally Defined 2	Local2

Help Save Cancel

Last Modified 3/25/2002 1:23:55 PM

Figure 10-1. Multiple Subject Headings Window

When you save settings on the Multiple Subject Headings window, subject headings from different subject thesauri will be indexed as separate entities. Each subject thesaurus will appear as . . .

- Individual browse and heading keyword search categories in the OPAC.
- Separate line items in your general subject browse search results.

Additionally, when Multiple Subject Heading functionality is enabled, conflicting authority headings that appear in different subject thesauri can co-exist in the system. For more information about searching for headings with multiple subject thesauri enabled, see the *OPAC Workflow-based Reference Guide*.

Important: Do NOT alter settings on the Multiple Subject Headings window on a production database.

From the Multiple Subject Headings window, you can . . .

- Enable multiple subject heading functionality.
- Configure settings for library-defined subject headings.
- Configure settings for standard subject headings.

Note: Once you enable multiple subject heading functionality, the Any Indicator 7 option in the Subject Headings to Index window will be permanently disabled.

10.3 Enabling Multiple Subject Heading Functionality

The setting that enables or disables multiple subject heading functionality is not visible on the Multiple Subject Headings window. This setting is not available because you do not have the option to disable multiple subject heading functionality once it is enabled. Enabling multiple subject heading functionality requires only that you click the Save button on the Multiple Subject Headings window.

After you configure the settings on the Multiple Subject Headings window, contact Innovative Customer Services for information about applying the settings to your database.

Note: Keep in mind that you CANNOT disable multiple subject heading functionality once it is enabled. Do NOT click the Save button on the Multiple Subject Headings window unless . . .

- You are absolutely certain that you want to enable multiple subject heading functionality
-AND-
- Innovative Customer Services has prepared your database for multiple subject headings.

If you are unsure about whether you meet the above criteria, contact Innovative Customer Services.

10.4 Working with Library-defined Headings

The Library-defined Headings section of the Multiple Subject Headings window ([Figure 10-2](#)) lets you create up to 10 library-defined subject heading types that can be used in an OPAC search. Via the MARC Views, you can create search hyperlinks using the user-defined subject thesauri as search types.

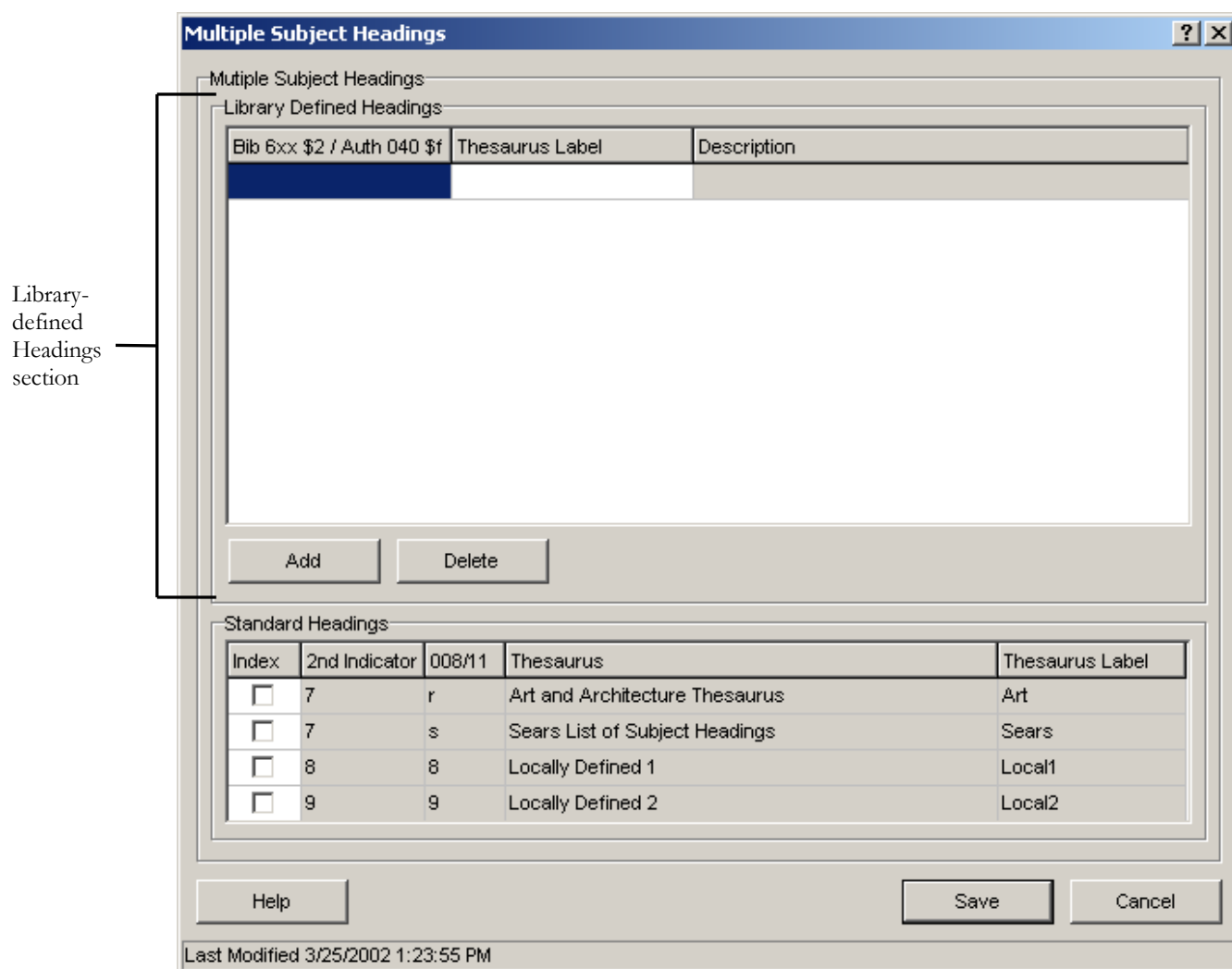


Figure 10-2. Multiple Subject Headings Window - Library-defined Headings Section

Each library-defined subject heading type has the following fields:

- **Bib 6xx \$2/Auth 040 \$f** - This field contains the value that must appear in the 6xx subfield \$2 tag of the bibliographic record and the 040 subfield \$f tag of the authority record of headings appearing in this index.
- **Thesaurus Label** - This field contains the text that is used as the label for this subject thesaurus on the Browse window.
- **Description** - This field is read only. The text in this field is always *User Defined 1*, *User Defined 2*, *User Defined 3*, etc.

You can add or delete a library-defined subject heading type.

10.4.1 Adding Library-defined Heading Types

To add a library-defined heading type,

1. On the Cataloging tab of the Virtua Profiler, double-click Multiple Subject Headings.

If you have not previously saved settings for multiple subject headings, a warning message appears, stating that by clicking the Save button on the Multiple Subject Headings window, you are permanently enabling multiple subject heading functionality (*Figure 10-3*).

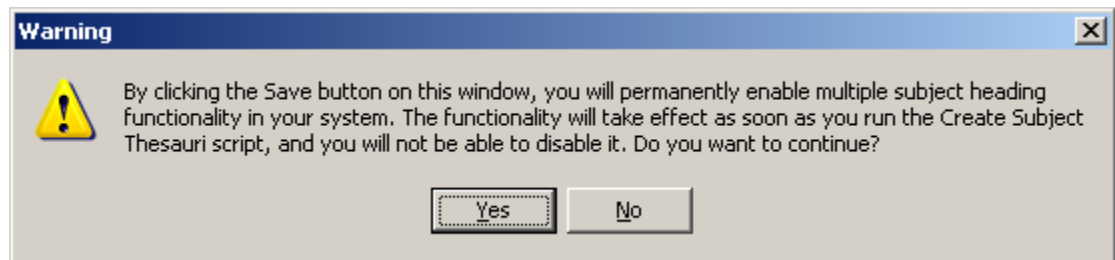


Figure 10-3. Multiple Subject Headings Warning Message

2. If you have contacted Innovative Customer Services and you are certain that you are ready to define settings for multiple subject headings, click the Yes button.

The Multiple Subject Headings window appears (*Figure 10-2*).

3. In the Library-defined Headings area, click the Add button.

A new row appears in the Library-defined Headings list box (*Figure 10-4*).

Multiple Subject Headings

Multiple Subject Headings

Library Defined Headings

Bib 6xx \$2 / Auth 040 \$f	Thesaurus Label	Description

Add Delete

Standard Headings

Index	2nd Indicator	008/11	Thesaurus	Thesaurus Label
☐	7	r	Art and Architecture Thesaurus	Art
☐	7	s	Sears List of Subject Headings	Sears
☐	8	8	Locally Defined 1	Local1
☐	9	9	Locally Defined 2	Local2

Help Save Cancel

Last Modified 3/25/2002 1:23:55 PM

Figure 10-4. Multiple Subject Headings Window - New Row Added

4. On the new row complete the information for the following fields:
 - **Bib 6xx \$2/Auth 040 \$f** - The value that must be in tag 6xx subfield \$2 of the bibliographic record and tag 040 subfield \$f of the authority record.
 - **Thesaurus Label** - The text that is used as the label on the Browse window for this subject thesaurus.

Note: The Description field is read only. The text in this field is always *User Defined 1*, *User Defined 2*, *User Defined 3*, etc.

5. Repeat steps 3 and 4 for each library-defined heading type that you want to define (up to a maximum of 10).

6. Click the Save button.

Your changes are saved to the database.

10.4.2 Deleting Library-defined Heading Types

To delete a library-defined heading type,

1. On the Cataloging tab of the Virtua Profiler, double-click Multiple Subject Headings.

The Multiple Subject Headings window appears ([Figure 10-5](#)).

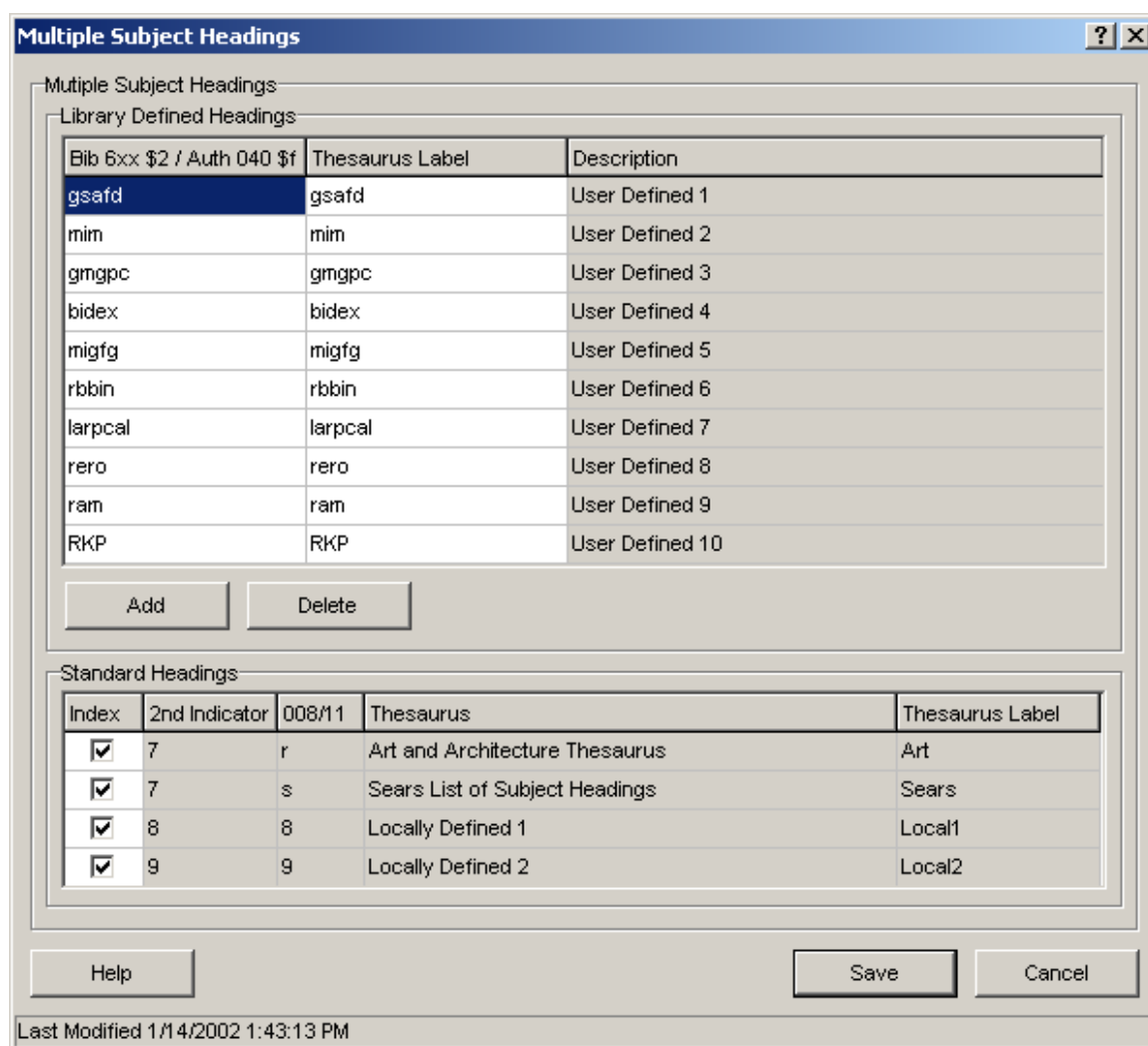


Figure 10-5. Multiple Subject Headings Window

- In the Library-defined Headings area, click the row of the heading type that you want to delete.

Note: You CANNOT delete heading types that are in use by the system.

- Click the Delete button.

The row is deleted from the Library-defined Headings list box.

4. Click the Save button.

Your changes are saved to the database.

10.5 Working with Standard Headings

In the Standard Headings area of the Multiple Subject Headings window, you can choose which of the following standard heading types are indexed:

- **Art and Architecture Thesaurus** - Indexes 6xx tags that have a second indicator of **7** in records that have an 008/11 value of **r**. The thesaurus label for this heading type is **Art**.
- **Sears List of Subject Headings** - Indexes 6xx tags that have a second indicator of **7** in records that have an 008/11 value of **s**. The thesaurus label for this heading type is **Sears**.
- **Locally Defined 1** - Indexes 6xx tags that have a second indicator of **8** in records that have an 008/11 value of **8**. If you choose to enable this heading type, you can define the thesaurus label.
- **Locally Defined 2** - Indexes 6xx tags that have a second indicator of **9** in records that have an 008/11 value of **9**. If you choose to enable this heading type, you can define the thesaurus label.

Note: The *Locally Defined 1* and *Locally Defined 2* heading types are linked to the heading types of the same name in the Subject Headings to Index window. If you select or de-select one of these check boxes in one window, the check box in the other window will automatically change to the same state.

Additionally, you can modify the text of the *Locally Defined 1* or *Locally Defined 2* heading types.

To choose which standard headings you want Virtua to index,

- In the Standard Headings section of the Multiple Subject Headings window, click the check box next to each standard heading type you want Virtua to index.

To modify the text of a locally defined standard heading thesaurus label,

1. Click the Thesaurus Label field of either the *Locally Defined 1* or *Locally Defined 2* heading type.
2. Press the F2 key on your keyboard to enable editing in the field.

Note: You cannot edit the thesaurus label field of a locally-defined standard heading thesaurus that has not been selected for indexing.

3. Type the text of the search category.

11. Setting Non-Parameterized Shelf Locations

The Non-Parameterized Shelf Locations parameter lets you specify shelf locations that are not parameterized. The shelf locations you configure here will populate a drop-down list on the Item Information window in the client. In this way, you can associate a non-parameterized shelf location with the current item.

Four buttons appear at the bottom of the Non-Parameterized Shelf Locations window and let you perform functions related to the shelf locations:

- **Add** - Lets you add a shelf location to the list.
- **Delete** - Deletes the selected row from the list of shelf locations.

Note: Deleting a non-parameterized shelf location that has already been assigned to an item record in the client will re-set the Non-Parameterized Shelf Location qualification for that item. That is, the Non-Parameterized Shelf Location check box on the Item Information window will be unchecked, and the item will then have no non-parameterized shelf location associated with it.

- **Save** - Saves the changes you make to the list of shelf locations.
- **Cancel** - Closes the Non-Parameterized Shelf Locations window without saving your changes.

To specify non-parameterized shelf locations,

1. On the Cataloging tab in the Virtua Profiler, double-click CATALOGING.
2. Double-click Non-Parameterized Shelf Locations.

The Non-Parameterized Shelf Locations window appears (*Figure 11-1*).

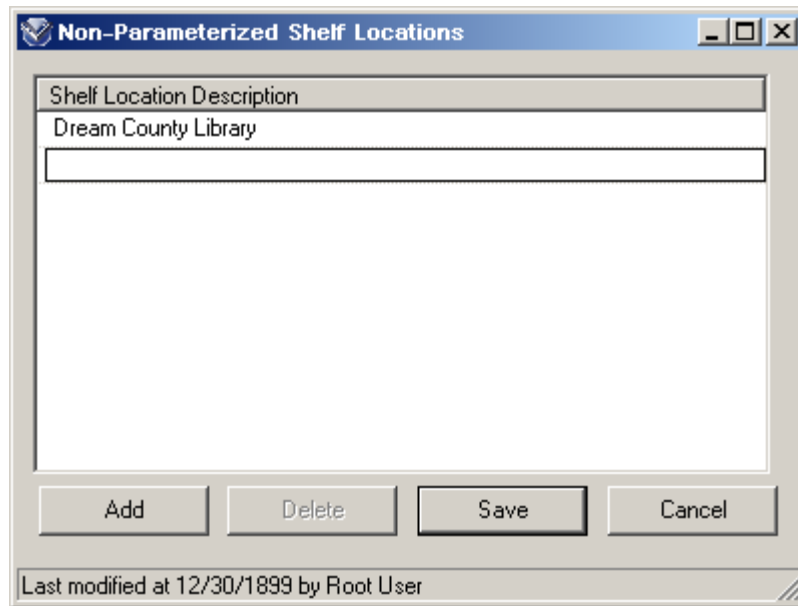


Figure 11-1. Non-Parameterized Shelf Locations Window

3. Click the Add button to add a new row to the list.
4. In the new row, type the description of the shelf location.
5. Add additional shelf locations to the list as desired.
6. Edit any existing shelf locations by highlighting the text in the desired row and modifying it as needed.
7. Click the Save button.

The shelf location names are saved to the database.

To delete a non-parameterized shelf location,

1. On the Non-Parameterized Shelf Locations window, place your cursor in the row that you want to delete.
2. Click the Delete button.

The row is deleted from the list.

3. Click the Save button.

The deletion is saved to the database.

12. Configuring Patron Cataloging Options

The Patron Cataloging Options parameter contains options that let you customize various aspects of patron cataloging and the Patron Editor window in the Virtua client (*Figure 12-1*). The Patron Editor window provides a user-friendly interface for creating and editing patron records.

Patron Editor - Virtua Library

Name: Cell Phone:
 Address: Email:
 City: Patron Type:
 State: Birthdate:
 Zip: Barcode:
 Primary Phone: Password:
 Alternate Phone:

Name Main Address Secondary Address Email/Phone Birthdate Card Number/Password Notes Back

Title: First Name: Middle Name: Last Name: Suffix:
 Patron Type: Language Preference:
☒ Valid name
☐ Display name

Library Info
 Registering Library:
 Aarronsburg Public Library
 Home Library:
 Aarronsburg Public Library

☐ In-Care-Of
☐ Company

Delete Next Submit Close

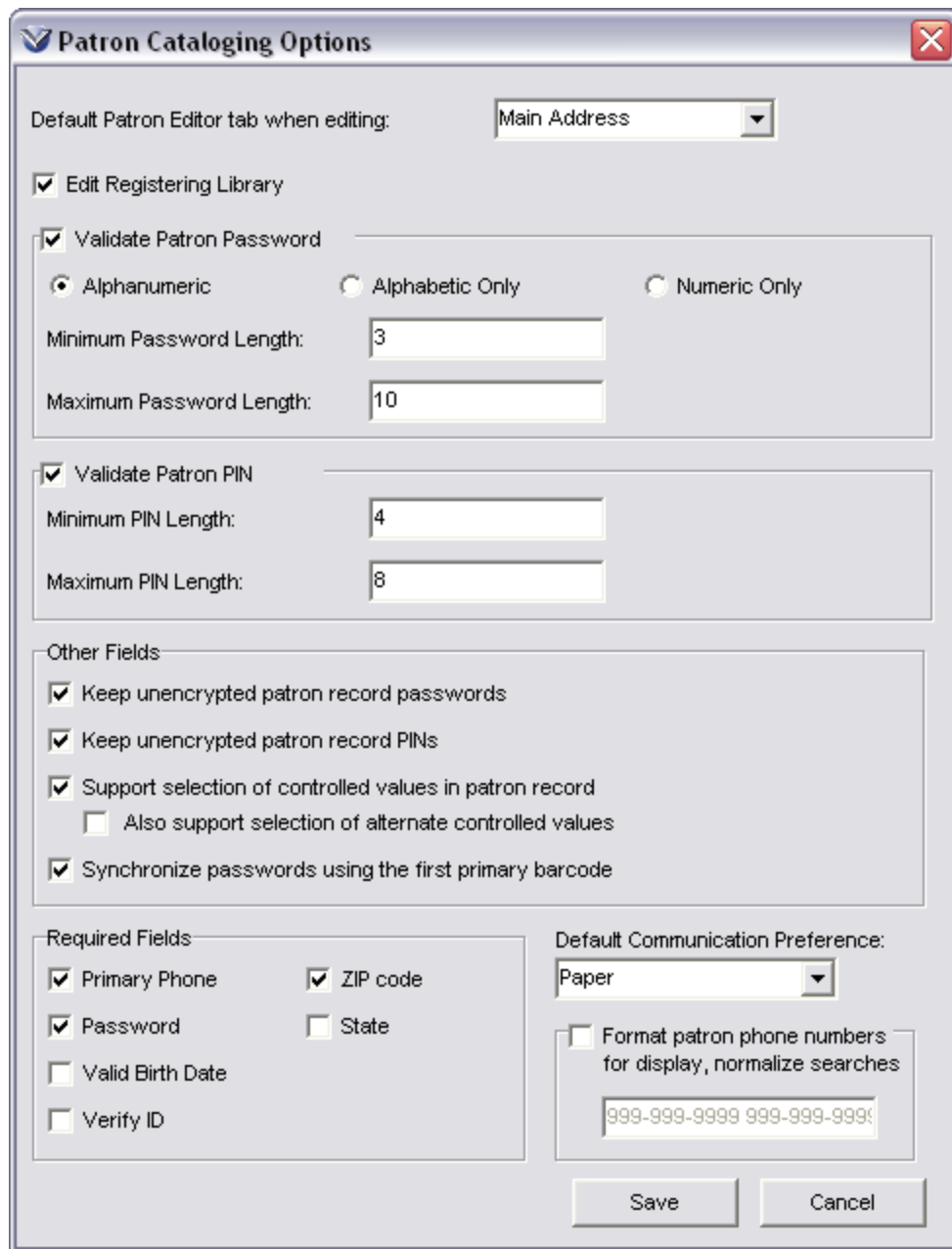
Figure 12-1. Patron Editor Window

This chapter describes the Patron Editor settings that you can define via the Patron Cataloging Options window in the Virtua Profiler (*Figure 12-2*).

To configure Patron Cataloging Options,

1. On the Cataloging tab in the Virtua Profiler, double-click CATALOGING.
2. Double-click Patron Cataloging Options.

The Patron Cataloging Options window appears (*Figure 12-2*).



Patron Cataloging Options

Default Patron Editor tab when editing:

☒ Edit Registering Library

☒ Validate Patron Password

☒ Alphanumeric
 ☐ Alphabetic Only
 ☐ Numeric Only

Minimum Password Length:

Maximum Password Length:

☒ Validate Patron PIN

Minimum PIN Length:

Maximum PIN Length:

Other Fields

☒ Keep unencrypted patron record passwords
☒ Keep unencrypted patron record PINs
☒ Support selection of controlled values in patron record
☐ Also support selection of alternate controlled values
☒ Synchronize passwords using the first primary barcode

Required Fields

☒ Primary Phone
 ☒ ZIP code
☒ Password
 ☐ State
☐ Valid Birth Date
☐ Verify ID

Default Communication Preference:

☐ Format patron phone numbers for display, normalize searches

Save Cancel

Figure 12-2. Patron Cataloging Options Window

3. In the *Default Patron Editor tab when editing* drop-down list, select the name of the Patron Editor window tab that you want to appear by default when you open a patron record for editing.
4. If you want the Registering Library field on the Name tab of the Patron Editor to be editable, select the Edit Registering Library check box.

5. If you want the Virtua server to validate the patron password (015 tag subfield \$b) when saving a patron record, select the Validate Patron Password check box.

Note:

- Selecting the Validate Patron Password check box enables the additional patron password settings within the Validate Patron Password group box. These settings are described below.
- If the Validate Patron Password check box is selected, a valid password must be specified on the Patron Editor window for the patron record to be saved successfully.
- Note that for general Virtua users the Validate Patron Password parameter, along with the additional patron password settings described below, applies to the Enter New PIN field on the Patron Editor window in the Virtua client. The Validate Patron PIN parameters available on the Patron Cataloging Options window are NOT used by Virtua for users other than Hong Kong Public Library users.

6. Select a password type from the following radio button options:

- Alphanumeric
- Alphabetic Only
- Numeric Only

Note: This setting is only enabled if you have selected the Validate Patron Password check box.

7. In the Minimum Password Length text box, type the number of characters you wish to specify as the minimum password length. You can type **0** (zero) to specify no minimum password length.
8. In the Maximum Password Length text box, type the number of characters you wish to specify as the maximum password length. You can type **0** (zero) to specify no maximum password length.

Note: If you enter **0** (zero) in both the Minimum Password Length and Maximum Password Length text boxes, Virtua will validate the patron password in regard to your password type setting (Alphanumeric, Alphabetic Only, Numeric Only), but Virtua will not validate the length of the patron's password.

9. The Validate Patron PIN check box setting, along with the Minimum and Maximum PIN Length and "Keep unencrypted patron PINs" settings, are NOT used by Virtua for general users.

Note: Hong Kong Public Library users should see the section "[Patron Cataloging Options Parameter](#)" in this user's guide for a description of the parameter.

10. If you want Virtua to store patron passwords without encryption in subfield \$b of the 015 and 016 tags, select the “Keep unencrypted patron record passwords” check box.
11. If you want Virtua to store patron PINs without encryption in subfield \$a of the 019 tag, select the “Keep unencrypted patron record PINs” check box.
12. If you want Virtua to provide a drop-down list for controlled values for staff users modifying the 302 tag of patron records, select the “Support selection of controlled values in patron record” check box. See the *Virtua Profiler/Circulation Parameters User’s Guide* for information on configuring the list of controlled patron values that appear in the drop-down list.
13. If you want to be able to configure drop-down lists for the fields on the Academic Info tab in the Patron Editor (which modifies the 301/302 tag of the patron record), select the “Also support selection of alternate controlled values” check box. See the *Virtua Profiler/Circulation Parameters User’s Guide* for information on configuring the list of values that appear in the drop-down lists on the Patron Editor.

Note: Selecting this check box affects the way patron information is stored. If you already have patron information stored in the 301 and/or 302 tags, contact Innovative Customer Support to discuss cataloging details before selecting the “Also support selection of alternate controlled values” check box.

14. If you want Virtua to automatically update the value in the 016 tag subfield \$b (password for the alternate patron barcode) when you update the value in the 015 tag subfield \$b (password for the primary patron barcode), select the “Synchronize passwords using the first primary barcode” check box. If this check box is not selected, changing the password in one of these fields will not update the other. Selecting

Note:

- Selecting this check box also means that the Alternate Barcode and Alternate Password fields will NOT appear in the Patron Editor.
- When this setting is enabled, if a staff user changes the value for the 016 tag subfield \$b in the patron record, that alternate password will be changed back to the value in the 015 tag subfield \$b when the record is saved.

15. If you want Virtua to require that a patron record contain a primary phone number in the 270 tag subfield \$k, select the Primary Phone check box.
16. If you want Virtua to require that a patron record contain a password in the 015 tag subfield \$b, select the Password check box.

17. If you want Virtua to require that a valid birth date in YYYYMMDD format in the 100 tag subfield \$d, select the Valid Birth Date check box.
18. If you want Virtua to require that the staff user verify the patron's ID (i.e., be required to select the Verified ID check box on the Patron Editor window) before modifying an existing patron's barcode or PIN, select the Verify ID check box.
Note: If this check box is not selected, the staff user is only required to select the Verified ID check box on the Patron Editor window when saving a *new* patron record.
19. If you want Virtua to require that a patron record contain a ZIP code in the 270 tag subfield \$e, select the ZIP code check box.
20. If you want Virtua to require that a patron record contain a state in the 270 tag subfield \$d, select the State check box.
21. In the Default Communication Preference drop-down list, select a value for a patron's default means of communication. The value you select here will automatically populate the Communication Field drop-down list on the Email/Phone tab in the Patron Editor for a new patron.
22. If you want Virtua to format the phone numbers (stored in the patron record 270 tag subfields \$j and \$k, first indicator 1 or 2) for display in the client AND normalize the search term when you perform a search for a patron's phone number, select the *Format patron phone number for display, normalize searches* check box. Then type the format in the text box using only the number 9 to represent each numeric character; do not type letters or the symbol * or ?.

Note:

- If this setting is disabled, Virtua will always display the phone number in the client exactly as it is saved in the patron record and will not normalize the format when the phone number is used as a search term.
- If this setting is enabled, Virtua will display the phone number in the client in the format indicated in the text box.
- In addition, if this setting is enabled, Virtua will normalize the search term when you perform a search for a patron's phone number (i.e., Virtua will remove non-numeric characters from the search term since only numeric values will be stored in the database).

Important: If the *Format patron phone number for display, normalize searches* setting was not turned on when you migrated to the current release, then if you do enable it,

run **NormalizePatronTelephone.sh**. See the *Virtua System Management: OPAC User's Guide* for more information.

23. When you have finished configuring your settings, click the Save button.

Your settings are saved to the database.

13. Configuring PAC Codes

The Preservation and Conservation Codes parameter lets you define PAC codes for use with the item records in your system. This chapter provides details on defining Preservation and Conservation Codes for your database. After you have defined PAC Codes, you can assign them to item records via the Item Information window in the Virtua client. Additionally, via the Location Names parameter, you can choose a PAC Code that will be used as the default for new item records.

To define PAC Codes,

1. On the Cataloging tab in the Virtua Profiler, double-click CATALOGING.
2. Double-click Preservation and Conservation Codes (PAC).

The Preservation and Conservation Codes (PAC) window appears (*Figure 13-1*).

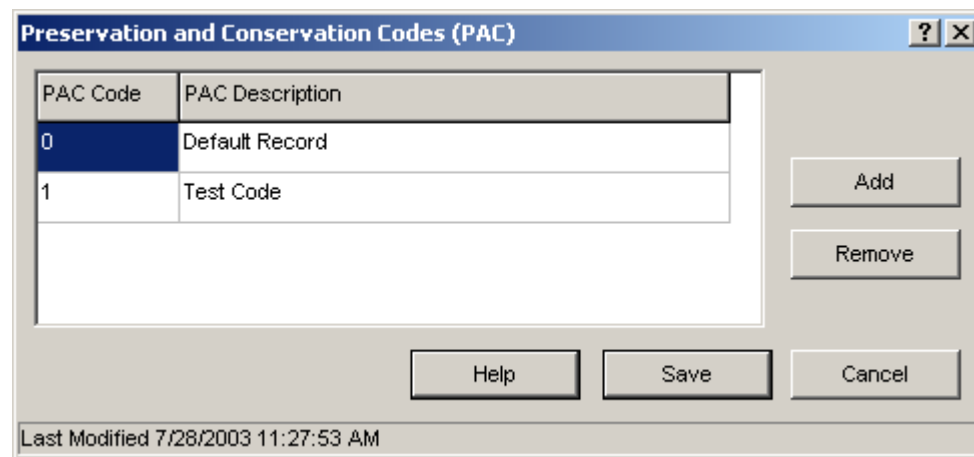


Figure 13-1. Preservation and Conservation Codes (PAC) Window

3. Click the Add button to add a new row to the list.
4. In the new row, modify the PAC Code and PAC Description as needed.
5. Add additional codes to the list as desired.
6. Edit any existing codes by highlighting the text in the desired row and modifying it as needed.
7. Click the Save button.

Your codes and descriptions are saved to the database.

To delete a PAC code,

1. On the Preservation and Conservation Codes (PAC) window, place your cursor in the row that you want to delete.
2. Click the Remove button.

The row is deleted from the list.

3. Click the Save button.

The deletion is saved to the database.

14. Configuring Record States

You can define record states via the Record States parameter in the Virtua Profiler. Via the Profiler, you can edit or delete the default states, and you can define additional states.

This chapter covers the following topics:

- ⇒ [Accessing the Record States Parameter](#)
- ⇒ [Aspects of the Record States Window](#)
- ⇒ [Working with the Record States Parameter](#)

For more information about working with record states, see the *Basic Cataloging Workflow-based Reference Guide*.

14.1 Accessing the Record States Parameter

To access the Record States parameter,

1. On the Cataloging tab of the Virtua Profiler, double-click CATALOGING.
2. Double-click Record States.

The Record States window appears ([Figure 14-1](#)).

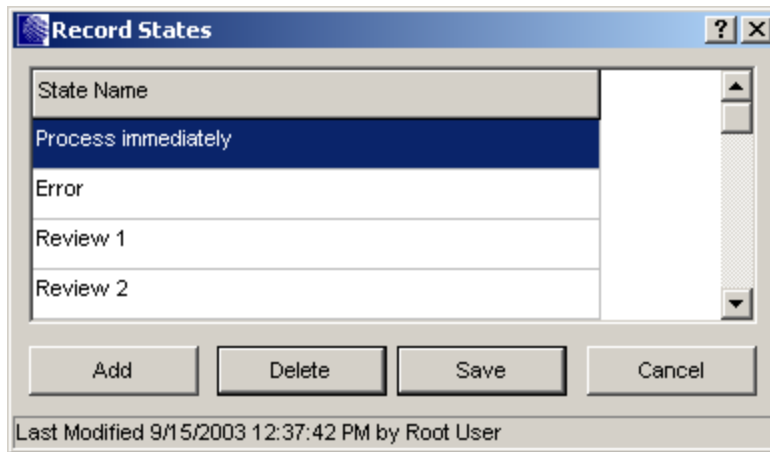


Figure 14-1. Record States Window

14.2 Aspects of the Record States Window

The Record States window displays the list of record states that have been defined for your library, including the record states that have been defined by default. For each record state, the State Name displays the description of the state that will appear to users in appropriate places throughout the interface.

Four buttons appear at the bottom of the Record States window and let you perform functions related to record states:

- **Add** - Lets you add a record state to the list.
- **Delete** - Deletes the selected record state from the list.
- **Save** - Saves the changes you make to the list of record states.
- **Cancel** - Closes the Record States window without saving your changes.

14.2.1 About Preset Record States

The following record states are preset in a new installation:

- **Process Immediately** - Indicates that the record has no state, meaning that all processing is completed at the time it is saved. Records that have a state of Process Immediately are ready for patron viewing. Patron records are in the Process Immediately record state by default when created or loaded to Virtua.

- **Deleted** - Indicates that the record has been deleted from the database. Records will be put in this state only if the Allow Undelete of MARC Records parameter is enabled in the Cataloging Basic Options of the Virtua Profiler.
- **Error** - Indicates that the record has not been completely processed because of an error encountered upon saving. Records in Error state must be corrected and re-processed.

Important: Process Immediately, Deleted, and Error state are required by the system and cannot be deleted. Their State Names, however, can be modified.

- **Review States 1-4** - Indicates levels of review. By offering four default Review states, Virtua lets your records pass through a four-level review process. You can add or delete review states as appropriate to the structure of your review process.
- **Overnight** - Assigned to records that are not immediately processed upon saving to the database. Records in Overnight state will be processed when a batch job is executed at a later time.
- **Wait** - Assigned when a cataloger is not currently working on a record but intends to come back and finish it later.

You can delete any of the default states except the system-assigned record states. You can edit the State Name of any default record state as needed. In addition, you can add record states, which are described in the section “[Defining New Record States](#)” in this chapter.

14.3 Working with the Record States Parameter

Via the Record States window, you can . . .

- Define new record states.
- Delete record states.
- Edit existing record states.

14.3.1 Defining New Record States

To add a record state to the list,

1. On the Record States window, click the Add button.

A new row labeled Default Record appears at the bottom of the list (*Figure 14-2*).

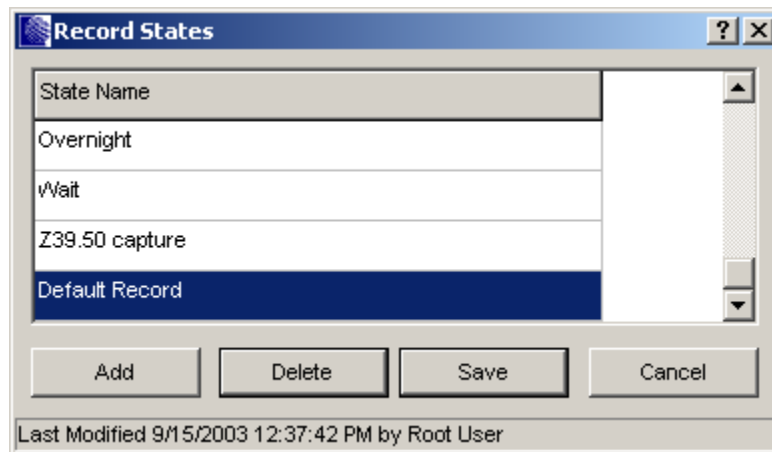


Figure 14-2. Record States Window - New Row Added

2. In the State Name column, type the name of the new record state.
3. Click the Save button.

The new state is saved to the database.

14.3.2 Deleting Record States

To delete a record state from the list,

1. On the Record States window, highlight the record state that you want to delete.
2. Click the Delete button.

Note: If the record state is in use by a record in the system, an error message will appear, and the state will not be deleted.

3. Click the Save button.

The record state is deleted from the database.

14.3.3 Editing Record States

To edit an existing record state,

1. On the Record States window, highlight the record state that you want to edit.
2. In the State Name text box, edit the description.
3. Click the Save button.

Your changes are saved to the database.

15. Configuring Record Validation Rules

The Record Validation Rules parameter lets you determine the action that is triggered whenever a validation rule is applied to an incoming record by the *server*. Note that in this parameter you CANNOT add or delete rules, change the ID of any rule, or modify the description of any rule.

Hint: For information on the use of the words *prefix*, *hyphen*, and *digits* in the validation rules, see the *Virtua Cataloging Reference Guide*.

To configure the Record Validation Rules parameter,

1. On the Cataloging tab in the Virtua Profiler, double-click CATALOGING.
2. Double-click Record Validation Rules.

The Record Validation Rules window appears (*Figure 15-1*), displaying the list of validation rules sorted by rule ID.

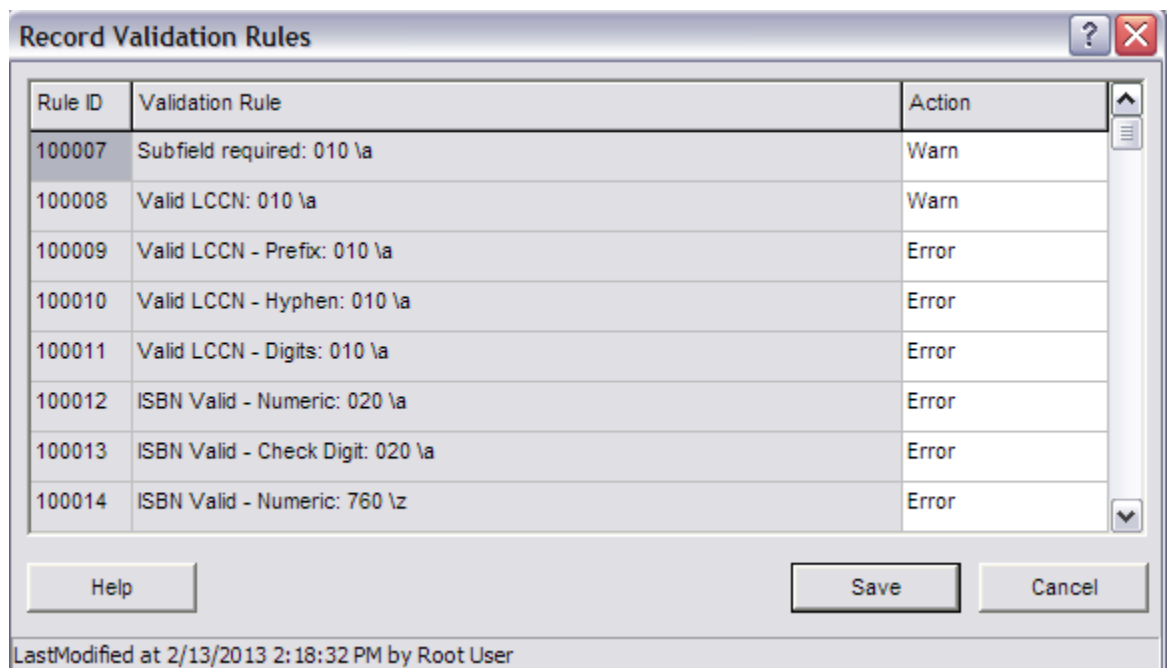


Figure 15-1. Record Validation Rules Window

For each Validation Rule displayed in the window, you can determine the action Virtua will take. You can choose among three possibilities:

- **Off** – No action is taken
- **Warn** – A warning is displayed, but the record is still cataloged.
- **Error** – An error is displayed. The record is not cataloged but put in Error state.

Note:

- If you set the action to Warn or Error, the system will store the diagnostic message in the diagnostic table in the database.
- In the Virtua client, via the Search by State feature, you can view the diagnostic messages associated with records put in Error state.
- If you set the action to Off, no diagnostic message will be stored in the diagnostic table in the database.

To set an action for a validation rule,

1. In the row containing the validation rule, click once to select the Action field.
2. Click the Action field again to see a drop-down box.
3. Choose an action from the drop-down list.
4. Click the Save button.

The action is saved to the database.

Hint: You can use the Rule ID as a filter on the Search by State window in the Virtua client.

16. Defining Stopwords

The Stopwords parameter lets you define the words that you want to use as stopwords in your bibliographic and heading keyword indexes. This chapter provides details on configuring the Stopwords parameter.

This chapter covers the following topics:

- ⇒ [Introduction to Stopwords](#)
- ⇒ [Viewing Stopwords](#)
- ⇒ [Adding Stopwords](#)
- ⇒ [Deleting Stopwords](#)

16.1 Introduction to Stopwords

Stopwords are terms or characters that will be ignored by the Virtua keyword indexing processes. Generally, these are terms that occur too frequently in indexed fields to be effective in search queries. When your keyword search terms include a stopwords, the stopwords is removed from the query by the Oracle keyword search functions.

For example, if . . .

- *I* is a stopwords.
- *Am* is a stopwords.

-AND-

- Your search term is *Sam I Am*.

The words *I* and *Am* are removed from the query and the search term is *Sam*.

The exception to this rule occurs when a stopwords exists in a phrase search. In this case, the Oracle keyword search function replaces the term with a wildcard. Any term in the searched field will qualify as a match for the stopwords.

For example, if . . .

- *I* is a stopwords.
- *The* is a stopwords.

-AND-

- Your search term is the phrase “*I write the songs.*”

The words *I* and *the* are used as wildcards and can be a match for any single term. Therefore, records included in the search results could include fields with the following phrases:

- *I* write *the* songs
- *They* write *few* songs
- *Sheep* write *baaaad* songs

You can define stopwords for both heading and bibliographic keyword searches.

16.2 Viewing Stopwords

To view the stopwords defined for your database,

1. On the Cataloging tab of the Virtua Profiler, click CATALOGING.
2. Double-click Stopwords.

The Stopwords window appears ([Figure 16-1](#)).

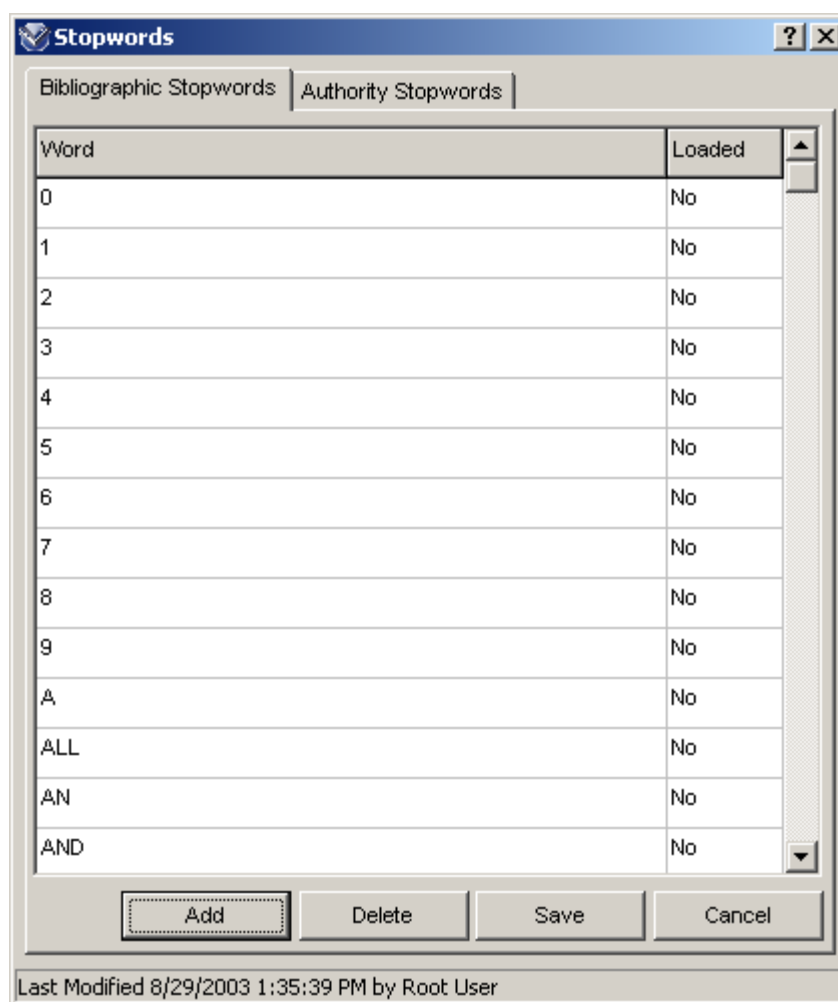


Figure 16-1. Stopwords Window - Displaying Stopwords for Bibliographic Keyword Searches

On the Stopwords window, the . . .

- **Bibliographic Stopwords** tab displays stopwords for keyword searches. This list is used for searches from the Keyword tab of the Search window in the Virtua client.
- **Authority Stopwords** tab displays stopwords for heading keyword searches. This list is used for any searches from the Heading tab of the Search window in the Virtua client.

Each tab includes the following columns of information:

- **Word** - Contains the stopword.
- **Loaded** - Contains *Yes* or *No* to indicate whether the stopword has been applied to the search index. If the value in this column is set to *No* for a stopword, the stopword has not been applied to the index. To apply a stopword, you need to rebuild the keyword index. For information about working with the keyword index, see the *Virtua System Management: OPAC User's Guide*.

16.3 Adding Stopwords

To add a stopword to the list of bibliographic or authority stopwords,

1. On the Bibliographic Stopwords or Authority Stopwords tab, click the Add button.

A new line appears at the top of the list box ([Figure 16-2](#)).

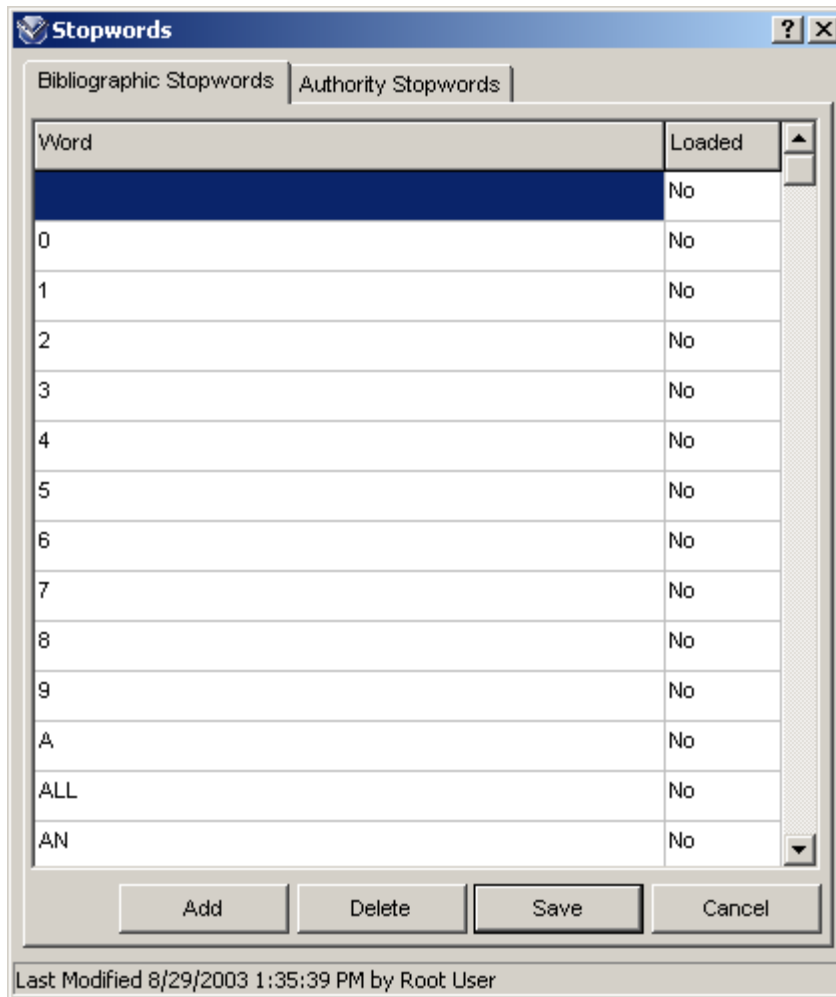


Figure 16-2. Stopwords Window - Displaying a New Line

2. In the Word column, type the stopwords, which must be either a single or hyphenated word.

Note:

- No punctuation marks are needed; Virtua ignores them.
- No diacritic marks are needed; Virtua stores stopwords without diacritics.

3. Repeat steps 1 and 2 for each stopword you want to add.

Note: After you add a stopword to the list, the Stopwords window moves the word to its place in the sort order.

4. Click the Save button to save the stopwords you added.

A confirmation window appears, stating: “These changes will not take effect until **Cr_CTX_Indexes.sh** is run. Continue?”

5. Click the Yes button to continue.

Your changes are saved to the database.

After you save changes to the Stopwords parameter, you will need to rebuild the keyword indexes to apply the changes. Until you rebuild the keyword indexes by running the script, the entry in the Loaded column for the stopwords you added will read No. For information about working with the keyword index, see the *Virtua System Management: OPAC User’s Guide*.

16.4 Deleting Stopwords

To delete a stopwords from the list of bibliographic or authority stopwords,

1. On the Bibliographic Stopwords or Authority Stopwords tab, select the stopwords you want to delete.
2. Click the Delete button.
3. Repeat steps 1 and 2 for each stopwords you want to delete.
4. Click the Save button.

A confirmation window appears indicating that your changes will not be applied until you run the appropriate scripts (*Figure 16-3*).

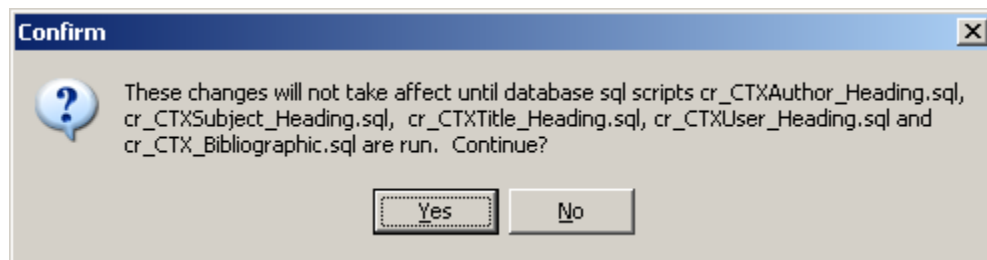


Figure 16-3. Stopwords Confirmation Message

5. Click the Yes button.

Your changes are saved to the database.

After you save changes to the Stopwords parameter, you need to rebuild the keyword index to apply the changes. For information about working with the keyword index, see the *Virtua System Management: OPAC User's Guide*.

17. Setting the Subject Headings to Index Parameter

The Subject Headings to Index parameter determines which subject heading tags (6xx) are indexed for general subject searches within your system. The subject headings index determines the contents of the subject browse list (for general subject headings).

Important: Innovative recommends that you do not alter settings for this parameter on a production database. If you make changes to this parameter, you will need to re-index your list of subject headings. For information on re-indexing the list of subject headings, see the *System Management: Cataloging User's Guide*.

Each subject heading type has a unique value for the second indicator in the 6xx tag and in the 11th position of the 008 tag. The table below lists each subject heading category and the associated tag values.

Heading Type	Second Indicator Value	008/11 Value
Blank	<i>No value</i>	<i>No value</i>
Library of Congress Subject Headings (LCSH)	0	a
LC Subject Headings for Children's Literature (LCSHAC)	1	b
Medical Subject Headings (MeSH)	2	c
National Agricultural Library subject authority file (NAL)	3	d
Source not specified	4	4
Canadian Subject Headings	5	k
Repertoire des vedettes-matiere	6	v
Any Indicator 7	7	z
Locally Defined 1	8	8
Locally Defined 2	9	9

Note: If you choose to enable multiple subject thesauri by saving parameters in the Multiple Subject Headings window, the Any Indicator 7 option will be permanently disabled. For information on the Multiple Subject Headings window, see the chapter “[Setting the Parameter for Multiple Subject Headings](#)” in this user’s guide.

To set the Subject Headings to Index parameter,

1. On the Cataloging tab of the Virtua Profiler, double-click CATALOGING.
2. Double-click Subject Headings to Index.

The Subject Headings to Index window appears ([Figure 17-1](#)).

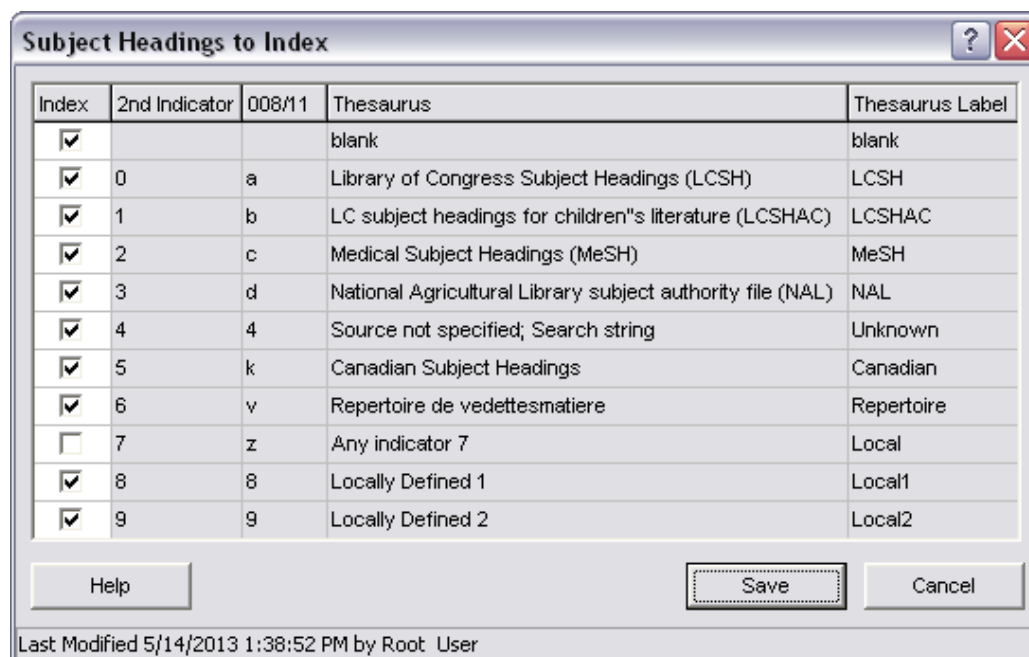


Figure 17-1. Subject Headings to Index Window

3. Select the check box next to the heading types you want to index.
4. Click the Save button.

Your changes are saved to the database.

If you make changes to this parameter, you will need to run the program **ReProcessBibs.ksh** to reprocess your bibliographic records to apply the changes to the subject browse index. For information about reprocessing bibliographic records, see the *Virtua System Management: Cataloging User's Guide*.

18. Defining Tags Indexed for the UDC Search

The UDC search is a control number browse for the Universal Decimal Classification (UDC) numbers in your bibliographic records. The Tags Indexed for UDC Search parameter determines which tag/subfield/indicator combinations are indexed for the UDC search.

From the Tags Indexed for UDC Search window, you can . . .

- Add tags to the index list.
- Remove tags from the index list.

To define the tags indexed for the UDC search,

1. On the Cataloging tab of the Virtua Profiler, double-click CATALOGING.
2. Double-click Tags Indexed for UDC Search.

The Tags Indexed for UDC Search window appears (*Figure 18-1*).

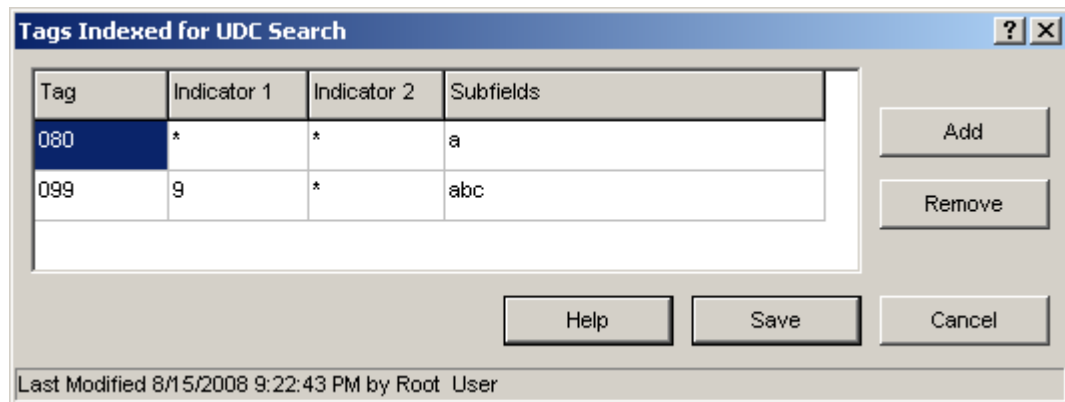


Figure 18-1. Tags Indexed For UDC Search Window

3. Click the Add button.

A blank line appears in the Tags Indexed for UDC Search window (*Figure 18-2*).

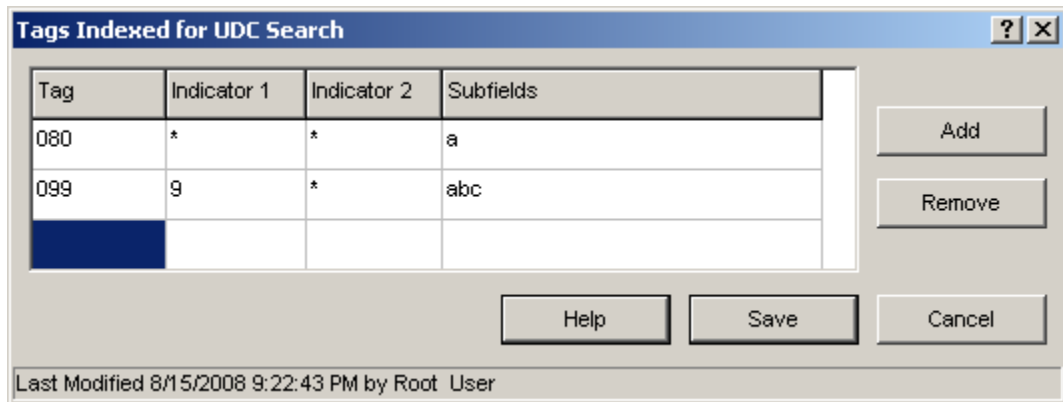


Figure 18-2. Tags Indexed for UDC Search Window

4. In the Tag field, type the three-digit tag of the field you want to index for the UDC search.
5. In the Indicator 1 field, type the one-character first indicator for the specified tag.
Tip: Enter a single space to represent a blank value.
 -OR-
 Type * to specify all first indicators.
6. In the Indicator 2 field, type the one-character second indicator for the specified tag. **Tip:** Enter a single space to represent a blank value.
 -OR-
 Type * to specify all second indicators.
7. In the Subfields field, type the subfields for this tag that you want to index.
 -OR-
 Type * to specify all subfields.

To remove a tag definition from the Tags Indexed for UDC Search window,

1. On the Tags Indexed for UDC Search window ([Figure 18-1](#)), select the line of the tag definition you want to remove.
2. Click the Remove button.
3. Click the Save button.

Your changes are saved to the database..

If you make changes to this parameter, you will need to run

PopulateUDCBrowse.exe to apply the changes to the UDC search index. For information about this program, see the *Virtua System Management: Cataloging User's Guide*.

19. Defining Tags Indexed for User Defined Searches

Library-defined browse and heading keyword search definitions are set in the Tags Indexed for User Defined Search parameter in the Virtua Profiler. A library-defined search is a type of custom heading search for which your library can determine indexing rules. You can determine which tag/subfield/indicator combinations are indexed for your library-defined search.

From the Tags Indexed for User Defined Search window, you can . . .

- Add tags to the User Defined Search list.
- Remove tags from the User Defined Search list.

Important: Tags indexed for the User Defined search are searchable **ONLY** via the User Defined Search. These tags are **NOT** searchable via Author, Title or Subject browse searches. Generally, only those tags that are not already subject to authority control (tag 260, tag 5xx, etc.) should be indexed for the library-defined search.

When you define a tag to be indexed for the user-defined search, Virtua creates a corresponding provisional authority record with the main heading in tag 172. Any cross-reference should use the same x72 format.

To define the tags indexed for the library-defined search,

1. On the Cataloging tab of the Virtua Profiler, double-click CATALOGING.
2. Double-click Tags Indexed for User Defined Search.

The Tags Indexed for User Defined window appears (*Figure 19-1*).

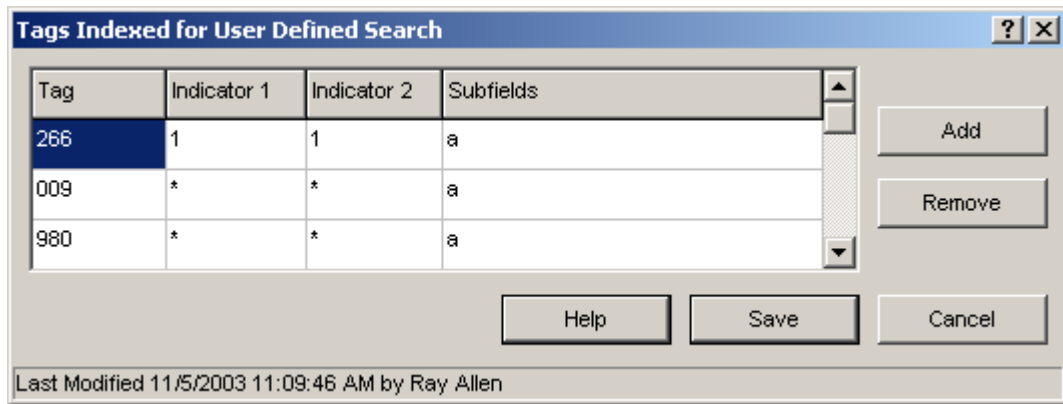


Figure 19-1. Tags Indexed For User Defined Window

- Click the Add button.

A blank line appears in the Tags Indexed for User Defined Search window (Figure 19-2).

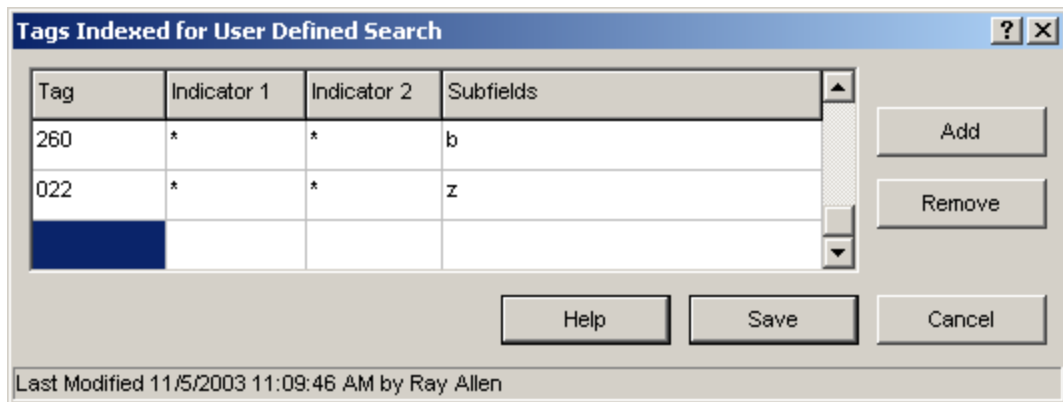


Figure 19-2. Tags Indexed For User Defined Search Window

- In the Tag field, type the three-digit tag of the field you want to index for the library-defined search.
- In the Indicator 1 field, type the one-character first indicator for the specified tag.

Note: Enter a single space to represent a blank value, or type * to specify all first indicators.

- In the Indicator 2 field, type the one-character second indicator for the specified tag.

Note: Enter a single space to represent a blank value, or type ***** to specify all first indicators.

7. In the Subfields field, type the subfields for this tag that you want to index.
-OR-
Type ***** to specify all subfields.

To remove a tag definition from the Tags Indexed for User Defined Search window,

1. On the Tags Indexed for User Defined Search window ([Figure 19-1](#)), select the line item of the tag definition you want to remove.
2. Click the Remove button.
3. Click the Save button.

Your changes are saved to the database.

If you make changes to this parameter, you will need to run **ReProcessBibs.ksh** to apply the changes to the user-defined browse indexes. For information about this program, see the *Virtua System Management: Cataloging User's Guide*.

Hint: To define the *name* of the user-defined search category, use the Language Editor. For details, see the *Virtua Translation and String Customization Guide*.

20. Defining Tags to Be Added

Using the Tags to Be Added parameter, you can specify tag/subfield combinations that you want to add to each incoming bibliographic record that Virtua processes via the client or **vload.exe**. This parameter can be used in conjunction with the [Tags to Be Deleted](#) parameter to replace one tag with another in incoming records. Tag definitions in the Tags to Be Added parameter will be applied to incoming records AFTER the Tags to Be Deleted tag definitions are applied.

Note: The Tags to Be Added parameter and Tags to Be Deleted parameter do not apply to FRBR records. When a record is FRBRized, new Work and Expression records are created, but no tags are added or deleted based on these parameters.

This chapter covers the following topics:

- ⇒ [Adding a Tag Definition to the Tags to Be Added Parameter](#)
- ⇒ [Removing a Tag Definition from the Tags to Be Added Parameter](#)
- ⇒ [Activating or Deactivating Tag Definitions on the Tags to Be Added Parameter](#)

20.1 Adding a Tag Definition to the Tags to Be Added Parameter

To add a tag definition to the Tags to Be Added parameter,

1. On the Cataloging tab of the Virtua Profiler, double-click CATALOGING.
2. Double-click Tags to Be Added.

The Tags to Be Added window appears ([Figure 20-1](#)).

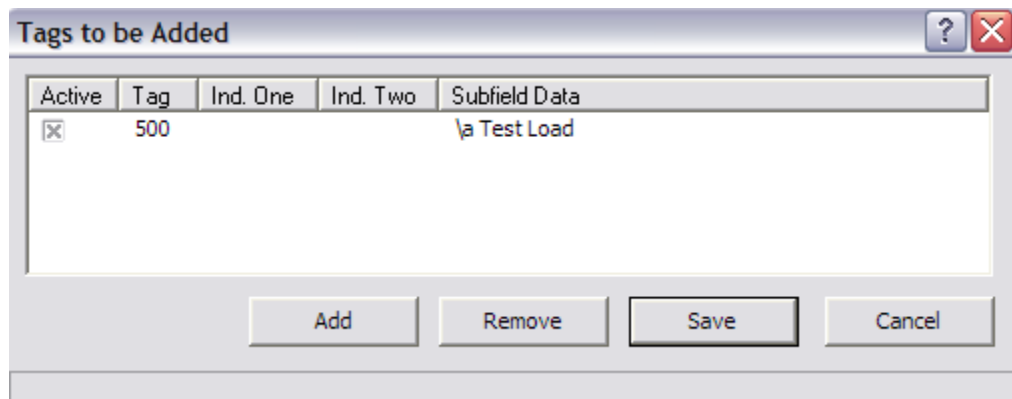


Figure 20-1. Tags to Be Added Window

3. Click the Add button. A new line appears on the Tags to Be Added window.
4. In the Tag column, type the three-digit tag that you want to define.
5. In the Indicator One column, type the one-character first indicator for the tag you specified. **Hint:** To represent a blank value, enter a single space.
6. In the Indicator Two column, type the one-character second indicator for the tag you specified. **Hint:** To represent a blank value, enter a single space.
7. In the Subfield Data column, type the subfields that you want to add to this tag. You can add multiple subfields, and define a subfield value for each subfield.
8. Click the Save button.

Your changes are saved to the database. When an item is added to the database via **vload.exe** or in the Virtua client, Virtua will add the tags and subfields you specify to the incoming records IF the Active check box is selected. Any tag definitions whose Active check box is NOT selected will not be added to incoming records.

20.2 Removing a Tag Definition from the Tags to Be Added Parameter

To remove a tag definition from the Tags to Be Added parameter,

1. On the Tags to Be Added window ([Figure 20-1](#)), select the tag definition you wish to remove.

Note: When you select a tag definition, a box will outline the selected field to allow you to edit it. When you click the Remove button, the entire row will be removed, not just the field with the active text box.

2. Click the Remove button.
3. Click the Save button.

The tag definition you selected is removed from the Tags to Be Added parameter.

20.3 Activating or Deactivating Tag Definitions on the Tags to Be Added Parameter

The check box in the Active column on the Tags to Be Added window lets you activate or deactivate tag definitions as needed.

To activate or deactivate a tag definition in the Tags to Be Added parameter,

- On the Tags to Be Added window (*Figure 20-1*), select or deselect the check box in the Active column for the desired tag definition.

21. Defining Tags to Be Deleted

Using the Tags to Be Deleted parameter, you can specify tag/subfield combinations that you want to delete from each incoming bibliographic record that Virtua processes via the client or **vload.exe**. This parameter can be used in conjunction with the [Tags to Be Added](#) parameter to replace one tag with another in incoming records. Tag definitions in the Tags to Be Deleted parameter will be applied to incoming records BEFORE the Tags to Be Added tag definitions are applied.

Note: The Tags to Be Deleted parameter and Tags to Be Added parameter do not apply to FRBR records. When a record is FRBRized, new Work and Expression records are created, but no tags are added or deleted based on these parameters.

From the Tags to Be Deleted window, you can . . .

- Add a tag definition to the Tags to Be Deleted window.
- Remove a tag definition from the Tags to Be Deleted window.

This chapter covers the following topics:

- ⇒ [Adding a Tag Definition to the Tags to Be Deleted Parameter](#)
- ⇒ [Removing a Tag Definition from the Tags to Be Deleted Parameter](#)

21.1 Adding a Tag Definition to the Tags to Be Deleted Parameter

To add a tag definition to the Tags to Be Deleted parameter,

1. On the Cataloging tab of the Virtua Profiler, double-click CATALOGING.
2. Double-click Tags to Be Deleted.

The Tags to Be Deleted window appears ([Figure 21-1](#)).

Source (003)	Tag	Indicator One	Indicator Two	Subfields
NcFayC	92	*	*	*

Buttons: Add, Remove, Save, Cancel

Last modified at 6/3/2010 4:13:30 PM by Root User

Figure 21-1. Tags to Be Deleted Window

- Click the Add button.

A blank line appears in the Tags to Be Deleted window, along with a text box (Figure 21-2).

Source (003)	Tag	Indicator One	Indicator Two	Subfields
NcFayC	92	*	*	*
	999			

Buttons: Add, Remove, Save, Cancel

Last modified at 6/3/2010 4:13:30 PM by Root User

Figure 21-2. Tags to Be Deleted Window

- In the Source (003) column, if desired, type the source value (i.e., the value in the 003 tag) that you want to define. If you specify a value in the Source column, the specified tags and subfields will be deleted from the incoming record ONLY if the record's 003 value matches the 003 value set in this parameter.
- In the Tag column, type the three-digit tag that you want to define.

6. In the Indicator One field, type the one-character first indicator for the tag you specified.
Tip: To represent a blank value, enter a single space.
 -OR-
 To specify ALL first indicators for that tag, type *.
7. In the Indicator Two column, type the one-character second indicator for the tag you specified.
Tip: To represent a blank value, enter a single space.
 -OR-
 To specify ALL second indicators for that tag, type *.
8. In the Subfields column, type the subfields that you want to delete from this tag.
 -OR-
 To specify ALL subfields of the tag, type *.
9. Click the Save button.

Your changes are saved to the database.

Example 1:

If you want to delete subfields \$a and \$b from all 650 tags with a second indicator of **8**, type the following information:

<u>Tag</u>	<u>Indicator One</u>	<u>Indicator Two</u>	<u>Subfields</u>
650	*	8	ab

In this example,

- The Tag and Indicator columns specify that this entry applies to all 650 tags where the second indicator is **8**.
- The Subfields column specifies that subfields \$a and \$b for this tag are to be deleted.

Example 2:

If you want to delete the entire 650 tag from records with a second indicator of **8** only from incoming records with the value OCoLC-D in the 003 tag, type the following information:

<u>Source</u>	<u>Tag</u>	<u>Indicator One</u>	<u>Indicator Two</u>	<u>Subfields</u>
OCoLC-D	650	*	8	*

In this example,

- The Source column indicates that deletions will be applied only to incoming records with the value OCoLC-D in the 003 tag.
- The Tag and Indicator columns specify that this entry applies to all 650 tags where the second indicator is 8.
- The Subfields column specifies that all subfields in the 650 tag are deleted, thereby removing the 650 tag from the record.

You can define up to 50 tags that you want to delete from each processed bibliographic record.

21.2 Removing a Tag Definition to the Tags to Be Deleted Parameter

To remove a tag definition from the Tags to Be Deleted parameter,

1. On the Tags to Be Deleted window (*Figure 21-1*), select the tag definition you wish to remove.
Note: When you select a tag definition, a box will outline the selected field to allow you to edit it. When you click the Remove button, the entire row will be removed, not just the field with the active text box.
2. Click the Remove button.
3. Click the Save button.

The tag definition you selected is removed from the Tags to Be Deleted parameter.

22. Appendix A - Default Keyword Indexing Rules

This appendix provides tables that list the default keyword indexing rules for variable fields, 008 fixed fields, and the Leader. These default values will be installed with your Virtua system unless you specify changes. Before you install the Virtua system, evaluate these settings and let your Innovative representative know of any changes you want to make. After the initial installation, you can change keyword indexing rules as desired.

Important: This set of indexing rules applies to *new* installations of Virtua. If you are migrating from an earlier version of Virtua, you will retain your old keyword indexing rules.

This appendix contains the following tables:

- ⇒ [Default Variable Field Indexing Rules](#)
- ⇒ [Default 008 Indexing Rules](#)
- ⇒ [Default Leader Indexing Rules](#)

22.1 Default Variable Field Indexing Rules

Attribute/Category	Tag	Subfields
1003/Author	100	abcdefghijklmnopqu4
	110	abcdefghijklmnopu4
	111	acdefgklmpqu4
	811	acdefgklmpqu4
	400	abcdefghijklmnopqu4
	700	abcdefghijklmnopqu4
	810	abcdefghijklmnopu4
	710	abcdefghijklmnopu4
	711	acdefgklmpqu4
	410	abcdefghijklmnopu4
	800	abcdefghijklmnopqu4
	411	acdefgklmpqu4

Attribute/Category	Tag	Subfields
63/Notes	555	a
	550	a
	546	a
	500	a
	502	a
	505	a
	506	abcde
	508	ab
	511	a
	520	a
	522	a
	530	a
	538	a
	545	a
1018/Publisher	260	b
21/Subject	600	abchklmpqtxyz
	610	abcehjkmpqtxyz
	611	aceghklmpqtxyz
	630	aghklmpqtxyz
	650	abcxyz
	651	abxyz
	655	bcxyza
4/Title	130	adfgghkjmnpqrst
	210	ab
	212	a
	240	adfgghkjmnpqrst
	243	adfgghklmnpqrsm
	245	abcfghknps
	246	abfghinp5
	247	abfghnp
	400	tfglnpu
	410	fgklmnp
	411	fklmnp
	440	anp
	490	a
	700	fgklmnpqrstu
	710	fgklmnpqrstu
	730	adfgghklmnpqrst
	740	ahnnp
	773	pt
	780	t
	785	t

Attribute/Category	Tag	Subfields
	800	fgklmnoprstu
	811	fgklnpstu
	830	adfgghklmnoprst
	840	a
	242	abhnpy
	711	fgklnpstu
	810	fgklmnoprstu
5/Series title	760	t
	800	t
	811	t
	830	a
	840	a
	440	a
	490	a
	400	t
	410	t
	411	t

22.2 Default 008 Indexing Rules

Attribute/Category	Type	Bib Level	Position	Number
8204/Biography	at	acdm	34	1
8164/Conference Publication	at	acdm	29	1
	a	bsi	29	1
1019/Cataloging Source	lm	abcdmsi	39	1
	p	abcdmsi	39	1
	at	acdm	39	1
	a	bsi	39	1
	gknor	abcdmsi	39	1
	ef	abcdmsi	39	1
	cdij	abcdmsi	39	1
8403/MP Cartographic	ef	abcdmsi	25	1
1011/Entered date	at	acdm	0	6
	a	bsi	0	6
	gknor	abcdmsi	0	6
	ef	abcdmsi	0	6
	cdij	abcdmsi	0	6
	lm	abcdmsi	0	6
	p	abcdmsi	0	6
8113/Date 2	at	acdm	11	4

Attribute/Category	Type	Bib Level	Position	Number
	a	bsi	11	4
	gknor	abcdmsi	11	4
	ef	abcdmsi	11	4
	cdij	abcdmsi	11	4
	lm	abcdmsi	11	4
	p	abcdmsi	11	4
8100/Form of Item	at	acdm	23	1
	a	bsi	23	1
	cdij	abcdmsi	23	1
	p	abcdmsi	23	1
8500/MU Form of Composition	cdij	abcdmsi	18	2
8203/Literary Form	at	acdm	33	1
8501/Format of Music	cdij	abcdmsi	20	1
8702/SE Form of Original Item	a	bsi	22	1
8160/SE Frequency	a	bsi	18	1
8202/Festschrift	at	acdm	30	1
8163/Govt Publication	at	acdm	28	1
	a	bsi	28	1
	gknor	abcdmsi	28	1
	ef	abcdmsi	28	1
	lm	abcdmsi	28	1
8165/Index	at	acdm	31	1
	ef	abcdmsi	31	1
8700/ISSN Center	a	bsi	20	1
8200/Illustrations	at	acdm	18	1
	at	acdm	19	1
	at	acdm	20	1
	at	acdm	21	1
54/Language	at	acdm	35	3
	a	bsi	35	3
	gknor	abcdmsi	35	3
	ef	abcdmsi	35	3
	cdij	abcdmsi	35	3
	lm	abcdmsi	35	3
	p	abcdmsi	35	3
8503/MU Literary Text SR	cdij	abcdmsi	30	1
	cdij	abcdmsi	31	1
8502/MU Accompanying Material	cdij	abcdmsi	24	1
	cdij	abcdmsi	25	1
	cdij	abcdmsi	26	1
	cdij	abcdmsi	27	1
	cdij	abcdmsi	28	1

Attribute/Category	Type	Bib Level	Position	Number
	cdij	abcdmsi	29	1
8150/Modified Record	at	acdm	38	1
	a	bsi	38	1
	gknor	abcdmsi	38	1
	ef	abcdmsi	38	1
	cdij	abcdmsi	38	1
	lm	abcdmsi	38	1
	p	abcdmsi	38	1
8601/VM Matter Visual Material	gknor	abcdmsi	23	5
1034/Nature of Contents	at	acdm	24	1
	at	acdm	25	1
	at	acdm	26	1
	at	acdm	27	1
	a	bsi	25	1
	a	bsi	26	1
	a	bsi	27	1
8703/SE Nature of Entire Work	a	bsi	24	1
8705/SE Original Alphabet	a	bsi	33	1
8401/MP Projection	ef	abcdmsi	22	2
8402/MP Prime Meridian	ef	abcdmsi	24	1
59/Place of Publication	at	acdm	15	3
	a	bsi	15	3
	gknor	abcdmsi	15	3
	ef	abcdmsi	15	3
	cdij	abcdmsi	15	3
	lm	abcdmsi	15	3
	p	abcdmsi	15	3
8161/SE Regularity	a	bsi	19	1
8400/MP Relief	ef	abcdmsi	18	1
	ef	abcdmsi	19	1
	ef	abcdmsi	20	1
	ef	abcdmsi	21	1
8112/Date 1	at	acdm	7	4
	a	bsi	7	4
	gknor	abcdmsi	7	4
	ef	abcdmsi	7	4
	cdij	abcdmsi	7	4
	lm	abcdmsi	7	4
	p	abcdmsi	7	4
8706/SE Successive Entry	a	bsi	34	1
8404/SE Special Format	ef	abcdmsi	33	1
	ef	abcdmsi	34	1

Attribute/Category	Type	Bib Level	Position	Number
8162/Target Audience	at	acdm	22	1
	gknor	abcdmsi	22	1
	cdij	abcdmsi	22	1
	lm	abcdmsi	22	1
8300/Type of Computer File	lm	abcdmsi	26	1
8111/Type of Date	at	acdm	6	1
	a	bsi	6	1
	gknor	abcdmsi	6	1
	ef	abcdmsi	6	1
	cdij	abcdmsi	6	1
	lm	abcdmsi	6	1
	p	abcdmsi	6	1
8600/VM Running Time	gknor	abcdmsi	18	3
8603/VM Technique	gknor	abcdmsi	34	1
8701/Type of Serial	a	bsi	21	1
1031/VM Type of Matter	gknor	abcdmsi	33	1

22.3 Default Leader Indexing Rules

Attribute/Category	Leader Position	Number
8012/Archival Control	8	1
1021/Bibliographic Level	7	1
8014/Descriptive Cataloging Rules	18	1
8013/Encoding Level	17	1
8015/Link Record	19	1
8011/Record Status	5	1
1001/Type	6	1

23. Appendix B - Call Number Indexing Types

This appendix lists and describes each call number indexing type available in the Call Number Indexing Type parameter. For information on setting the Call Number Indexing Type parameter, see the section [“Specifying a Call Number Indexing Type”](#) in this user’s guide.

Call Number Indexing Type	Description
LC or Dewey	First character is alphanumeric (a-z or 0-9). Numbers are padded so that 11 is sorted before 101 .
Only Dewey (w/wo prefixes)	Alphabetic characters before the numeric characters are put into a regular sort form. The numeric characters are padded so that 11 is sorted before 101 .
Data form	All characters are allowed in the call number. The sort is done on a character-by-character match, meaning that 101 is sorted before 11 .
UDC sort form	All subfield indicators are replaced with one space and the call number is mapped to the UDC sort form.
Special data form	All characters are allowed in the call number. The sort is done on a character-by-character match, meaning that 101 is sorted before 11 . If the call number begins with a square bracket ([), the portion of the call number until the closing bracket (]) is ignored.
LC or Dewey with six digits for numbers instead of four	First character must be an alphanumeric (a-z or 0-9). Numbers are padded so that 11 is sorted before 101 . Works the same way as LC or Dewey type except that cutters are padded for six digits.
Special call number sort for Goteborg	Special call number sort algorithm for Goteborg.

24. Appendix C - Using Call Number Incrementing in the Client

After you set the Item Call Number Increment parameter in the Virtua Profiler (see the section "[Configuring Increment Settings for Item-level Call Numbers](#)"), you can use the call number incrementing feature when creating or modifying item-level call numbers in the Item Information window of the Virtua client.

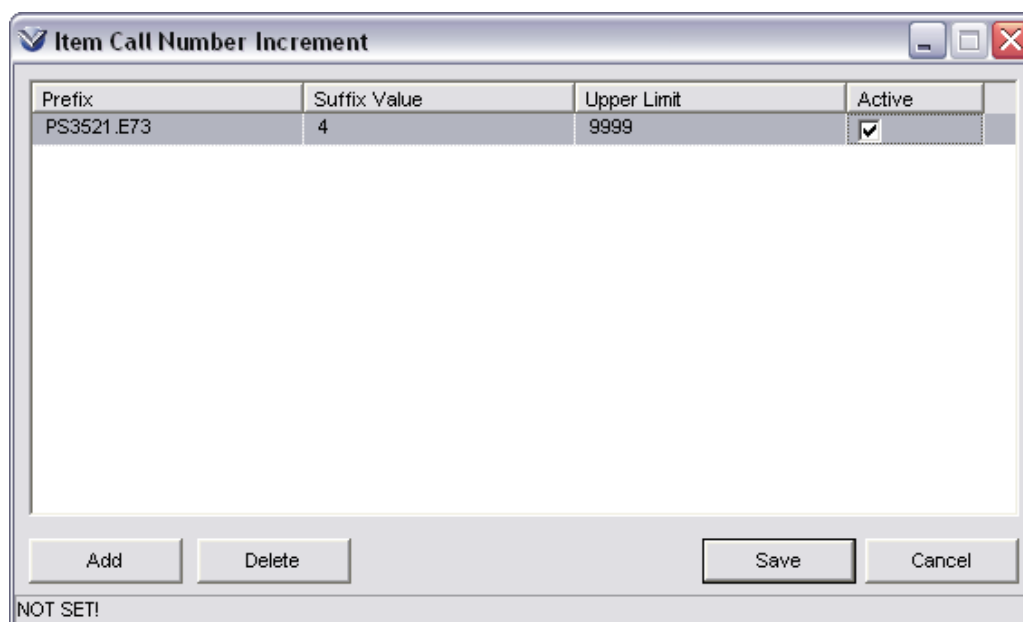
When you enter an item-level call number with a prefix that you defined in the Item-Level Call Number Increment window of the Virtua Profiler, you can append the suffix to the end of the call number and, if you are creating multiple items, have the suffix increment by one for each item.

In the following example we describe how to create five items with item-level call numbers. Each call number begins with the prefix **PS3521.E73** and ends with a suffix that increments from **4** for the first item to **8** for the fifth item.

To perform this function . . .

1. In the Virtua Profiler, on the Item Call Number Increment window ([Figure 5-8](#)) . . .
 - Set the Prefix field to **PS3521.E73**.
 - Set the Suffix field to **4**.
 - Select the Active check box.
 - Save your changes.

The entry in your Item Call Number Increment window should resemble the example in [Figure 24-1](#).



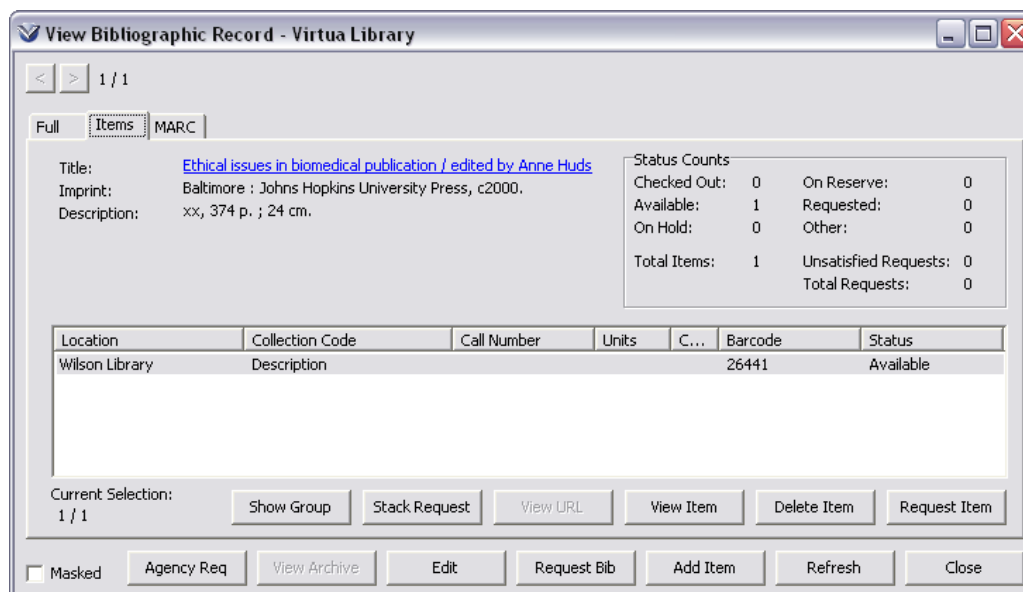
The window titled "Item Call Number Increment" contains a table with the following data:

Prefix	Suffix Value	Upper Limit	Active
PS3521.E73	4	9999	☒

At the bottom of the window are four buttons: "Add", "Delete", "Save", and "Cancel". A status bar at the very bottom displays "NOT SET!".

Figure 24-1. Item Call Number Increment Window

2. Log in to the Virtua client.
3. Open a record's View Bibliographic Record window (*Figure 24-2*).



The window titled "View Bibliographic Record - Virtua Library" shows the following information:

Navigation: 1 / 1

Full **Items** MARC

Title: [Ethical issues in biomedical publication / edited by Anne Huds](#)
 Imprint: Baltimore : Johns Hopkins University Press, c2000.
 Description: xx, 374 p. ; 24 cm.

Status Counts:

Checked Out:	0	On Reserve:	0
Available:	1	Requested:	0
On Hold:	0	Other:	0
Total Items:	1	Unsatisfied Requests:	0
		Total Requests:	0

Location	Collection Code	Call Number	Units	C...	Barcode	Status
Wilson Library	Description				26441	Available

Current Selection: 1 / 1

Buttons: Show Group, Stack Request, View URL, View Item, Delete Item, Request Item, Masked, Agency Req, View Archive, Edit, Request Bib, Add Item, Refresh, Close.

Figure 24-2. View Bibliographic Record Window - Items Tab

4. Click the Add Item button.

The Item Information window appears (*Figure 24-3*).

Item Information - Virtua Library

Item Elements | Notes | Status | Acquisitions | Other Elements

Bibliographic Information

Title: Ethical issues in biomedical publication / edited by Anne Hudson Jones and Faith McL...

Description: xx, 374 p. ; 24 cm.

Imprint: Baltimore : Johns Hopkins University Press, c2000.

Item Information

Item ID:

Barcode:

Barcode Type: Regular

Item Class: Book

Reserves Item Class:

Item URL:

Location: Wilson Library

Shelving Location: Wilson Library

Number of Pieces: 1 ☐ Circulate Pieces

Price: \$.00

EPN Number:

Accession Number:

AV Accession Number:

Collection Code:

Call Number

Copy:

Call #:

2nd Call #:

Units

☐ Free Text

☐ Enumeration and Chronology

☒ None

☐ Preservation and Conservation

Code:

☐ Non-Parameterized Shelf Location

Location:

Circulation Rules

☒ Use Matrix

☐ Use Loan Period: 44

☒ Allow Request ☒ Floats

☐ Create Multiple Items

☒ Increment Copy Number ☒ Increment Barcode ☒ Save and Repeat ☐ Save Copies:

☐ Masked

Figure 24-3. Item Information Window

5. In the Call # or second Call # textbox, type **PS3521 .E73#**, where # will become the incremented call number.

Note: The # sign must occur in the first 13 characters of the call number.

6. Enter a barcode for this item in the Barcode field. The barcode will increment by one for each item. Make sure that the barcode will not conflict with the barcode of items existing in your database.
7. Select the Create Multiple Items check box at the bottom of the window.
8. Select the Increment Copy Number check box.
9. Select the Increment Barcode check box.
10. Click the Save Copies radio button.
11. In the Save Copies text box, type **5** for the number of items you want to create.
12. Complete the remaining fields on the Item Information window as needed.
13. Click the Save button.

Virtua automatically creates five new items, which appear on the Items tab of the View Bibliographic Record window (*Figure 24-4*).

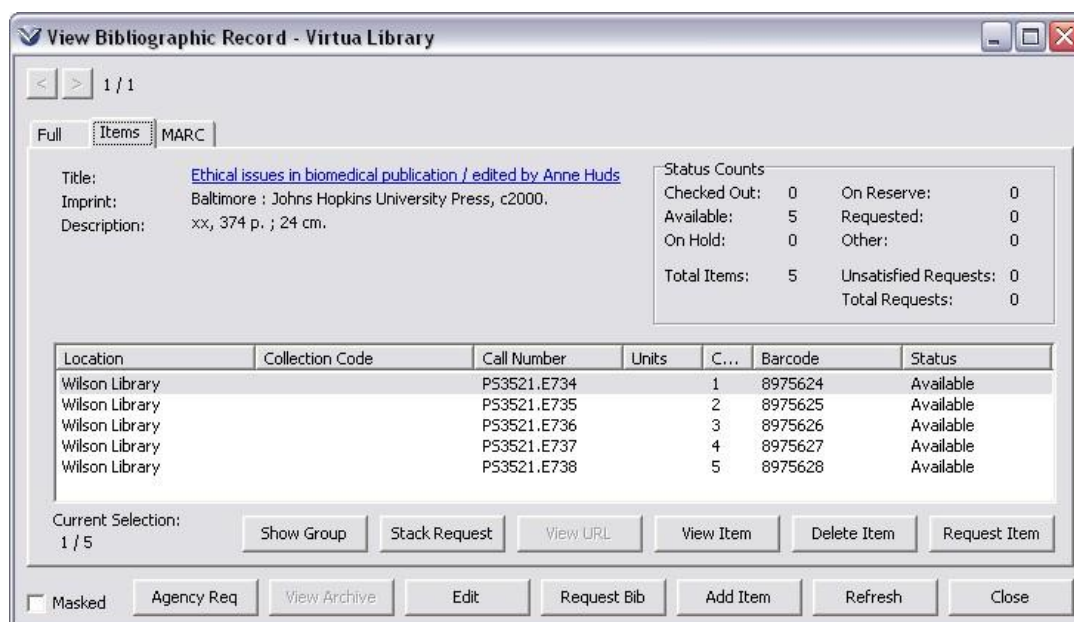
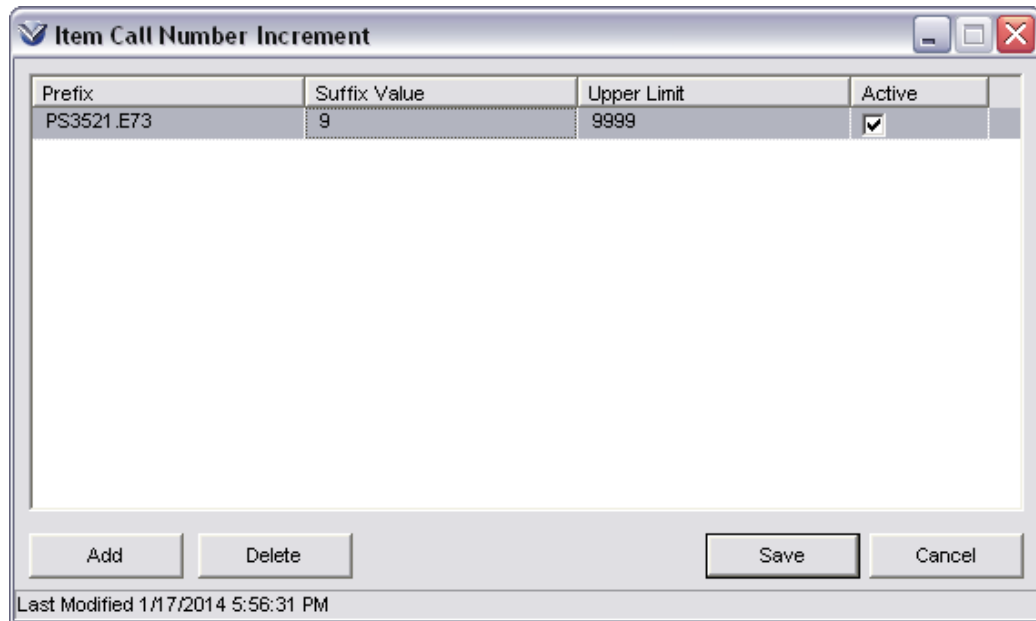


Figure 24-4. View Bibliographic Record window - Items Tab

-AND-

The Suffix field of the Item Call Number Increment parameter increases by five, from a value of four to a value of nine (*Figure 24-5*).



Prefix	Suffix Value	Upper Limit	Active
PS3521.E73	9	9999	☒

Add Delete Save Cancel

Last Modified 1/17/2014 5:56:31 PM

Figure 24-5. Item Call Number Increment Window

For more information on creating an item record, see the *Basic Cataloging Workflow-based Reference Guide*.

25. Appendix D - List of Types and Bib Levels

In this appendix, we list the Type and Bib Level values for different MARC 21 and CATMARC formats.

25.1 For MARC 21 Bib Type Class

Type

This Value:	Designates:
a	Language material
b	Archival and manuscript control [obsolete]
c	Printed music
d	Manuscript music
e	Printed map
f	Manuscript map
g	Projected medium
i	Nonmusical sound recording
j	Musical sound recording
k	2D non-projectable graphic
m	Computer file
o	Kit
p	Mixed material
q	Community Information
r	3D artifact or naturally occurring object
t	Manuscript language material

Bib Level

This Value:	Designates:
a	Monographic component part
b	Serial component part
c	Collection
d	Subunit
m	Monograph/item
s	Serial

25.2 For CATMARC Bib Type Class

Type

This Value:	Designates:
a	Language material
b	Language material, manuscript
c	Printed music
d	Manuscript music
e	Printed map
f	Manuscript map
g	Projected medium
h	Microforms
i	Nonmusical sound recording
j	Musical sound recording
k	2D non-projectable graphic
l	Machine-readable data file
m	Computer file
o	Kit
r	Tri-dimensional objects

Bib Level

This Value:	Designates:
a	Analytic
b	Part component
c	Collection
m	Monograph
s	Serial

26. Appendix E - List of MARC 21 Record Formats

Below, we list valid MARC 21 record formats and their corresponding codes for the 006 and 007 tags.

006 tag

Format:	Code:
Book	a
Printed Music	c
Manuscript Music	d
Printed Map	e
Manuscript Map	f
Projected Medium	g
Non-musical Sound Recording	i
Music Sound Recording	j
2-D Non-projectable Graphic	k
Computer File	m
Kit	o
Mixed Material	p
3-D Artifact/Natural Object	r
Serial	s
Manuscript Language Material	t

007 tag

Format:	Code:
Map	a
Electronic Resource	c
Globe	d
[Community Info	e
Tactile Materials	f
Projected Graphic	g
Microform	h
Non-projected Graphic	k
Motion Picture	m
Vendor Block/Restriction	n
Kit	o
Patron Block/Restriction	p

Notated Music	q
Remote Sensing Image	r
Sound Recording	s
Text	t
Video	v
Unspecified	z

27. Appendix F - Defining Keyword Indexing for UNIMARC Databases

In this appendix, we describe how to set keyword indexing rules for UNIMARC databases. If your library does not use a UNIMARC database, this information does not apply to you.

Note: The MARC format of a database is determined by the MARC Format Flag. If your MARC Format Flag is not set to UNIMARC, you will not be able to perform the actions described in this appendix. For information on setting the MARC Format Flag, see the section “[About the MARC Format Options Settings](#)” in this user’s guide.

For an overview of the keyword rules and the Keyword Indexing Configuration Editor, see the chapter “[Configuring Keyword Searching](#)” in this user’s guide.

27.1 Defining Index Settings for an Attribute in a UNIMARC Database

Important: If your library uses a UNIMARC database, follow the information in this section instead of in the section “[Setting Indexing Rules for a Search Category](#)” in the chapter “[Configuring Keyword Searching](#).” Except for that section, “Configuring Keyword Searching” is applicable to a UNIMARC database.

Information stored in the keyword index for a search category depends on settings in the Index Configuration section of the Keyword Indexing Configuration Editor ([Figure 27-1](#)).

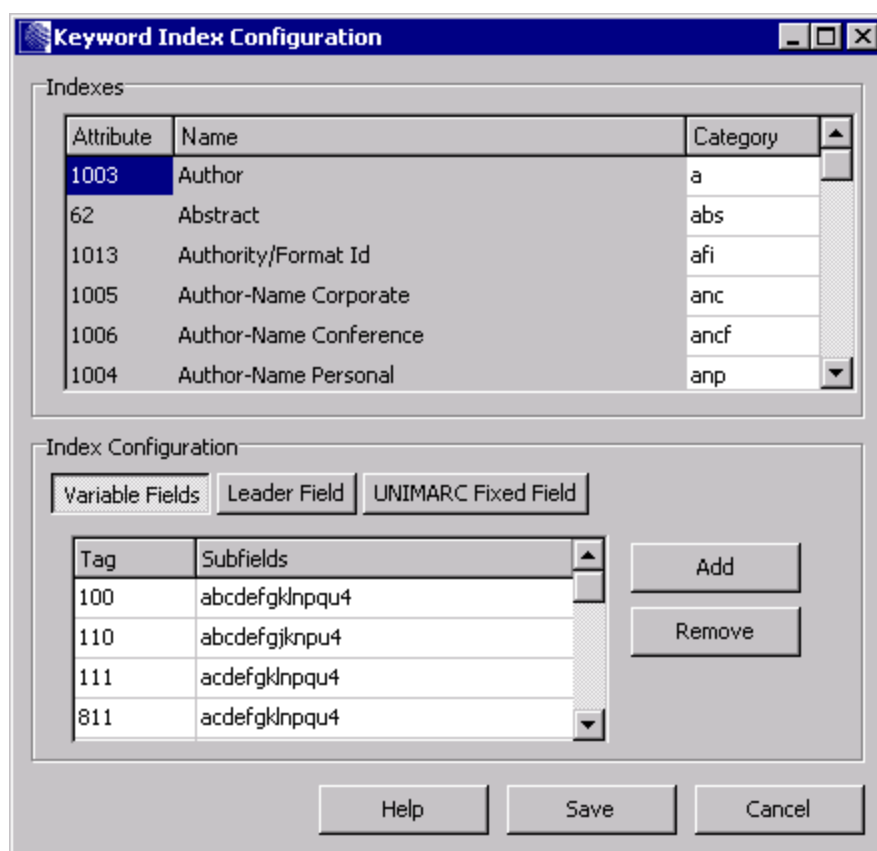


Figure 27-1. Keyword Indexing Configuration Editor

For each index you can select ONE of the following field types:

- **Variable Fields** - Non-fixed fields for which you define tags and subfields to store for the search category.
- **Leader Field** - Position(s) in the Leader. You can define one or more positions to include in the index.
- **UNIMARC Fixed Field** - Position(s) in fixed field tag/subfield combinations.

Important: For each search category, you can define indexing rules in only one of the above field types.

27.1.1 Setting Keyword Indexing Rules for Variable Fields

To assign variable fields (non-fixed fields) to the indexing rules of a search category,

1. Open the Keyword Indexing Configuration Editor.
2. In the Indexes section, select the search category to which you want to assign variable field(s).
3. Click the Variable Fields button.

The Variable Fields settings appear in the Index Configuration area ([Figure 27-2](#)).

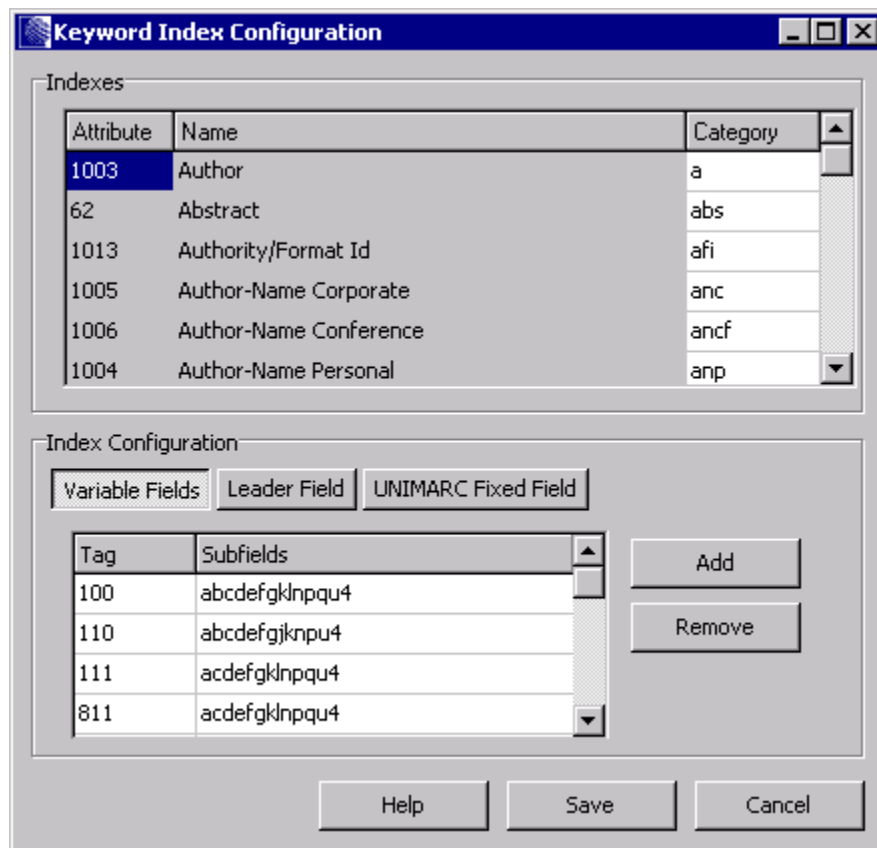


Figure 27-2. Keyword Indexing Configuration Editor - Variable Fields

-OR-

If Leader or UNIMARC fixed fields have already been assigned to this category, a diagnostic message asks, “WARNING: The current data will be lost. Continue?”

- To delete ALL settings for this category and continue to the Variable Fields settings, click the Yes button.
 - To retain the current settings, click the No button.
4. Click the Add button to add a field.
 5. In the Tag column, type the three-digit tag of the field you want to add to the index.
 6. In the Subfields column, type one or more subfields that you want to add to the index. If you are specifying multiple subfields, do NOT include any delimiters or spaces. For example, if you want to specify subfields \$a, \$b, and \$c, type **abc**.
 7. Repeat steps 4 - 6 to add additional fields to the keyword indexing rules for this category.
 8. Click the Save button.

Your changes are saved to the database.

To remove fields from a category,

1. Choose the category you want to change.
2. In the Index Configuration area, select the field you want to remove.
3. Click the Remove button.

27.1.2 Setting Keyword Indexing Rules for Fields in the Leader

To assign fields in the Leader to the indexing rules of a search category,

1. Open the Keyword Indexing Configuration Editor.
2. In the Indexes section, select the category to which you want to assign the Leader field(s).
3. Click the Leader Field button.

The Leader Field settings appear in the Index Configuration area (*Figure 27-3*).

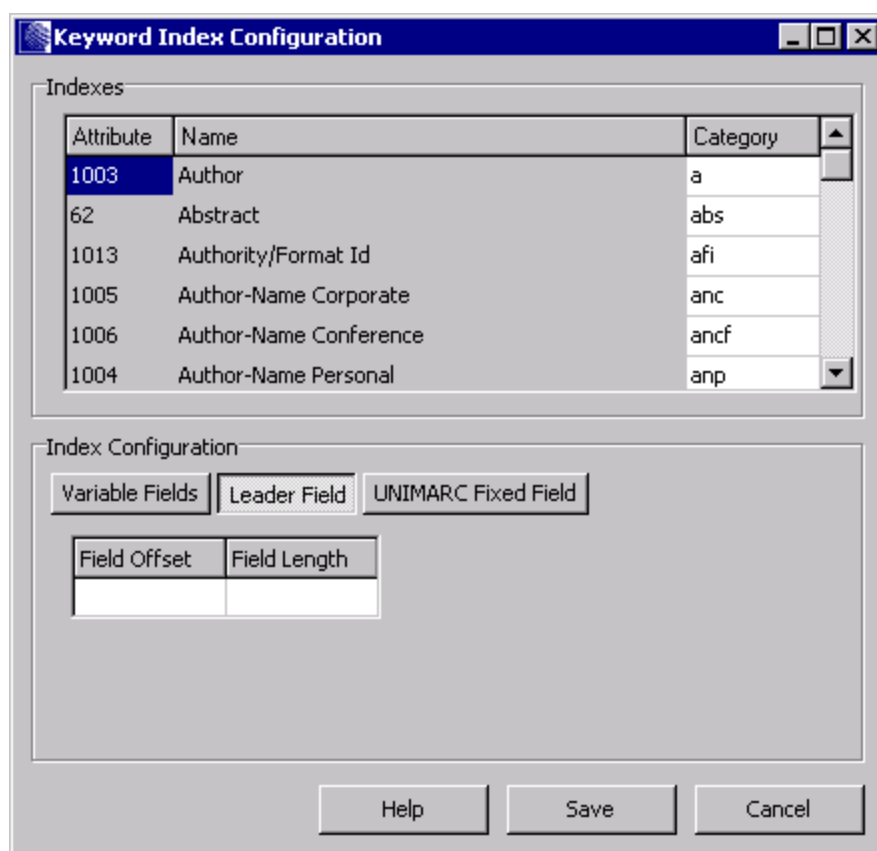


Figure 27-3. Keyword Indexing Configuration Editor - Leader Field

-OR-

If variable fields or UNIMARC fixed fields have already been assigned to this category, a diagnostic message asks, “WARNING: The current data will be lost. Continue?”

- To delete ALL settings for this category and continue to the Leader Field settings, click the Yes button.
 - To retain the current settings, click the No button.
4. Click the Add button to add a field.
 5. In the Field Offset column, type the first position of the field(s) you want to specify. If you are defining a field with multiple positions, type only the FIRST position of the field.
 6. In the Field Length column, type the number of positions in the field.

7. Repeat steps 4 - 6 to add additional fields to the keyword indexing rules for this category.
8. Click the Save button.

Your changes are saved to the database.

To remove fields from a category,

1. Choose the category you want to change.
2. In the Index Configuration area, select the field you want to remove.
3. Click the Remove button.

27.1.3 Setting Keyword Indexing Rules for Fields in the UNIMARC Tag

To assign fields in a UNIMARC fixed field to the indexing rules of a search category,

1. Open the Keyword Indexing Configuration Editor.
2. In the Indexes section, select the category to which you want to assign UNIMARC fixed fields.
3. Click the UNIMARC Fixed Field button.

The UNIMARC Fixed Field settings appear in the Index Configuration area ([Figure 27-4](#)).

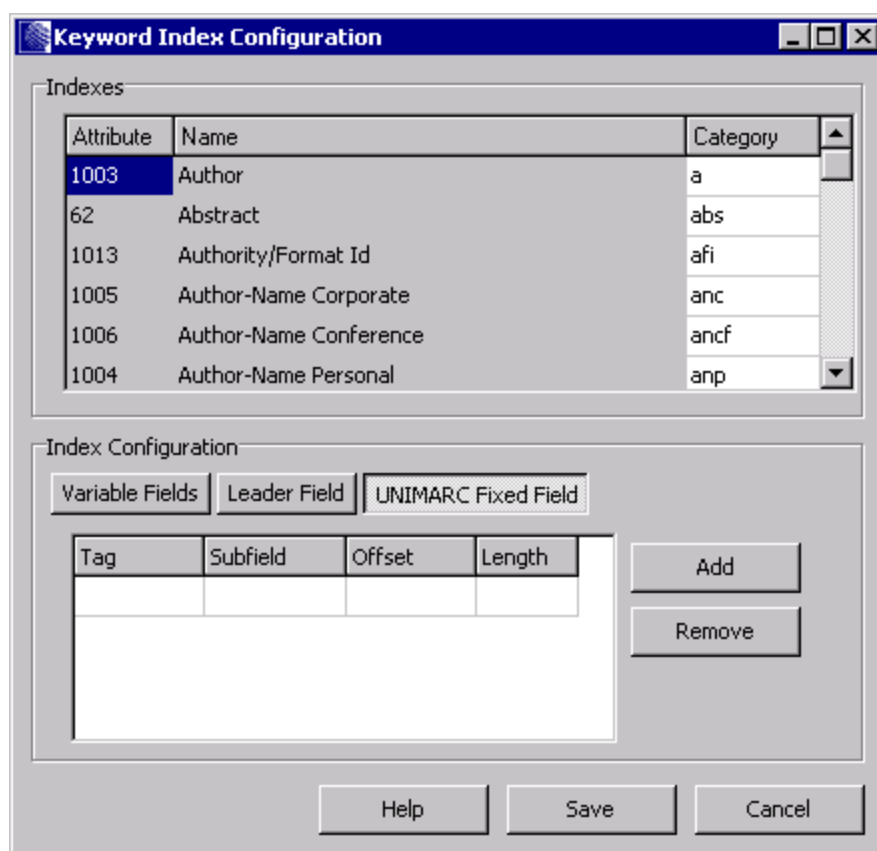


Figure 27-4. Keyword Indexing Configuration Editor - UNIMARC Fixed Field

-OR-

If variable or Leader fields have already been assigned to this category, a diagnostic message asks, "WARNING: The current data will be lost. Continue?"

- To delete ALL settings for this category and continue to the UNIMARC Fixed Field settings, click the Yes button.
 - To retain the current settings, click the No button.
4. Click the Add button to add a field.
 5. In the Tag column, type the three-digit tag of the field you want to add to the index.
 6. In the Subfield column, type one subfield that you want to add to the index.

7. In the Offset column, type the first position of the field(s) you want to specify. If you are defining a field with multiple positions, type only the FIRST position of the field.
8. In the Length column, type the number of positions in the field.
9. Repeat steps 4 - 8 to add additional fields to the keyword indexing rules for this category.
10. Click the Save button.

Your changes are saved to the database..

To remove fields from a category,

1. Choose the category you want to change.
2. In the Index Configuration area, select the field you want to remove.
3. Click the Remove button.

28. Appendix G - Parameters

Specific to the Hong Kong Public Library

28.1 Reading Program Nominators Parameter

The Reading Program Nominators parameter on the Cataloging tab of the Virtua Profiler (*Figure 28-1*) lets you define codes and descriptions of nominators for a reading program. The codes will appear in the Nominator drop-down list on the Reading Program tab of the Hong Kong Patron Editor.



Figure 28-1. Reading Program Nominators Window

The Reading Program Nominators parameter lists the nominator you have defined for your database. Each nominator consists of an alphanumeric code and a description.

The nominator code must have the following characteristics:

- Be unique across the database.
- Be no fewer than three and no more than seven alphanumeric characters.
- Begin and end with an alphabetic character.

- Have the format of XYZ, where:
 - X = 1, 2, or 3 alphabetic characters, followed by...
 - Y = 1 or 2 numeric characters, followed by...
 - Z = 1 or 2 alphabetic characters.

The nominator code in the patron record is an indexed field (tag 303 subfield \$b) that is available in the client. Searching a nominator code returns a list of all patron records in which the code appears.

28.2 Patron Cataloging Options

Parameter

The Validate Patron PIN check box on the Patron Cataloging Options window ([Figure 12-2](#)) allows you to determine if the patron PIN (019 tag subfield \$a) is validated when saving a patron record.

1. If you want the Virtua server to validate the patron PIN (019 tag subfield \$a) when saving a patron record, select the Validate Patron PIN check box.

When this setting is enabled, Virtua (or Chamo) validates the PIN to make sure that it contains only numeric characters, and that it falls within the specified Minimum PIN Length and Maximum PIN Length values. When this setting is NOT enabled, the software does not validate the PIN. The PIN can be of any length, and may contain alphanumeric characters.

Notes:

- This parameter is NOT used by Virtua for users other than Hong Kong Public Library users.
- Selecting the Validate Patron PIN check box enables the additional patron PIN settings within the Validate Patron PIN group box. We describe these settings below.
- If the Validate Patron PIN check box is selected, a valid PIN must be specified on the Patron Editor window for the patron record to be saved successfully.

2. In the Minimum PIN Length text box, type the number of characters you wish to specify as the minimum PIN length. You can type **0** (zero) to specify no minimum PIN length.

3. In the Maximum PIN Length text box, type the number of characters you wish to specify as the maximum PIN length. You can type **0** (zero) to specify no maximum PIN length.
4. If you want Virtua to store patron passwords without encryption, select the *Keep unencrypted patron record passwords* check box. If you do NOT select this check box, Virtua stores patron passwords in an encrypted form.
5. If you want Virtua to store patron PINs without encryption, select the *Keep unencrypted patron record PINs* check box. If you do NOT select this check box, Virtua stores patron PINs in an encrypted form.

28.3 Publisher Prefix Configuration

When the MARC 21 Format flag is set to BRO in the Cataloging Basic Options, the Publisher Prefix Configuration parameter appears on the Cataloging tab.

The Publisher Prefix Configuration window ([Figure 28-2](#)) lets you configure the various combinations of Industry Codes, Country Codes, and Publisher ID ranges that make up the Publisher Prefixes you will assign to Publishers when they request ISBNs. The Publisher Prefix is related to a group of ISBNs that a particular publisher can use on newly published books. The Publisher Prefix values configured here appear on the Create ISBN Prefix window in the Virtua client.

For each of the fields on the Publisher Prefix Configuration window, you can . . .

- Click the Add button to add a new blank line where you can enter a new value.
- Select a code and click the Delete button to remove that code from the list.
- Click the Save button to save your changes

Before you configure Publisher ID Ranges at the bottom of the window, configure the Industry and Country codes that are being used at the BRO.

Publisher Prefix Configuration

Industry Codes

Code	Description
001	
111	
978	
979	
999	

Add Delete

Country Codes

Code	Description
444	four-four-four
555	five
962	

Add Delete

Publisher ID Ranges

Start	End	Next	Industry	Country
8	14	9	001	444
100	200	100	978	444
150	200	150	001	444
201	301	254	978	555
201	301	257	001	444
15000	16999	15000	001	444

Add Delete

Save Cancel

Figure 28-2. Publisher Prefix Configuration

The following values can be configured on this window:

Industry Codes - This area defines the book industry codes available to select on the Create ISBN Prefix window in the Virtua client. Each entry must have a three-digit code; a description is optional.

Country Codes - This area defines the country codes available to select on the Create ISBN Prefix window in the Virtua client. Each entry must have a three-digit code; a description is optional.

Publisher ID Ranges - This area defines a range of publisher ID ranges that will be coupled with Industry Code + Country Code combinations. In the client, the Create ISBN Prefix window will display only those publisher ID ranges associated with a selected industry and country code combination.

- The Industry and Country codes available in this area are based on the codes configured in this window.
- The Start and End columns let you define a range of two- to five-digit codes for a publisher.

Note: When you add a publisher ID range and do not specify a Next value, Virtua will predict the appropriate Next value. If the ID range does not contain any available IDs to assign as the Next value, Virtua will display a message to notify you, and you must correct the range.

29. Appendix H - Changes in this Guide

29.1 Changes for Version 16.1

No changes were made.

29.2 Changes for Version 16.0 SP1

[“About the Display Routing List Setting”](#) - Added to describe the new Display Routing List setting on the Cataloging Basic Options window. This setting lets you specify whether Virtua automatically displays the routing list when you check in an issue for a title for which a routing list exists.

Index

0

- 003 tag, Tags to Be Deleted parameter and · 143
- 005 tag
 - do not update when Add/Edit tag... · 38
 - retain upon loading · 50
- 006 tag, adding to the keyword index rules · 88
- 007 tag, adding to the keyword indexing rules · 88
- 008 tag, adding to the keyword indexing rules for a search category · 86

1

- 172 tag, in user-defined authority records · 136

3

- 360 Resource Manager · 55

A

- Ad Hoc reporting · 54
- Add price to new items using ISBN \$c · 38, 44
- adding stopwords · 128
- adding tags automatically · 139
- Additional Access Points · 8
 - 1xx\$at tag · 9
 - 1xx/240 tag · 10
 - 4xx/8xx\$at tag · 9
 - 7xx\$at tag · 9
 - defined · 8
 - example · 8
 - parameter · 6
 - parameter, applying changes · 11
 - setting · 10
 - types of · 9
 - Uniform Title · 9
- Allow Undelete for MARC Records setting · 37, 48
- Alphabetic only radio button, on Item Barcode Validation window · 76
- Alphanumeric radio button, on Item Barcode Validation window · 76
- Also support selection of alternate controlled values option, Patron cataloging Options window · 113
- alternate barcode, for patron · 113

- Always use the incoming 005 tag when updating/loading LC/NACO authority records setting · 38
- Always use the incoming 005 tag when updating/loading LC/NACO authority setting · 50
- Anywhere search category · 73
- Arabic Stop Words parameter · 12
- Arabic Stopwords parameter · 6
- Archive Bibliographic Records setting · 38, 45
- ASN, indexing duplicates · 36
- assigning fields to the keyword indexing rules for a search category
 - fixed fields (006/007) · 88
 - fixed fields (008) · 86
 - fixed fields (Leader) · 90, 165
 - UNIMARC fixed field · 167
 - variable fields · 84, 164
- attribute number · 82, *See* search attribute number
- Authority Message parameter · 14
 - configuring · 15
 - dialog box (fig) · 16
- Authority Messages parameters · 6, 14
 - Heading Replacement Flag · 14, 16
 - MARC Heading Conflict Flag · 14, 17
 - New Heading Message · 14, 18
- authority record indexing · 51
- Automatic Generation of 035 settings · 36, 43

B

- Barcode History tab · 48
- barcode history, maintaining · 48
- Barcode Type setting · 35, 39
- barcodes
 - configuring rules for items · 75
- Batch Item Editor · 55
- Bib 6xx \$2/Auth 040 \$f · 101, 102
- bib type class values
 - CATMARC · 159
 - MARC 21 · 158
- Bib-1 · 64
- BRO · 172
- browse index, determining which subject headings are included · 132
- Browse Results window, with Additional Access Points · 8

C

- Call Number Index and Priority window · 20 (fig) · 22, 24

- accessing · 21
- adding a call number definition · 23
- adding a tag · 23
- applying changes · 26
- deleting a call number definition · 25
- Existence Subfields · 24
- Index Subfields · 24
- Multiple Call Number Indexes Allowed Check box · 23
- options · 22
- Rule Indicator 1 · 24
- Rule Indicator 2 · 24
- setting the priority order · 25
- sort order · 22
- Tag column · 24
- call number indexing
 - allowing multiple call numbers for each record · 23
 - list of types · 152
 - rules · 20
 - adding a call number definition · 23
 - not modifying · 20
 - specifying a type · 26
- Call Number Indexing Type parameter · 26, 27
- Call Number parameters · 6, 20
- call number priority
 - order · 20
 - setting · 25
- Call Number Type
 - defining for collection codes · 55
- call numbers
 - holding-level · 27
 - incrementing · 27, 31
 - item-level · 30, 51
 - keyword indexing and · 75
- CallIndexForm.sh · 26, 27
- Cannot Delete Item check box, on Collection Codes
 - Definitions window · 55
- Cataloging Basic Options parameter · 6, 34
 - setting · 34
- cataloging parameters
 - accessing · 3
 - list of · 6
 - when to change them · 7
- Cataloging tab · 3
- categories · *See* search categories
- category codes · *See* search category codes
- category name · 64, 82
- Chamo
 - collection code groups · 61
 - configuring Filtered collection groups · 61
- changes in the guide · 175
- ChangeToNoSingleAuthority.sh · 52
- Check for New Duplicate Patrons setting · 36, 40
- choosing a call number format · 26
- classification fields, keyword indexing and · 75
- codes · *See* search category codes
- Collection Code Definitions parameter · 6, 54
- collection code groups · *See also* Collection Groups
 - adding · 58
 - filtering in Chamo · 61
 - using to filter results in Virtua client · 60
- Collection Code Groups parameter · 6, 57
- collection codes
 - adding · 54
 - adding to collection code group · 59
 - adding to groups · 57
 - assigning to items · 54
 - configuring · 54
 - Cost Export report and · 55
 - defining call number type for · 55
 - deleting · 55
 - filtering by · 57
 - modifying · 55
 - prefix, defining · 54
 - preventing from deletion · 55
 - viewing once assigned to items · 54
- collection groups · *See* Collection Code Groups
- Collection Groups Filter, in Virtua client · 60
- communication preference · 114
- configuring
 - Additional Access Points parameter · 10
 - Authority Messages · 14
 - call number indexing rules · 20
 - Call Number Indexing Type parameter · 26
 - Call Number parameters · 20
 - call number priority · 20
 - effect of · 7
 - fixed field (006/007) indexing rules · 88
 - fixed field (008) indexing rules · 86
 - fixed field (Leader) indexing rules · 90, 163, 165
 - fixed field (UNIMARC) indexing rules · 167
 - fixed field keyword search categories · 71
 - Heading Replacement Flag · 16
 - Holdings Call Number Increment parameter · 27
 - indexing rules · 83
 - for fixed field (006/007) search categories · 84
 - for fixed field (008) search categories · 84, 86
 - for fixed field (Leader) search categories · 84, 165
 - for fixed field (UNIMARC) search categories · 167
- Item Call Number Flag parameter · 30
- Item Call Number Increment parameter · 31
- keyword indexing rules · 162
 - consequences of changing · 63
 - for fixed field search categories · 71
 - for fixed fields (006/007) · 88
 - for fixed fields (008) · 86
 - for fixed fields (Leader) · 90, 165
 - for fixed fields (UNIMARC) · 167
 - for variable fields · 84, 164
 - limitations on · 70
 - search categories immediately available · 94
 - what happens after you save · 94
- keyword searching · 62, 63
- MARC Heading Conflict Flag · 18
- non-parameterized shelf locations · 107
- PAC Codes · 116

Patron Cataloging Options · 109
 Patron Editor · 109
 record states · 118
 search category codes · 82
 Subject Headings to Index parameter · 133
 Tags Indexed for UDC Search parameter · 134
 Tags Indexed for User Defined Search parameter · 136
 Tags to Be Deleted parameter · 142
 UNIMARC fixed field indexes · 163, 167
 variable field search categories · 83, 84, 163, 164
 Control Number Options settings · 42
 control numbers, keyword indexing and · 74
 Country Codes, on Publisher Prefix Configuration window · 174
 Cr_CTX_Indexes.sh, adding stopwords and · 130
 Create ISBN Prefix window, configuring · 172
 CreateSubjectThesari_1.ksh · 97
 CreateSubjectThesari_2.ksh · 97

D

Default Communication Preference option, Patron Cataloging Options window · 114
 default keyword indexing rules · 77, 146
 Default Patron Editor tab when editing option, Patron Cataloging Options window · 111
 defining a required authority heading · 18
 deleted items, maintaining history of · 48
 Deleted_Item_v · 48
 deleting stopwords · 130
 deleting tags automatically · 142, 144
 example · 144
 deleting tags from indexing rules · *See* removing tags from keyword indexing rules
 diagnostic messages, server generated · 124
 diagnostic table · 124
 Display Routing List setting · 38, 53
 Do Not Support Single Authority Record setting · 38, 51
 duplicate ASNs, allowing · 36

E

Edit Registering Library option, Patron Cataloging Options window · 111
 enabling item-level call numbers · 30
 Error state records · 124
 evaluating keyword search categories · 64
 list of categories · 65
 list of fixed field search categories · 71

F

Fixed Field indexing rules

006/007 tag · 84, 88
 008 tag · 84, 86
 assigning multiple Bib-levels · 88
 assigning multiple Bib-types · 88
 assigning multiple formats · 90
 Leader · 90, 163, 165
 UNIMARC · 163, 167
 fixed field search categories · 64, 71
 list of · 71
 For items with no item-level call number...setting · 38, 50
 Format patron phone number for display, normalize searches setting · 114
 FRBR
 Tags to Be Added parameter and · 139
 Tags to Be Deleted parameter and · 142
 Full Text search category · 74

G

Gather Cataloging Statistics setting · 38, 46
 Generate 035 for Auths setting · 43
 Generate 035 for Bibs setting · 43
 Generate Item Barcode Using Prefix setting · 36, 40

H

Heading Replacement Flag · 14, 16
 defining similar headings · 16
 dialog box (fig) · 17
 setting · 16
 holding-level call numbers
 activating increment settings · 29
 increment settings · 27
 Holdings Call Number Increment parameter
 accessing · 27
 Active field · 29
 configuring · 28
 deleting · 30
 Next Value field · 29
 Prefix field · 29
 Upper Limit field · 29
 Hong Kong Patron Editor · 170

I

incrementing holdings call numbers · 27
 example · 29
 incrementing item call numbers · 153
 example · 153
 Index \$e in 100...setting · 37, 44
 Index \$e in 110...setting · 37, 45
 Index Configuration section · 81
 Index Control Numbers setting · 36, 42
 Index Duplicate ASN setting · 36, 42

Index Duplicate LCCN setting · 36, 42
 Index National Bibliography Number setting · 37, 51
 Index Other Standard Identifier setting · 37, 46
 Index Publisher for Browse setting · 37, 47
 Index Publisher Number setting · 37, 47
 Indexes section · 81
 Attribute column · 82
 Category column · 82
 editable fields · 82
 modifying · 81
 Name column · 82
 non-editable fields · 82
 Indexible Subject Headings · *See* Subject Headings to
 Index parameter
 indexing
 setting call number rules · 20
 setting keyword rules · 77
 subject headings · 132
 Industry Codes, on Publisher Prefix Configuration
 window · 173
 Innovative fixed field search categories · 64
 ISBN, indexing · 36
 ISSN, indexing · 36
 Item Barcode Validation parameter · 75
 item barcodes, configuring rules for · 75
 Item Call Number Flag · 30
 (fig) · 31
 options · 31
 Item Call Number Increment parameter
 accessing · 31
 Active field · 33
 automatically incrementing the suffix field · 156
 configuring · 32
 deleting · 33
 Prefix field · 33
 Suffix field · 33
 Upper Limit field · 33
 item call number incrementing, using in the Virtua
 client · 153
 Item Information window · 30, 153
 (fig) · 155
 Barcode field · 156
 Multiple Items check box · 156
 Save Copies radio button · 156
 Save Copies text box · 156
 item price
 configuring default · 44
 setting a limit on · 52
 item records, relinking · 51
 Item_Detail_v Ad Hoc view · 54
 item-level call numbers · 51
 activating increment settings · 33
 disabling · 31
 enabling · 30
 one call number · 31
 two call numbers · 31
 increment settings · 31

K

Keep unencrypted patron record passwords option,
 Patron Cataloging Options window · 113
 Keep unencrypted patron record passwords setting ·
 172
 Keep unencrypted patron record PINs option, Patron
 Cataloging Options window · 113
 Keep unencrypted patron record PINs setting · 172
 keyword index
 assigning fixed fields · 86, 88, 90
 for UNIMARC databases · 165, 167
 assigning variable fields · 84
 for UNIMARC databases · 164
 available categories · 65
 removing fields · 88, 90, 92, 165, 167, 169
 keyword indexes, limitations on · 74
 Keyword Indexing Catalog · *See* Keyword Indexing
 Configuration Editor
 Keyword Indexing Catalog parameter · 7
 Keyword Indexing Configuration Editor · 62, 77, 162
 accessing · 78
 adding a field · 85, 87, 90, 92, 168
 aspects of · 81
 assigning fixed fields to a search category · 86, 88,
 90, 165, 167
 assigning variable fields to a search category · 84,
 164
 available categories · 65
 available record formats · 160
 available record types · 160
 Bib-levels · 88, 158
 Bib-types · 88, 158
 category name · 82
 choosing a field type · 83
 in a UNIMARC database · 163
 configuring search category codes · 82
 determining the order in which search categories
 appear · 92
 Fixed Fields (006/007) button · 84
 Fixed Fields (008) button · 84
 Fixed Fields (Leader) · 84, 163
 Fixed Fields (UNIMARC) · 163
 Format · 90
 Index Configuration section · 81, 83, 162
 index name · 82
 Indexes section · 81
 Keyword Indexing Configuration Editor (fig) · 80
 Leader Fields · 84, 163
 Length · 88, 90, 92, 166, 169
 Offset · 88, 90, 92, 166, 169
 Other Fixed Fields (006/007) · 84
 search category code · 82
 Search Order tab · 92
 setting indexing rules for a search category · 83
 specifying a Bib-level · 88
 specifying a Bib-type · 88
 specifying a format · 90

- specifying a tag · 86, 90
- specifying an offset · 88, 90, 92
- specifying the number of fixed field positions · 88, 90, 92
- Tag · 90
- translating · 82
- Variable Fields · 163
- Variable Fields button · 83
- keyword indexing rules
 - applying to records in your database · 95
 - assigning fixed fields · 86, 90, 165, 167
 - assigning variable fields · 84, 164
 - cataloging records after changing · 95
 - changing · 77
 - configuring for a search category · 83
 - consequences of changing · 77
 - default · 77, 146
 - modifying · 77
 - modifying in a UNIMARC database · 162
 - removing fields · 86
 - setting for a UNIMARC database · 162
 - setting for fixed field search categories · 71
 - special categories · 70
- keyword search
 - aspects of · 62
 - configuring · 62
 - determining indexed categories · 63
 - evaluating categories · 63
 - evaluating search categories · 64
 - limitations on configuring search categories · 70
 - searching all variable field search categories · 73
 - searching for items at a specified location · 73
 - searching the text of items · 74
 - understanding search categories · 64
 - workflow for configuring · 63
- keyword search categories · *See* search categories
 - displaying in the Permissions list · 95
- Keyword Search Help window · 94
- keyword table · 62

L

- LC/NACO authority records · 50
- LCCN, indexing · 36
- Leader, adding to the keyword index · 90, 165
- library-defined search
 - configuring · 136
 - index settings · 134, 136
- library-defined subject headings, creating linked searches and · 100
- Location code, filtering by · 73
- Location search category · 73

M

- Maintain Item Barcode History setting · 38, 48

- MARC 21 Format setting** · 36, 42
- MARC Auth Format setting** · 36, 42
- MARC Editor Tag Pasting settings · 52
- MARC Format Options settings · 36, 41
- MARC Format setting · 36, 41
- MARC Heading Conflict Flag · 14, 17
 - dialog box (fig) · 18
 - options · 18
 - setting · 18
- maximum length for item barcodes · 76
- Maximum Password Length option, Patron Cataloging Options window · 112
- Maximum PIN Length setting · 172
- Minimum Barcode Length field, on Item Barcode Validation window · 76
- minimum length for item barcodes · 76
- Minimum Password Length option, Patron Cataloging Options window · 112
- Minimum PIN Length setting · 171
- modifying
 - Indexes section · 81
 - keyword indexing rules · 77
 - in a UNIMARC database · 162
- multiple MARC formats, setting · 36, 42
- multiple subject heading functionality · 96
 - adding a library-defined subject heading · 101
 - cannot be disabled · 99
 - deleting a library-defined subject heading · 103
 - enabling · 99
 - required scripts · 97
 - CreateSubjectThesari_1.ksh · 97
 - CreateSubjectThesari_2.ksh · 97
 - UpdateAuthoritySubj.exe · 97
 - required steps for enabling · 97
 - standard subject headings · 105
 - Art and Architecture · 105
 - locally defined · 105
 - Sears List of Subject Headings · 105
 - user permissions and · 97
 - working with library-defined subject headings · 100
- Multiple Subject Headings parameter · 7
- Multiple Subject Headings window · 96
 - (fig) · 98
 - adding a library-defined heading · 101
 - consequences of pushing the Save button · 99
 - deleting a library-defined heading · 103
 - Library-defined Headings section · 100
 - not modifying · 99
 - read before accessing · 96
 - Standard Heading section · 105
 - Warning Message · 101
- music number, display of · 46, 47

N

- New Heading Message parameter · 14, 18

tag limit · 19
 wildcard · 19
 window (fig) · 19
 Non-Parameterized Shelf Locations parameter · 7, 107
 Non-Parameterized Shelf Locations window (fig) · 108
 non-parameterized shelf locations, configuring · 107
 normalize patron phone number search terms · 114
 NormalizePatronTelephone.sh · 115
 Numeric only radio button, on Item Barcode
 Validation window · 76

O

operation log · 46

P

PAC Codes, configuring · 116
 parameter
 12 · See Subject Headings to Index parameter
 13 · See Call Number Index and Priority
 parameter, See Call Number Indexing Format
 161 · See Item Call Number Flag
 172 · See Authority Messages parameters
 173 · See Automatic Generation of 035 parameter
 176 · See MARC Format Flag
 191 · See Control Number Flags
 33 · See Additional Access Points, See Tags
 Indexed for User Defined Search parameter
 Password option · 113
 passwords
 defining maximum length for patron · 112
 defining minimum length for patron · 112
 storing unencrypted patron · 113
 synchronizing patron primary and secondary · 113
 Paste Tag function · 52
 Paste To All function · 52
 pasted tags in MARC Editor, placement of · 52
 Patron Cataloging Options, configuring · 109
 patron communication preference · 114
 Patron Editor
 configuring · 109
 enabling configuration of Academic Info values for
 · 113
 hiding alternate barcode and password fields · 113
 Patron Editor Options parameter · 7
 patron fees, setting a limit on · 52
 Patron Keyword searching · 36, 40
 patron passwords
 specifying format · 112
 specifying length · 112
 storing unencrypted · 113
 synchronizing primary and alternate · 113
 patron phone numbers, formatting · 114
 patron PINs, storing unencrypted · 113

Patron Search Results window · 41
 permissions · See user permissions
 phone number, requiring for patrons · 113
 PINs, storing unencrypted patron · 113
 PopulateBibOtherIdentifier.sh · 46
 PopulateBibPublisherNumber.sh · 47
 PopulateUDCBrowse.exe · 135
 PPARAMSET
 1.13 · See MARC Format Flag
 1.15 · See Control Number Flags
 1.29 · See Automatic Generation of 035 parameter
 3.1 · See Call Number Indexing Format
 3.15 · See Additional Access Points, See Tags
 Indexed for User Defined Search parameter
 3.2 · See Call Number Index and Priority
 parameter
 3.7 · See Item Call Number Flag
 3.8 · See Subject Headings to Index parameter
 3.9 · See Authority Messages parameters
 precision search, available search categories · 94
 prefix, defining for collection codes · 54
 Preservation and Conservation Codes (PAC)
 parameter · 7
 Preservation and Conservation Codes (PAC) window
 (fig) · 116
 Price Threshold setting · 38, 52
 price, configuring default item · 44
 primary barcode, for patron · 113
 Primary Phone option, Patron Cataloging Options
 window · 113
 Production of Records by User report · 46
 Prompt User check box · 37, 52
 psdriver.exe, restarting · 34
 pseudos · See Additional Access Points
 Publisher ID Ranges, on Publisher Prefix
 Configuration window · 174
 Publisher Prefix Configuration parameter · 172
 Publisher Prefix Configuration window · 173

R

Reading Program Nominators parameter · 170
 record formats · 160
 record states
 adding · 121
 configuring · 118
 default · 119
 Deleted · 120
 deleting · 121
 Error · 120
 Overnight · 120
 Process Immediately · 119
 Review States · 120
 system defined · 120
 Wait · 120
 Record States parameter · 7
 Record States window · 119

Record States window (fig) · 119
 Record Validation Rules · 7
 Record Validation Rules window (fig) · 123
 record validation rules, configuring · 123
 relinking item records · 51
 removing tags from keyword indexing rules · 86, 88, 90, 92, 165, 167, 169
 replacing tags in incoming records · 139, 142
 ReProcessAuths.ksh · 43
 ReProcessBibs.ksh · 11, 43, 44, 45, 133, 138
 ReProcessForPublisherHeadings.sh · 48
 ReProcessForPublisherUserHeadings.sh · 48
 Require units for serial bibs/holdings items setting · 38, 43

S

Save button · 11, 16, 17, 18, 19, 23, 25, 26, 27, 29, 31, 33, 38, 86, 88, 90, 92, 94, 96, 99, 101, 103, 105, 108, 116, 117, 121, 122, 129, 130, 133, 135, 138, 140, 144, 145, 156, 165, 167, 169
 search attribute number · 64
 Search by State feature · 49, 124
 Search by State window · 124
 search categories
 about · 64
 Anywhere (attribute 1035) · 72, 73
 assigning fixed fields · 84
 assigning variable fields · 83
 attribute · 82
 available for setting indexing rules · 64, 65
 available via a precision search · 94
 category codes · 64, 82
 default keyword indexing rules for · 77, 146
 defining category codes · 82
 defining variable fields for · 84
 determining the order in which they appear · 92
 determining the type of · 65
 evaluating · 64
 fixed field · 71
 Full Text (attribute 8900) · 74
 impact on search filters · 71
 Innovative fixed field · 64
 limitations on · 70
 list of · 65
 fixed field search categories · 71
 Location (attribute 8999) · 72, 73
 names · 64, 82
 translating · 82
 parts of · 64
 providing access to · 95
 restricted categories · 72
 search attribute number · 64
 setting indexing rules for · 83
 system-defined · 72
 types of · 64
 user-defined · 136

 user-defined · 65
 viewing the available list of · 94
 Z39.50 Bib-1 use attributes · 64
 search category codes · 64
 modifying · 82
 Search Order tab · 92
 Serials Solutions® · 55
 server-side validation of bibliographic records · 123
 SetKeepFeesOnDeletedItemsFlag.sh · 48
 setting · *See* configuring
 shelf locations · *See* non-parameterized shelf locations
 similar headings · 16
 single authority record indexing · 51
 State option, Patron Cataloging Options window · 114
 stopwords
 adding · 128
 defining Arabic exceptions · 12
 deleting · 130
 introduction to · 125
 viewing · 126
 authority heading keyword searches · 127
 for bibliographic keyword searches · 127
 Stopwords parameter · 7
 stopwords window
 Add button · 128
 Delete button · 130
 Stopwords window (fig) · 127
 Subfield Data field, on Tags to Be Added window · 140
 subfields, adding to incoming records · 140
 subject heading index · 132
 Subject Headings to Index parameter · 7, 132
 Any indicator 7 · 132
 applying changes · 133
 Blank · 132
 Canadian Subject Headings · 132
 LC Subject Headings for Children's Literature (LCSHAC) · 132
 Library of Congress Subject Headings (LCSH) · 132
 Locally Defined 1 · 132
 Locally Defined 2 · 132
 Medical Subject Headings (MeSH) · 132
 National Agricultural Library subject authority file (NAL) · 132
 options · 132
 Repertoire des vedettes-matiere · 132
 setting · 133
 Source not specified · 132
 window (fig) · 133
 subject headings, allowing multiple types · 98
 subject thesauri · 98
 Support selection of controlled values in patron record option, Patron Cataloging Options window · 113
 Synchronize passwords using the first primary barcode option, Patron Cataloging Options window · 113
System Management: Cataloging User's Guide · 11, 43, 44, 45, 96, 132, 133, 135, 138

System Management: OPAC User's Guide · 20, 26,
27, 62, 64, 74, 95, 115, 128, 130, 131
System Management: Reference Guide · 26
system-defined search categories · 72

T

Tag Placement setting · 37, 52
tags
 adding to incoming records · 139
 deleting from incoming records · 142
 replacing in incoming records · 139, 142
Tags Indexed for UDC Search parameter · 7
 applying changes · 135
 configuring · 134
 removing a tag definition · 135
 window (fig) · 135
Tags Indexed for User Defined Search parameter · 7,
134, 136
 applying changes · 138
 configuring · 136
 removing · 138
 window (fig) · 137
Tags to Be Added parameter · 7, 139
 activating tag definitions · 141
 adding tag definitions · 139
 deactivating tag definitions · 141
 removing tag definitions · 140
Tags to Be Deleted parameter · 7, 142
 adding · 142
 example · 144
 Indicator 1 field · 144
 Indicator 2 field · 144
 limit · 142
 removing tags · 145
 Source field · 143
 Subfields field · 144
 window (fig) · 143

U

UDC search, configuring · 134
Uniform Title as an Additional Access Point · 9
UNIMARC database, defining keyword indexing rules
for · 162
UNIMARC Fixed Field · 163
 adding to the keyword index · 167
 button · 167
units, requiring for serial/holdings item records · 43
Update tag and indicator numbers of bibliographic
records... setting · 49
Update tags and indicator numbers ... setting · 38
UpdateAuthoritySubj.exe · 97
Use Codabar 39 Mod 10 validation for item/patron
barcodes setting · 38, 43
User Defined Search · *See* library-defined browse

user permissions
 keyword search categories and · 63, 77, 95
 multiple subject heading functionality and · 97
user-defined · *See also* library-defined
user-defined search categories · 65, 136
USMARC · *See* MARC 21

V

Valid Birth Date option, Patron Cataloging Options
window · 114
Validate Item Barcode check box · 76
Validate Patron Password option, Patron Cataloging
Options window · 112
Validate Patron PIN option · 171
Validate Patron PIN option, Patron Cataloging
Options window · 112
Value for 003 setting · 36, 39
Variable Field settings, assigning multiple subfields ·
86, 165
variable fields, definition of · 83
variable tags, adding to the keyword index · 84
 for a UNIMARC database · 164
Verify ID option, Patron Cataloging Options window ·
114
View Record window (fig) · 154, 156
viewing
 Additional Access Points parameter · 8
 Authority Message parameter · 14
 Call Number Index and Priority parameter · 21
 Call Number Indexing Type parameter · 26
 Heading Replacement Flag · 16
 Holdings Call Number Increment parameter · 27
 Item Call Number Increment parameter · 31
 Item Level Call Number parameter · 30
 Keyword Indexing Configuration editor · 78
 MARC Heading Conflict Flag · 17
 New Heading Message parameter · 18
 Subject Headings to Index parameter · 133
 Tags Indexed for UDC Search parameter · 134
 Tags Indexed for User Defined Search parameter ·
136
 Tags to Be Deleted parameter · 142
Virtua ILS – Integrated Library System · 1
Virtua Profiler
 cataloging tab · 3
 overview of · 1
Virtua Profiler/Global Settings User's Guide · 1
Virtua Record Loading User's Guide · 31
vload.exe
 adding tags via · 139
 deleting tags via · 142
VRT barcode type · 39

W

workflow for keyword indexing · 63

Z

Z39.50

Bib-1 use attributes · 64

Zip code option, Patron Cataloging Options window ·
114