

Primer



Integrated Library System

Getting Started

with the Virtua Profiler

VIRTUA ILS – INTEGRATED LIBRARY SYSTEM

Getting Started
with the Virtua Profiler
Version 16.1
October 2017



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1. Introduction to the Virtua Profiler

The Virtua Profiler lets you customize almost every aspect of the Virtua™ ILS – Integrated Library System, and it offers all the benefits of a graphical user interface (GUI) running under a Windows 2000¹ or Windows XP operating system. In addition, the Virtua Profiler lets you perform tasks efficiently because it connects directly to the Oracle database.

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

Using the Virtua Profiler, you can . . .

- Set up, view, and edit parameters that affect each Virtua subsystem.
- Set up user profiles for the Virtua system.
- Configure Views of records that appear in the OPAC.
- Configure keyword indexing rules for your system.

This chapter covers the following topics:

- ⇒ [Using This Guide](#)
- ⇒ [Diagram of the Interactions of the Virtua Profiler](#)

1.1 Using This Guide

The *Virtua Profiler Getting Started Primer* is one of six user's guides that make up the documentation for the Virtua Profiler. The other guides are . . .

- *Virtua Profiler/Global Settings User's Guide* - Provides details on parameters that appear on the Global Settings tab of the Virtua Profiler, including information on setting user permissions and library locations parameters.
- *Virtua Profiler/Cataloging Parameters User's Guide* - Provides details on setting parameters that appear on the Cataloging tab of the Virtua Profiler, including information on configuring keyword searching.

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- *Virtua Profiler/OPAC Parameters User's Guide* - Provides details on setting parameters that appear on the OPAC tab of the Virtua Profiler, including how to configure MARC views.
- *Virtua Profiler/Circulation Parameters User's Guide* - Provides details on setting parameters that appear on the Circulation tab of the Virtua Profiler, including circulation matrices and location-specific circulation parameters.
- *Virtua Profiler/Acquisitions Parameters User's Guide* - Provides details on setting parameters that appear on the Acquisitions tab of the Virtua Profiler, including Purchase Request parameters.

This primer provides information about the general features of the Virtua Profiler, including its interactions with the database, the tree structure, tabs, menu bar, pop-up menus, and pop-up help. We also provide details on setting defaults, configuring Local Service Names, and logging in to the Profiler for the first time. Throughout this guide, we assume that you have read the *Virtua Client Getting Started Primer*, which offers an overview of the Virtua system and an explanation of terminology.

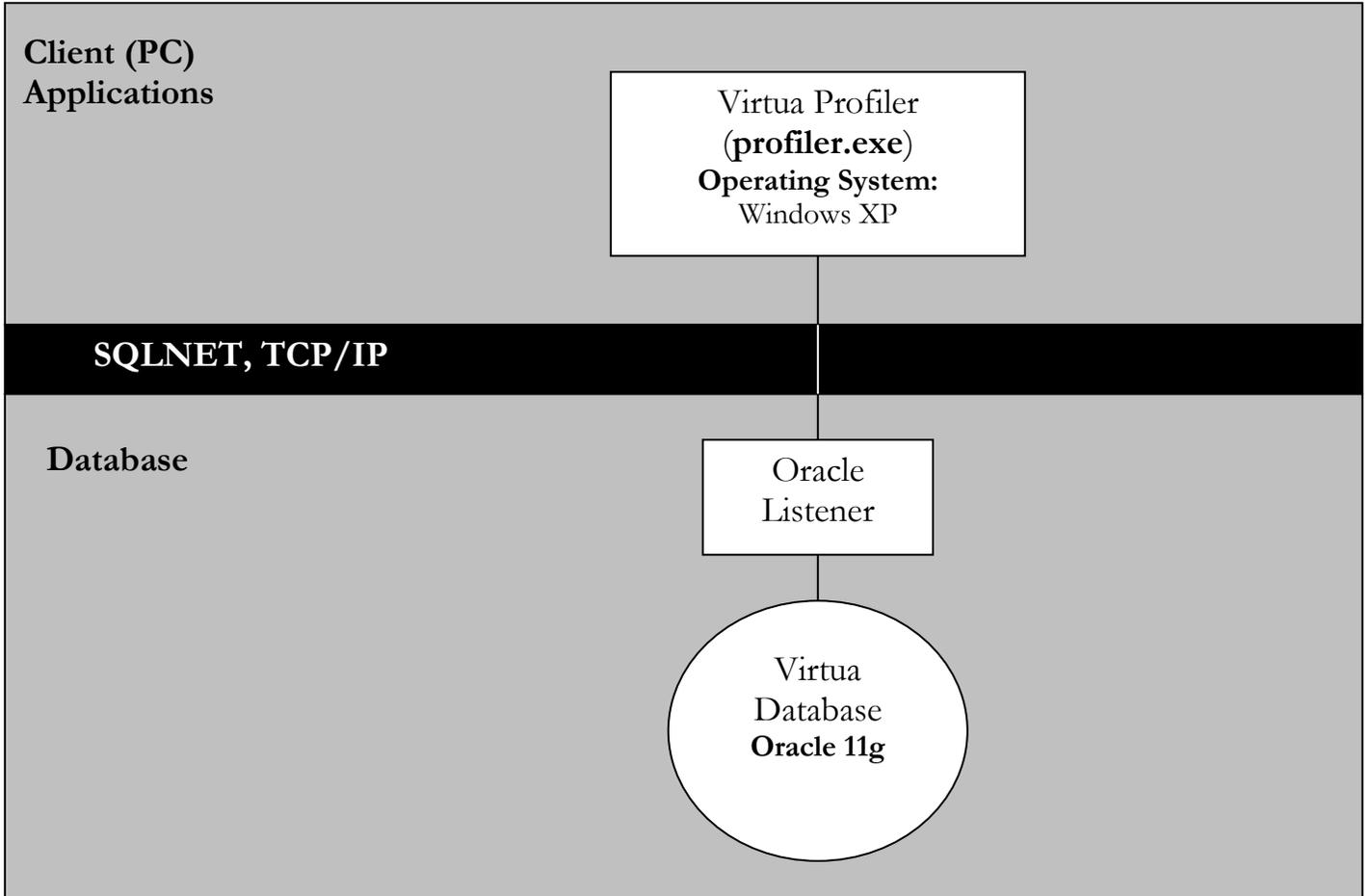
You can use the list below and the [Table of Contents](#) to locate specific information in this guide. For your easy reference, this guide also contains a [Table of Figures](#) and an [Index](#). In addition, each chapter in this guide begins with a list of topics that are included in the chapter, and each topic is hyperlinked to the appropriate section.

For . . .	See . . .
A diagram of the interactions of the Virtua Profiler	Section 1.2
Details on setting defaults, configuring Local Service Names, and logging in to the Virtua Profiler	Chapter 2
An overview of the Virtua Profiler and descriptions of the tree structure, tabs, menu bar, pop-up menus, and help	Chapter 3
Details on windows, tables, and other common features of the Virtua Profiler	Chapter 4
Information on the recommended order in which to set your Virtua Profiler parameters	Appendix A
Details on the changes that were made to update this user's guide from the last version.	Appendix B

Note: Throughout the *Virtua Profiler Getting Started Primer*, we assume that you are familiar with your Windows 2000 or Windows XP operating system.

1.2 Diagram of the Interactions of the Virtua Profiler

The Virtua Profiler is part of a two-tier, client/database system.



2. Getting Started

Before you can begin working with parameters, you must first log in to the Virtua Profiler. Before you can log in to the Profiler, however, you must complete various configuration tasks, which we describe in this chapter.

Note: The first three topics in this chapter are also discussed in the *Virtua Installation User's Guide*. You must complete these tasks before you log in to the Profiler. If you have already completed these tasks, you can skip ahead to the section “[Logging in to the Virtua Profiler](#)” in this chapter.

This chapter covers the following topics:

- ⇒ [Configuring Local Net Service Names](#)
- ⇒ [Setting Windows Time and Date Defaults](#)
- ⇒ [Configuring Oracle NLS_LANG Settings](#)
- ⇒ [Logging in to the Virtua Profiler](#)

2.1 Configuring Local Net Service Names

By configuring Local Net Service Names, you specify which databases you can access via the Virtua Profiler. To configure Local Net Service Names, you need to run the Oracle Net Manager.

Note: Running the Oracle Net Manager generates a new **tnsnames.ora** file. If you backed up your **tnsnames.ora** file from a previous installation of the Oracle Net Client, you need to insert the backup file in the \network\ADMIN directory of your Oracle 11g installation *before* you configure other Local Net Service Names.

To run the Oracle Net Manager,

1. On your Windows taskbar, click Start/All Programs/Oracle - OraClient11g_home1.

Note: The name of your shortcut path may vary slightly.

2. Select Configuration and Migration Tools.
3. Select Net Manager.

The Oracle Net Manager Welcome screen appears (*Figure 2-1*).

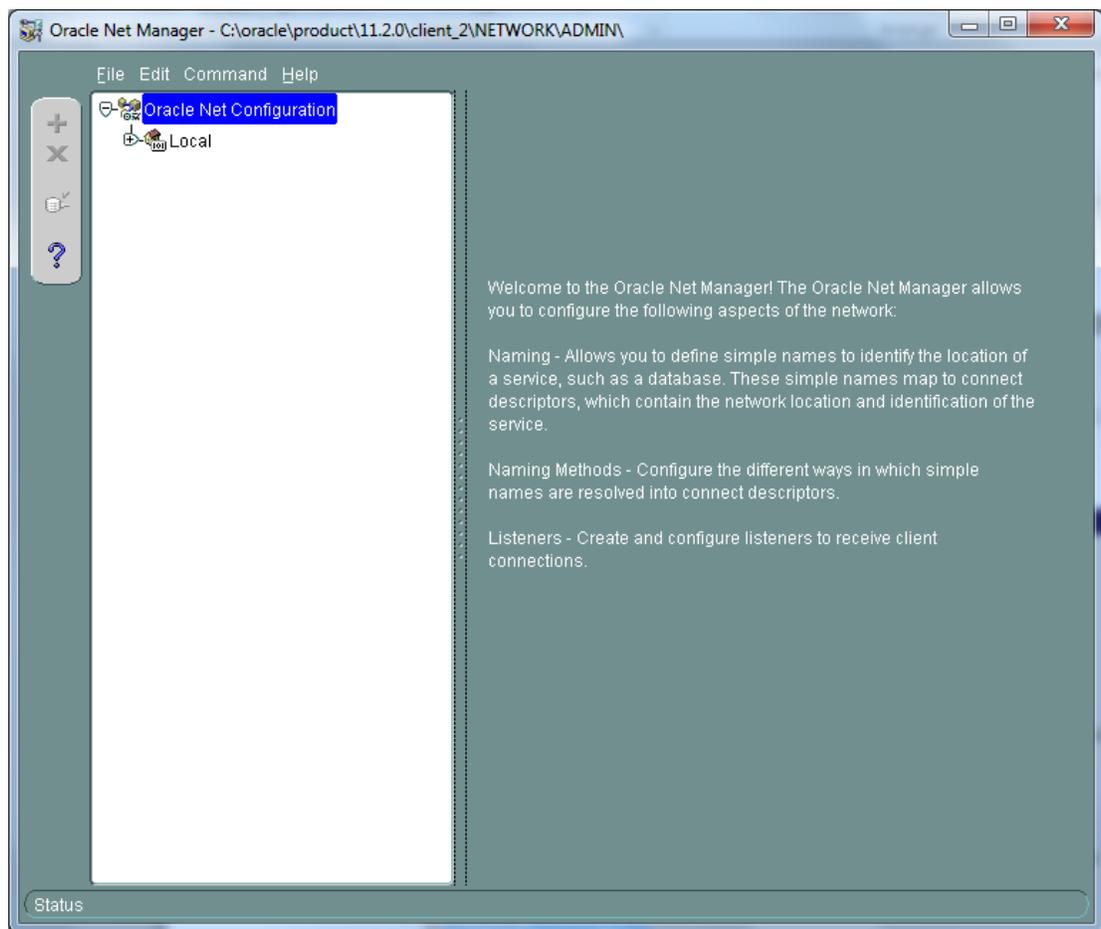


Figure 2-1. Oracle Net Manager - Welcome Screen

4. Expand the tree structure and select Service Naming (*Figure 2-2*).

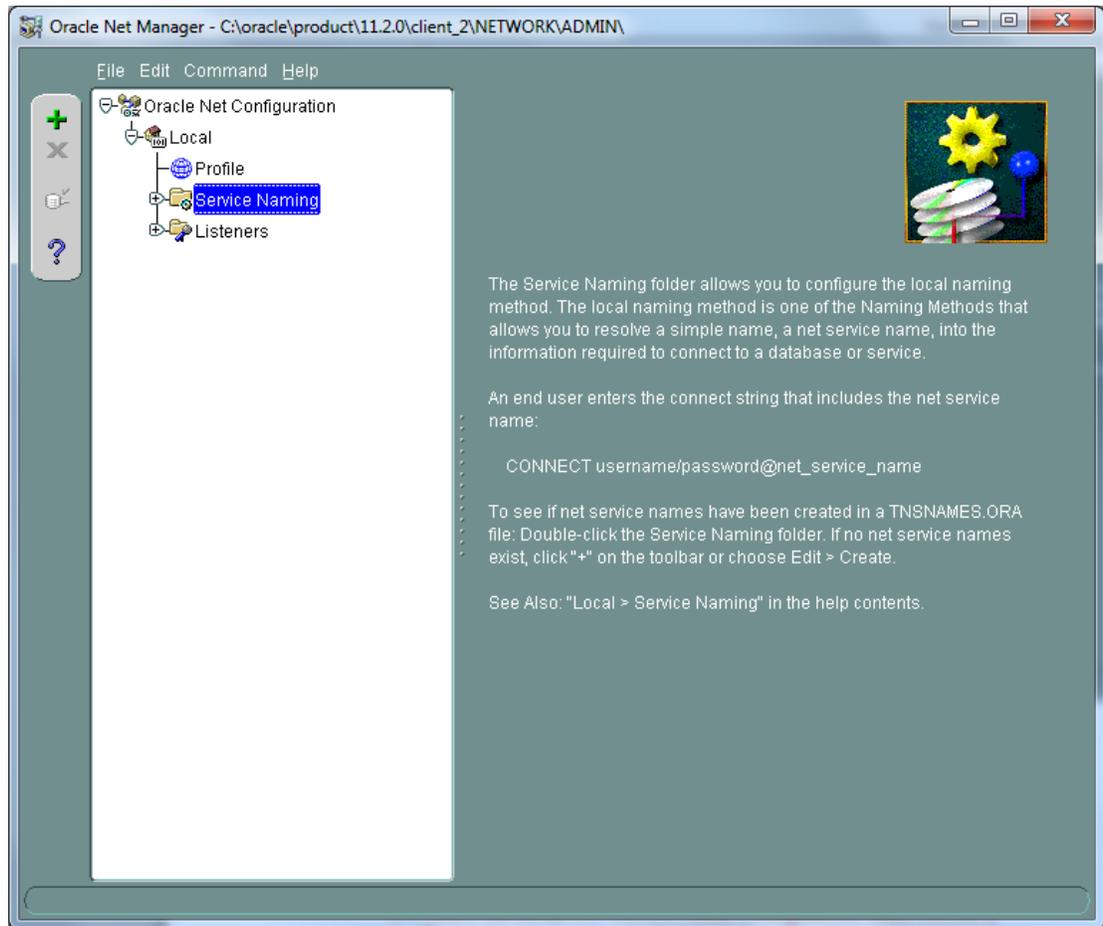


Figure 2-2. Oracle Net Manager - Tree Structure

5. Click the green plus sign icon  to display the Net Service Name Wizard Welcome screen (Figure 2-3).

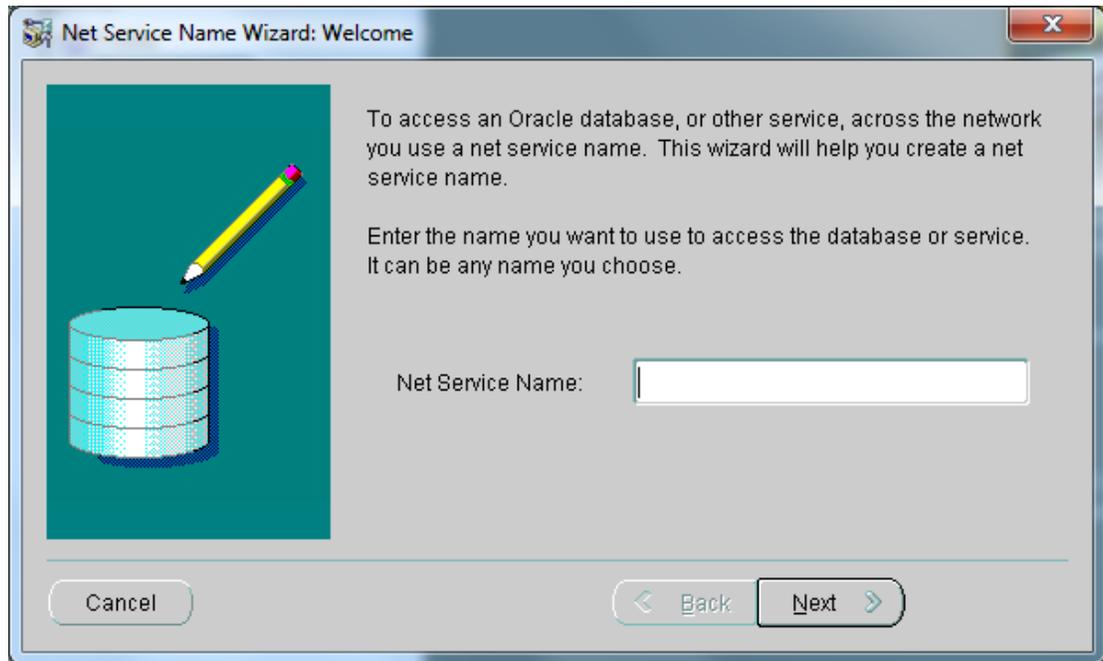


Figure 2-3. Oracle Net Manager - Net Service Name Wizard Welcome Screen

6. In the Net Service Name field, type a unique name for your database.

Note: We recommend that you use the server name where the database resides followed by the database number, for example, *apollo01* or *venus81*. Do NOT include parentheses in this name.

7. Click the Next button to view the Net Service Name Wizard, Protocol screen ([Figure 2-4](#)).

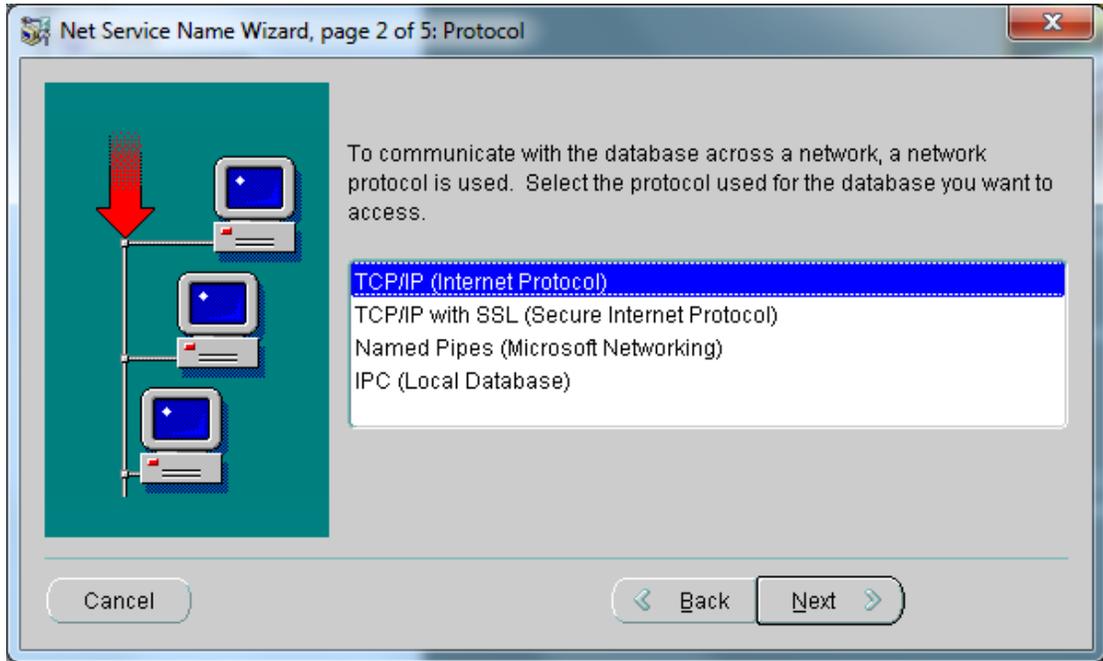


Figure 2-4. Oracle Net Manager - Net Service Name Wizard Protocol Screen

8. Select TCP/IP (Internet Protocol), and then click the Next button to view the Protocol Settings screen (Figure 2-5).

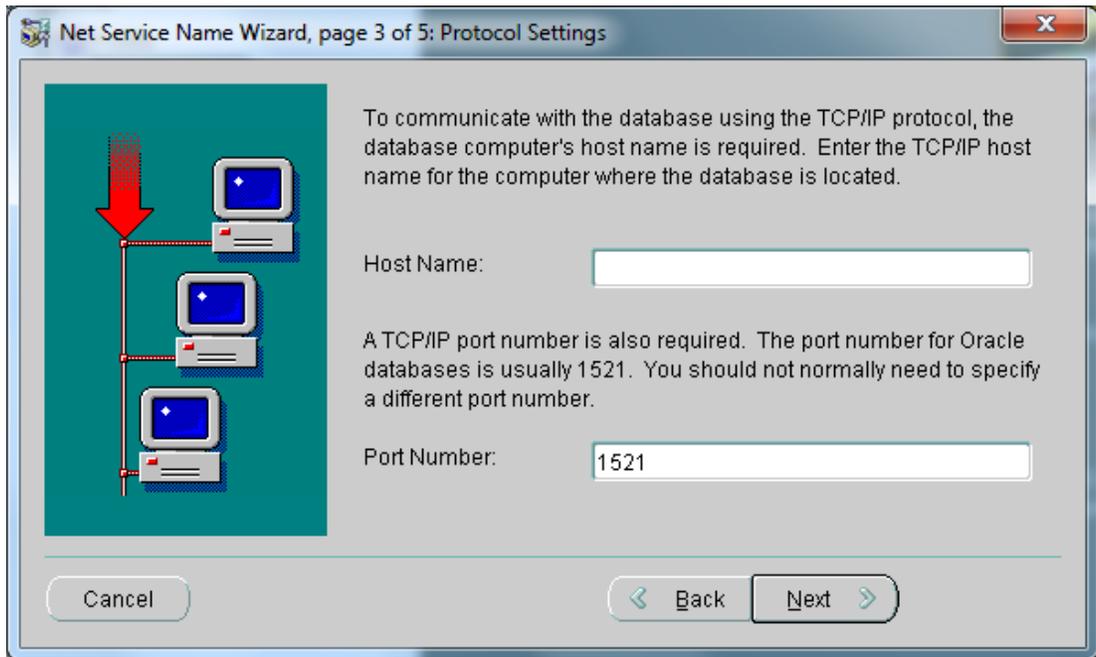


Figure 2-5. Oracle Net Manager - Net Service Name Wizard Protocol Settings Screen

9. In the Host Name field, type the IP address or the host name of the server, for example, *100.15.15.101* or *zeus.library.edu*.
10. If the Oracle Listener on the database you specified listens for a connection on a port other than 1521, type the port number in the Port Number field. Otherwise, accept the standard port number of 1521.
11. Click the Next button to proceed to the Service screen (*Figure 2-6*).

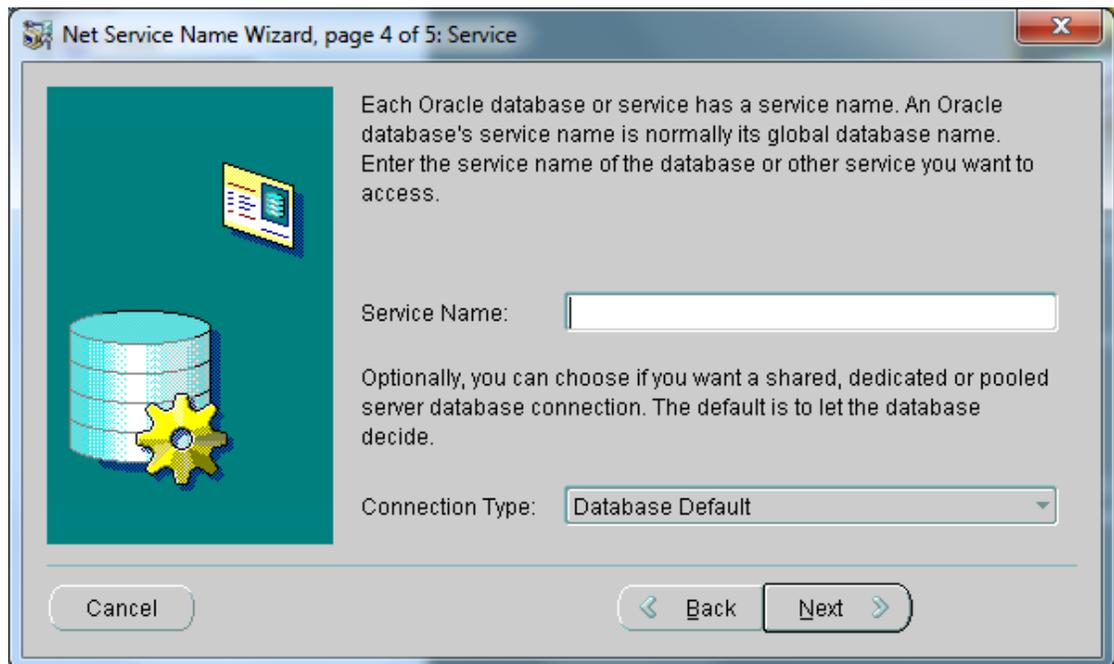


Figure 2-6. Oracle Net Manager - Net Service Name Wizard Service Screen

12. In the Service Name field, type your database's System Identifier. Use the name of the database as it is declared on the server. Virtua databases are *vtls##*, where *##* is the database number, for example, *vtls01*.
13. Click the Next button to proceed to the Net Service Name Configuration, Test screen (*Figure 2-7*).

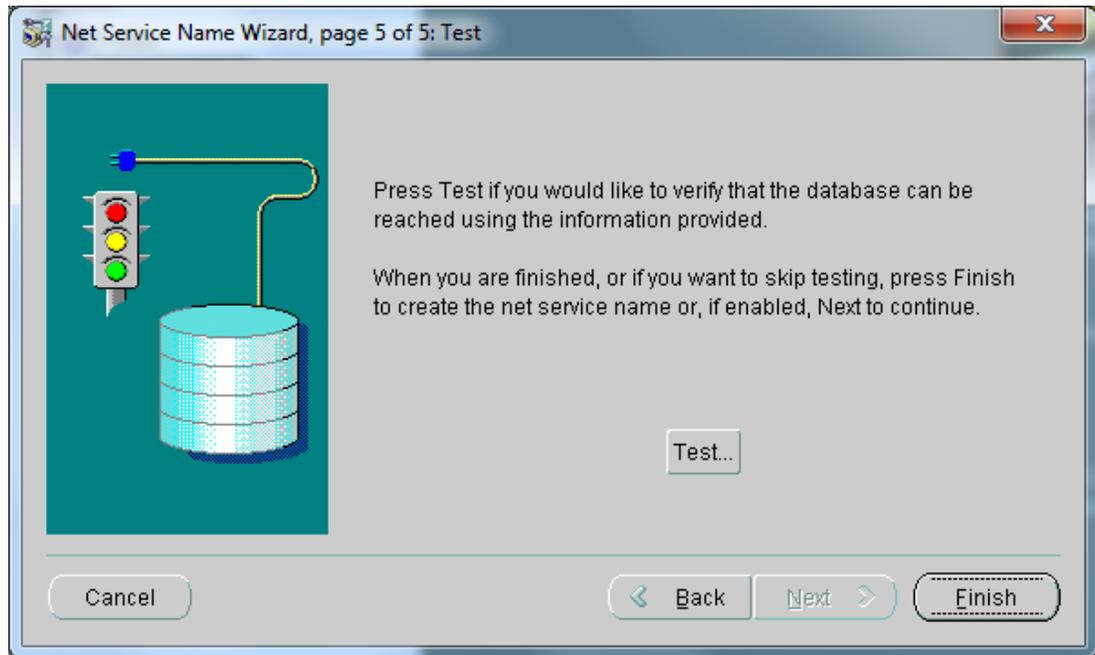


Figure 2-7. Oracle Net Manager - Net Service Name Wizard Test Screen

14. Click the Test button to test the new configuration.

The Oracle client attempts to connect to the database using a default password for Oracle databases. This connection attempt will fail. Information about the failed test will be displayed on the Connection Test screen ([Figure 2-8](#)).

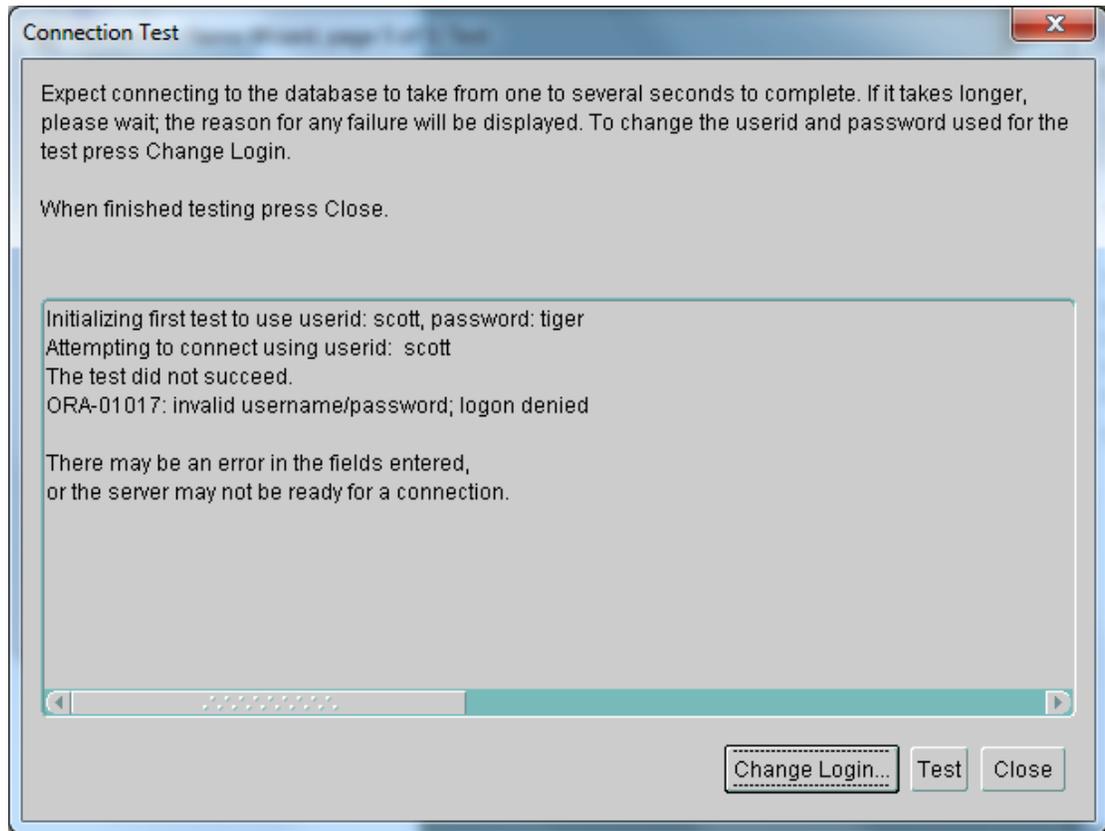


Figure 2-8. Connection Test Screen - Failure Message

15. Click the Change Log-in button to view the Log-in dialog with the default connection information (Figure 2-9).

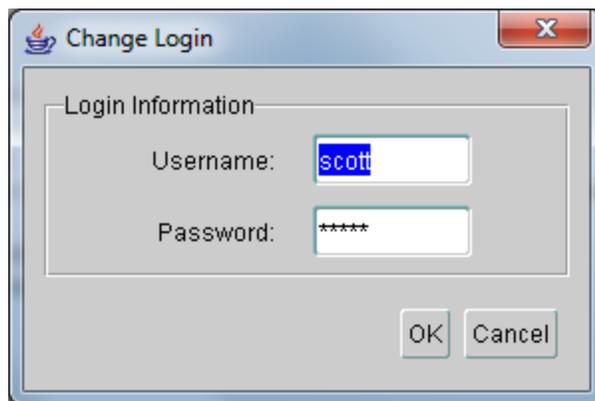


Figure 2-9. Log-in Dialog Box

16. Type the Oracle username and password for the database to which you are setting up a connection.
17. Click the OK button to return to the Connection Test screen (*Figure 2-8*).
18. Click the Test button to test the new username and password you entered.

If the username/password you entered is correct, the Connection Test screen will display a confirmation message (*Figure 2-10*).

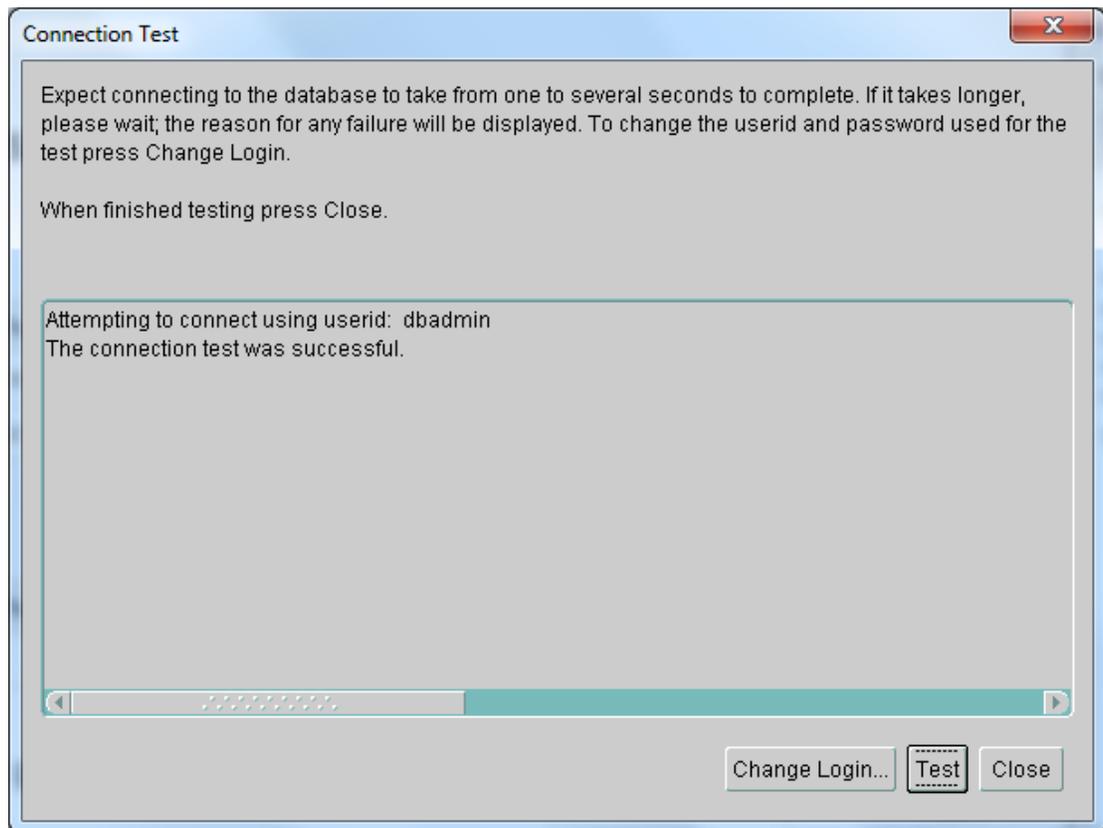


Figure 2-10. Connection Test Screen - Confirmation Message

19. Click the Close button close the Connection Test screen and return to the Test screen (*Figure 2-7*).
20. On the Test screen, click the Finish button. The Oracle Net Manager main window appears, with your new Local Net Service Name highlighted in the tree structure (*Figure 2-11*).

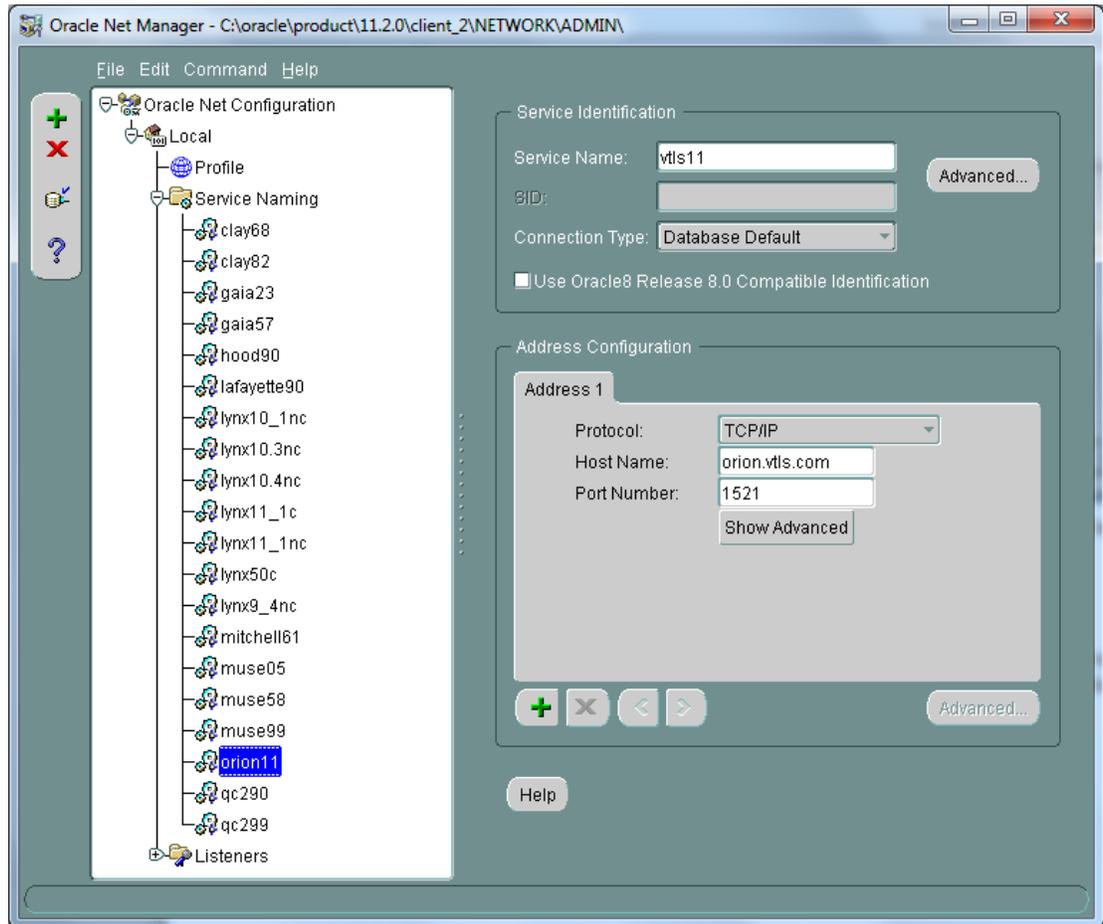


Figure 2-11. Oracle Net Manager - Displaying New Local Net Service Name

21. If you would like to configure another Local Net Service Name, return to step 4 of this workflow.

-OR-

If you have finished adding Local Net Service Names, select Save Network Configuration from the File menu (Figure 2-12).

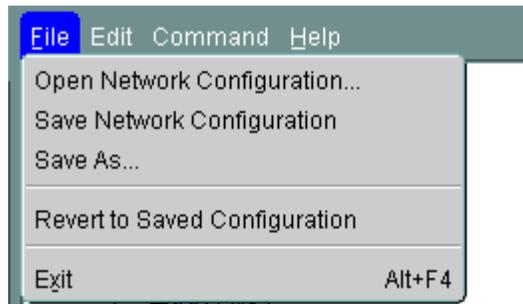


Figure 2-12. Oracle Net Manager - File Menu

22. Once you have saved your network configuration settings, click Exit to close the Oracle Net Manager.

2.2 Setting the Windows Time and Date Defaults

In order for the Virtua Profiler to work properly, two default settings must be set correctly for your Windows operating system:

- Time Display
- Date Format

The Virtua Profiler uses the format of your Windows time and date settings for displaying times and dates within parameters. For example, when you set up the Library Hours parameter, you will set your library hours according to the date format selected for your Windows operating system.

Below we provide instructions for setting the Time and Date defaults for your Windows® XP operating system. If you are using a different Windows operating system, your procedures may vary slightly from those provided below.

Important: You must set the Time Display and the Date Format *before* you log in to the Virtua Profiler.

2.2.1 Setting the Time Display

To set the proper Time Display for a Windows XP operating system,

1. On the Windows taskbar, click the Start button.
2. Choose Settings/Control Panel/Regional and Language Options.

The Regional and Language Options window appears (*Figure 2-13*).

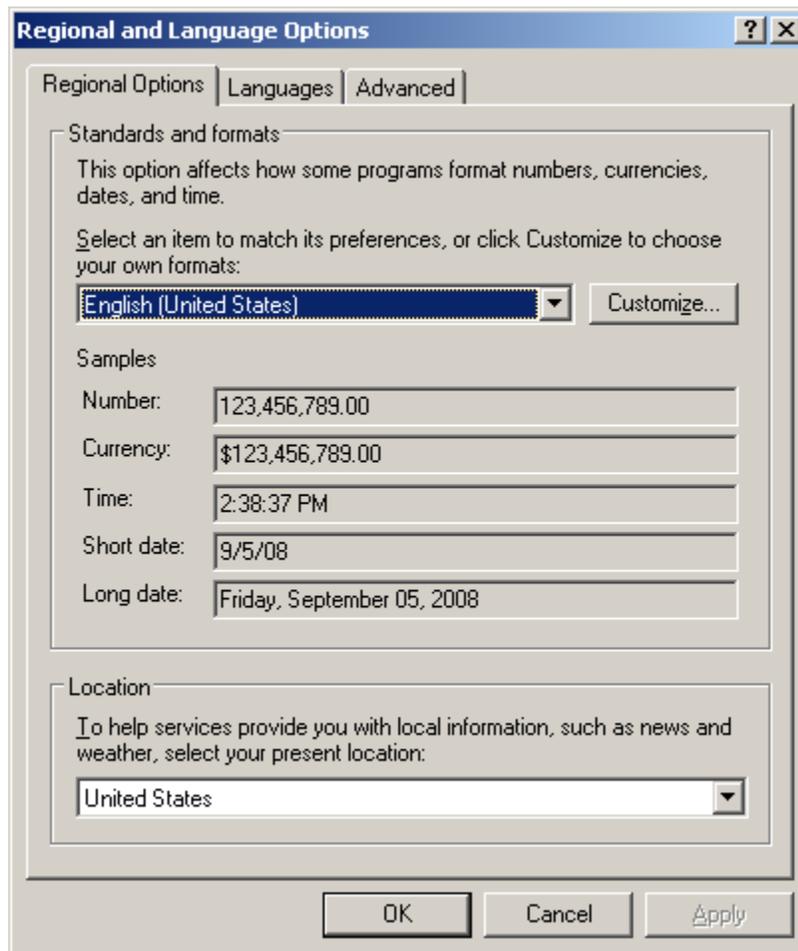


Figure 2-13. Regional and Language Options Window

3. On the Regional and Language Options window, click the Customize button (*Figure 2-15*). The Customize Regional Options window appears.

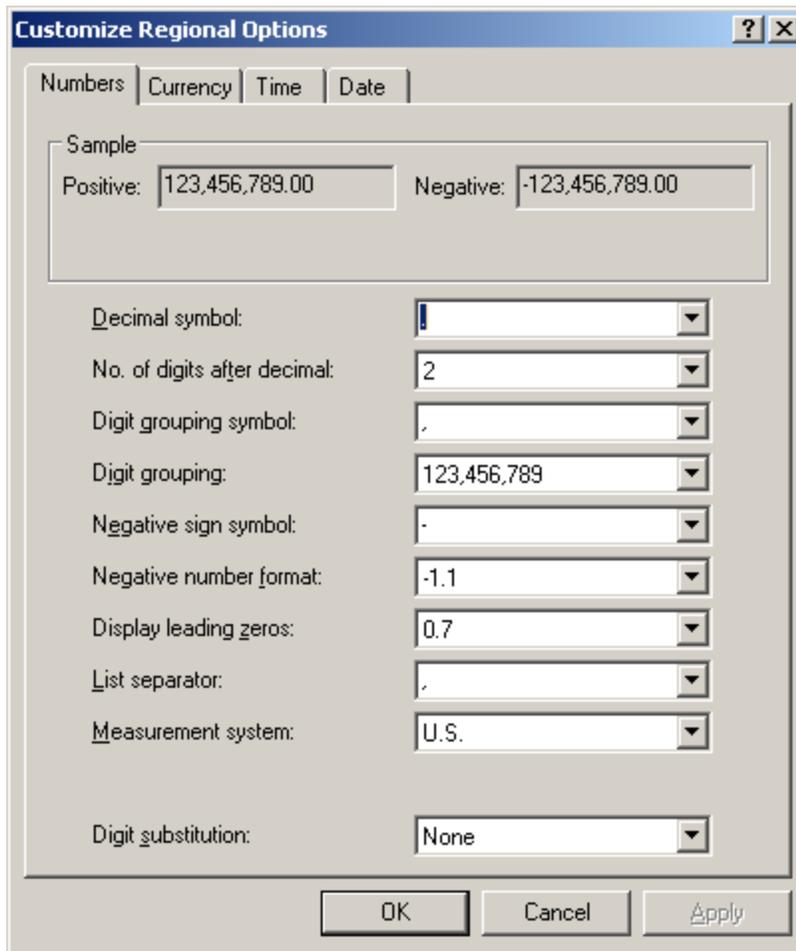


Figure 2-14. *Customize Regional Options Window*

4. Click the Time tab.

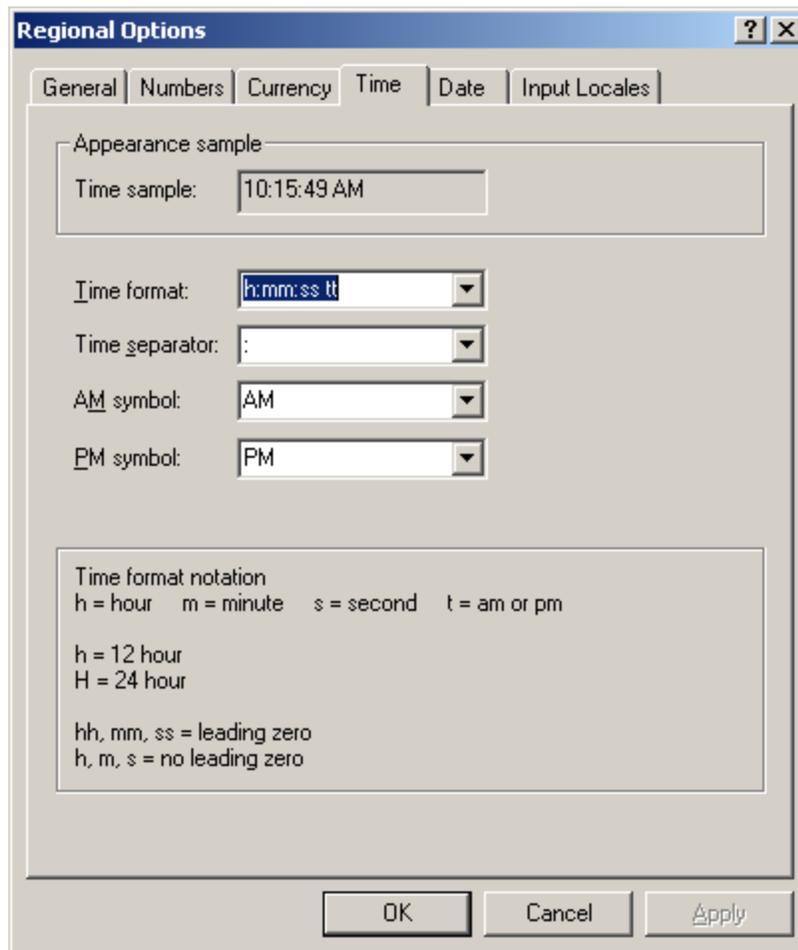


Figure 2-15. Regional Options Window - Time Tab

5. Choose an appropriate Time Format.
6. In the pull-down list boxes labeled AM Symbol and PM Symbol, make sure the symbols for AM and PM are exactly that: **AM** and **PM**, with no periods.
7. Click OK.

Your settings are applied. The time display you chose will appear throughout the Profiler.

2.2.2 Setting the Date Format

To set the proper Date Format for a Windows XP operating system,

1. On the Windows taskbar, click the Start button.
2. Choose Settings/Control Panel/Regional Options.

The Regional and Language Options window appears (*Figure 2-13*).

3. On the Regional Options window, click the Customize button. The Customize Regional Options window appears (*Figure 2-16*).
4. Click the Date tab.

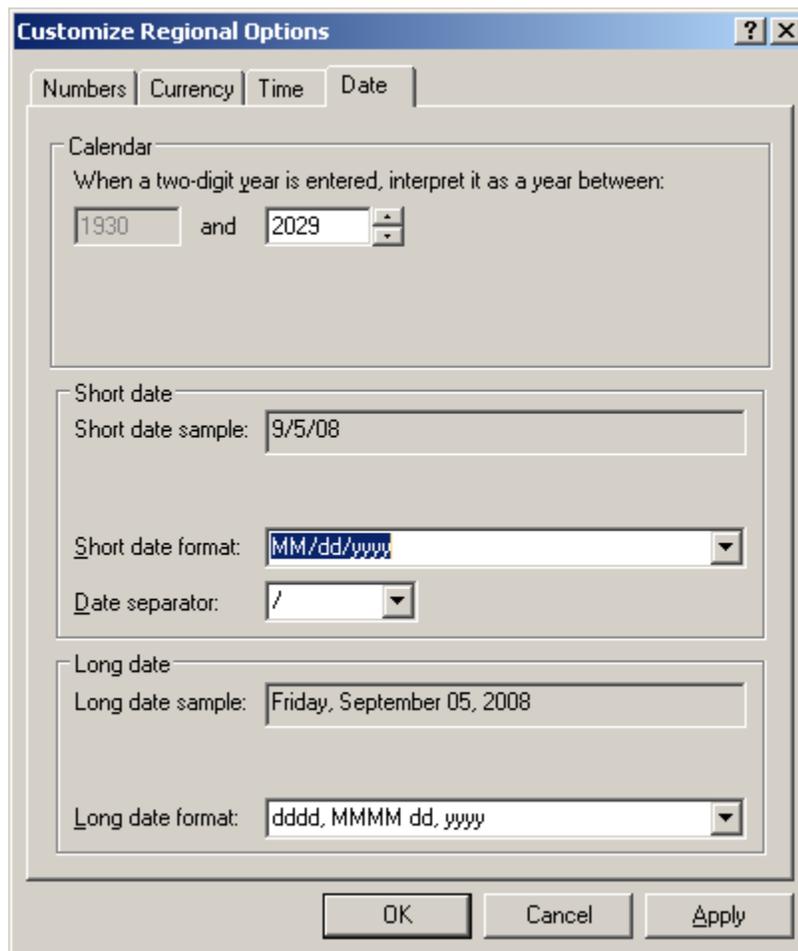


Figure 2-16. Customize Regional Options Window - Date Tab

5. In the drop-down list box labeled Short Date Format, choose a date format with a four-digit year, and then click OK.

Your settings are applied. The date format you chose will be used throughout the Profiler.

2.3 Configuring Oracle NLS_LANG Settings

For your Virtua Profiler to display and write UTF-8 characters, the Oracle NLS_LANG settings on your PC must match the NLS_LANG settings in your Virtua database. The NLS_LANG setting for ALL Virtua databases is AL32UTF8.

When you launch the Virtua Profiler, Virtua checks to make sure that your NLS_LANG setting is properly configured. If it is NOT set correctly, the following message appears ([Figure 2-17](#)).



Figure 2-17. Error Message Displayed When NLS_LANG Setting Is Incorrect

Note: The Virtua Profiler configures the message to be appropriate for the locality of your PC. For example, [Figure 2-17](#) shows the message that would appear on a machine where the locality is AMERICAN_AMERICA.

Click the Yes button to change your NLS_LANG setting to AL32UTF8. If you click the No button, the Connect menu item will be disabled on the File menu, and you will not be able to log in to the Virtua Profiler.

Note: After the NLS_LANG setting is properly configured, this message will NOT appear when you launch the Profiler.

2.4 Logging In to the Virtua Profiler

You are ready to launch the Virtua Profiler after you have . . .

- Successfully installed the Virtua Profiler by following the installation procedures in the *Virtua Installation User's Guide*.
- Configured your Local Net Service Names.
- Set the Windows Time Display and Date Format.

2.4.1 Launching the Virtua Profiler

To launch the Virtua Profiler,

- On the Windows Start menu, choose Programs/VTLS/Profiler.

Virtua checks your NLS_LANG setting (see the section “[Configuring Oracle NLS_LANG Settings](#)”). If it is properly configured, the Virtua Profiler main window appears (*Figure 2-18*).

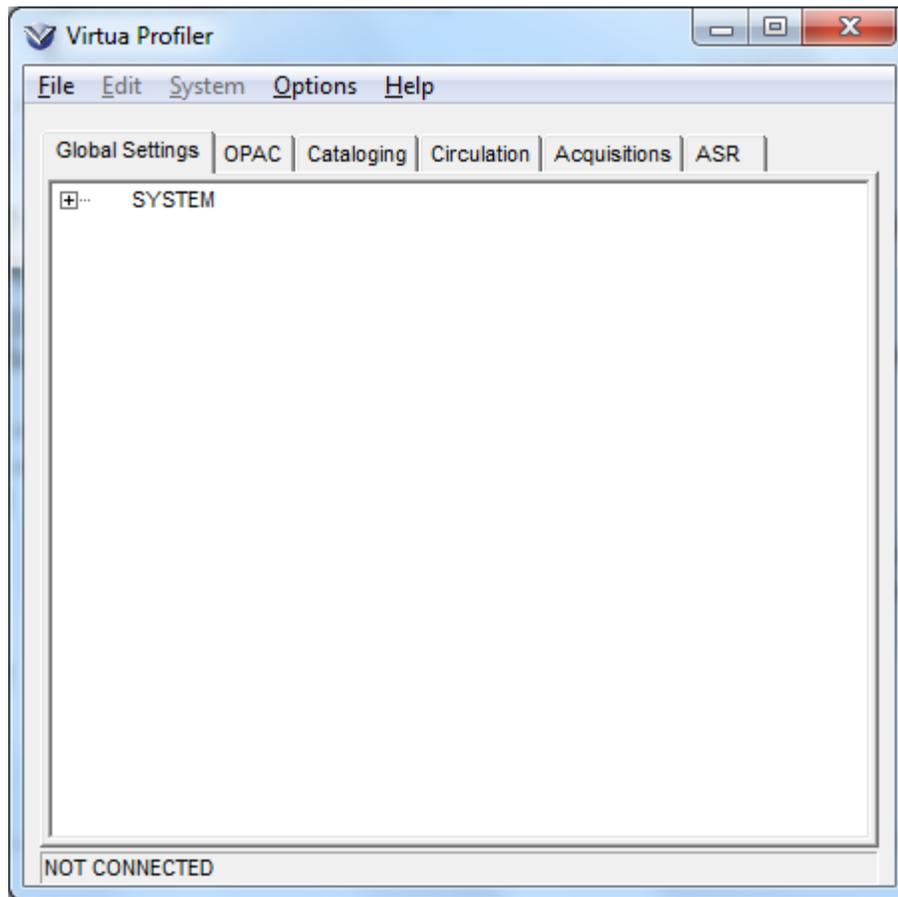


Figure 2-18. Virtua Profiler Main Window

At the bottom of the window, the status bar displays NOT CONNECTED.

2.4.2 Connecting to a Database and Logging in to the Profiler

To connect to an Oracle database and log in to the Virtua Profiler,

1. On the menu bar, click File.
2. Choose Connect.

Note: The Connect menu item is enabled only if you have the Oracle Client installed and if your Oracle NLS_LANG setting is properly configured.

The Log-in dialog box appears (*Figure 2-19*).

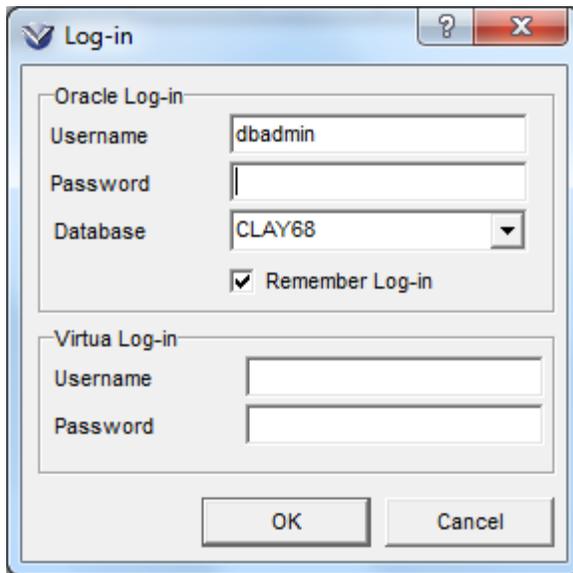


Figure 2-19. Virtua Profiler Log-in Box

3. In the Oracle Log-in area, type your Oracle username and password in the appropriate text boxes.
4. In the Database drop-down list box, select a database.

Note: This list box contains the Local Net Service Names that you configured with the Net Configuration Assistant. For details, see the section “[Configuring Local Net Service Names](#)” in this chapter.

5. If you want your Oracle log-in information to be remembered the next time you log in to the Virtua Profiler, select the Remember Log-in check box..

Note: If you select the Remember Log-in check box, the next time you log in to the Virtua Profiler, the Oracle username and database that you selected for the previous log-in will be supplied for you.

6. In the Virtua Log-in area, type your Virtua username and password in the appropriate text boxes, and then click OK.

Note: You can log in using any User Profile that has permission to access the Profiler. Throughout this guide, however, we assume that you are logged in as

root, which gives you access to all the features in the Virtua Profiler. For details on User Profiles, see the *Virtua Profiler/Global Settings User's Guide*.

An Oracle channel or connection is established between the client and server using an Oracle Client on your PC and an Oracle User Account on the server.

Note: To connect to the Oracle database, an Oracle listener must be running. If you receive an error message indicating that a listener is NOT running, start a listener, and then try logging in again. For details on starting an Oracle listener, see the *Virtua Installation User's Guide*.

Virtua then authenticates your username and password. If Virtua is able to validate your user profile, it initializes and configures the main window of the Virtua Profiler according to your user permissions (*Figure 2-20*).

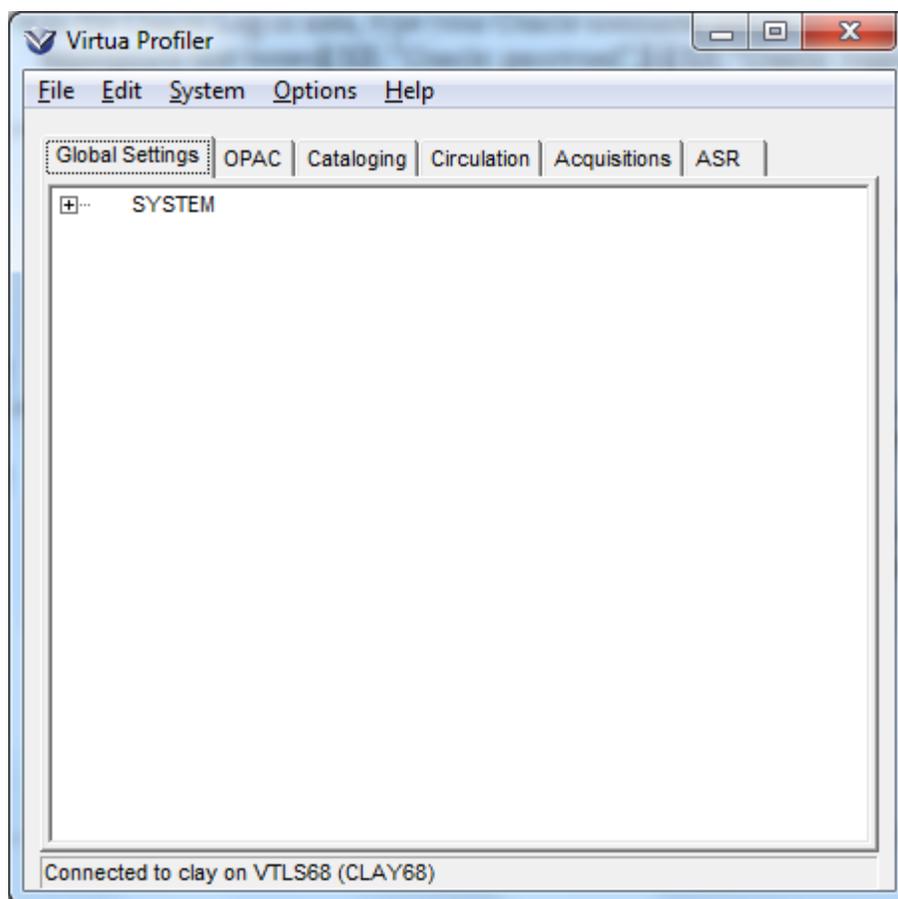


Figure 2-20. Virtua Profiler Main Window

The content of the Virtua Profiler main window will vary, depending on your user permissions. For details on viewing the Virtua Profiler window, see the following chapter, “[Getting Oriented](#).”

Note: After you have established a connection, you can use the Connect option on the File menu to change your connection at any time during your session.

2.4.3 Locked Oracle User Accounts: What to Do

When you log in to the Virtua Profiler several times using an incorrect Oracle password, the system “locks” the Oracle user account so that you cannot attempt any more log ins. You need to run a script to unlock the Oracle user account.

To unlock an Oracle user account,

1. Log in to your server as the **dbadmin** user.
2. Type: `./unlockProfilerAccount.sh <user_account_name>`

...where [**<user_account_name>**] is the username assigned to the Oracle user in the database.

3. Press Enter.

The script unlocks the user.

3. Getting Oriented

In this chapter, we describe the aspects of the Virtua Profiler main window, provide hints for navigating the Profiler, and discuss general parameter characteristics. In addition, this chapter contains an overview of the editing functions that are available throughout the Profiler.

This chapter covers the following topics:

- ⇒ [Working with Tabs on the Profiler Main Window](#)
- ⇒ [Working with the Profiler “Tree” Structure](#)
- ⇒ [Working with the Profiler Menu Bar](#)
- ⇒ [About the Pop-up Menu](#)
- ⇒ [Setting the Font of the Virtua Profiler](#)
- ⇒ [Getting Help with the Virtua Profiler](#)

3.1 Working with Tabs on the Profiler Main Window

After you log in to the Virtua Profiler, the Virtua Profiler main window appears (*Figure 3-1*).

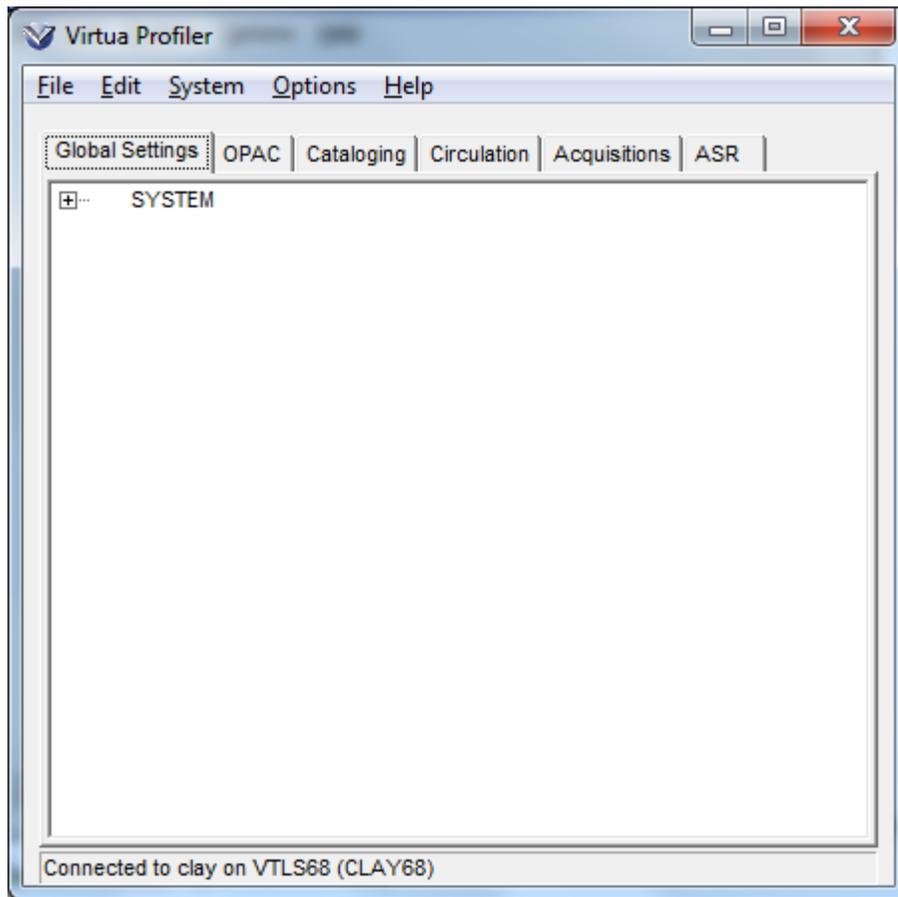


Figure 3-1. Virtua Profiler Main Window

The status bar at the bottom of the window indicates the database and server to which you are connected. The tnsnames alias is displayed in parentheses in the status bar.

Note: The tnsnames alias is specified in the **tnsnames.ora** file, and appears in the Database drop-down list on the Profiler's Log-in window ([Figure 2-19](#)).

The main window can display up to five tabs, depending on the functions your user permissions allow. For details on User Profiles, see the *Virtua Profiler/Global Settings User's Guide*.

Four tabs relate to specific subsystems: OPAC, Cataloging, Circulation, and Acquisitions. One tab, Global Settings, contains settings that control functions throughout your entire system. At least one tab must appear for you to use the Virtua Profiler.

You can view the parameters associated with a particular tab by clicking that tab and then expanding the first heading in the tree. For details, see the following section.

3.2 Working with the Profiler “Tree” Structure

Each tab on the Virtua Profiler main window has a “tree” structure that represents the hierarchy of the parameters on that tab. Using your mouse or your keyboard, you can navigate the Profiler by expanding and collapsing the tree.

The tree structure builds dynamically, meaning that the Virtua Profiler does not build all the branches of the trees at once. Rather, as you select an item, or heading, the Virtua Profiler builds that part of the structure. When you click a heading, if one or more subheadings exist, a plus sign (+) appears to the left of the primary heading. When you click the plus sign or double-click the heading, the plus sign changes to a minus sign (-), indicating that the branch of the tree is fully expanded.

Note: The settings for user permissions are organized using a similar tree structure. For details on user permissions, see the *Virtua Profiler/Global Settings User’s Guide*.

In this chapter, we describe several ways in which you can expand and collapse the Virtua Profiler tree structure. For simplicity, however, throughout this user’s guide and in the other Virtua Profiler user’s guides, we use only the double-click method in our step-by-step instructions. Keep in mind that all of the following methods are available to you.

3.2.1 Expanding the Tree

To expand the tree structure of a heading,

- Double-click the heading.
-OR-
- Click the plus sign (+) to the left of a heading.
-OR-
- Highlight a heading that has a plus sign (+), and then press the RIGHT arrow key on your keyboard.

Note that when you click a plus sign (+), it changes to a minus sign (-) to indicate that the heading is expanded.

3.2.2 Collapsing the Tree

To collapse the tree structure of a heading,

- Double-click the heading.
-OR-
- Click the minus sign (-) to the left of a heading.
-OR-
- Highlight the heading, and then press the LEFT arrow key on your keyboard.

Note that when you click a minus sign (-), it changes to a plus sign (+) to indicate that the heading is not expanded.

3.2.3 Viewing and Editing a Fully Expanded Item

In most cases, you can view and/or edit only those items that have been fully expanded.

To view and/or edit a fully expanded item,

- Double-click the item.

A window associated with the selected heading appears. The main window is disabled while any parameter-specific window is open.

3.2.4 Understanding Tree “Paths” in this Guide

Throughout this guide and in the other Virtua Profiler user’s guides, we provide you with step-by-step instructions for finding items in the Virtua Profiler tree structure. In some cases, however, we abbreviate instructions by indicating the path to a branch in the tree.

For example, to simplify a path to a specify library location, which you define via the Location Names parameter, we would indicate the path to the window in the following manner:

Global Settings tab/SYSTEM/Location Names/Kenmore Art Library/East Branch

When we represent a path in this way, you can assume that a double-click on the last item in the path (in this case, East Branch) will display the relevant window (in this case, Modify Sublocation).

3.3 Working with the Profiler Menu Bar

The Virtua Profiler menu bar offers five menus: File, Edit, System, Options, and Help.

3.3.1 File Menu

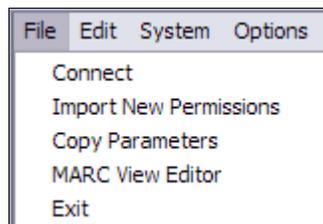


Figure 3-2. File Menu

The File menu offers the following menu items:

- **Connect** - Displays the Log-in dialog box, where you can connect to a different database and/or as a different Virtua User. For details, see the section “[Logging In to the Virtua Profiler](#)” in this user’s guide.
- **Import New Permissions** - Lets you import the permissions associated with the latest Virtua client while keeping the permissions already set in your database. Every time you install a new version of the Profiler, you *must* use this feature (for details, see the *Virtua Profiler/Global Settings User’s Guide*.)
- **Copy Parameters** - Displays the Parameter Copy Utility window, where you can copy Virtua Profiler parameters from one database to another. For details, see the chapter “[Working with the Parameter Copy Utility](#)” in this user’s guide.
- **MARC View Editor** - Displays the MARC View Editor window, where you can edit View records. For details, see the *Virtua Profiler/Global Settings User’s Guide*.
- **Exit** - Logs you out of the Virtua Profiler and closes the Virtua Profiler main window.

3.3.2 Edit Menu

The Edit menu (*Figure 3-3*) displays three options: Add, Modify, and Delete.

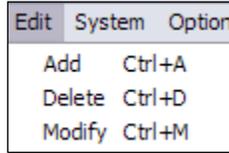


Figure 3-3. Edit Menu

- **Add** - Lets you add a new item to the tree. The new item is added under the highlighted item.
- **Delete** - Lets you delete the highlighted item. In most cases, you receive a confirmation message before the item is deleted.
- **Modify** - Lets you modify the highlighted item.

Note: These editing features work only for parameters that can be edited directly from the tree.

The options on the Edit menu duplicate functions that are also available from the pop-up menu and from keyboard shortcuts. For details, see the section “[About the Pop-up Menu](#)” in this chapter.

3.3.3 System Menu

The System menu (*Figure 3-4*) displays five options: Global Settings, OPAC, Circulation, Cataloging, and Acquisitions. ASR (Automated Stack Request) is available for flagged databases.



Figure 3-4. System Menu

Each option on the System menu corresponds to a tab on the Virtua Profiler window. You can use this menu to switch from one tab to another.

3.3.4 Options Menu

The Options menu displays three options: Font, Sort Locations By, and Language.

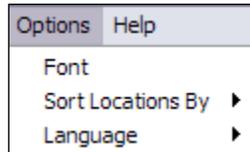


Figure 3-5. Options Menu

- **Font** - Lets you choose a font for the Virtua Profiler interface. For details, see the section “[Setting the Font of the Virtua Profiler](#)” in this chapter.
- **Sort Location By** - Offers a submenu with two options that let you determine how to sort locations in the Location Names parameter:
 - ◆ **Name** - Sorts locations by name.
 - ◆ **Number** - Sorts locations by location code.
- **Language** - Offers a submenu of language display options for the Virtua Profiler interface, including permissions. Innovative will add languages to the submenu as translations are completed. Translations of Profiler language strings are stored in **plang.*** files, which reside in the DBTables directory of your Virtua Client installation (for information about translating the Virtua Profiler, see the *Virtua Translation and String Customization Guide*).

Important: For the Language option to function, you must have the Virtua Client installed on the same PC as the Profiler.

3.3.5 Help Menu

The Help menu ([Figure 3-6](#)) displays two options: About and Permissions Help.

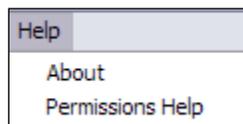


Figure 3-6. Help Menu

- **About** - Displays Innovative copyright and license restriction information and version numbers for your Virtua Profiler, server, and database.
- **Permissions Help** - Displays online Virtua Profiler Permissions help. For more information, see the section “[Using Online Profiler Permissions Help](#)” in this guide.

Note: Profiler Permissions help is also available from the Help menu in the Virtua client. For more information see the *Virtua Client Getting Started Primer*.

3.4 About the Pop-up Menu

The editing functions that are available via the Edit pull-down menu are also available from a pop-up menu.

Note: The pop-up menu is available *only* for items that support editing functions.

To see the pop-up menu,

1. Highlight the desired parameter.
2. Click your right mouse button.

The pop-up menu appears ([Figure 3-7](#)).

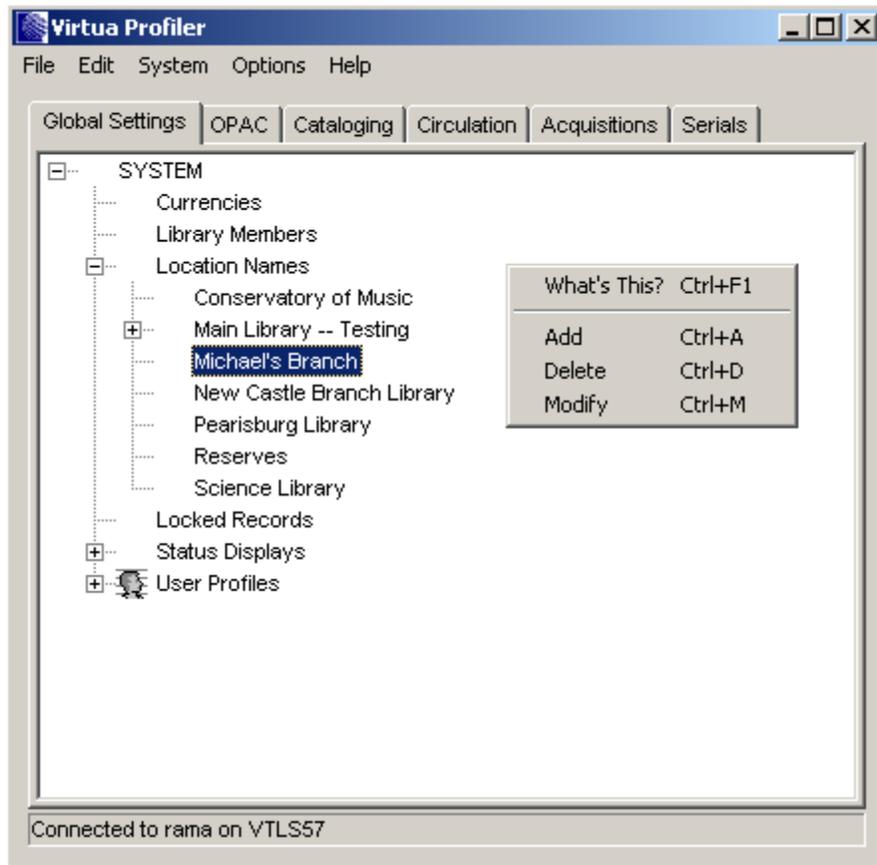


Figure 3-7. Pop-up Menu (Displaying Editing Functions)

The pop-up menu contains the options described below. Note that next to each option a shortcut key combination appears and performs the same function as the menu item.

- **What's This?** - Displays context-sensitive help about the selected tab.
- **Add** (CTRL+A) - Lets you add a new item to the tree. The new item is added under the highlighted item. For example, in [Figure 3-7](#), the Add function would let you add a new sublocation to the Main Library.
- **Delete** (CTRL+D) - Lets you delete the highlighted item. You receive a confirmation message before the item is deleted. For example, in [Figure 3-7](#), the Delete menu item would let you delete the Main Library.
- **Modify** (CTRL+-) Lets you modify the highlighted item. For example, in [Figure 3-7](#), the Modify menu item would let you modify settings for the Main Library.

For details on using the *What's This?* option from the pop-up menu, see the section “[Getting Help with the Virtua Profiler](#)” in this chapter.

3.5 Setting the Font of the Virtua Profiler

You can use the Font option, which is available on the Options menu, to set the font of the Virtua Profiler.

Important: When you set the font of the Virtua Profiler, keep in mind that . . .

- Large fonts can cause text to run off its window or control. We recommend that you do NOT choose a font size that is larger than the default font. Depending on the font style you select, you may need to adjust the font point size to keep the font the same size as the default font.
- When installing fonts, keep in mind that some fonts use more disk space than others. For example, Arial Unicode MS uses approximately 30 MB of disk space, whereas Tahoma, the default font of Virtua, uses about 0.5 MB.

To choose the font of the Virtua Profiler,

1. On the Virtua Profiler menu bar, click Options.
2. Choose Font.

The Font window appears ([Figure 3-8](#)).

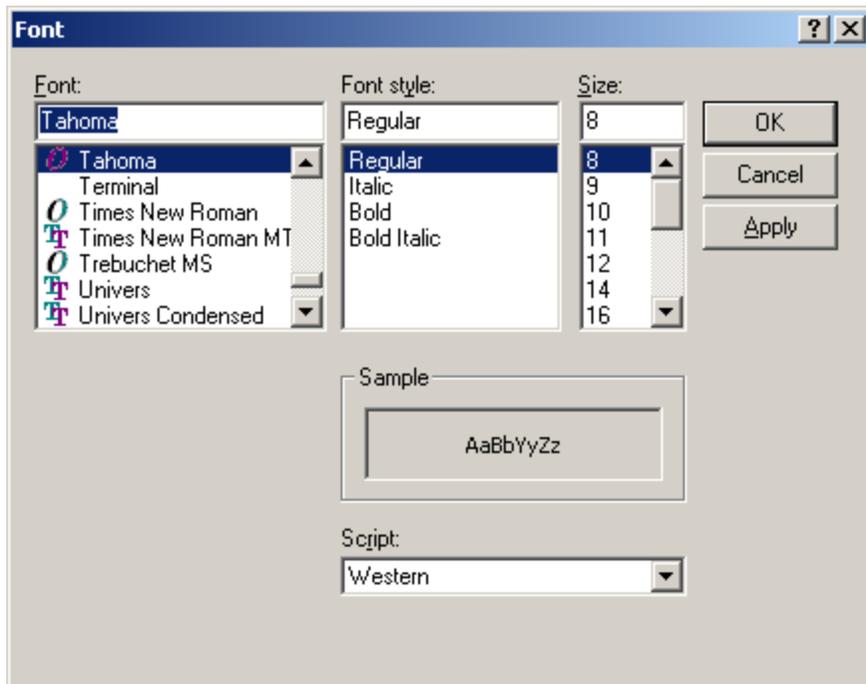


Figure 3-8. Font Window

3. Choose the desired font, font style and size, and then click OK.

The font of the Virtua Profiler main window and all parameter windows changes as appropriate.

Note: The font of some strings, such as menu items, is determined by the display settings defined for your Windows operating system. The Virtua Profiler's Font option does not affect the font of these strings. For details on configuring your Windows display settings, consult your Windows documentation.

3.6 Getting Help with the Virtua Profiler

3.6.1 Using Context-sensitive Help

Context-sensitive help lets you complete tasks both easily and efficiently by providing you brief information about the aspects of the window or dialog box that you are viewing. Context-sensitive help is available on each window in the Virtua Profiler. By clicking your right mouse button, you can get context-sensitive help for objects such as buttons, list boxes, check boxes, and radio buttons. These screen tips are known as *What's This?* pop-up help.

To see the *What's This?* help for a feature,

1. Point your mouse cursor at the feature in question.
2. Click the *right* mouse button.

A *What's This?* pop-up appears ([Figure 3-9](#)), either alone or as part of a menu.

What's This?	Ctrl+F1
Add	Ctrl+A
Delete	Ctrl+D
Modify	Ctrl+M
Copy Data	Ctrl+C
Apply	Ctrl+V

Figure 3-9. What's This? Help Menus

3. Click the *What's This?* option.

The appropriate screen tip appears ([Figure 3-10](#)).

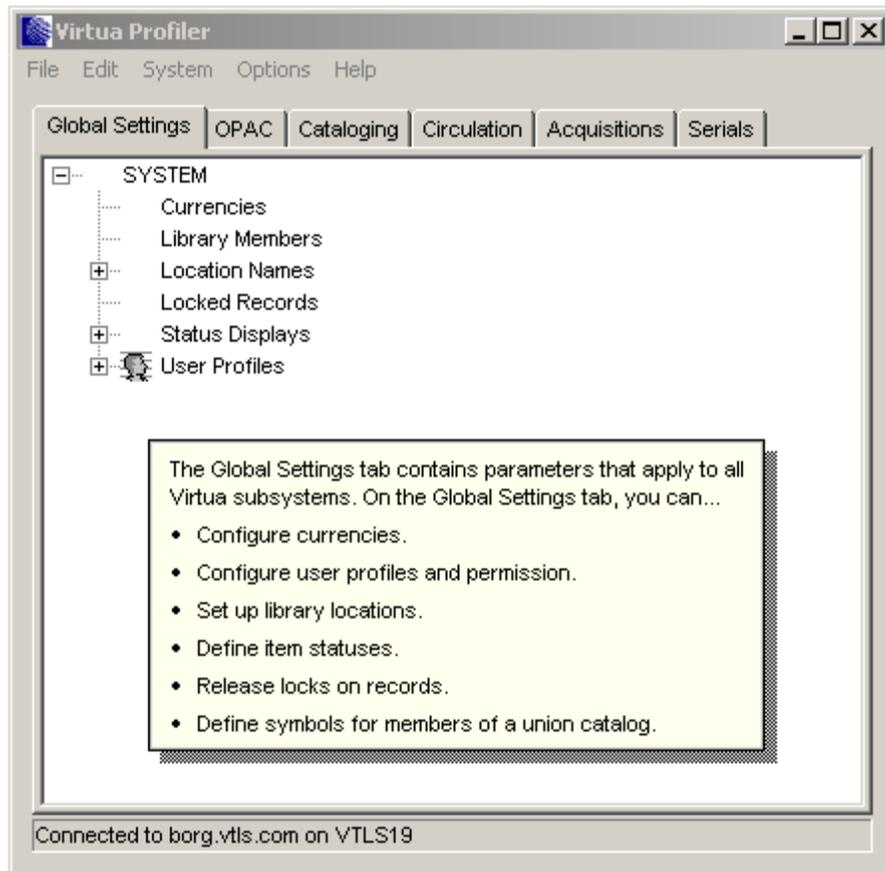


Figure 3-10. What's This? Screen Tip

4. When you are finished reading the screen tip, click anywhere on the screen.

The *What's This?* screen tip disappears.

For details on getting help via the Virtua System Guides, see the *Virtua Getting Started Primer*.

3.6.2 Using Online Profiler Permissions Help

Virtua Profiler Permissions help makes it easy for you to determine which permission setting in the Virtua Profiler corresponds to a particular feature in the client and vice versa.

You can access online Profiler Permissions help in the Virtua Profiler in two ways:

1. From the Help menu on the Virtua Profiler menu bar.

-OR-

2. From the Help button on the Add/Modify User window.

Note: You can access the Help menu on the Virtua Profiler menu bar only if you *do not* have a Virtua Profiler parameter window open. While setting permissions, use the Help button on the Add/Modify User window to access Profiler Permissions help.

To display Profiler Permissions help from the Help menu on the Virtua Profiler menu bar...

1. On the Virtua Profiler menu bar, click Help.
The Help menu drops down.
2. Choose Permissions Help.

The Profiler Permissions help window appears (*Figure 3-11*).

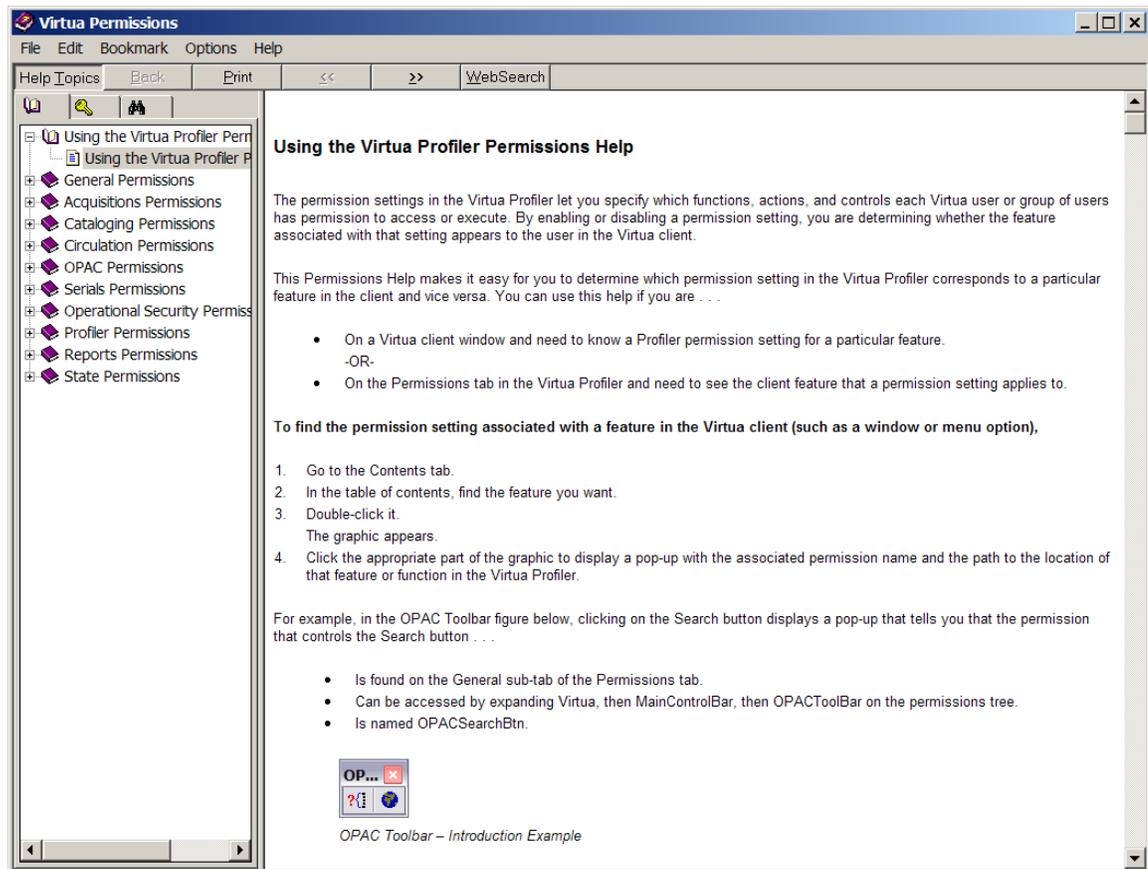


Figure 3-11 - Profiler Permissions Help Window

To display Profiler Permissions help using the Help button on the Add/Modify User Window...

1. On the Add/Modify User Window, click the Help button ([Figure 3-12](#)).
The Profiler Permissions help window appears ([Figure 3-11](#)).

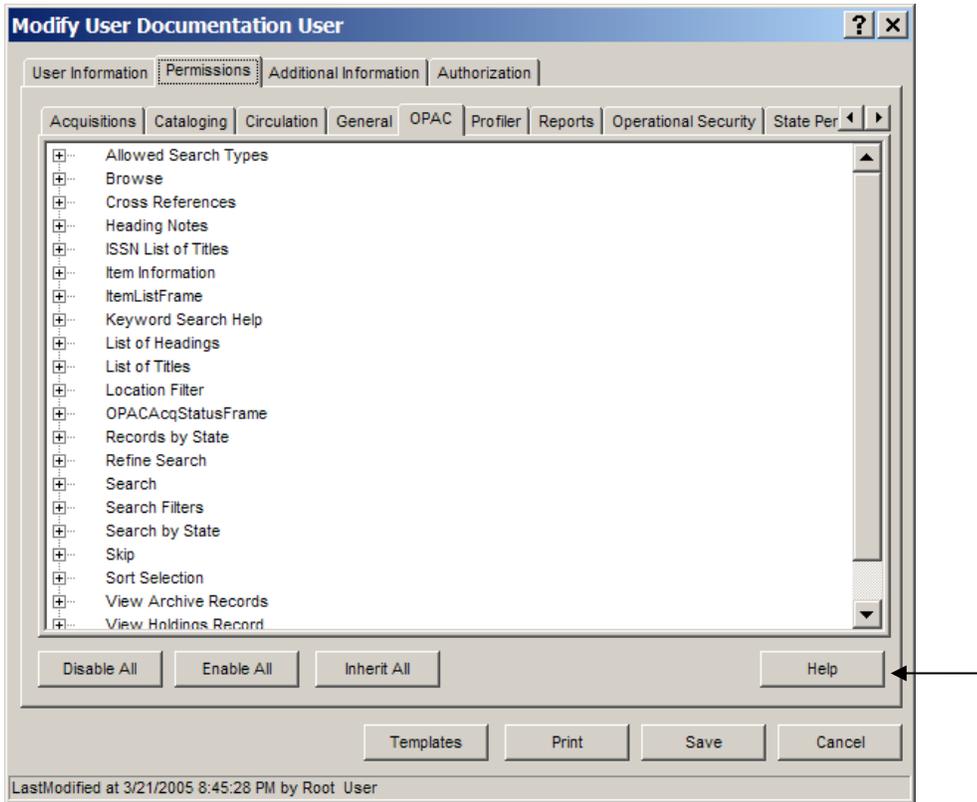


Figure 3-12 - Modify User Window

4. About Common Features and Procedures

Each Virtua Profiler parameter appears on its own window, which is accessible from the Virtua Profiler tree and contains settings that are specific to that parameter. While each parameter offers different configurable settings, the windows on which the parameters appear have common features and offer similar functions. As such, you will perform many of the same procedures repeatedly throughout the Virtua Profiler.

In this chapter we provide descriptions of some of the global features that you will see throughout the Virtua Profiler. Additionally, we provide step-by-step instructions for tasks that you will perform repeatedly while configuring parameters in the Virtua Profiler.

Important: To avoid repetition, in this and other Virtua Profiler user's guides, we assume that you are familiar with the features and tasks described in this chapter. In general, we do not repeat this information elsewhere.

This chapter covers the following topics:

- ⇒ [Types of Windows Used in the Virtua Profiler](#)
- ⇒ [General Window Features](#)
- ⇒ [Working with Tables](#)
- ⇒ [Using the Pop-up Calendar to Set Dates](#)
- ⇒ [A Note About Character Limits](#)

4.1 Types of Windows Used in the Virtua Profiler

Four basic types of windows are used throughout the Virtua Profiler.

- Windows with a single drop-down list box.
- Windows with a table and an Add button.
- Windows with input boxes and/or tabs.

- Windows with a table and NO Add button.

A basic understanding of these types of windows and their features can help you determine what you must do to configure a parameter that appears on a particular type of window.

4.1.1 Windows with One or More Drop-down List Boxes

The simplest window design offers one or more pull-down list box, a Save or OK button, and a Cancel button. The Minimum Circulation Question window (Circulation tab/System Parameters/Minimum Circulation Question) is an example of the simplest window, where you must choose either YES or NO from the drop-down list box (*Figure 4-1*).

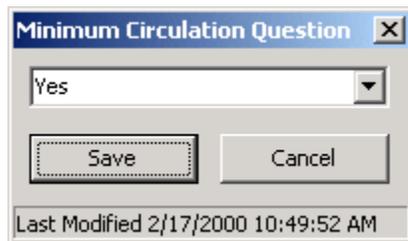


Figure 4-1. Minimum Circulation Question Window (Simple Window with Pull-down List Box)

4.1.2 Windows with a Table and an Add Button

A second type of window displays a table containing one or more columns and rows. An Add button appears on these windows. The Shipping Methods window (Acquisitions tab/Shipping Methods) is an example of a window with a table and an Add button (*Figure 4-2*).

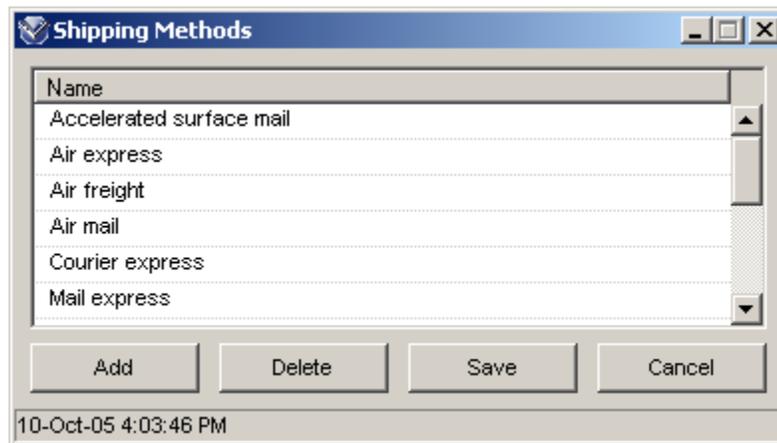


Figure 4-2. Shipping Methods (Window with Table and Add Button)

Note: In most cases, a window with an Add button also contains a Delete button or a Remove button, which lets you delete rows from the table.

4.1.3 Windows with Input Boxes and Tabs

A third type of window contains a variety of input fields and may contain multiple tabs to organize complex data. Circulation Matrix windows contain input boxes and multiple tabs. For example, in [Figure 4-3](#), we show an example of the Location + Patron + Item Matrix window (Circulation tab/Circulation/Location + Patron + Item/Main Library/Faculty/Fiction).

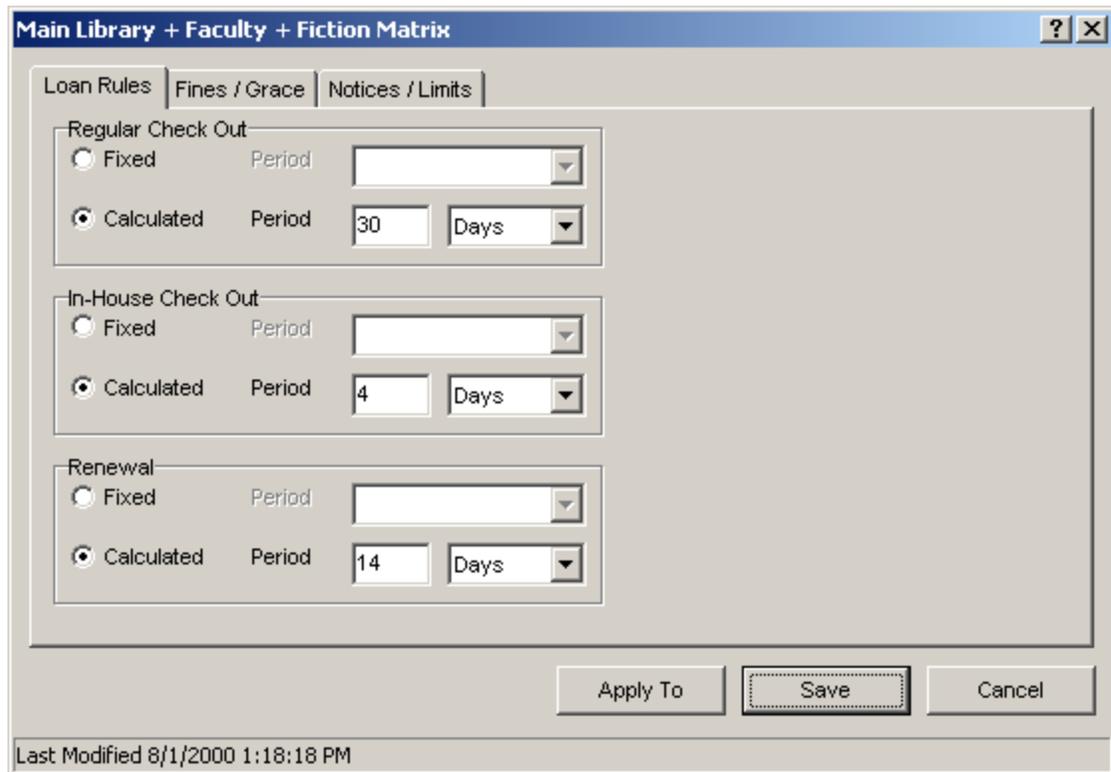


Figure 4-3. Location + Patron + Item Matrix Window (Input Boxes and Multiple Tabs)

4.1.4 Windows with a Table and NO Add Button

The fourth type of window contains a table but NO Add button. Check-out Limits Matrix windows contain a table but no Add button. For example, in [Figure 4-4](#) we show the Faculty Block/Alert Matrix window (Circulation tab/Circulation/Alerts & Blocks/Faculty).

Alert/Block	Overdue	Requested Overdue	Billed	Reserve Overdue	Owed Amount	Days Overdue
Checkout Alert	5	3	1	5	100.00	1
Checkout Block	100	7	3	10	150.00	200
Renewal Alert	5	2	2	3	100.00	1
Renewal Block	100	4	3	5	150.00	1000
Hold Alert	15	8	3	8	30.00	1
Hold Block	30	15	5	12	100.00	31
Recall Alert	2	1	0	1	30.00	1
Recall Block	3	2	1	2	30.00	31
Loan Alert	5	4	2	4	40.00	1
Loan Block	8	9	4	8	80.00	31
Page Alert	12	9	5	2	30.00	1
Page Block	15	12	7	4	50.00	31

Save Cancel

Last Modified 3/8/2000 10:46:54 AM

Figure 4-4. Block Alert Matrix (Table and NO Add Button)

On this type of window, you can edit the data in the cells of the table, but you cannot add new rows. New rows, however, may be added to the table as a result of additions to other parameters.

4.2 General Window Features

Each window in the Virtua Profiler contains the following two buttons:

- **Save** or **OK** - Saves to the database the changes that you made on the window. After you configure a parameter, you must click the Save button for the settings to be saved to the database.
- **Cancel** - Cancels any changes that you made and closes the window.

Additionally, all windows display a status bar at the bottom that indicates either . . .

- NOT SET!

Note: All parameters maintain their NOT SET status until you save them for the first time.

-OR-

- The date and time the parameter was last saved.

4.3 Working with Tables

When a parameter window contains a table, you can . . .

- Edit the information in the table.
- If the window contains an Add button, add a row to the table.
- If the table contains a Delete button, delete a row from the table.

Note: In some cases, you can delete rows from a table even if the window does not contain a Delete button.

4.3.1 Editing Information in a Table

To edit information in a table, you can . . .

- Add text to an empty cell.
- OR-
- Edit existing text.
- OR-
- Select an option from a drop-down list box in a cell.

For cells that contain a drop-down list box (*Figure 4-5*), the box usually does not appear until you click *twice* in the cell. It disappears when you click somewhere else in the table.

Calendar Configuration

Name:

Hours

Start Date	End Date	Hours
3/3/2008	3/3/2010	Default

Add Delete

Closed Dates

Add Delete

Set ASR Set Circ Save Cancel

Last modified at 3/3/2008 3:59:13 PM by Root User

Figure 4-5. Editing Table Rows

Data in some cells cannot be edited or deleted. This is because some data are hard coded in Virtua and are crucial to the operations of the Virtua Profiler. Usually, if data cannot be edited or deleted, Virtua does not let you highlight the cells that contain the data.

4.3.2 Adding New Rows to Tables

To add a new row to a table,

- Click the Add button.

The cursor will automatically go to the beginning of the first column, ready for your first entry.

Note:

- You can add rows to a table *only* if the window displays an Add button.

- You must complete the data in each cell of a row; otherwise, Virtua will not save the changes in that row.
- In most cases, you cannot add a new row until you have completely filled the previous row.

4.3.3 Deleting Rows from Tables

Windows that contain tables also contain a Delete button or a Remove button, which lets you delete rows from the table.

To delete a row from a table,

1. Highlight any cell in the row that you want to delete.
2. Click the Delete button or the Remove button, as appropriate.
3. Click the Save button.

The row is deleted from the table.

Note: Information is not deleted from the database until you click the Save button. Additionally, in some cases, when you click the Save button, you receive a confirmation message that asks you to confirm the deletion.

4.4 Using the Pop-up Calendar to Set Dates

Some parameters require that you to set various dates. For example, via the Location Names parameter, you set the Default Reserve Start Date and the Default Reserve End Date on the Add/Modify Main Location window. To facilitate date-setting, Virtua offers a pop-up calendar.

To access the pop-up calendar,

1. Click the down arrow in the desired date field.

Note: If the date field appears in a table, you must click the cell *twice* to see the down arrow.

The pop-up calendar appears (*Figure 4-6*).

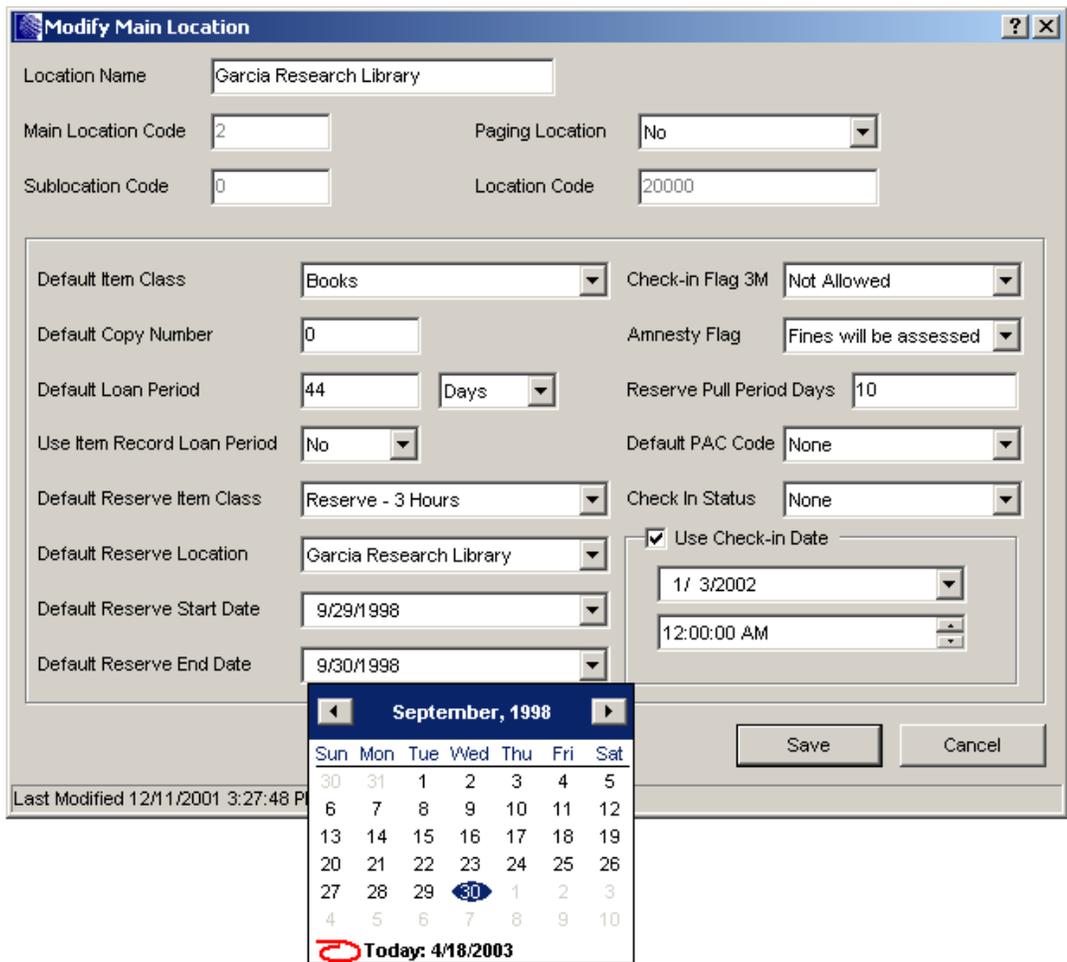


Figure 4-6. Pop-up Calendar

2. Use the arrows at the top of the calendar to choose a different month and/or year.
3. When you find the desired month and year, click the desired day of the month.

Note: You can also navigate the calendar using the arrow keys on your keyboard.

The calendar closes, and the date you chose appears in the appropriate cell.

4.5 A Note about Character Limits

Theoretically, information you enter for statuses, location names, and other user-defined descriptions can have strings that are hundreds of characters in length. Throughout Virtua, however, the fields that display these descriptions can show only a *limited* number of characters. Any characters that go beyond the display capabilities of a particular field will NOT be visible.

For example, in [Figure 4-7](#), the Location name field contains more characters than the window can display. The server stores the information correctly, but it is NOT visible to the user. Smaller windows will display fewer characters.

Add New Main Location

Location Name: Very Long Name for a Main Location tha

Main Location Code: 5 Paging Location: Yes

Sublocation Code: 0 Location Code: 50000

Default Item Class: Juvenile-Fiction Check-in Flag 3M: Not Allowed

Default Copy Number: 0 Amnesty Flag: Fines will be assessed

Default Loan Period: 0 Hours Reserve Pull Period Days: 0

Use Item Record Loan Period: No Default PAC Code: None

Default Reserve Item Class: Reserve - 3 Hours Check In Status: None

Default Reserve Location: Archives - Genealogy

Default Reserve Start Date: 4/18/2003

Default Reserve End Date: 4/19/2003

Use Check-in Date

4/18/2003

12:00:00 AM

Save Cancel

NOT SET !

Figure 4-7. Add New User Window (Displaying Long Names)

The number of characters that will appear in a field depends upon . . .

- The character set and font you use.
- The display settings of your Windows operating system.

Hint: As a general rule, we recommend that you limit your descriptions to 35 characters.

5. Working with the Parameter Copy Utility

The Virtua Profiler offers a utility that lets you copy the parameter settings from one database to another database. In this chapter, we describe how you can use the Parameter Copy Utility to copy parameters across databases.

Caution: The Parameter Copy Utility will overwrite any existing parameter settings in your target database. This change is *irreversible* and will affect the behavior of your database. If your target database already contains parameter settings, we suggest that you back up your database before you use the Parameter Copy Utility.

The success of the copying task depends on a number of elements. Be aware that when we designed the Parameter Copy Utility, we did so based on the following assumptions and conditions:

1. The source and target databases are on the same major release.
2. The source and target databases were created as copies of one another.
3. When connecting to the source and target databases, you use the **dbadmin** user.

It is important to note that the source parameters *replace* the target values; they do not merge with them. *The target database will end up being an exact copy of the source database.* This means that if the target database contains a parameter, say, a new location that does not exist in the source database, then when you copy locations from the source to the target, the new location will be removed.

Note: If a location on the target database does not exist on the source, and this location is in use on the target, Virtua will not be able to copy locations. As a result, the report generated by the process will display the following error:

```
Fatal error occurred. Reason: ORA-02091: transaction rolled back  
ORA-02292: integrity constraint (DBADMIN.FK2_USERS) violated -  
child record found. No parameters were copied.
```

To get around this situation and to synchronize locations, before running the utility, first copy the locations from the target database to the source.

This chapter covers the following topics:

- ⇒ [Accessing the Parameter Copy Utility](#)
- ⇒ [Aspects of the Parameter Copy Utility Window](#)
- ⇒ [Copying Parameters from One Database to Another](#)

5.1 Accessing the Parameter Copy Utility

To access the Parameter Copy Utility,

- On the Virtua Profiler menu bar, click File, and choose Copy Parameters.

The Parameter Copy Utility window appears (*Figure 5-1*).

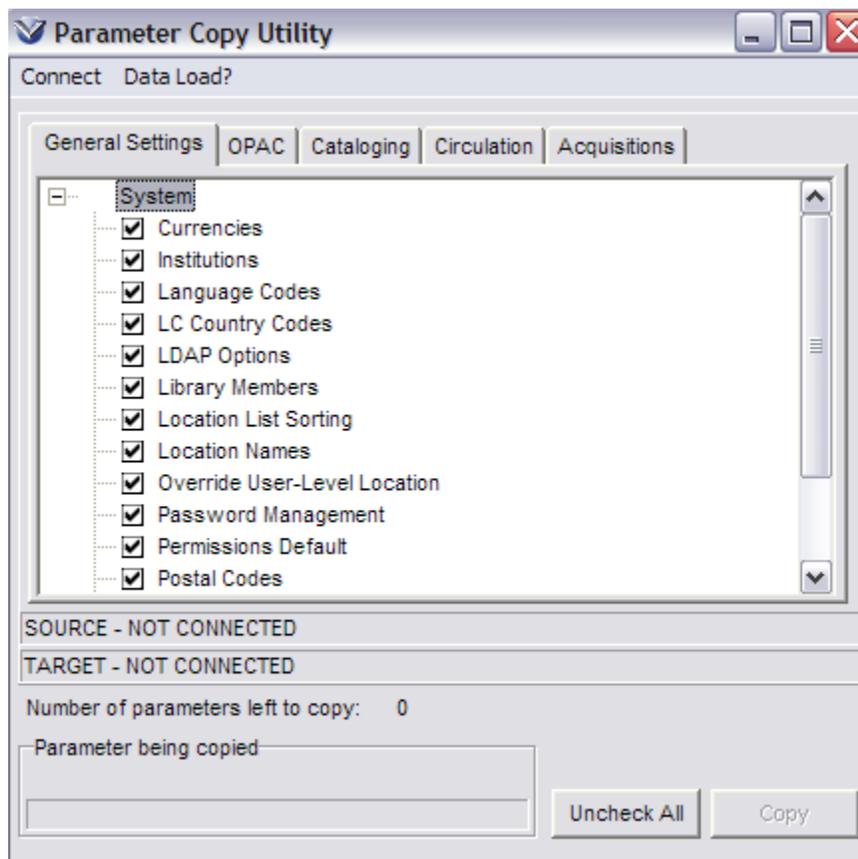


Figure 5-1. Parameter Copy Utility Window

5.2 Aspects of the Parameter Copy Utility Window

Utility Window

You can use the Parameter Copy Utility window to select options for copying parameters from one database to another. In the following sections, we describe the elements of the Parameter Copy Utility window.

5.2.1 Pull-down Menus on the Parameter Copy Utility Window

The Parameter Copy Utility window contains two pull-down menus: Connect and Data Load.

5.2.1.1 Connect Menu



Figure 5-2. Connect Menu

The Connect menu offers the following menu items:

- **Source** - Displays the Log-in dialog box, where you can connect to the source database (i.e., the database *from* which you want to copy parameter settings).
- **Target** - Displays the Log-in dialog box, where you can connect to the target database (i.e., the database *to* which you want to copy parameter settings).

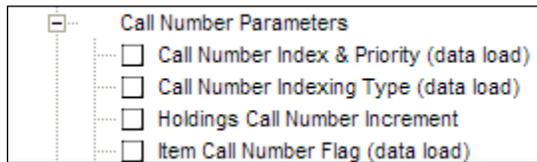
5.2.1.2 Data Load? Menu



Figure 5-3. Data Load? Menu

The Data Load? menu offers one menu item:

- **Migrate Data Load Parameters** - Controls the setting that determines whether to copy data load parameters, which are parameters that must be copied prior to the initial loading of data into the database. Data load parameters are designated with the label (*data load*) in the parameter tree structure on the Parameter Copy Utility window.



- The Migrate Data Load Parameters menu item is a flag that has two modes:
 - ◆ **Unchecked** - Specifies that non-data load parameters will be copied. This is the default copy mode.
 - ◆ **Checked** - Specifies that data load parameters will be copied.

When you click the Migrate Data Load Parameters menu item, the current setting of the flag toggles between checked or unchecked, as appropriate.

Note: The setting of the Migrate Data Load Parameter flag determines which parameters you will be allowed to select for copying.

- If the Migrate Data Load Parameter menu item is selected (i.e., the menu item is checked), you will be able to select *only* data load parameters for copying.
- If the Migrate Data Load Parameter menu item is NOT selected (i.e., the menu item is unchecked), you will be able to select *only* non-data load parameters for copying.

5.2.2 Tabs on the Parameter Copy Utility Window

The Parameter Copy Utility window contains tabs, each of which displays a tree structure. For the most part, the headings of the tree on each tab of the window correspond to the headings on each tab of the Virtua Profiler main window.

Each branch of the tree on the General Settings tab of the Parameter Copy Utility window corresponds to a parameter that appears on the Global Settings tab on the Virtua Profiler main window. For example, the Currencies heading corresponds to the Currencies parameter, and the Users and Groups heading corresponds to the User Profiles parameter.

Each heading on the Parameter Copy Utility window has a corresponding check box, which lets you choose whether to copy those parameter settings from the source database to the target database. When you begin the parameter-copying process, all selected (i.e., checked) parameters will be copied to the target database.

Note: When you select a check box, you are electing to copy ALL the settings associated with a given parameter. For example, if you select the Status Displays check box, you will copy ALL item status definitions from the source database to the target database.

5.2.3 Information Bars on the Parameter Copy Utility Window

At the bottom of the Parameter Copy Utility window, information bars indicate your connection status to a source and a target database. Before you have connected to a source and a target database, the information bars display...

SOURCE - NOT CONNECTED
TARGET - NOT CONNECTED

After you have established a connection to the source and the target database, the information bars display the connection information.

5.2.4 Status Fields on the Parameter Copy Utility Window

At the bottom of the Parameter Copy Utility window, two status fields indicate the progress of your parameter copying session.

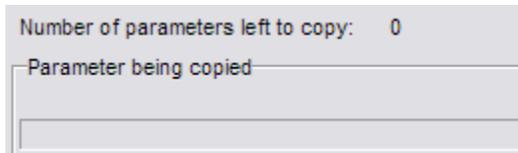


Figure 5-4. Parameter Copying Progress Indicators

The status fields are inactive until you begin the parameter-copying process. After you begin the process, the fields indicate...

- **Number of parameters left to copy** - Of the parameters you have selected to copy, the number of parameters that have not yet been copied.
- **Parameter being copied** - The name and progress of the parameter currently being copied.

Note: If you access another application after you begin the parameter-copying process, you will NOT be able to switch back to the Parameter Copy Utility window until the process is complete. If you want to monitor the progress of the parameter-copying procedure, do NOT switch to another application after you have started the copying process.

5.2.5 Buttons on the Parameter Copy Utility Window

The Parameter Copy Utility window offers two buttons:

- **Uncheck All** - De-selects all parameters of a given type (either data load or non-data load) on all tabs. When you access the Parameter Copy Utility window, all *non-data load* parameters are selected by default. This button lets you de-select all selected parameters.

Note: When you click the Uncheck All button to de-select all parameters, the button label toggles to Check All. Clicking the Check All button *selects* all parameters of a given type on all tabs.

- **Copy** - Begins the parameter-copying process.

5.3 Copying Parameters from One Database to Another

The parameter-copying process consists of the following steps:

- Establishing source and target database connections.
- Selecting the parameters that you want to copy.
- Performing the copy process.

We describe each of these steps in detail in the following sections of this chapter.

5.3.1 Establishing Database Connections

Before you can copy parameters from one database to another, you must establish two database connections:

- **Source** - The database *from* which you want to copy parameters.
- **Target** - The database *to* which you want to copy parameters.

Note: You can establish database connections either before or after you select parameters for copying. For details on selecting parameters, see the section “[Selecting Parameters to Copy](#)” in this chapter.

5.3.1.1 Connecting to the Source Database

To connect to the source database,

1. On the Parameter Copy Utility window, click Connect on the menu bar.
2. Choose Source.

The Log-in dialog box appears ([Figure 5-5](#)). The Username field is already populated with *dbadmin* and cannot be edited.

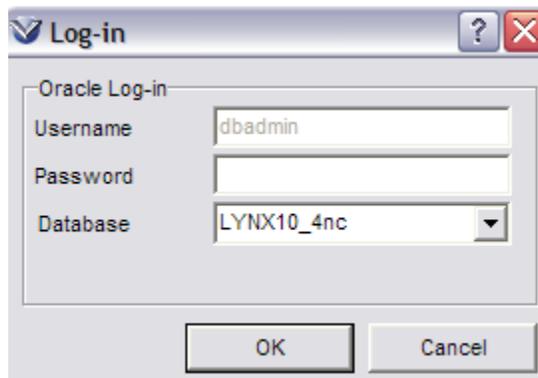


Figure 5-5. Source Log-in Dialog Box

3. In the Password text box, type the Oracle password associated with the source database.
4. In the Database drop-down list, select the source database, and then click OK.

Virtua establishes a connection to the selected database. The source database connection information appears in the status bar on the Parameter Copy Utility window (*Figure 5-6*).

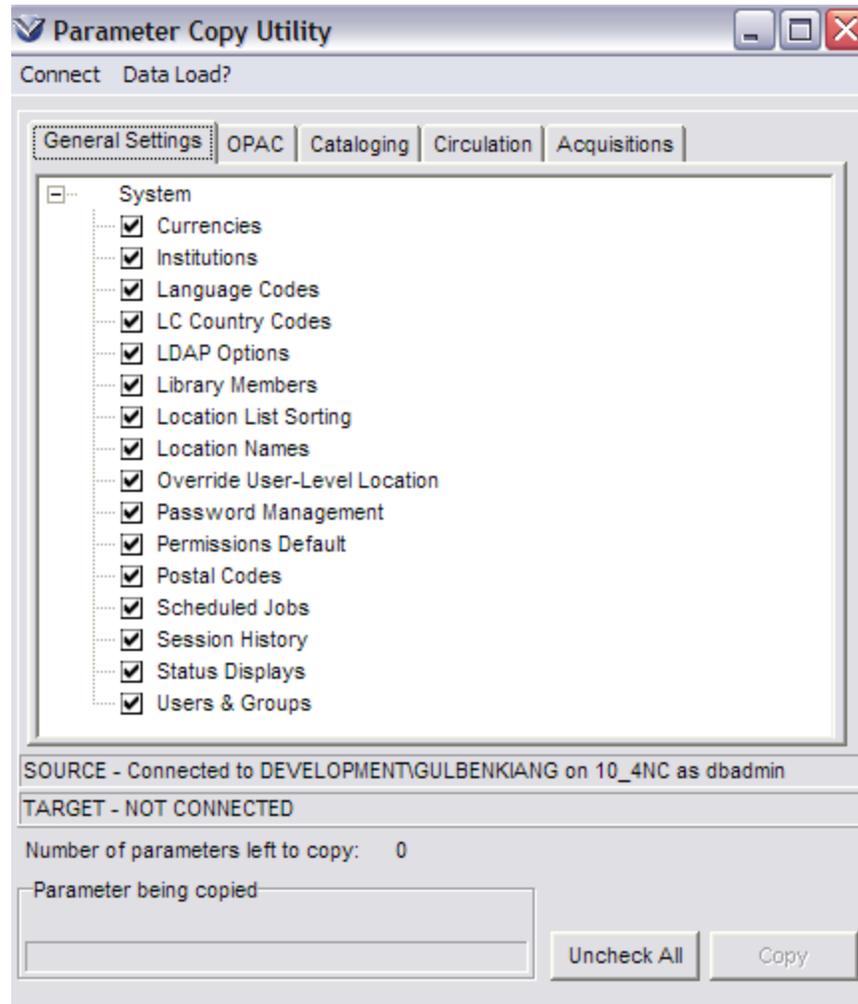


Figure 5-6. Parameter Copy Utility Window Displaying Source Connection Information

5.3.1.2 Connecting to the Target Database

To connect to the target database,

1. On the Parameter Copy Utility window, click Connect on the menu bar.
2. Choose Target.

The Log-in dialog box appears (*Figure 5-7*).

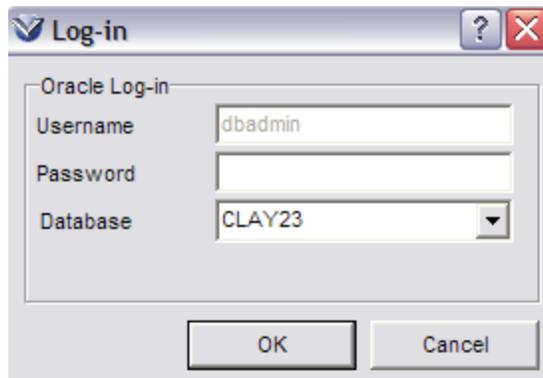


Figure 5-7. Target Database Log-in Dialog Box

3. In the Password text box, type the Oracle password associated with the target database.
4. In the Database drop-down list, select the target database, and then click OK.

Virtua establishes a connection to the selected database. The target database connection information appears in the status bar on the Parameter Copy Utility window ([Figure 5-8](#)).

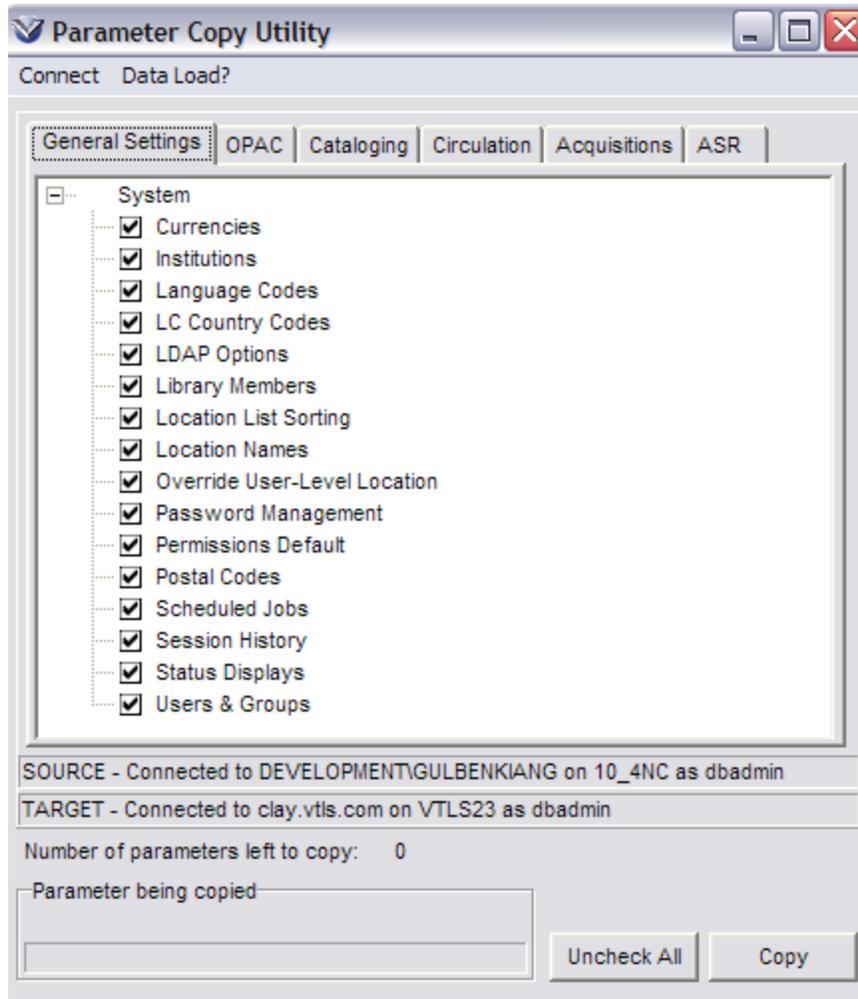


Figure 5-8. Parameter Copy Utility Window Displaying Target Connection Information

5.3.2 Selecting Parameters to Copy

Before you can begin copying parameters, you need to choose which parameters to copy. Using the Data Load? menu option, you can choose to copy either . . .

- **Non-data Load Parameters**
- OR-
- **Data Load Parameters**

In the following sections, we describe how you can establish your data load setting and choose parameters for copying.

Note: You can select parameters for copying either before or after you connect to the source and target database. For details on connecting to databases, see the section “[Establishing Database Connections](#)” in this chapter.

5.3.2.1 Establishing the Data Load Setting

To establish your data load setting,

1. On the Parameter Copy Utility menu bar, click Data Load?.

By default, the Migrate Data Load Parameter option is unchecked. By default, all *non*-data load parameters are selected and will be copied unless you modify the selections.

2. Retain the data load default setting.

-OR-

Change the setting by checking the Migrate Data Load Parameter option, in which case, all data load—and *only* data load—parameters are selected and will be copied unless you modify the selections.

Once you have established the data load setting, and assuming you want to modify the default parameter selections, the next step is to select the parameters you want to copy.

5.3.2.2 Selecting Non-data Load Parameters

To select non-data load parameters for copying,

1. On the Parameter Copy Utility menu bar, click Data Load? and verify that the Migrate Data Load Parameters option is unchecked.

Hint: At this point, depending on how many default parameter selections you want to change, you might click the Uncheck All button to de-select all parameters and start from scratch.

2. On the General Settings tab, select the check boxes that correspond to the parameters you want to copy.
3. On the OPAC tab, select the parameters that you want to copy.
4. On the Cataloging tab, select the parameters that you want to copy.

Note: Some Cataloging parameters are data load parameters. You will not be able to select these parameters for copying.

5. On the Circulation tab, select the parameters that you want to copy.
6. On the Acquisitions tab, select the parameters that you want to copy.

Some parameters use and depend on settings in other parameters. Therefore, if you choose to copy one parameter, you may be required to copy other, related parameters as well. For example, the Location Names parameter requires that the Item Class Definitions parameter be copied. If you choose to copy the Location Names parameter, the following message appears (*Figure 5-9*):

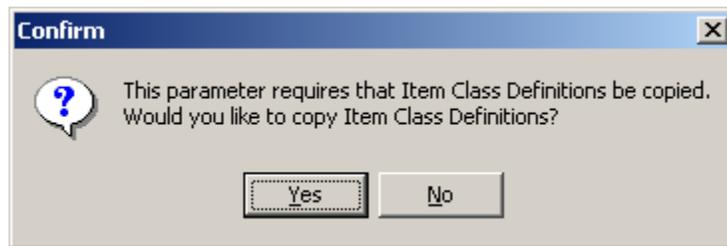


Figure 5-9. Item Class Definitions Required Message

Likewise, if you choose to de-select a parameter that affects other parameters, you will receive a message to that effect. For example, if you de-select the Item Class Definitions parameter, the following message appears (*Figure 5-10*):

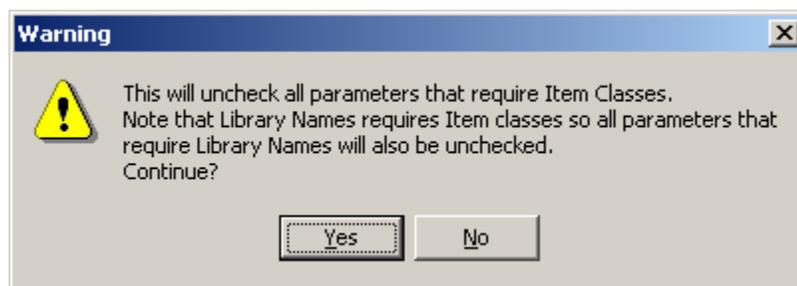


Figure 5-10. Other Parameters Will Be Unchecked Message

5.3.2.3 Selecting Data Load Parameters

To select data load parameters for copying,

1. On the Parameter Copy Utility menu bar, click Data Load? and verify that the Migrate Data Load Parameters option is checked.

On the General Settings tab, notice that all *non*-data load parameters are de-selected and shaded (*Figure 5-11*), indicating that they are not available for selection.

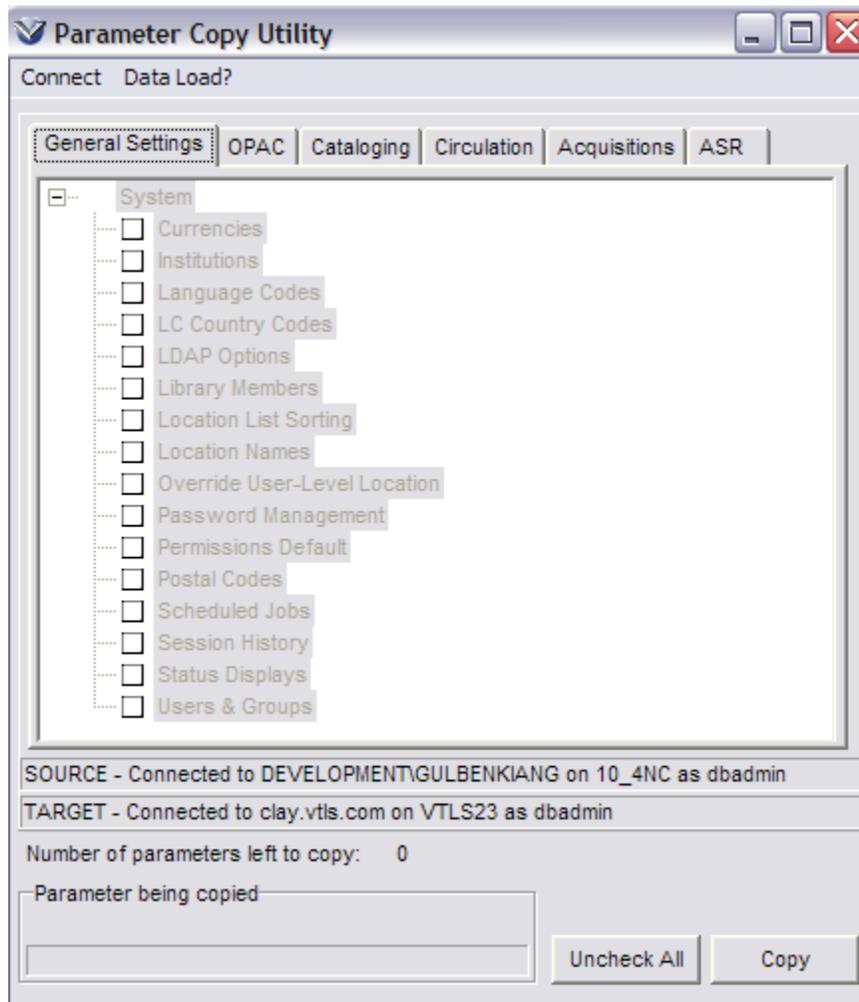


Figure 5-11. Non-data Load Parameters Grayed Out

2. Click the Cataloging tab.

On the Cataloging tab (Figure 5-12), non-data load parameters are not shaded, but they are de-selected and cannot be selected. When the Migrate Data Load Parameters option was checked, all data load parameters were selected by default.

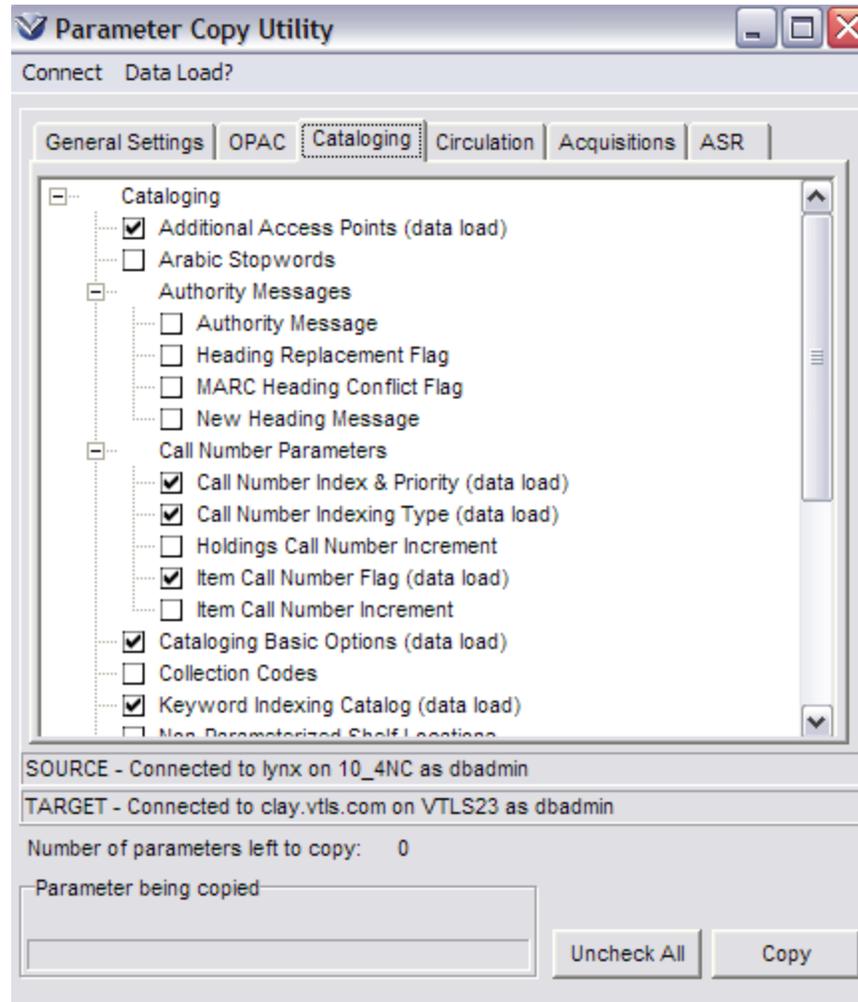


Figure 5-12. Parameter Copy Utility - Cataloging Tab

- De-select any data load parameters that you do NOT want to copy.

5.3.3 Performing Parameter Copying

After you have connected to a source and target database and selected the parameters that you want to copy, you are ready to begin the parameter-copying process.

To perform the parameter-copying process,

1. On the Parameter Copy Utility window, click the Copy button.

A warning message appears (*Figure 5-13*).

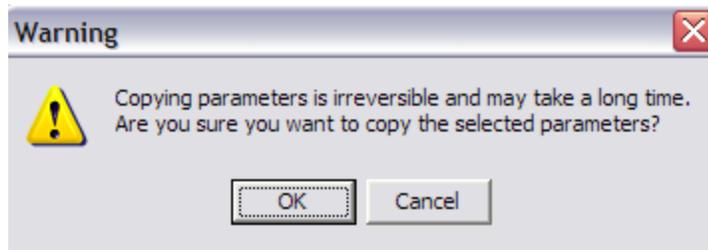


Figure 5-13. Copy Parameters Warning Message

Important: Once you click the OK button, the parameter-copying process will begin. Parameter copying is irreversible. Click the OK button only if you are certain that you want to copy the selected parameters.

2. If you are certain that you want to copy the selected parameters, click the OK button.

Virtua performs a series of checks and may display one or more messages, asking you to provide some information.

- First, Virtua checks to make sure that the target database is the same version as the source database.
 - ◆ If the database versions match, Virtua proceeds to the next check.
 - ◆ If the versions do NOT match, the following message appears (*Figure 5-14*), indicating the version numbers of each database and asking you if you want to proceed.



Figure 5-14. Database Version Mismatch Message

We recommend that you click No.

- Next, Virtua checks whether you have chosen to copy the Users & Groups (i.e., User Profiles) parameter.
 - ◆ If you have chosen to copy the Users & Groups parameter, Virtua proceeds with the parameter-copying process.
 - ◆ If you have NOT chosen to copy the Users & Groups parameter, the Log-in dialog box appears ([Figure 5-15](#)).

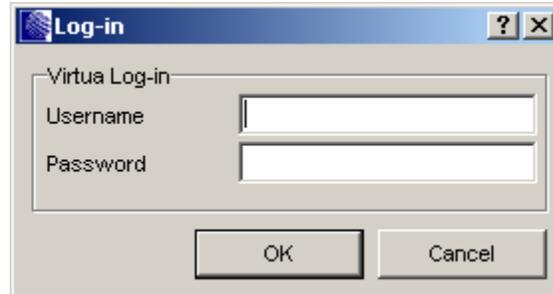


Figure 5-15. Log-in Dialog Box

The Log-in dialog box provides a mechanism for maintaining referential integrity for parameters that refer to Users & Groups when User Profiles are not copied. You must provide a valid username and password for the *target* database. The username you specify will be used to define the “Last Modified By” attribute of all copied parameters.

After Virtua has performed the necessary checks and you have provided all the requested information, the parameter-copying process begins. You can monitor the progress of the parameter-copying process via the progress indicators on the Parameter Copy Utility window ([Figure 5-16](#)).

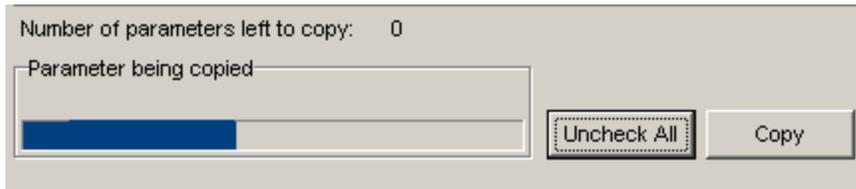


Figure 5-16. Parameter Copy Utility Window - Status of the Copy Process

Note: If you access another application during the parameter-copying process, you will NOT be able to switch back to the Parameter Copy Utility window until the process is complete. If you want to monitor the progress of the parameter-copying procedure, do NOT switch to another application after you have started the copying process.

After the parameter-copying process is complete, Virtua will generate an HTML report of the copying session and display it on your screen (Figure 5-17).

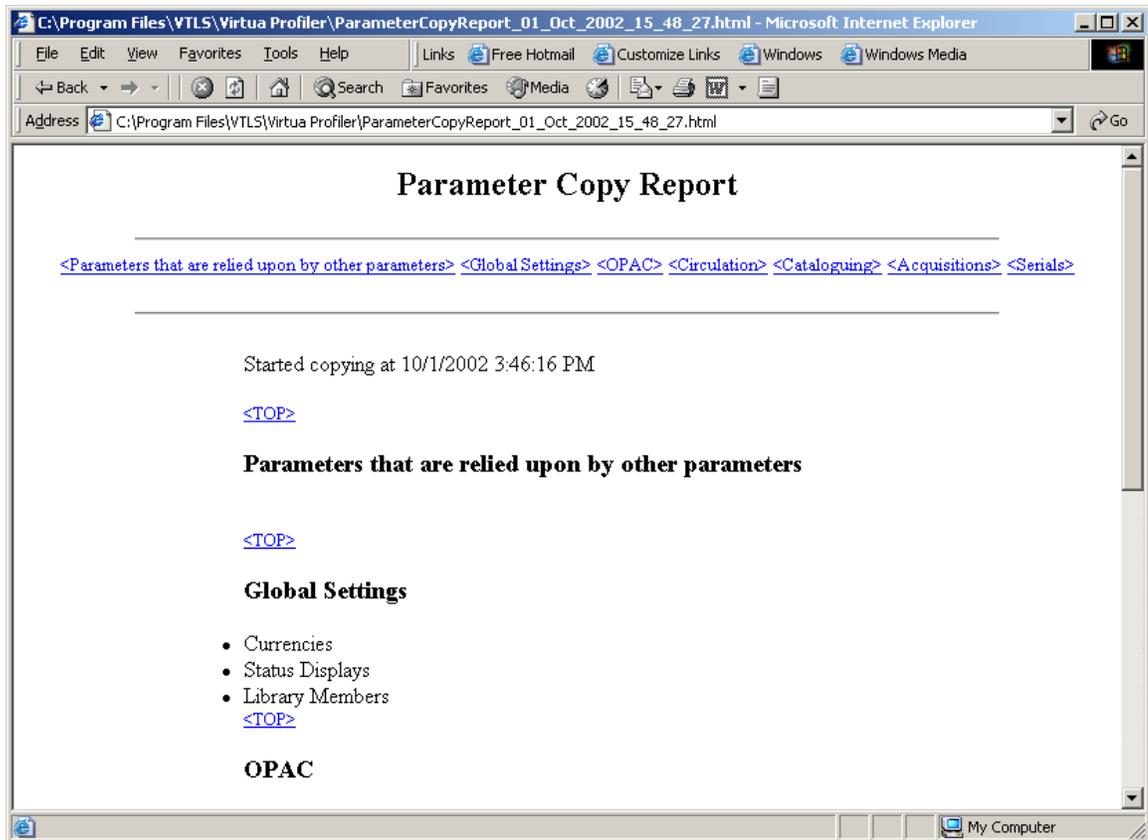


Figure 5-17. Parameter Copy Report

Note: Virtua will prompt you with a Save dialog box so that you can save the report file **ParameterCopyReport_date_time.html** on your machine.

The report contains a list of the parameters that were copied during your parameter-copying session. Additionally, the report lists the parameters that were copied that rely upon other parameters.

6. Appendix A - Recommended Order for Setting Parameters

The Virtua Profiler allows you to set parameters in any order, and you can modify your parameter settings whenever necessary. For maximum efficiency and to ensure the integrity of your database, however, we recommend that you set your Profiler parameters in the following order.

1. Set the **Currencies** parameter. For details, see the *Virtua Profiler/Global Settings User's Guide*.

Note: If your Home currency is not yet set, see the *System Management: Acquisitions User's Guide*. You will need to set your Home currency before you configure other currencies via the Currencies parameters.

2. Set the **Status Displays** parameter. For details, see the *Virtua Profiler/Global Settings User's Guide*.
3. Set the **Item Class Definitions** parameter. For details, see the *Virtua Profiler/Circulation Parameters User's Guide*.
4. Set the **Preservation and Conservation Codes** parameter. For details, see the *Virtua Profiler/Cataloging Parameters User's Guide*.
5. Set the **Location Names** parameter. For details, see the *Virtua Profiler/Global Settings User's Guide*.
6. Set the **Patron Types** parameter. For details, see the *Virtua Profiler/Circulation Parameters User's Guide*.
7. Set the **MARC Format Flag**. For details, see the *Virtua Profiler/Cataloging Parameters User's Guide*.
8. Set your remaining **Global Settings** in any order. For details, see the *Virtua Profiler/Global Settings User's Guide*.
9. Set all remaining **Cataloging parameters** in any order. For details, see the *Virtua Profiler/Cataloging Parameters User's Guide*.

10. Set all remaining **Circulation parameters** in any order. For details, see the *Virtua Profiler/Circulation Parameters User's Guide*.
11. Set the **Fiscal Years** parameter. For details, see the *Virtua Profiler/Acquisitions Parameters User's Guide*.
12. Set all remaining **Acquisitions parameters**. For details, see the *Virtua Profiler/Acquisitions Parameters User's Guide*.

7. Appendix B - Changes in this Guide

7.1 Changes for Version 16.1

No changes were made.

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