



Advanced Cataloging: Creating Bibliographic Records

WORKFLOW-BASED REFERENCE GUIDE
Advanced Cataloging

2017



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Introduction to Advanced Cataloging

The Advanced Cataloging Workflow-Based Reference Guide contains a variety of reference topics for performing Cataloging tasks beyond basic functions such as original or copy cataloging and the creation of item records. The topics covered in this guide will help you understand how the Virtua™ ILS – Integrated Library System handles authority control, allows creation of cross referencing, and utilizes load options to process records in your database.

This guide will also describe specific cataloging settings and system parameters required for working with bibliographic and item records, as well as InfoStation reports that pertain to records in your database. For more basic cataloging topics, please refer to the Basic Cataloging Workflow-Based Reference Guide.

Understanding Menu & Toolbars

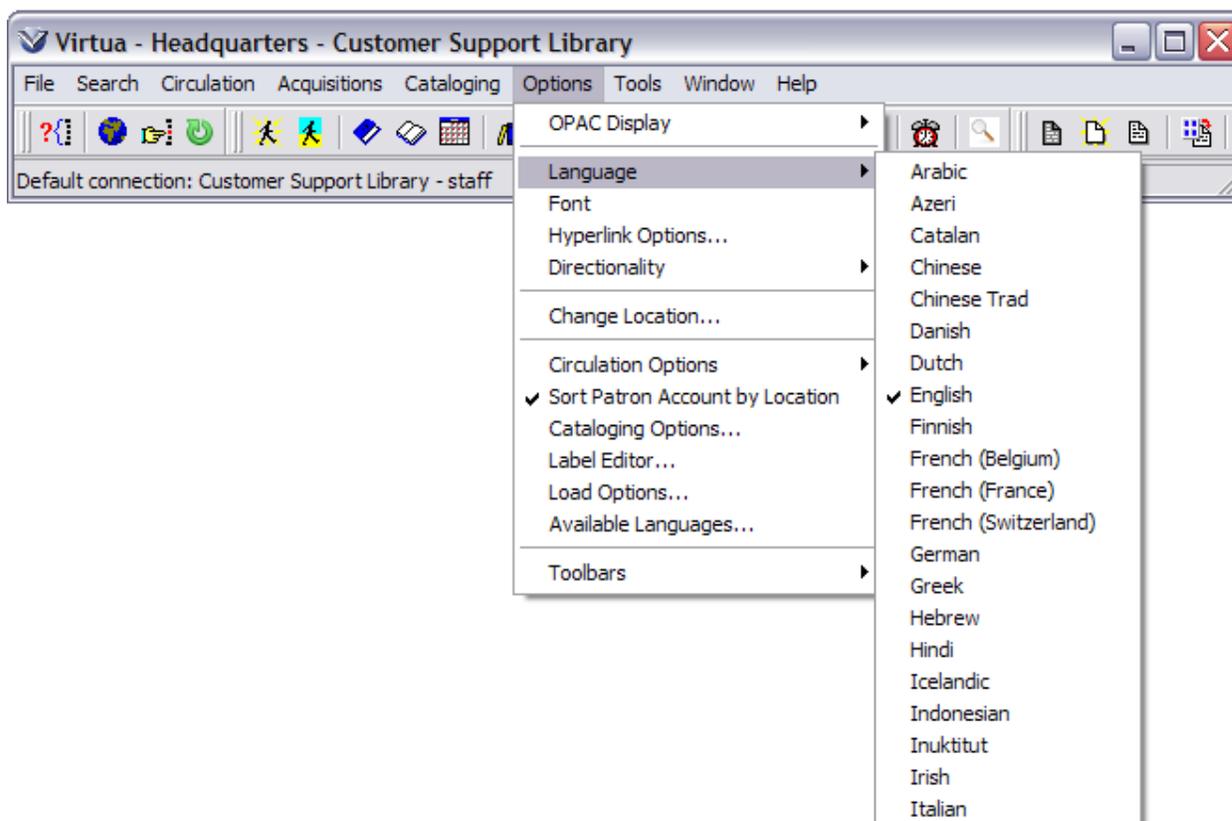
Language and Directionality Options

Language and Directionality options can be set from the **Options** pull-down menu.

Language

Select a language from the menu list.

Any translated strings for that language will appear in the Client interface.

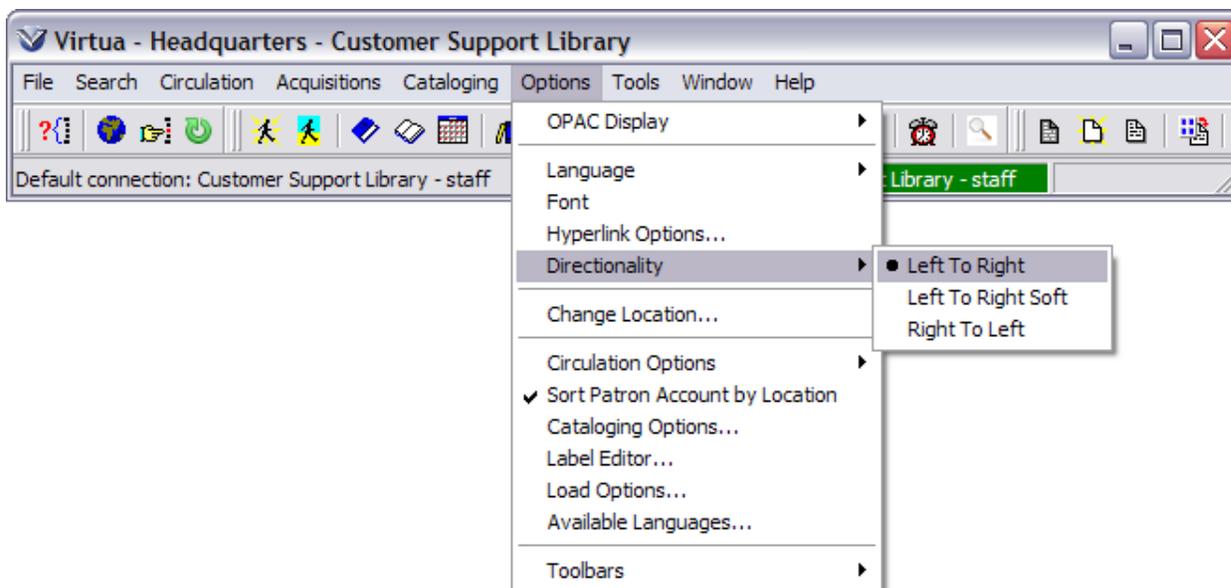


Directionality

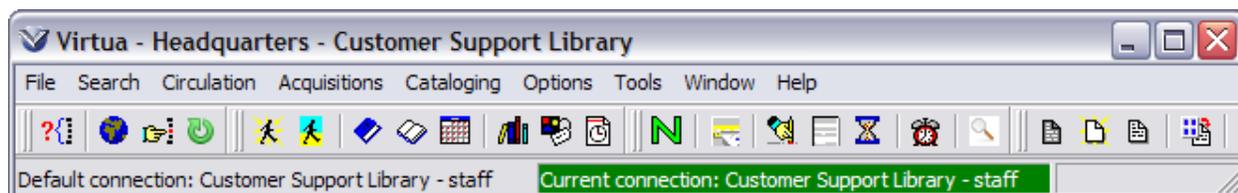
Select Left to Right soft and all text, regardless of directionality, will left justify

Select Left to Right Soft text that is left-justified text will display left justified and right-justified text will display to the right.

Select Right to Left and all the text, regardless of directionality, will right justify.



Virtua File Menu



Menu bar	Icon	Function Keys	Function
File			
Records			
Create			Select a template to create a MARC record
Delete			Select a file of local records or a single local record to delete
Edit Local			Select a file of local records to edit
Edit Item			Modify various elements of item records with the Batch Item Editor.
Translate			Display the Batch Character Set Translation panel to convert a file of local records to the Unicode character set
Import Records			Imports records from OCLC, other bibliographic utilities, and local files
Import to Selection List			Imports records from a source file directly to the Purchase Request List.
Workform			
Edit			Select a workform to edit
Delete			Select a workform to delete
Close			Close multiple records or workforms without closing the Editor itself
Save Record			Save changes made to an existing local record
Save Record As			Save local record to a different file or overwrite an existing local record with new changes
Append Record To			Add record to an existing file of local records
Save Copy to Database			Duplicates a MARC record and saves it to a designated database
Save to Database		F11	Save the record and create index entries
Save as FRBR			Save as a FRBR record

Save as Combined		Save a FRBR record in standard MARC format.
Delete Record from Database		Remove record from the database and delete index entries
Delete		Select a workform to delete

Virtua Edit Menu



Menu bar	Icon	Short Cut	Function
Edit			
Cut		Ctrl X	Cut selected text
Copy		Ctrl C	Copy selected text
Paste		Ctrl V	Paste Selected text
Add Tag		Shift, Ctrl, A	Add MARC tag
Copy Tag		Shift, Ctrl, C	Copy MARC tag
Paste Tag		Shift, Ctrl, V	Paste MARC tag
Paste Tag to All			Paste MARC tag into all open MARC records
Delete Field		Shift, Ctrl, D	Delete MARC tag
Validate Record		Alt E, V	Starts record validation
Icon only			Edit 008 tag

MARC Editor Window

The **MARC Editor** can be used to:

- Create a new record (original cataloging)
- Edit a MARC record from the Virtua database
- Edit a MARC record from a local diskette, hard drive, or network drive
- Edit a MARC record from a bibliographic utility or Z39.50 compliant database

The screenshot shows the MARC Editor window with the following fields:

001		vtls000253299
003		NcFayC
005		20070118000500.0
008		040927s2005 nyub 000 1 eng
010		
020		1a 0316011770 : 1c \$30.95
035		1a (DLC)2004022563
039		9
040		1a DLC 1c DLC 1d GcMbt
082	0	0
099		1a F 1a KOSTOVA
100	1	1a Kostova, Elizabeth.

At the bottom, the information bar shows: (a) Language material (m) Monograph/Item Masked MARC 21 Bib: Book OPAC

Tags, Indicators, and Fields:

Virtua provides a layout of the tags, indicators, and fields for each type of MARC or 2709 format record/workform that Virtua Supports.

006		m	g	e
008				030819+19911999 1 gpl 000 d eng 1
090				1a VTL5 1c VTL5
100				1a Shakespeare, William, 1d 1564-1616.
245				1a Henry 5
245	1	4		1a The life of King Henry the fifth / 1c by William Shakespeare.
260				1a Project Gutenberg, 1c 1997
440				1a The library of the future complete works of William Shakespeare
440				1a Project Gutenberg 1c Ethel 1119
600				1a "The electronic version of the Complete Works of William Shakespeare's copyright 1996-1995 by World Library, Inc., and is provided by Project Gutenberg web generation."
856				1u 1aoc2310.txt

Type and Bib Level Options:

The MARC Editor provides a pull-down list boxes showing Type and Bib Level Options. The codes for the selected options are displayed from the Leader of the MARC record.

The screenshot shows the MARC Editor window with the following fields:

006				1u 1aoc2310.txt
(a) Language material	(m) Monograph/Item			Masked
<	>	MARC 21 Bib: Book	OPAC	

The pull-down menus show the following options:

- Language material (a)
- Monograph/Item (m)
- Masked
- MARC 21 Bib: Book
- OPAC

Tracking Tabs:

The MARC Editor keeps track of the records or workforms that you create or access during the current session.

The screenshot shows the Tracking Tabs with the following options:

- USMARC Bib: Book
- OPAC

Information Bar:

The information bar at the bottom of the MARC Editor window indicates three things:

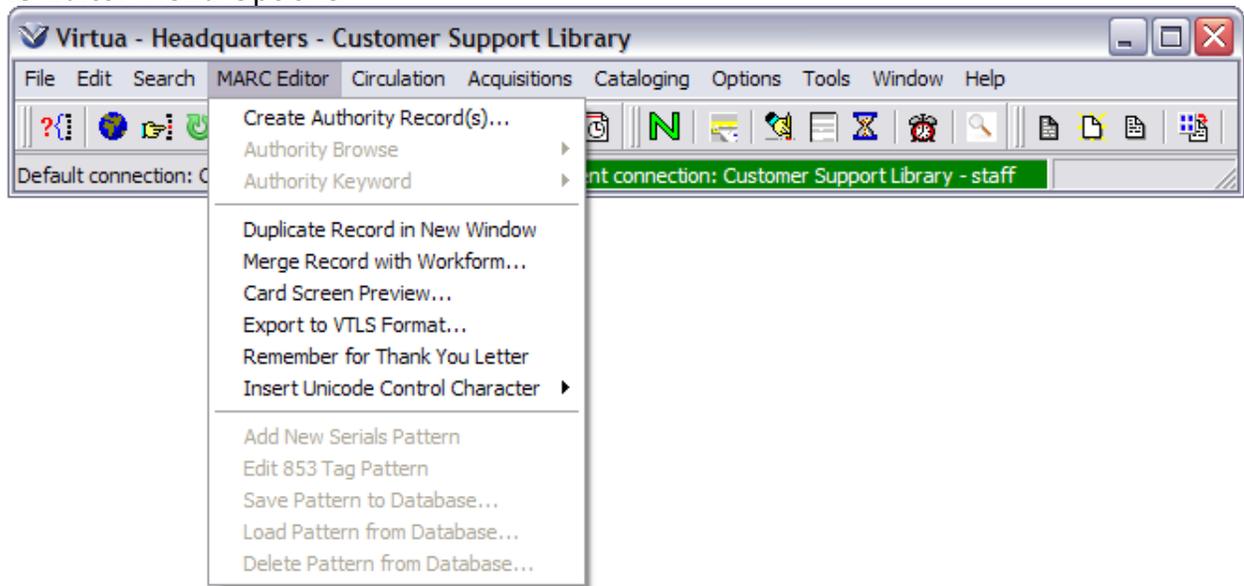
The screenshot shows the Information Bar with the following text: MARC21 Bib: Book OPAC Modified

The type of record being created or edited: USMARC Bib: Book.

Whether it is a workform or a record and if a record, whether it is New, Local, or accessed from the OPAC.

If typing the first entry into the MARC Editor or adding or deleting a tag has changed the record, the word **Modified** appears on the Information Bar.

MARC Editor Menu Options



- **Create Authority Records:** Allows you to create authority from selected headings information in an open MARC record.
- **Authority Browse:** Opens the Browse Search window populated with the information from the selected tag.
- **Authority Keyword:** Opens the Keyword Heading Search window populated with the information from the selected tag.
- **Duplicate Record in New Window:** With a record or workform open in the MARC Editor, this feature allows you to open a new window that duplicates the first.
- **Merge Record with Workform:** With a MARC record open in the MARC Editor, you can add tags by merging the record with a workform. Tag not in the record but that are in the workform will be added to the record.
- **Card Screen Preview:** Allows you to preview the "public view" of the record you are editing.
- **Export to VTLS Format:** Converts records to MARC 2709 format. Re-maps 001/035 tags to VTLS Classic format.
- **Remember for Thank You Letter:** While the record of a gift or deposit is open in the MARC Editor, lets you append the data in the 541 tag to a file to be used in printing Thank You Letters or acknowledgments.
- **Insert Unicode Control Character:** Unicode Control Characters are tags that help with text flow and direction for languages such as Hebrew and Arabic that are right justified.

Understanding VTLS Locally-Defined Tags and Fixed Fields

There are three special MARC record tags defined by VTLS for use in the Virtua client and server. Each of these special tags contains several non-USMARC fixed fields.

- 999 VIRTUA tag
- 999 VTLSSORT tag
- 039 tag

The 999 VIRTUA Tag

The 999 VIRTUA tag gives you a way to enter, in a 2709 format, non-MARC information associated with a MARC record and to communicate that information to and from the Virtua client and server. The 999 VIRTUA tag has a subfield 'a' whose value begins with VIRTUA. The **MARC Editor** adds the tag automatically to a MARC record if it is not already present.

The following VTLS locally defined fixed fields are stored in the 999 VIRTUA tag.
Local Level: A one-integer field that appears in all fixed-field layouts and defines the source of the record.

- 0 – Directly downloaded from an online utility (such as OCLC, RLIN, etc.)
- 1 – Record copied from the same database or from another VTLS database
- 2 – Upgrade of a short record downloaded from a non-MARC-based system
- 4 – Created by direct manual entry
- 5 – Loaded from tape

Analyzed Flag:

The Analyzed Flag indicates whether the record is part of an analyzed series.

- 0 or blank – the record does not represent part of an analyzed series
- 1 – the record represents part of an analyzed series

The 999VTLSSORT Tag

The 999 VTLSSORT tag lets you define in the **MARC Editor** a customized sorting of the tags in a MARC record as it displays on the View Record, Patron Information, and Record Previewing windows. The software normally sorts tags in numeric order, but the VTLSSORT tag lets you sort tags in any order you wish. The data that follows VTLSSORT consists of a series of tag number delimited with an asterisk (*). The asterisk identifies the tag as unique to the MARC record where the VTLSSORT tag is found. The order of the delimited tags indicates the order in which the tags display in the MARC editor.

Note: This tag *cannot* be modified.

For example: Re-ordering the MARC record so that the 090 tag comes before the 040 tag results in a VTLSSORT tag as follows:

MARC Editor - Phoenix99

<input type="checkbox"/>	001			vtls000203144
<input type="checkbox"/>	003			NcFayC
<input type="checkbox"/>	005			20101119091300.0
<input type="checkbox"/>	008			880928s1988 nyu 00010 eng d
<input type="checkbox"/>	010	<input type="checkbox"/>	<input type="checkbox"/>	la 88-60733
<input type="checkbox"/>	020	<input type="checkbox"/>	<input type="checkbox"/>	la 0451522613 (pbk.) :
<input type="checkbox"/>	035	<input type="checkbox"/>	<input type="checkbox"/>	la ocm18538266
<input type="checkbox"/>	039	<input type="checkbox"/>	9	la 201011190913 'b staff 'c 200701152359 'd VLOAD 'y 200406232040 'z load
<input type="checkbox"/>	040	<input type="checkbox"/>	<input type="checkbox"/>	la EZH 'c EZH 'd HQB
<input type="checkbox"/>	500	<input type="checkbox"/>	<input type="checkbox"/>	la Contains bibliographic referenes
<input type="checkbox"/>	049	<input type="checkbox"/>	<input type="checkbox"/>	la HQBA
<input type="checkbox"/>	092	<input type="checkbox"/>	<input type="checkbox"/>	la 822.33 'b S
<input type="checkbox"/>	100	1	<input type="checkbox"/>	la Shakespeare, William, 'd 1564-1616.
<input type="checkbox"/>	240	1	0	la All's well that ends well
<input type="checkbox"/>	245	1	0	la All's well that ends well : 'b with new dramatic criticism and an updated bibliography / 'c William Shakespeare ; edited by Sylvan Barnet.
<input type="checkbox"/>	250	<input type="checkbox"/>	<input type="checkbox"/>	la New rev. ed.
<input type="checkbox"/>	260	<input type="checkbox"/>	<input type="checkbox"/>	la New York, NY : 'b New American Library, 'c c1988.
<input type="checkbox"/>	300	<input type="checkbox"/>	<input type="checkbox"/>	la xxxix, 220 p. ; 'c 18 cm.
<input type="checkbox"/>	490	0	<input type="checkbox"/>	la A Signet classic
<input type="checkbox"/>	490	0	<input type="checkbox"/>	la The Signet classic Shakespeare
<input type="checkbox"/>	501	<input type="checkbox"/>	<input type="checkbox"/>	la MARCIVE 03/01/06
<input type="checkbox"/>	504	<input type="checkbox"/>	<input type="checkbox"/>	la Bibliography: p. 215-220.
<input type="checkbox"/>	700	1	<input type="checkbox"/>	la Barnet, Sylvan.]
<input type="checkbox"/>	913	0	0	la SHAAWTE95000
<input type="checkbox"/>	999	<input type="checkbox"/>	<input type="checkbox"/>	la VIRTUA50
<input type="checkbox"/>	999	<input type="checkbox"/>	<input type="checkbox"/>	la VTLS SORT0010*0030*0050*0080*0100*0200*0350*0390*0400*5000*0490*0920*1000*2400*

(a) Language material (m) Monograph/item Masked

< > MARC 21 Bib: Book OPAC

OPAC1

The 039 Tag

The VTLS locally-defined 039 tag keeps track of the history of a MARC record, which includes the date of database entry, the name of the database entry "person," and a series of dates of modification and names of modifiers. The 039 tag applies to all record formats

Note: You *cannot* edit the 039 tag. By default, the tag will not even appear in the **MARC Editor**. When you create or modify a record, Virtua automatically creates or modifies the 039 tag. You can choose to display this tag by modifying the **Tags Not to Display** field in the **Cataloging Options** window.

Subfields of the 039 Tag

Subfield	Value	Definition
a	YYYYMMDDHHMM	Most Recent Modification Date
b	Any String	Most Recent Modifier Virtua Log-in Name
c	YYYYMMDDHHMM	Previous Modification Date
d	Any String	Previous Modifier Virtua Log-in Name
y	YYYYMMDDHHMM	Virtua Database Entry Date
z	Any String	Virtua Database Entry Person Virtua Log-in Name

When new records are created or loaded into the Virtua database, the added 039 tag will include only \y and \z.

- The first time the record is edited, Virtua adds a set of \a \b (Modification Date + Log-in Name).
- The next time the record is edited, Virtua moves \a \b to \c \d and creates a new \a \b.
- With each modification of the record, Virtua updates and replaces the \a \b and moves the \a \b to the most recent \c \d.
- The \c \d repeat for each previous modification for up to 4 c/d combinations. In this way, the last 5 modifications of the record are stored in reverse chronological order.

MARC Editor - Phoenix99

<input type="checkbox"/>	001			vtls000223695
<input type="checkbox"/>	003			NcFayC
<input type="checkbox"/>	005			20070117023400.0
<input type="checkbox"/>	008			900209r19901924wju b s00110aeng
<input type="checkbox"/>	010	<input type="checkbox"/>	<input type="checkbox"/>	la 90-50091
<input type="checkbox"/>	020	<input type="checkbox"/>	<input type="checkbox"/>	la 0299125408 : lc \$25.00
<input type="checkbox"/>	020	<input type="checkbox"/>	<input type="checkbox"/>	la 0299125440 (pbk.) : lc \$12.95
<input type="checkbox"/>	035	<input type="checkbox"/>	<input type="checkbox"/>	la ocm21409474
<input type="checkbox"/>	039	<input type="checkbox"/>	9	la 200701170234 lb VLOAD ly 200406232043 lz load
<input type="checkbox"/>	040	<input type="checkbox"/>	<input type="checkbox"/>	la DLC lc DLC ld HQB
<input type="checkbox"/>	043	<input type="checkbox"/>	<input type="checkbox"/>	la n-us—
<input type="checkbox"/>	049	<input type="checkbox"/>	<input type="checkbox"/>	la HQBA
<input type="checkbox"/>	082	0	0	la 813/.4 la B l2 20

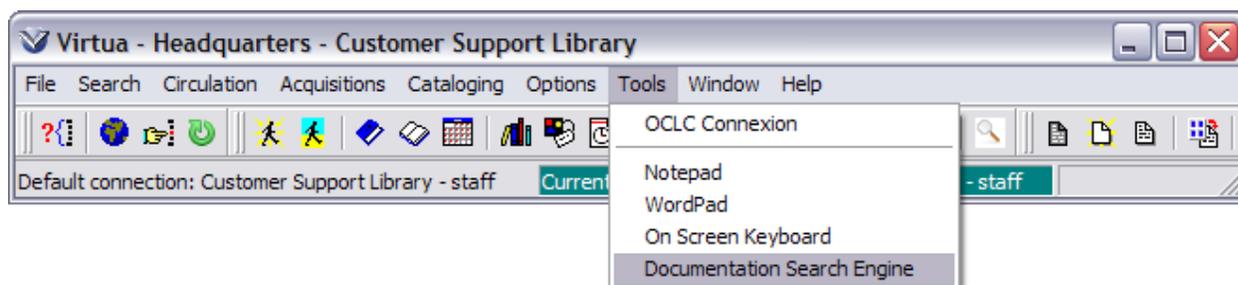
(a) Language material (m) Monograph/Item Masked

< > MARC 21 Bib: Book OPAC

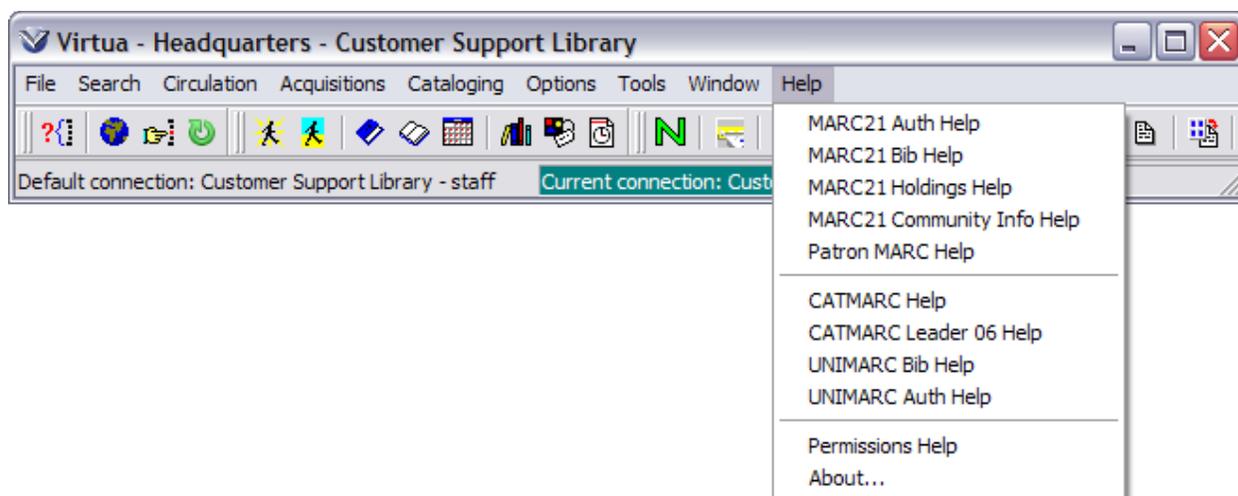
OPAC1

Documentation and Help

Virtua Users Guides are available in searchable .pdf format from the **Tools** menu; click on the **Tools** menu, then select **Documentation Search Engine**. The Documentation Search Engine appears on your Tools menu by default, it is functional only if the Virtua documentation has been installed via the Documentation Installer. For details on the Documentation Search Engine, see the section *Getting Help with Virtua: Viewing and Searching the Virtua Documentation* in the *Virtua Client Getting Started Primer*.

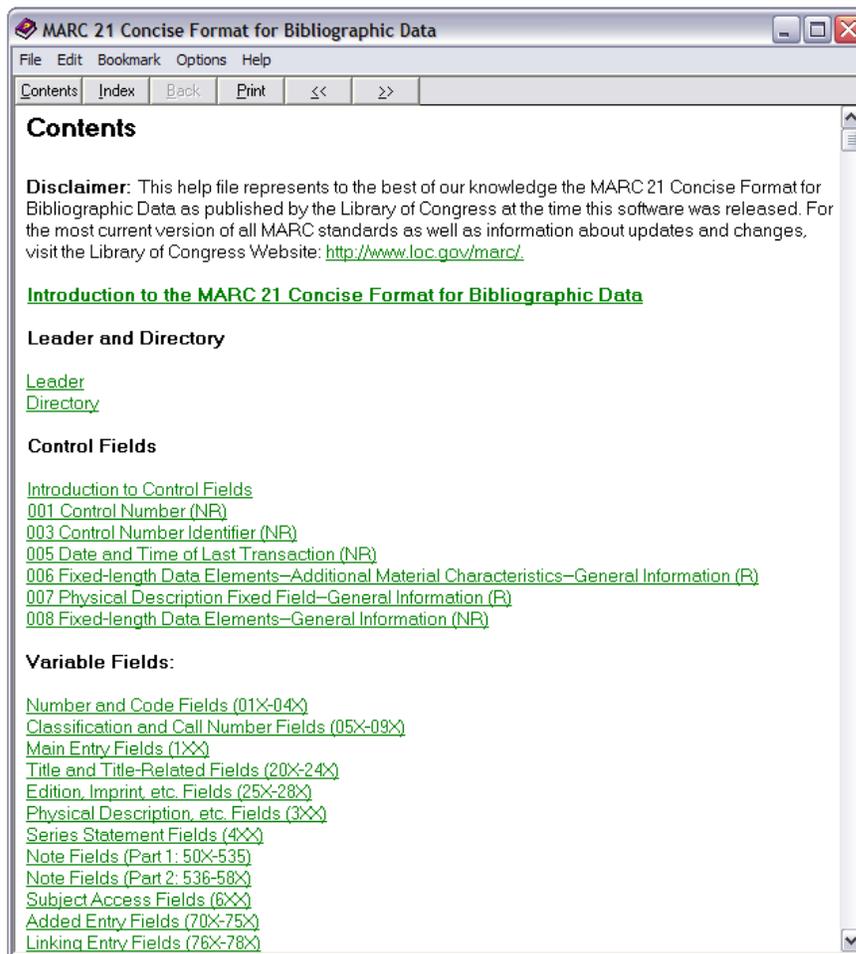


The **Help** Menu links to detailed information about **MARC 21, CATMARC, SWEMARC, and UNIMARC Format**.



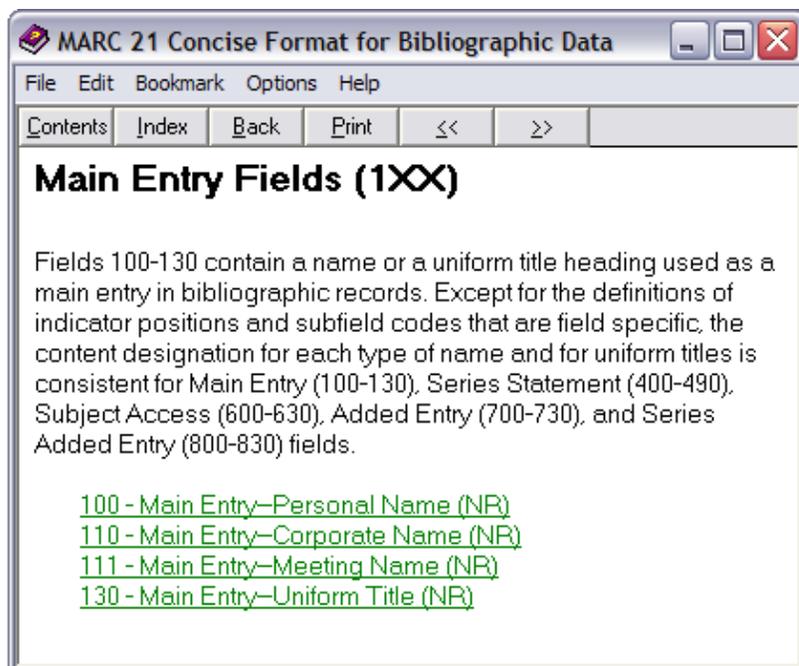
Select the type of help you wish to access. The **Concise Format Data** window will appear for the format you selected

For example: When **MARC21 Bib Help** is chosen from the **Help** menu, the **Marc 21 Concise Format for Bibliographic Data** will appear.

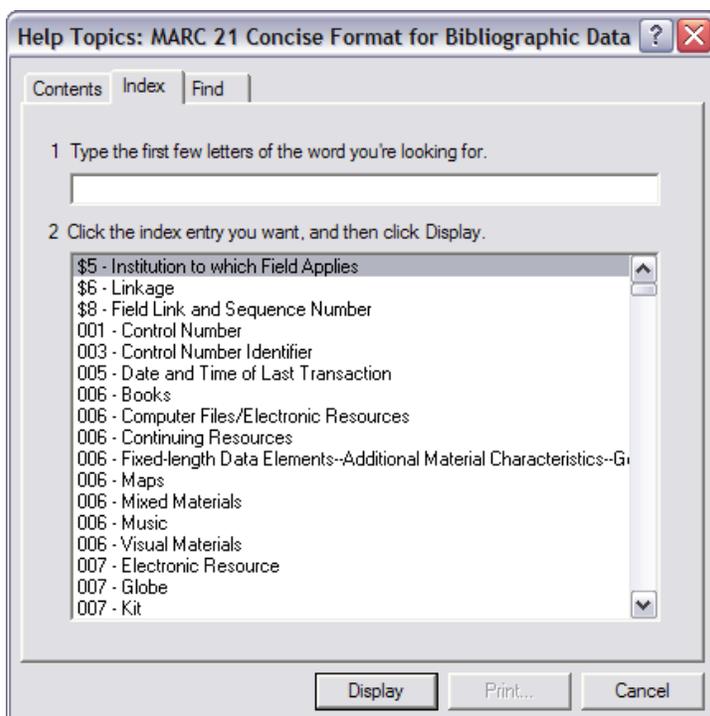


Note: The information appears in tag number order.

Select a topic by clicking on the desired link within the **Concise Format Data** window; the topic will be brought up in the concise format data window.

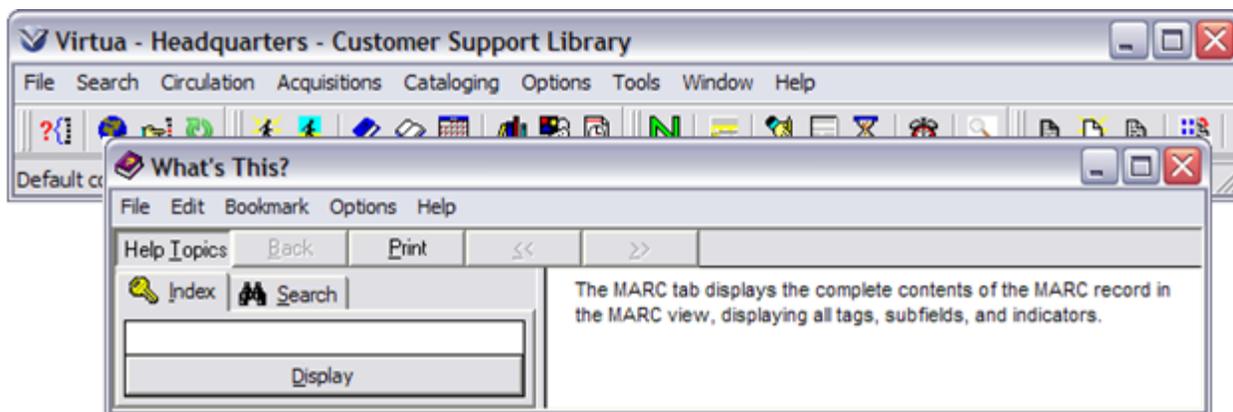


Click on the **Index** tab to use the index feature. The index feature is used to search a list, in tag number order, of all tags associated with that particular type of MARC record. When the Index feature is selected, the Help Topics window appears.

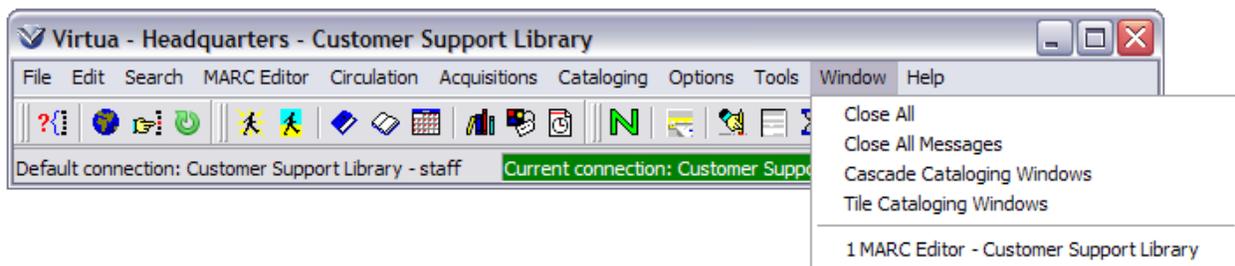


Click on the **Find** tab to search by keyword.

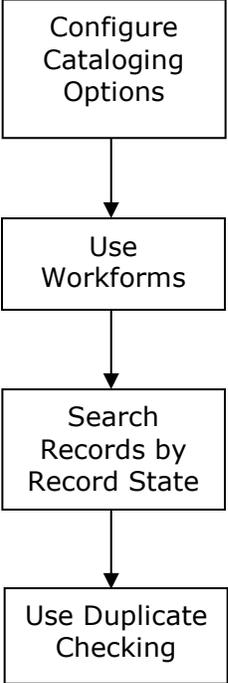
Feature specific help is available; from the window for which additional information about a feature is wanted, using the **F1** key or right mouse click will bring forward more information regarding that portion of the window.



The **Window** Menu tracks the order in which open Virtua windows were accessed.

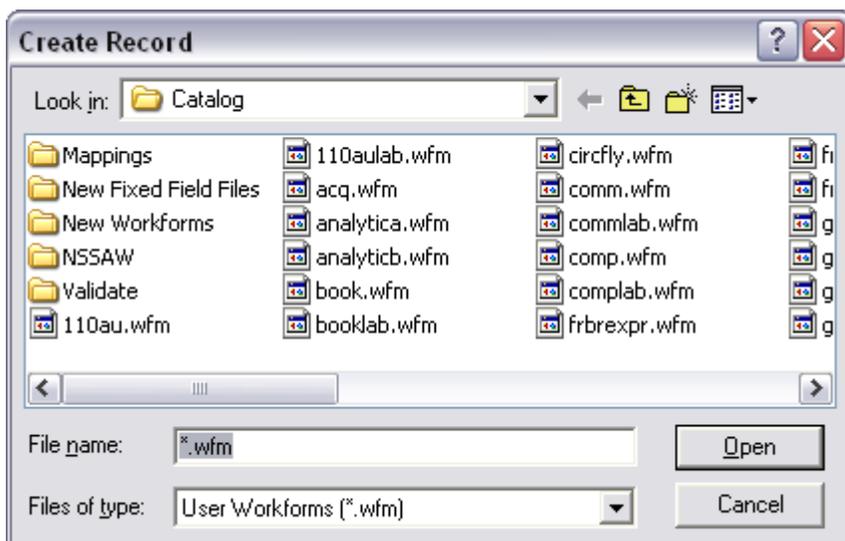


Cataloging Workforms

Recommended Workflow	Explanation
 <pre> graph TD A[Configure Cataloging Options] --> B[Use Workforms] B --> C[Search Records by Record State] C --> D[Use Duplicate Checking] </pre>	<p>Virtua provides a user-friendly interface for cataloging material based on cataloging workforms.</p> <p>To help you create new records, Virtua provides preset workforms for Bibliographic, Authority, Holdings, and Community Information MARC formats; Patron; and circ-on-the-fly records. These may be modified to suit your needs.</p> <ul style="list-style-type: none"> • The workforms are located at C:/Program Files/VTLS/Virtua/Catalog/ • The workforms can be identified by the file extension *.wfm. • Most workforms are available in two versions, one without subfield codes labeled and one with labels. <p>Summary</p> <ul style="list-style-type: none"> • Edit an existing workform • Create a new workform • Save workforms • Merge a workform with a record <p>Key Terms</p> <ul style="list-style-type: none"> • MARC Editor • MARC Indicator • MARC Tag • Workform

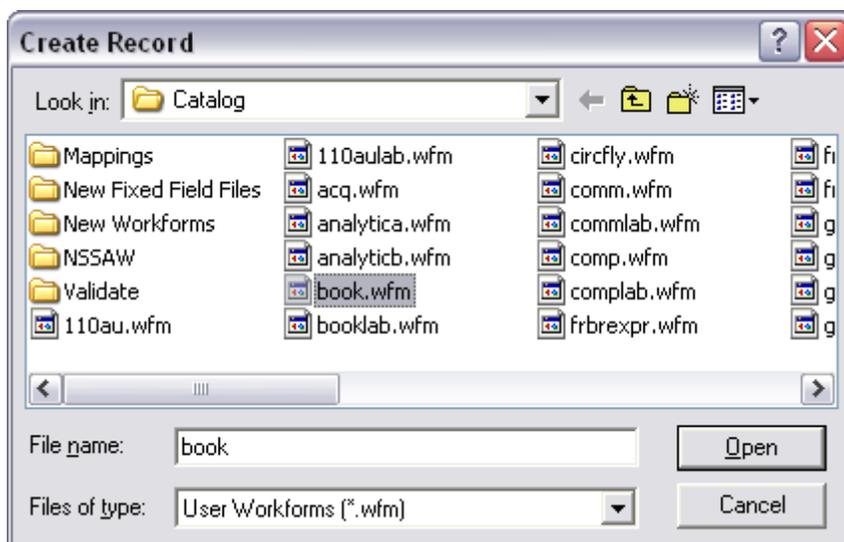
Workforms

Click on the **Add New Record** icon  on the **Cataloging Toolbar** or select **File → Records → Create Record**. The **Create Record** window appears.



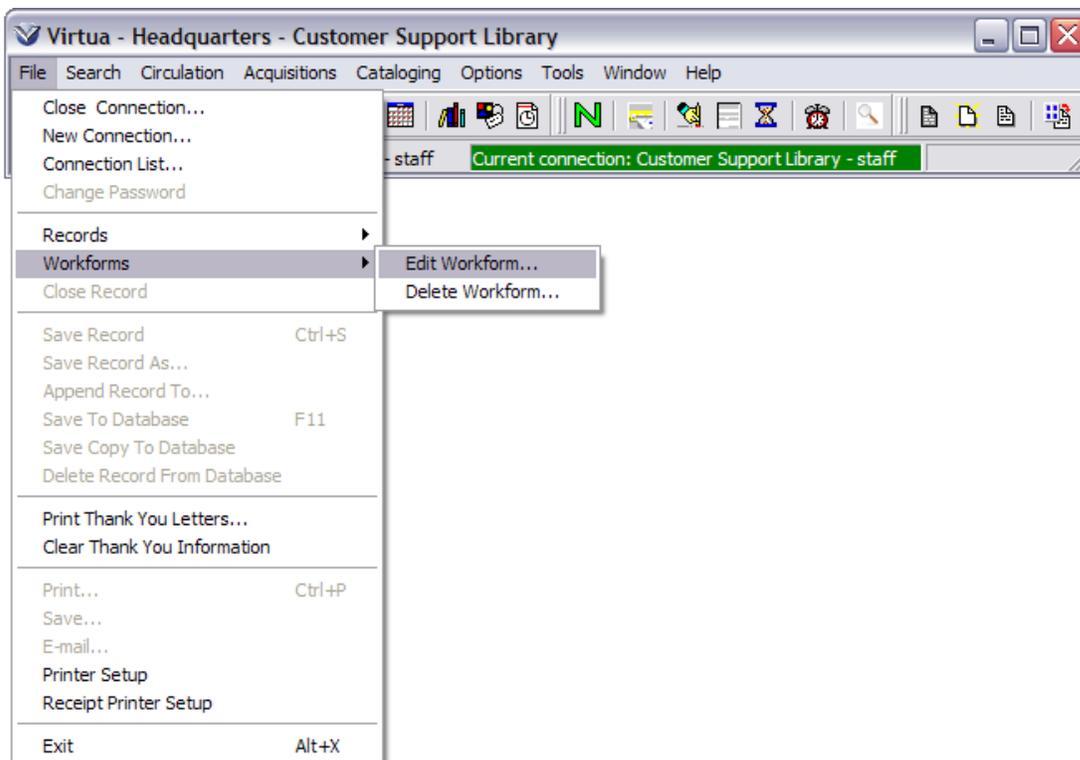
Note: The directory displayed will default to the last directory viewed from within Virtua Client.

Select a workform and click **Open**. The **MARC Editor** will appear with the workform loaded.

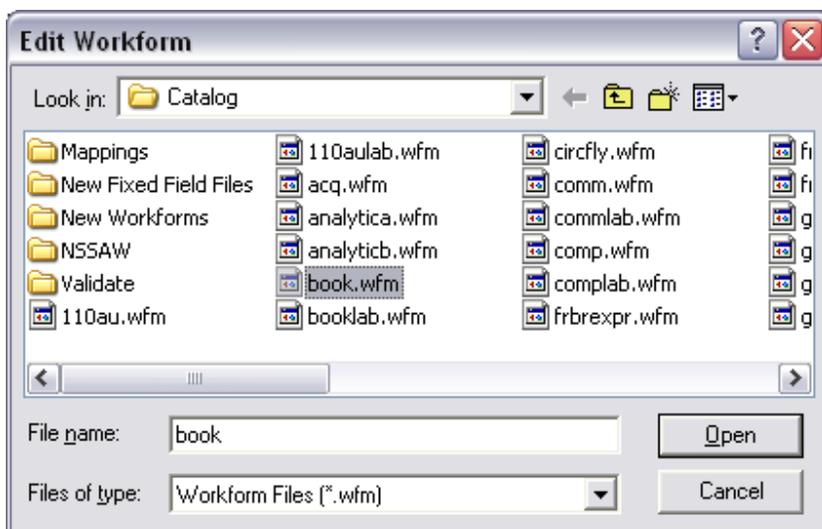


Edit a Workform

Click the **Edit Workform** icon  or on the **Cataloging** toolbar or select **File** → **Workforms** → **Edit Workform** on the Virtua menu bar.

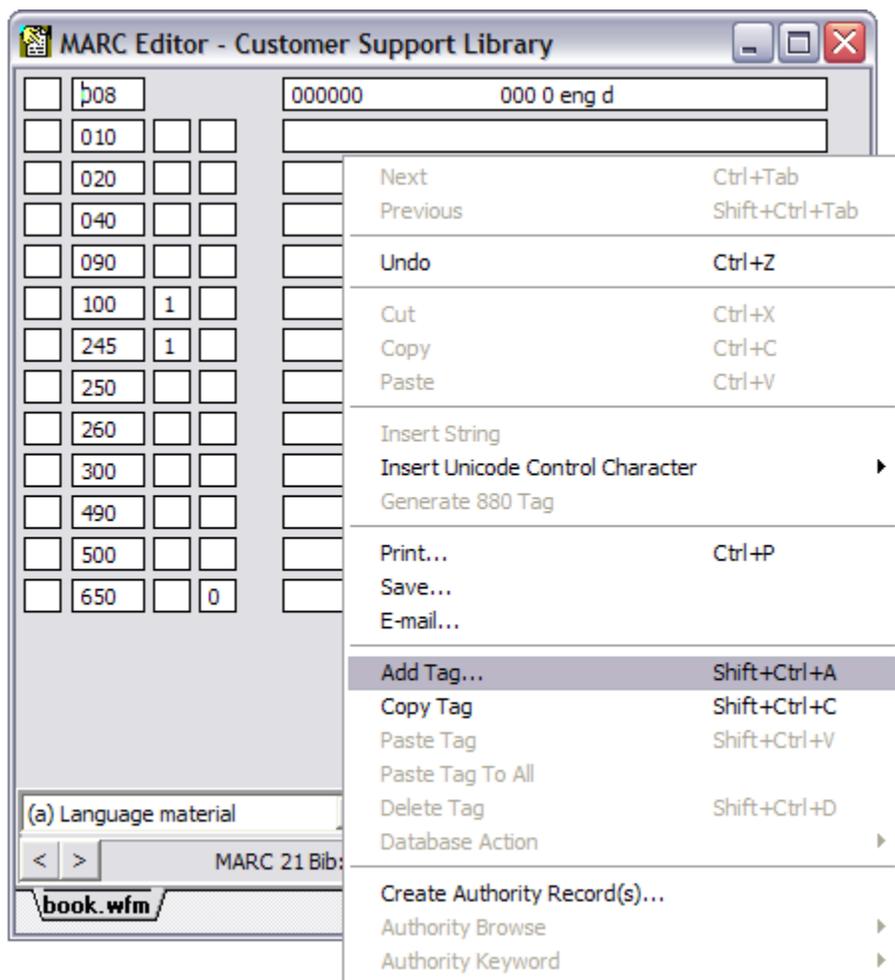


The **Edit Workform** window appears.



Select the workform to edit. Click **Open**; the **MARC Editor** window appears.

Edit the Workform by adding or deleting tags from the right mouse click pop-up menu.



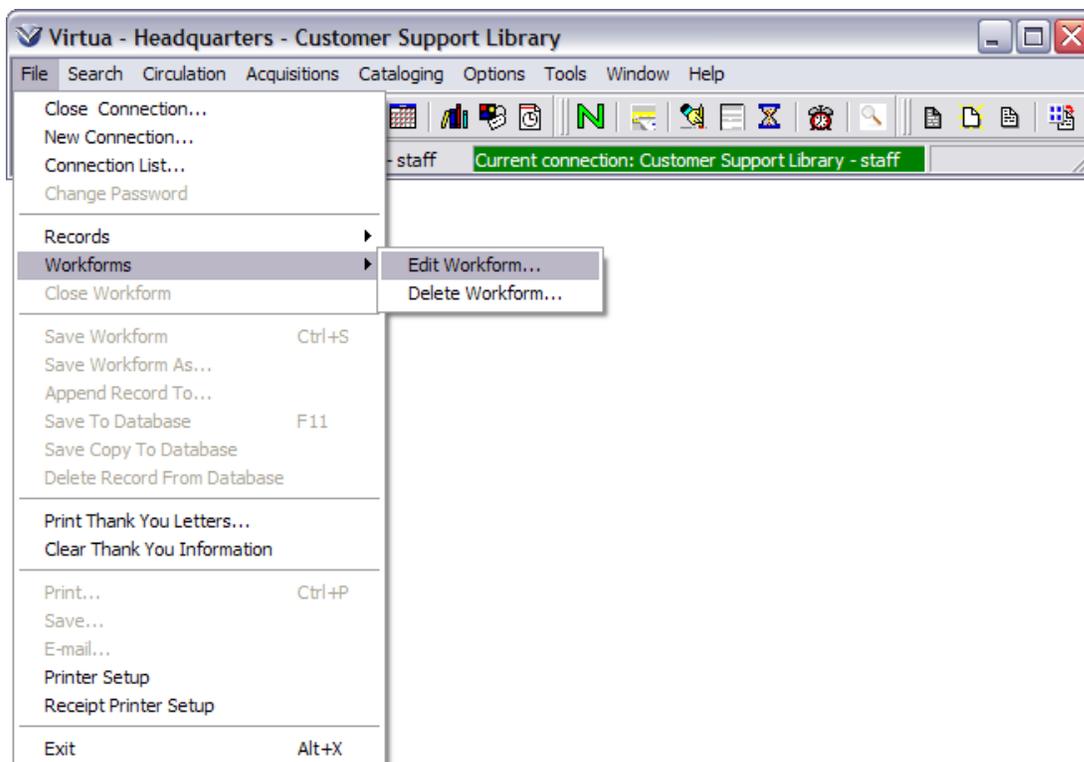
Save the workform.

Select **File** → **Save** to save the workform with its **existing** name.

Select **File** → **Save As** to save the workform with a **different** name.

Delete an Existing Workform

Select **File** → **Workform** → **Delete Workform**.



The **Delete Workform** dialog box appears.



Select the workform to delete; the **Confirm** deletion box will appear.

Click **Yes** to delete the workform.

Specialty Workforms

Brief MARC Records to Circulate Non-Cataloged Material

You may create brief bibliographic records to circulate material that has not yet been added to the database. This is called circ-on-the-fly. Your library designates a special workform for the purpose of creating circ-on-the-fly records. Virtua Cataloging provides a workform called `circfly.wfm`.

To create a brief bibliographic record using circ-on-the-fly:

Follow the steps to create a new MARC record.

Choose the workform designated by your library as the one to use for circulating material on the fly. Virtua has a circ-on-the-fly workform that you may select from **Circulation → Transactions → Circfly**.

Brief MARC Records to Circulate Non-Library-Owned Material

You may want to create brief bibliographic records to circulate material that is not owned by your library. An example of such material is a book or article owned by a professor who wants to place it on reserve in the library.

Virtua does not supply a workform for this, but you can create a special workform to be used for these brief records. The Circ-on-the-fly workform has the briefest entries and is a good place to start.

To create a brief bibliographic record for non-library-owned material:

Follow the steps to create a new MARC record.

Choose the workform designated by your library as the one to use for non-library-owned material. This may be the circ-on-the-fly workform or one designed by your library.

Patron Workform

Virtua provides a default patron workform, **patron.wfm**, which you can use or modify to create patron records. If you modify the default patron workform, you can save the workform under the same name or a different name. The installation programs for Virtua releases will not overwrite any `*.wfm` files that already exist.

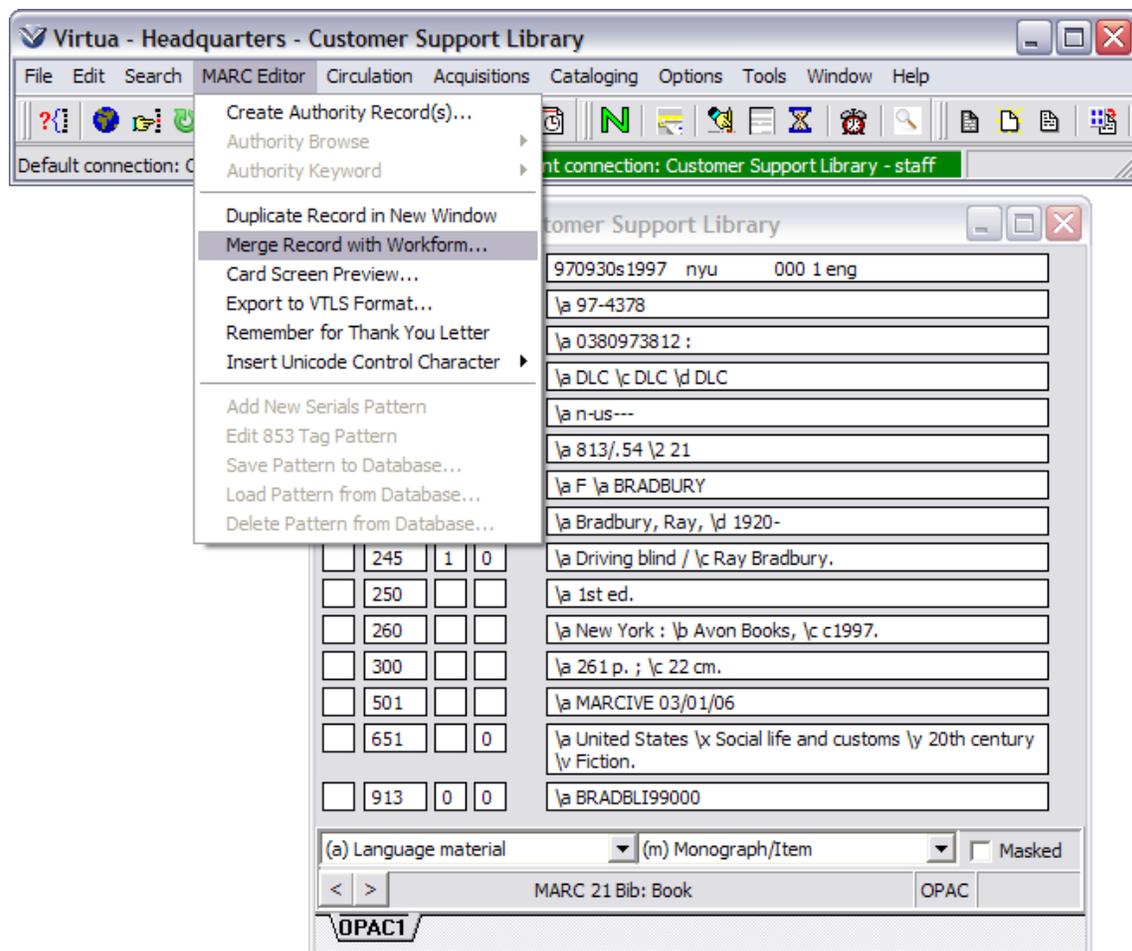
Merging Workforms with MARC Records

When a number of new tags need to be added to an existing MARC record, Virtua offers a workform merge feature. Instead of adding individual tags to the record, you can merge a workform into the record to add tags and subfield data contained in the workform but missing in the record.

To add tags to a MARC record via a workform merge:

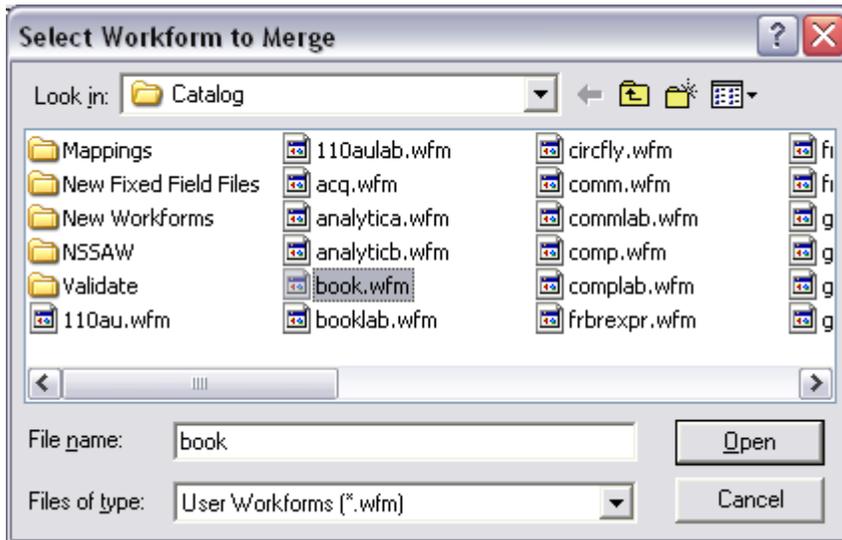
In the **MARC Editor**, open the bibliographic record to which you want to add tags.

In the menu bar, click the **MARC Editor**, and then choose **Merge Record with Workform**.



- **If** a default workform has been specified via the **Cataloging Options** function, the merge will begin automatically.
- **If** no default workform has been specified, the **Select Workform to Merge** dialog box will appear).

Select a workform and click the **Open** button. The merge will begin.

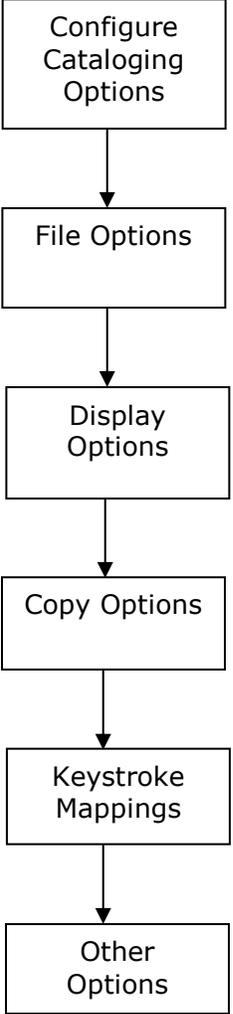


The merge function will:

- Overwrite the bib level of the record with the bib level of the workform.
- Add tags and subfield data contained in the workform but missing in the record.
- Not overwrite or change any data already in the record.

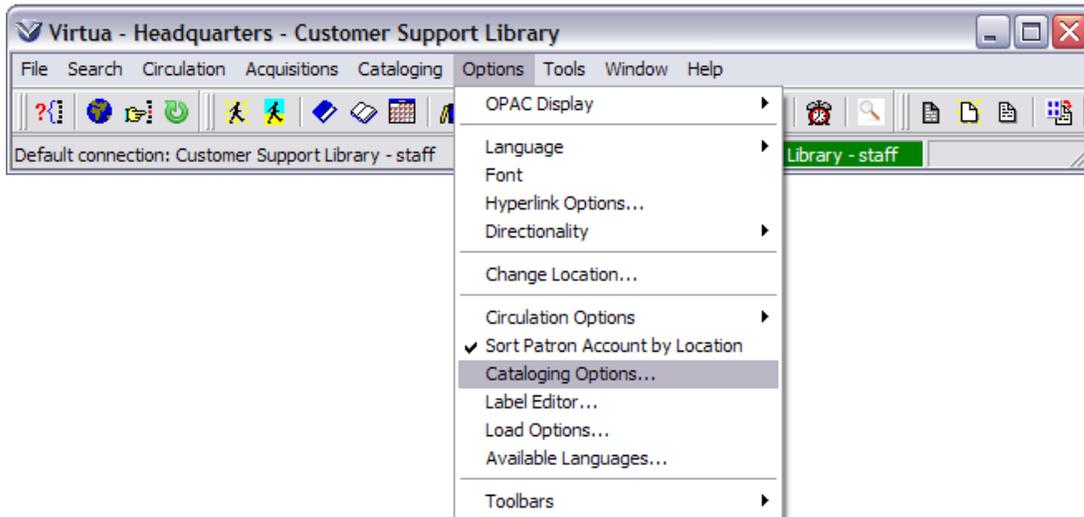
After the merge is complete, Virtua displays the inserted tags and subfields in the **MARC Editor** window. The MARC record will scroll to the first added or modified tag.

Setting Cataloging Options

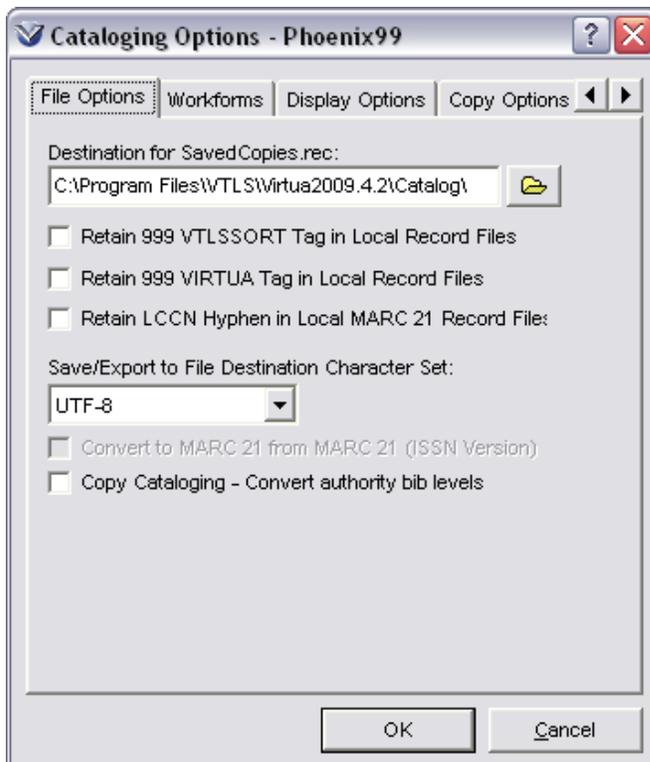
Recommended Workflow	Explanation
 <pre> graph TD A[Configure Cataloging Options] --> B[File Options] B --> C[Display Options] C --> D[Copy Options] D --> E[Keystroke Mappings] E --> F[Other Options] </pre>	<p>The Cataloging Options window offers numerous options for customizing your cataloging session. There are seven tabs, each containing options that may be set.</p> <ul style="list-style-type: none"> • File Options • Workforms • Display Options • Copy Options • Editor Keystroke Mappings • Label printing • Other Options <p>Virtua allows you to select from a wide variety of options, from choosing a default workform, selecting a subfield delimiter, and specifying tags not to be displayed or copied, to determining the type of record validation you want the system to perform.</p> <p>Summary</p> <ul style="list-style-type: none"> • Set File Options • Set Display Options • Set Copy Options • Set Keystroke Mappings • Set Other Options <p>Key Terms</p> <ul style="list-style-type: none"> • Cataloging Options • MARC Editor • MARC Indicator • MARC Tag

Cataloging Options Window

To choose options for your cataloging session, on the Virtua menu bar select **Options** → **Cataloging Options**.



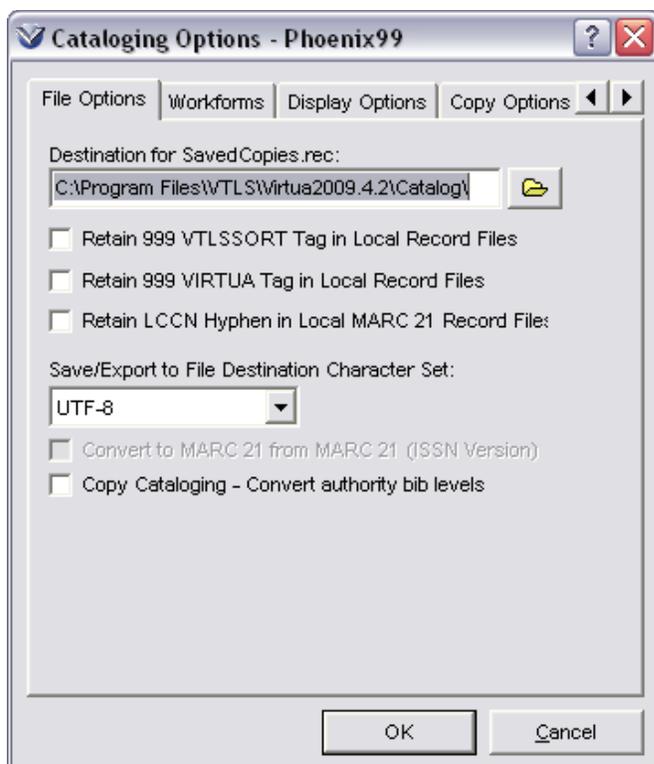
The **Cataloging Options** window appears with the **File Options** tab displaying. Click on the tabs to display other options.



When you are finished choosing your options, click **OK**. The options you set will remain in force even after you log off the client and log back in.

Note: Cataloging Options under each tab are discussed in detail in the following sections.

File Options



Label	Description
Destination for SavedCopies.rec	Click the folder icon to the right of the Destination for SavedCopies.rec field, and select a location for the SavedCopies.rec file. SavedCopies.rec is the local file to which Virtua saves records when you choose to Save Copy to Database. The Destination for SavedCopies.rec is the location that will be opened when you click on the OpenSavedCopies.rec button on the Cataloging toolbar.
Retain locally-defined 999 VTLSSORT Tag in Local Record Files	The 999 VTLSSORT tag lets you define in the MARC Editor a customized sorting of the tags in a MARC record as it displays on the View Record, Patron Information, and Record Previewing windows.

Retain locally-defined 999 VIRTUA Tag in Local Record Files

The 999 VIRTUA tag gives you a way to enter, in a 2709 format, non-MARC information associated with a MARC record and to communicate that information to and from the Virtua client and server.

Retain LCCN hyphens in local MARC 21 Record Files

The MARC 21 format specifies that LCCN's do not have hyphens. However, Virtua puts hyphens into 010 tag data when records are imported, so we give you the option of removing them when you save the record to a local file. If you choose NOT to retain the hyphens, the system removes the first hyphen only and pads to six digits the serial number between the hyphen and the supplemental number with zeros.

Save/Export to File Destination Character Set

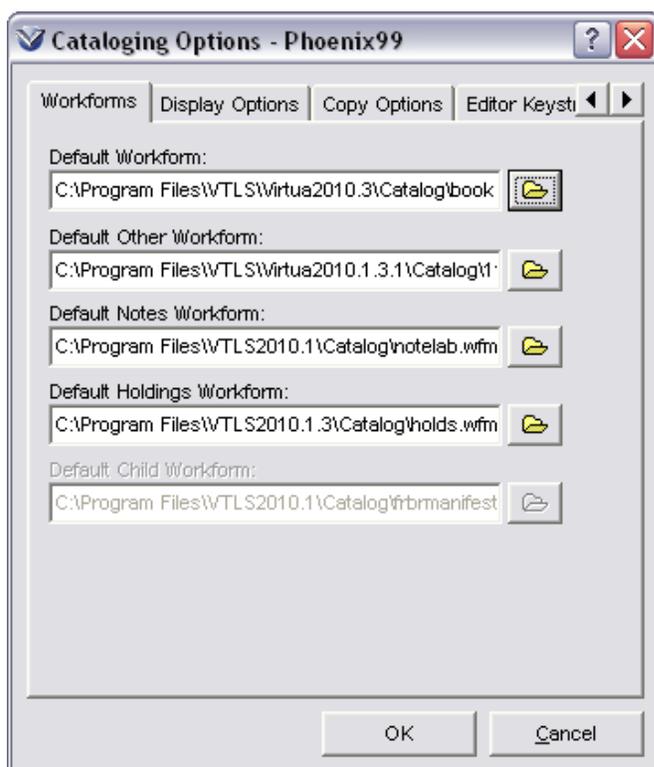
Allows you to select from multiple character sets.

Note: This option works in conjunction with the Save functions on the File drop-down menu and Export to VTLS format function on the **MARC Editor** drop-down menu. The default is UTF-8. If you choose a character set other than the default, when you save a record in the MARC Editor, the system converts the record to the specified character set.

Copy Cataloging – Convert authority bib levels

Select the 'Copy Cataloging – Convert Authority bib levels' check box to convert authority records from a version 46 and higher Virtua database to records that can be saved to a pre-46 database.

Workforms

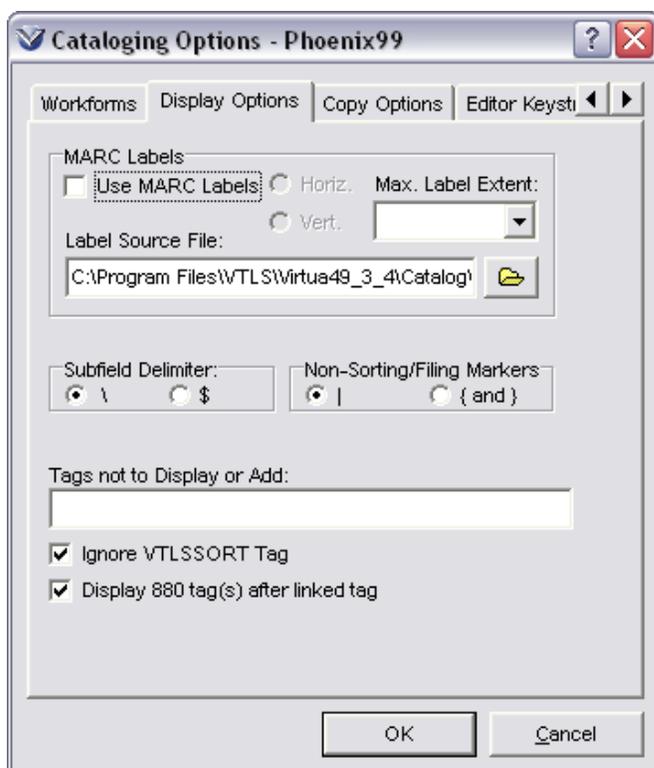


Label	Description
Default Workform	Click the folder icon to the right of the Default Workform field, and select from the Select Default Workform dialog box. When you use the Create Record function, this workform will appear in the MARC Editor automatically.
Default Other Workform	Click the folder icon to the right of the Default Other Workform field, and select from the Select Default Workform dialog box. When you use the Create Other Record function, this workform will appear in the MARC Editor automatically.
Default Notes Workform	Click the folder icon to the right of the Default Notes Workform field, and select from the Select Default Workform dialog box. Virtua supplies a predefined notes workform (notelab.wfm) to be used to create copy-specific notes. When you create a new copy-specific notes record for a holdings or item record, this workform will appear in the MARC Editor automatically.
Default Holdings Workform	Click the folder icon to the right of the Default Holdings Workform field, and select a workform from the Select Default Workform dialog box. Virtua supplies a predefined workform (holds.wfm) to be used to create holdings records. When you create a new holdings record from the View Bibliographic Record window, this workform (or another that you have customized) will appear in the MARC Editor automatically.

<p>Default Child Workform</p>	<p>Click the folder icon to the right of the Default Child Workform field, and select a workform from the Select Default Workform dialog box. When you use the Create Child Record function to create a new record, this workform will appear in the MARC Editor automatically.</p> <p>Note: This functionality is used for Virtua Archives Management customers.</p>
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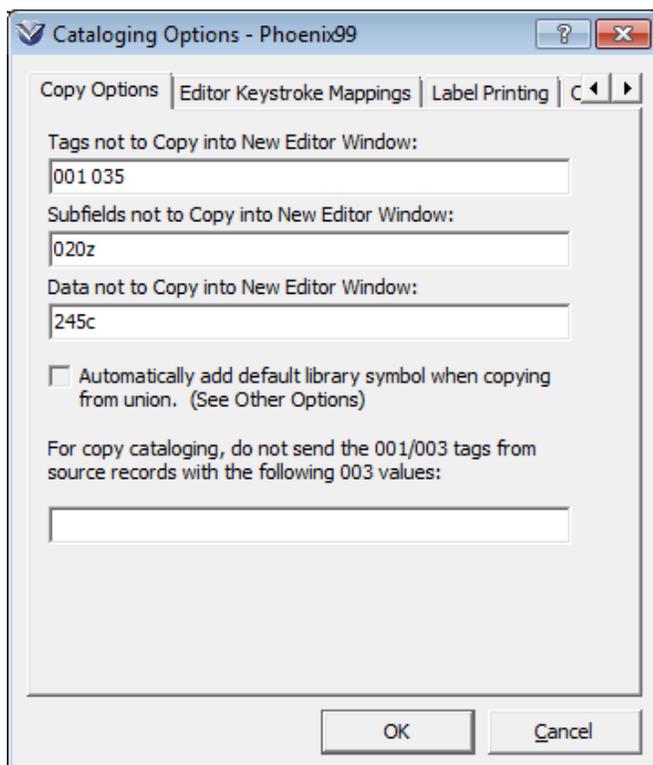
Display Options

On the **Display Options** tab, you can set options that are related to the display of records or workforms in the **MARC Editor**.



Label	Description
Use MARC labels	<p>Select or de-select Use MARC Labels as the editing mode for the MARC Editor. If you choose to Use MARC Labels, you can then select the following:</p> <ul style="list-style-type: none"> • Whether you want the labels to appear above (vertically) or beside (horizontally) the data field in the MARC Editor. • The percentage of the screen used for labels in horizontal format. • The path to the source file for the labels. The default file is labels.rec.
Subfield Delimiter	<p>Choose the Subfield Delimiter you want to display in the MARC Editor. In the United States, the backslash (\) is usually used.</p>
Non-Sorting/Filing Marker	<p>Choose the Marker that you want to use in the MARC Editor. Non-sorting/filing markers function like the non-filing indicator. The MARC Editor displays the beginning and ending markers as either vertical bars, The Great Gatsby, or as wavy brackets, The }Great Gatsby.</p>
Tags Not to Display	<p>In the Tags Not to Display box, type any tags you do NOT want to appear or be edited in the MARC Editor or, if a list of tags already exists, delete any tags you do want to appear in the MARC Editor.</p>
Ignore VTLSSORT Tag	<p>If this option is checked, tags in the MARC Editor will display in numerical order. If this option is unchecked, the VTLSSORT tag will determine the order in which tags display.</p>
Display 880 tag(s) after linked tag	<p>Enable this if you want 880 tags to display directly after the linked tag. If left unchecked, they will display in numeric order.</p>

Copy Options



The screenshot shows a dialog box titled "Cataloging Options - Phoenix99" with three tabs: "Copy Options", "Editor Keystroke Mappings", and "Label Printing". The "Copy Options" tab is active. It contains three text input fields for tags, subfields, and data not to be copied into a new editor window. The first field contains "001 035", the second contains "020z", and the third contains "245c". There is an unchecked checkbox for "Automatically add default library symbol when copying from union. (See Other Options)". Below this is a text area for "003 values" which is currently empty. At the bottom are "OK" and "Cancel" buttons.

Cataloging Options - Phoenix99

Copy Options | Editor Keystroke Mappings | Label Printing | C ◀ ▶

Tags not to Copy into New Editor Window:
001 035

Subfields not to Copy into New Editor Window:
020z

Data not to Copy into New Editor Window:
245c

Automatically add default library symbol when copying from union. (See Other Options)

For copy cataloging, do not send the 001/003 tags from source records with the following 003 values:

OK Cancel

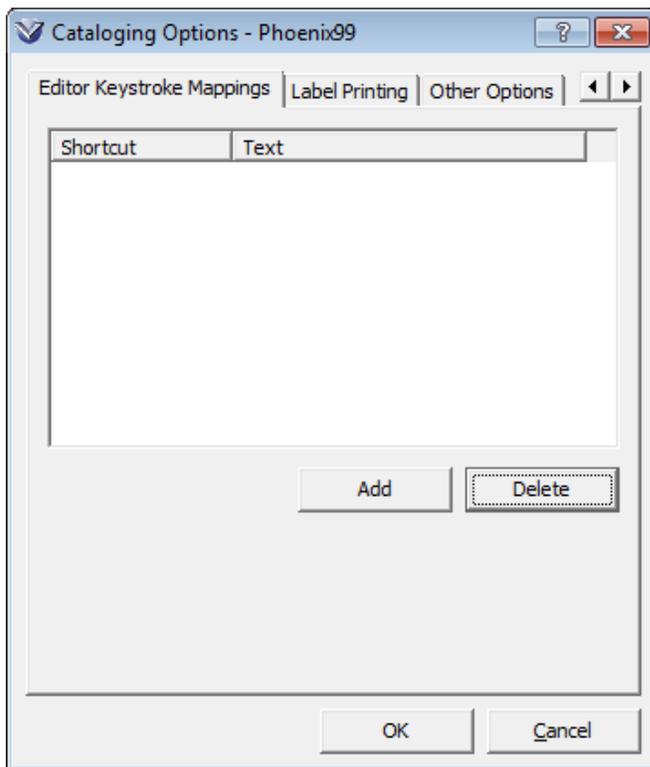
Label	Description
Tags not to Copy into New Editor Window	Tags will not be duplicated when the record is copied. The 001 tag (Control #) must display in this window or the original record will be overwritten.
Subfields not to Copy into New Editor Window	<p>When a record is duplicated in the MARC Editor, this option will not copy either the information in these tags or the tag themselves.</p> <p>Enter the information into the text box with the tag number followed immediately by the subfield. Use a space to separate tags. If multiple subfields are desired for the same tag add the subfield letters next to each other.</p> <p>Example: 020z 245dh</p>
Data not to Copy into New Editor Window	<p>When a record is duplicated in the MARC Editor, this option will remove any data in these fields but will copy empty tags and subfields.</p> <p>Enter the information into the text box with the tag number followed immediately by the subfield. Use a space to separate tags. If multiple subfield are desired for the same tag add the subfield letters next to each other.</p> <p>Example: 541abgh 978a</p>
Automatically add default library symbol when copying from union	Virtua will automatically insert the default library symbol in records copied from a union catalog. The check box will be active only if a library symbol is typed in the Default Library Symbol field on the Other Options tab. Note that Virtua prevents the deletion of a bibliographic record that contains a library symbol.
For copy cataloging, do not send the 001/003 tags from source records with the following 003 values	When this field is populated, Virtua will save the copies of the records without the original 001 and 003 tags. Virtua instead will add new 001 and 003 tags, and will not generate a new 035 tag.

Note: Virtua also has the ability to specify tags and/or subfields to be deleted from incoming records based on the source of record (value in 003 tag). This is a value defined in the Profiler and will apply to ALL incoming records from that source.

Editor Keystroke Mapping

Virtua provides the ability to create keyboard shortcuts for commonly used phrases or diacritics. These shortcuts are created in the **Cataloging Options** window, **Editor Keystroke Mappings** tab, and are available in the **MARC Editor** window when creating or editing MARC records.

To create a keyboard shortcut, click on the **Editor Keystroke Mapping** tab of the **Cataloging Options** window.



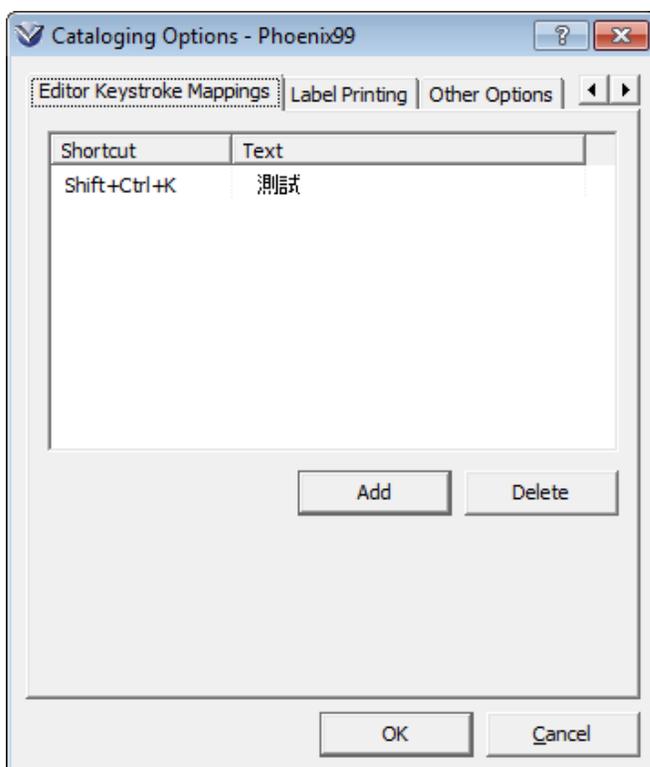
Click the **Add** button. The **Add New Editor Shortcut** window will appear.



In the Shortcut textbox, enter the keystrokes for the keyboard shortcut. The keystrokes will appear in the Shortcut textbox.

In the Text textbox, enter the corresponding text for the keyboard shortcut.

Hit the **Enter** key. The **Add New Editor Shortcut** window will close and the shortcut with the corresponding text will appear in two columns on the **Editor Keystroke Mappings** tab.



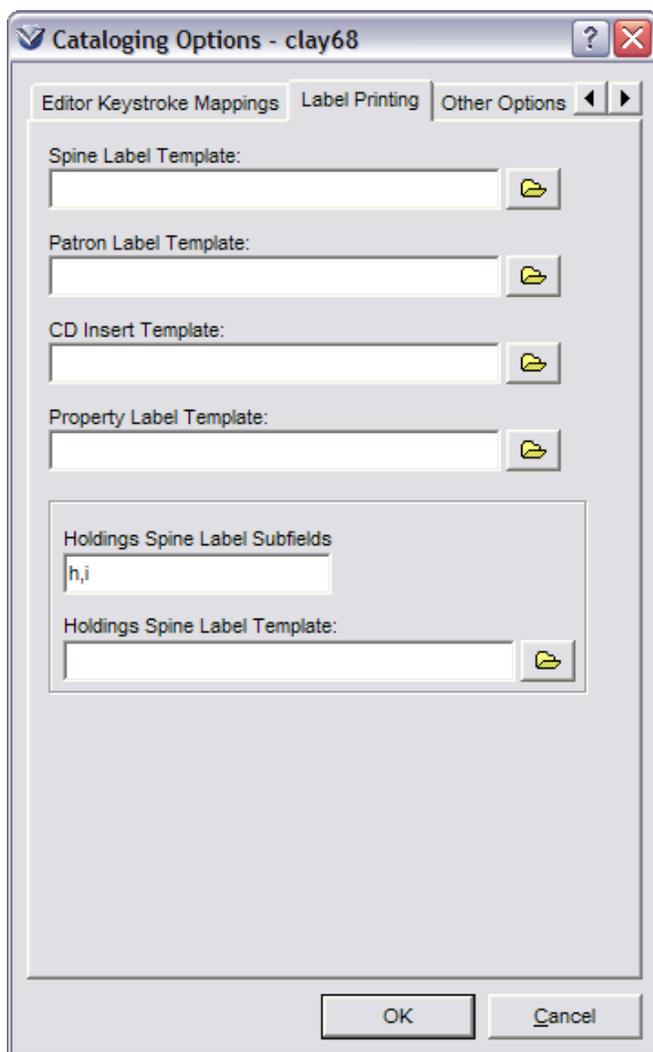
In the **MARC Editor**, place your cursor in the tag where you wish to enter the text.

Perform the keyboard shortcut. The associated text will appear

Label Printing

The Virtua Client lets you create printable files of spine labels, CD inserts and patron address labels from Saved Lists created in Chamo. Templates to be used for the label creation must be specified on the **Label Printing** tab of Cataloging Options in order for the labels to be created.

A separate template may be used for each type of label.



Label	Description
Spine Label Template	Displays the name and location of the template to be used for printing spine labels. If you do not specify a file, Virtua will use the default template labinput.txt in the Virtua directory.
Patron Label Template	Displays the name and location of the template to be used for printing patron address labels from Saved Lists. Virtua does not come with a default template.
CD/Insert Template	Displays the name and location of the template to be used for printing CD inserts from Saved Lists. Virtua does not come with a default template.
Property Label Template	Displays the name and location of a template for printing property labels. If you do not specify a file, Virtua will use the default file proplabinput.txt in the Virtua directory.
Holdings Spine Label Subfields	Allows you to define which subfields of the 852 tag Virtua will use when finding a call number to print on a spine label. This list is comma-delimited, and the default values are 'h' and 'i'.
Holdings Spine Label Template	Displays the name and location of a template for printing holdings spine labels. If you do not specify a file, Virtua will use the default file holdlabinput.txt in the Virtua directory.

Other Options

The screenshot shows a dialog box titled "Cataloging Options - clay68" with a "Label Printing" tab and an "Other Options" tab. The "Other Options" tab is active. The dialog contains several sections of settings:

- Validation Options:** A group box containing three checked checkboxes: "Validate when Saving to File", "Validate when Saving to Database", and "Use Specific Bibliographic Rule Files".
- General Options:** A group of checkboxes including "Show Delete Warnings" (checked), "Mask New Records" (unchecked), "Edit 006, 007, 008 in Editor" (checked), "Use Multiple Editors" (unchecked), "Overwrite Variable Fields" (unchecked), "Use Patron Editor" (checked), and "Print request slip for new trapped items" (checked).
- Bibliographic MARC Format:** A dropdown menu currently set to "MARC 21".
- Default Library Symbol:** An empty text input field.
- Email Reply To Address:** An empty text input field.
- Email From Address:** An empty text input field.
- XML Editor:** An empty text input field with a browse button (hand icon).
- Analytic Record Control Number Source Tag:** A group box with two radio buttons: "001" (selected) and "035".

At the bottom of the dialog are "OK" and "Cancel" buttons.

Label	Description
Validation Options	Check the box which represents the desired validation workflow.
Show Delete Warnings	You can choose whether or not to display a warning when you delete tags.
MASK New Records	If checked, all new records will be masked.
Edit 008 in MARC Editor	If checked, clicking once in the 008 tag of the MARC record will allow you to directly edit the 008 tag in the MARC Editor . The bottom of the MARC Editor will display the number and value of the tag where the cursor is positioned. If this option is not selected, the 008 tag will open in a Fixed Field Editor window for editing.
Use Multiple MARC Editors	If checked, each MARC record is opened in a new MARC Editor window.
Overwrite Variable Fields	Allows you to determine whether variable field data is automatically selected in the MARC Editor so it can be immediately overwritten by your next keystrokes.
Use Patron Editor	If checked, the Patron Editor interface will be used for creating/editing patron records. Profiler Tip: 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. See <i>Configuring Patron Cataloging Options</i> in the <i>Virtua Profiler: Cataloging Parameters User's Guide</i> for more information.
Print Request Slip for Newly Trapped Items	If checked, Virtua will print a request slip when an item that can be used to satisfy an outstanding request is added to a bibliographic record. For this to work, the <i>Do Not Trap New Items</i> option in the Virtua Profiler must be disabled.
Bibliographic MARC Format	Allows you select the bibliographic MARC format for new records that are created. Most typically used when a database allows multiple MARC formats. Profiler Tip: 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. See <i>Setting the Cataloging Basic Options Parameter: About the MARC Format Options Setting</i> in the <i>Virtua Profiler: Cataloging Parameters User's Guide</i> for more information.

Default Library Symbol

For union catalog users, specifies the default library symbol that you want Virtua to add to a newly created bibliographic record. Note that Virtua prevents the deletion of a bibliographic record if it contains a library symbol.

Profiler Tip: Via the Library Members parameter, union catalogs can define a name and symbol for each member library and specify the bibliographic tag into which the symbol should be inserted. See *Working with the Library Members Parameter* in the *Virtua Profiler: Global Settings User's Guide* for more information.

Email Reply To Address

If the database uses the server to send Client emails, users must specify a Reply To email address here in order for those emails to be sent from the Client.

Profiler Tip: The E-mail Configuration parameter allows you choose whether e-mails sent via the Virtua client are sent through the default e-mail client software on the workstation or through the Virtua server software. See *Working with the E-Mail Configuration Parameter* in the *Virtua Profiler: Global Settings User's Guide* for more information.

Email From Address

Allows you to configure an e-mail address to use as the From address for e-mails sent from the Virtua client.

XML Editor

Allows you specify the local location of a third-party XML editing program to use to edit XML records. This means that you will be able to view and edit the XML records from the **View Bibliographic Record** window.

Analytic Record Control Number Source Tag

Allows you to specify whether the 001 or 035 of the parent bibliographic record is used for the 773 tag subfield \$w when creating an analytic record from a bibliographic record.

Load Options

Recommended Outline	Explanation
<div data-bbox="212 457 436 548" style="border: 1px solid black; padding: 5px; margin-bottom: 10px;">Configure Load Options</div> <div data-bbox="212 625 436 758" style="border: 1px solid black; padding: 5px; margin-bottom: 10px;">Define Duplicate Tests</div> <div data-bbox="212 842 436 932" style="border: 1px solid black; padding: 5px; margin-bottom: 10px;">Define Merge Rules</div> <div data-bbox="212 1016 436 1106" style="border: 1px solid black; padding: 5px; margin-bottom: 10px;">Define State</div> <div data-bbox="212 1157 436 1247" style="border: 1px solid black; padding: 5px;">Load Records</div>	<p data-bbox="488 453 1325 590">Virtua provides the ability in the client to specify options for saving records either to the database using the Import Tool or by editing local records in the MARC Editor and then saving the records to the database.</p> <p data-bbox="488 659 646 695">Summary</p> <ul data-bbox="537 705 1127 877" style="list-style-type: none"> • Configure Load Options • Configure Duplicate Tests • Configure Merge Rules • Load records using the Import Tool • Load records using Edit local records <p data-bbox="488 915 667 951">Key Terms</p> <ul data-bbox="537 961 837 1129" style="list-style-type: none"> • Duplicate tests • Merge Record • Merge Rules • Database actions • Record State <p data-bbox="488 1167 797 1203">Profiler Parameter</p> <ul data-bbox="537 1213 976 1249" style="list-style-type: none"> • Heading Replacement Flag

Configure Load Options

The **Load Options** window allows you to set a wide variety of options for loading records into the Virtua database. The **Load Options** window contains five tabs:

- General
- Bibliographic and Community Information
- Authority
- Holdings
- Patron

Record-Loading Logging

When records are loaded via the Virtua client, the logs will contain the following information:

- Number of Records Processed
- Number of Records Successfully Saved to/Validated in DB
- Number of Records Failed by Vericat
- Number of Records Not Saved to/Not Valid according to DB
- Number of Saved/Validated Records without Diagnostics
- Number of not rejected (warning flagged) records
- Bib IDs of successfully imported records
- Bib IDs of records put into Error state
- Bib IDs of records being imported that were found in the database
- Warning messages about missing headings or newly created headings

Local Load Options File Option

The **Save to File...** button and **Local Options File** field are on the following tabs only: Bibliographic, Authority, Holdings, and Patron.

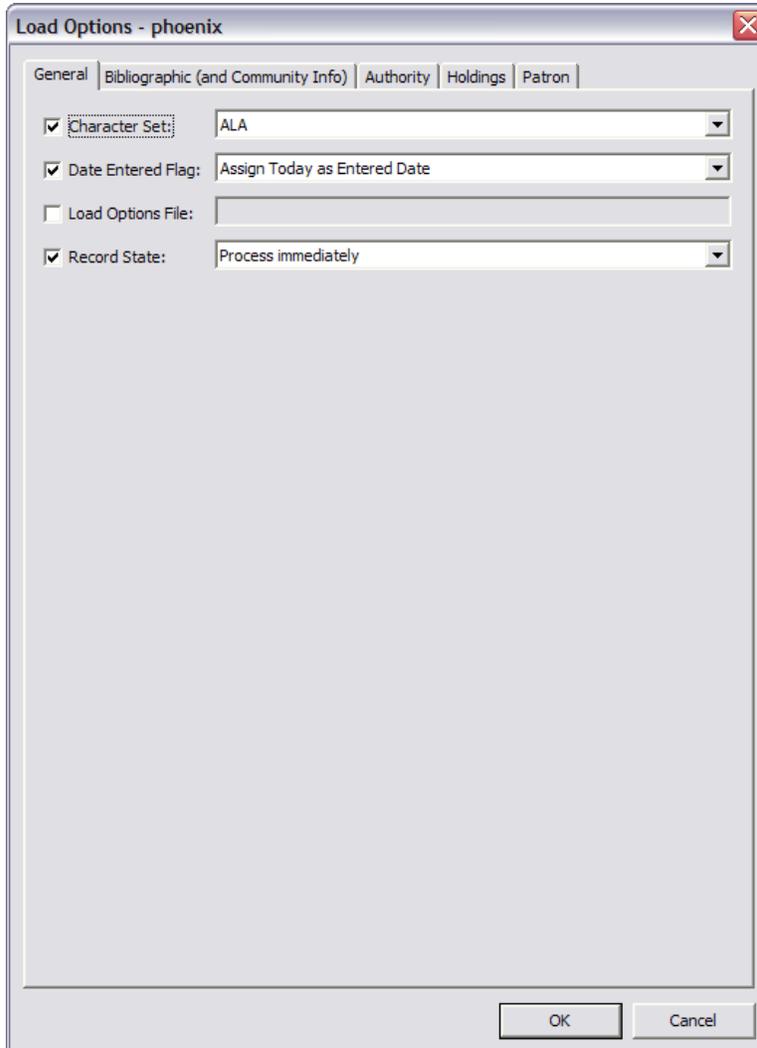
The **Save to File...** button allows you to save to the local PC options configured for a specific record type *plus* the options configured on the **General** tab (*except* for the **Load Options File** option). To import the records via the Virtua client use the **Local Options File** field.

After a **Local Options File** is created it may be edited with a text editor to add command-line load options that are normally available for use with **vload.exe** (see the *Virtua Record Loading User's Guide* for a description of command-line options available with **vload.exe**).



General Tab

Select **Options** → **Load Options** from the Virtua Main menu. The **General** tab is the default tab. Options set on this tab will affect **ALL** records, regardless of format.



The screenshot shows a dialog box titled "Load Options - phoenix" with a close button (X) in the top right corner. The dialog has five tabs: "General", "Bibliographic (and Community Info)", "Authority", "Holdings", and "Patron". The "General" tab is selected. Inside the dialog, there are four settings:

- Character Set: ALA (dropdown menu)
- Date Entered Flag: Assign Today as Entered Date (dropdown menu)
- Load Options File: (empty text field)
- Record State: Process immediately (dropdown menu)

At the bottom of the dialog are two buttons: "OK" and "Cancel".

Click the check box to enable desired features and select an option from the drop-down list if necessary.

Feature	Purpose
Character Set	<p>Allows you specify the character set of the incoming record(s). By default, the system converts the data in each loaded record to the UTF-8 character set. The default character set load option is "no mapping." You do not have to specify "no mapping" if you are loading records that are already in the UTF-8 character set.</p> <p>If your records are NOT in UTF-8, you need to specify the appropriate character set option so that the character set will be mapped correctly. You can choose from the following character sets:</p> <ul style="list-style-type: none"> • UTF-8 (no mapping is necessary) • MARC 21 • ANSI extended for UCL + ANSI 8 + ANSI Z39.47 • EUROPA 3 • Windows Latin1 • PC-8 • Windows ALA • Windows Arabic • Windows Hebrew • Windows Cyrillic • Windows Latin 2 • ISO 6937/2 • Microsoft CP 850 • ISO 6937/2 + Arabic • Greek • Big5 (the variant used by Tamkang University) • Big5 (HKSCS) • ANSI-8 + Hebrew • UTF-8 character sets in which some separate diacritics need to be combined. • Swiss ANSI8 • GBK • TIS620 Classic Thai
Date Entered Flag	<p>Allows you specify which of two dates to use as the Entered Date for the record(s).</p>
Load Options File	<p>Allows you type the name of a file, which is saved on the server that contains preset options.</p>

Record State | Allows you choose the record state, as defined by your library in the Cataloging Record States parameter, to which you want to save the incoming records.

Profiler Tip: The Record States parameter lets you define record states, edit or delete the default states, and define additional states. See *Configuring Record States* in the *Virtua Profiler: Cataloging Parameters User's Guide* for more information.

Bibliographic Tab

Click the **Bibliographic** tab. Options set on this tab will affect only bibliographic and community information records.

The screenshot shows the 'Load Options - phoenix' dialog box with the 'Bibliographic (and Community Info)' tab selected. The dialog has several sections with checkboxes and dropdown menus:

- Database Action: Load Item Bib Parent
- Create Items: Process data in item tags regardless of location
- Require Virtua 949 Label
- Shelf Location: [text field]
- Item Class: [text field]
- Duplicate Tests: [text area]
 - Add
 - Edit
 - Delete
- Merges: [text area]
 - Add
 - Edit
 - Delete
- Non-Dupl. Action: Do not save non-duplicate incoming records.
- Split FRBR
- Load Options File: [text field]
- Validation: Validate and save
- Move 880 tag data to associated tags
- Local Options File: [text field] [icon]
- Save To File...

At the bottom of the dialog are 'OK' and 'Cancel' buttons.

Click the check box to enable desired features and select an option from the drop-down list if necessary.

Feature	Purpose
Database Action	Allows you tell the software which action to take – load items and parent records OR create items only – against a file of bibliographic records.
Create Items	Allows you specify the rules by which item records are created from information in the 949 VIRTITEM tag of the incoming parent bibliographic records.
Virtua 949 Label	Allows you specify whether or not a Virtua Label is needed in the 949 tag subfield \a. See Virtua 949 Labels section for further details.
Shelf Location	Allows you specify a shelf location for loaded items.
Item Class	Allows you specify the item class for loaded items.
Duplicate Tests	Allows you specify duplicate tests for incoming records based on particular tags. The software can perform duplicate checking on the 001, 010, 015, 020, 022, 024, 028, and 035 tags of bibliographic records.
Merges	Allows you create rules for merging incoming records with existing records when duplicate records are created.
Non-Duplicate Action	Allows you specify which action to take against incoming records that are NOT duplicates of records in the database
FRBR Splitting	Allows you specify to split records into work, expression, and manifestation (FRBR standard) or not to use the FRBR standard.
Validate Only	Allows you specify whether incoming bibliographic records are both validated with and saved to the database or only validated.
	<p>Profiler Tip: 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 <i>server</i>. Note that in this parameter you CANNOT add or delete rules, change the ID of any rule, or modify the description of any rule. See <i>Configuring Record Validation Rules</i> in the <i>Virtua Profiler: Cataloging Parameters User's Guide</i> for more information.</p>

Move 880 Tag Data to Associated Tags

If the record contains 880 fields, the data in the 880 fields will be moved to replace equivalent data in those associated tags listed in the linking fields. The data in the associated tags will be moved to a 921 (first indicator 1, which means this tag has former "Romanized" data that was associated with an 880) with a subfield \$6, which has the equivalent tag number (245, 260, etc.).

For the **Duplicate Tests** and **Merges** features Additional windows open when you click the **Add** button.

Add Duplicate Test Window

Add Merge Window

Virtua 949 Label

Before you can run the 949 Item Load program, certain parameters should be set in the database.

Parameter	Purpose
Item-level Call Number Flag	set in Cataloging parameters via the Virtua Profiler
Item class definitions	set in Circulation parameters via the Virtua Profiler
Library locations	set in Global parameters via the Virtua Profiler

By setting those parameters first, you can provide valid values for the following:

Values	Location in 949 Tag
Item-level call number	Specify in the 949 VIRTUAITEMCALLNUMBER tag(s).
Item class	Specify the item class code as a value in subfield \X of the 949 VIRTUAITEM tag (mandatory).
Shelf location	specify the shelf location code as a value in subfield \D of the 949 VIRTUAITEM tag (optional).

The **949 Item Load program** supports two types of 949 tags in the bibliographic or holdings record. These tags determine the processing of the record. Information from these tags, plus location and copy number information from 852 tags in the holdings record, is used to create item records. The two tags are:

949 Tag	Purpose
949 VIRTUAITEM tag	Contains most of the data for an item record. Each tag contains information for exactly ONE item record. You can have as many 949 VIRTUAITEM tags in one record as you want.
949 VIRTUAITEMCALLNUMBER tag	Contains the data for ONE item-level call number. The Item Call Number Flag parameter set in the database being loaded determines the number of 949 VIRTUAITEMCALLNUMBER tags that can be supported per item record created.

Subfield \5 stores an integer that is the link between a 949 VIRTUAITEMCALLNUMBER tag and the associated 949 VIRTUAITEM tag within one record. The subfield \5 is required if the following conditions are true:

- Multiple 949 VIRTUAITEM tags exist in the record
- 949 VIRTUAITEMCALLNUMBER tags also exist in the record
- The item associated with this 949 VIRTUAITEM tag has an associated item-level call number.

An item record can be created only from a parent record that exists in the Virtua database even if that parent record exists only moments before associated items are loaded by the 949 Item Load program.

- Each item created from a 949 item tag in a holdings record is linked to a holdings record in the Virtua database.
- Each item created from a 949 item tag in a bibliographic record is linked to a bibliographic record in the Virtua database.

Syntax of 949 Tag: 949 ## \A VIRTUAITEM \D nine-digit location code \V price of item \W ISO currency code \6 barcode number \5 linking integer \9 units information free text \X Books

Note: See the Virtua Record Loading User's Guide for information on additional subfields used in the 949 tag.

Creating Items with a 949 Tag

Set the **Bibliographic Load Options**. In this example, we are creating items only.

The screenshot shows the 'Load Options - phoenix' dialog box with the 'Bibliographic (and Community Info)' tab selected. The 'Database Action' is set to 'Load Item Bib Parent'. The 'Create Items' dropdown is also set to 'Load Item Bib Parent'. The 'Require Virtua 949 Label' checkbox is checked. Other options like 'Shelf Location', 'Item Class', 'Duplicate Tests', 'Merges', 'Non-Dupl. Action', 'Split FRBR', 'Load Options File', 'Validation', 'Move 880 tag data to associated tags', and 'Local Options File' are unchecked or empty. The 'Save To File...' button is visible at the bottom left, and 'OK' and 'Cancel' buttons are at the bottom right.

Add 949 tag to the bibliographic record. Note the item barcode in the subfield \6.

001				\vtls000010351
003				NcFayC
005				20070111224900.0
008				880919s1988 iaua 00100 eng
010				\a 87-62082
020				\a 0696011700 : \c \$24.95
035				\a ocm18450446
039			9	\a 200701112249 \b VLOAD \y 200406232006 \z load
040				\a DLC \c DLC \d HQB
049				\a HQBA \a HQBV \a HRTS \a HQB# \a HRT+ \a HRUP \a HRU*
082	0			\a 747.213 \2 19
092				\a 747 \b D
245	0	0		\a Decorating with personal style / \c [editor, Pamela J. Wilson].
250				\a 1st ed.
260				\a Des Moines, Iowa : \b Meredith Corp., \c c1988.
300				\a 224 p. : \b col. ill. ; \c 26 cm.
500				\a At head of title: Better homes and gardens.
500				\a Includes index.
501				\a MARCIVE 03/01/06
650			0	\a Interior decoration \x Themes, motives.
700	1			\a Wilson, Pamela J.
730	0			\a Better homes and gardens.
913	0	0		\a *DWPSTY99000
949				\A VIRTUAITEM \B 101 10351 \D 10000 \F 1 \X 1 \6 55446
999				\a VIRTUA50

(a) Language material (m) Monograph/item Masked

< > MARC 21 Bib: Book OPAC Modified

OPAC1

Load the record via the **Import Tool**. An item record is created once the record is processed.

View Bibliographic Record - Phoenix99

1 / 1

Full Items MARC

Title: Decorating with personal style / [editor, Pamela J. Wilson].

ISBN: 0696011700 :

Publication: Des Moines, Iowa : Meredith Corp., c1988.

Description: 224 p. : col. ill. ; 26 cm.

Format/Edition: 1st ed.

Status Counts

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

Call Number	shelving Location	Units	Status	Item Barcode
747 D	Technical Services		In Processing	55445

Current Selection: 1 / 1

View URL View Item Delete Item Request Item

Masked View Archive Edit Request Bib Add Item Refresh Close

Authority Tab

The software automatically performs default authority checking on the 001, 010, and then the 1xx tags. In duplicate checking, authors and subjects will match without regard to case (terms are normalized) and the ending punctuation. For example, the authority heading for Smith, David K. will replace the heading Smith, David k when loaded into the database.

Protect Local Cross References when Merging Authority Records

Locally defined cross references can be protected from being overwritten when existing authority records are being replaced by matching incoming authority records.

This option utilizes a local code in subfield \$5 of the local cross reference tag. If the code is defined in the Merge Options of the Authority tab of the **Load Options** window, then the local x-ref fields will stay in the resulting record.

Set Load Options for Authority Records

Click the **Authority** tab. Options set on this tab will affect only authority records.

Load Options - phoenix

General | Bibliographic (and Community Info) | Authority | Holdings | Patron

Database Action: ESU_Merge

Blind References: Load blind references

Heading Type:

Duplicate Tests:

Add Edit Delete

Merges:

Add Edit Delete

Non-Dupl. Action: Do not save non-duplicate incoming records.

Load Options File:

Local Options File: Save To File...

OK Cancel

Click the check box to enable desired features and select an option from the drop-down list if necessary.

Settings	Purpose
Database Action	<p>Allows you specify which action to take against a file of input records.</p> <ul style="list-style-type: none"> • ESM_Merge: Allows a provisional authority record to stay as a provisional after modification • ESM_Over: Database override; record is saved to the database and overrides Error State if a conflict is found. <p>Note: You can use ESM_Over, for example, if you wanted the 1xx to become a 4xx and the 4xx to become 1xx. In Classic VTLIS, this is what "over" was used for. You can use the ESM_Over setting to allow users to change a 5xx tag in an authority record to a 4xx.</p>
Blind Records	<p>Allows you determine whether or not to load authority records that will be blind records.</p>
Heading type	<p>Allows you select Subject as type or specify that type is determined by tag and other data in the record. Important: Only used if 'Do Not Support Single Authority Record' parameter is enabled in the <i>Virtua Profiler</i>.</p> <p>Profiler Tip: The <i>Do Not Support Single Authority Record</i> 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. See <i>Setting the Cataloging Basic Options Parameter: About the Do Not Support Single Authority Record Setting</i> in the <i>Virtua Profiler: Cataloging Parameters User's Guide</i> for more information.</p>

Holdings Tab

Click the **Holdings** tab. Options set on this tab will affect only holdings records.

The screenshot shows a dialog box titled "Load Options - phoenix" with a close button (X) in the top right corner. The dialog has five tabs: "General", "Bibliographic (and Community Info)", "Authority", "Holdings", and "Patron". The "Holdings" tab is selected. The dialog contains several options, each with a checked checkbox and a dropdown menu or text field:

- Database Action: Load Item Holdings Parent
- Create Items: Process data in item tags regardless of location
- Virtua 949 Label: A Virtua Label is not needed
- Hold Migration Flag: No holdings migration
- Shelf Location: [Text Field]
- Item Class: [Text Field]
- Load Options File: [Text Field]

At the bottom of the dialog, there is an unchecked checkbox for "Local Options File:" with a file icon to its right and a "Save To File..." button. At the very bottom are "OK" and "Cancel" buttons.

Click the check box to enable desired features and select an option from the drop-down list if necessary.

Settings	Purpose
Database Action	Allows you tell the software which action to take. For example, load items and parent records OR create items only.
Create Items	Allows you specify the rules by which item records are created from information in the 949 VIRTUAITEM tag.
Virtua 949 Label	Allows you specify whether a Virtua Label is needed in the 949 tag subfield \a. (See Virtua 949 Label below)
Hold Migration Flag	Allows you specify whether to migrate holdings records from the classic VTLS system to Virtua.
Shelf Location	Allows you specify a shelf location for loaded items.
Item Class	Allows you specify the item class for loaded items.

Patron Tab

Click the **Patron** tab. Options set on this tab will affect only patron records.

The screenshot shows a dialog box titled "Load Options - phoenix" with a close button (X) in the top right corner. The dialog has five tabs: "General", "Bibliographic (and Community Info)", "Authority", "Holdings", and "Patron". The "Patron" tab is selected. The dialog contains several options:

- Date Pattern:** YYYMMDDHH24MI (dropdown menu)
- Check Date:** No date check (dropdown menu)
- Expiration Date:** (text input field)
- Delete Date:** (text input field)
- Duplicate Tests:** (text area with "Add", "Edit", and "Delete" buttons below it)
- Merges:** (text area with "Add", "Edit", and "Delete" buttons below it)
- Non-Dupl. Action:** Do not save non-duplicate incoming records. (dropdown menu)
- Load Options File:** (text input field)
- Local Options File:** (text input field with a file icon button and a "Save To File..." button below it)

At the bottom of the dialog are "OK" and "Cancel" buttons.

Click the check box to enable desired features and select an option from the drop-down list if necessary.

Settings	Purpose
Date Pattern	Allows you specify the pattern that the system will use to interpret the dates found in the 042 tag subfields \a, \b, and \c of the incoming records. Currently, there is only ONE date pattern supported.
Check Date	Allows you specify whether to check the transaction date in the 005 tag of the incoming record against the last transaction date in the database record. If the transaction date in the incoming record is older than the date in the database record, then the record is not loaded.
Expiration Date	Allows you specify an expiration date, which Virtua will insert in tag 042 \b if the date does not exist in the incoming record.
Delete Date	Allows you specify a delete date, which Virtua will insert in tag 042 \c if a date does not exist in the incoming record.
Duplicate Tests	Allows you determine duplicate tests and database actions for incoming records based on specified tags.
Merges	Allows you create rules for merging incoming records with existing records so that identified tags from the existing record will be incorporated into the incoming record.
Non-Duplicate Action	Allows you specify which action to take against non-duplicate records in a file.

Select an option from the dropdown menu to the right of the desired feature.

Duplicate Tests and Merging Records

Define Duplicate Tests for Incoming Records

You can define duplicate rules in the load options of the Virtua client. Virtua allows you to match on the following tags of the MARC tags:

- **Bibliographic Records:** 001, 010, 015, 020, 022, 024, 028, 035.

Profiler Tip: The 015, 024, and 028 tags are only available for bibliographic duplicate tests *if you choose to index them*: 015 = Index National Bibliography Number; 024 = Index Other Standard Identifier; 028 = Index Publisher Number. See *Setting the Cataloging Basic Options Parameter* in the *Virtua Profiler: Cataloging Parameters User's Guide* for more information.

- **Authority Records:** 010, 035, 1xx

- **Patron Records:** 001, 015, 016

Select **Options** → **Load Options** from the drop down menu of the Virtua main menu

Click the Bibliographic (and Community Info) tab.

Click in the check box labeled **Duplicate Checks** and then click the **Add** button.

In the **Dominant Tags** area, select a MARC tag number to act as a duplicate check. The available options are the 001, 010, 015, 020, 022, 024, 028, or 035 tags. You may also define multiple duplicate tests.

Add Duplicate Test - Phoenix99

Dominant Tags

020 Add: 020 Subfield 'a' in the 020 tag of an incoming record must match the subfield 'a' in the 020 tag of an existing record.

Delete

Action

Replace duplicate record in database with incoming record Merge Name: _____

OK Cancel

In the **Action** area, select that action that you want Virtua to take when it detects duplicate records. The choices are to . . .

- Replace the duplicate record in the database with the incoming record.
- Ignore the incoming record and leave the database unchanged.
- Save the incoming record in Error state for later processing.
- Remove the duplicate record in the database and discard the incoming record.
- Merge the duplicate record in the database with the incoming record.

If you selected the Action **Merge the duplicate record in the database with the incoming record**, the **Merge Name** text box will become active. Type a merge name. This name will be used to link your duplicate test to the merge rules that you will define for merging any records that meet the test. For any other Action, skip this step and proceed to the next step.

Click the **OK** button.

Define Merge Rules for Incoming Records

When incoming records are duplicates of existing records you might want to retain some information from the existing records, and some information from the incoming record. You can do this by defining which tags to retain and merge with the new, incoming record.

If you specified the **Duplicate Test** action ***Merge the duplicate record in the database with the incoming record***, you must now set the **Merges** option.

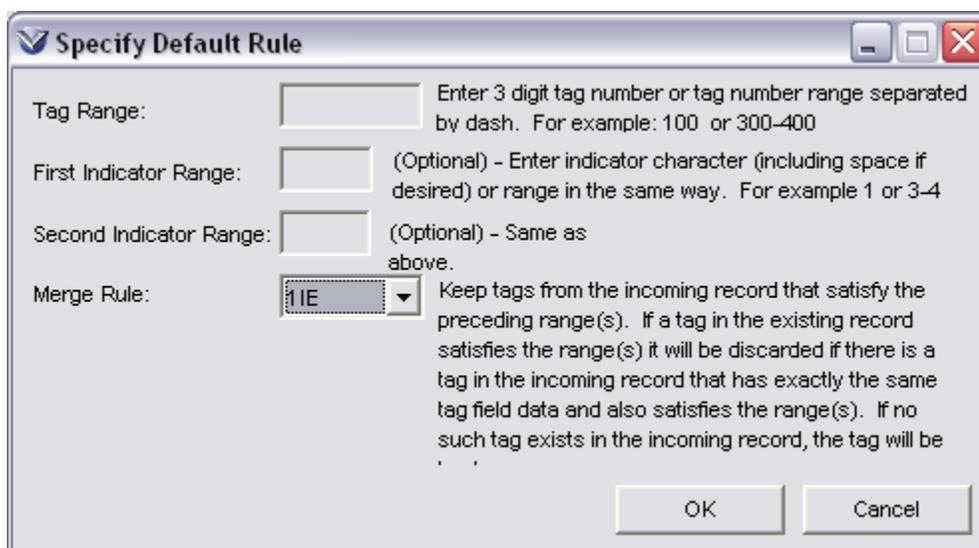
On the **Load Options** window, click on the check box labeled **Merges**.

Click the **Add** button. The **Add Merge** window will appear.

Type the **Merge Name** that you created when setting the **Duplicate Tests** option.

Hint: If there are multiple **Merge Names** defined in the **Duplicate Tests** window, choose the **Merge Name** that you want linked to this particular merge; then repeat the following steps for every other **Merge Name** defined in the **Duplicate Tests** option.

Click on the **Specify** button to define a **Default Rule**. This should be the rule that applies to most of the tags in the MARC records. The **Specify Default Rule** window will appear.



Specify Default Rule

Tag Range: Enter 3 digit tag number or tag number range separated by dash. For example: 100 or 300-400

First Indicator Range: (Optional) - Enter indicator character (including space if desired) or range in the same way. For example 1 or 3-4

Second Indicator Range: (Optional) - Same as above.

Merge Rule: Keep tags from the incoming record that satisfy the preceding range(s). If a tag in the existing record satisfies the range(s) it will be discarded if there is a tag in the incoming record that has exactly the same tag field data and also satisfies the range(s). If no such tag exists in the incoming record, the tag will be .

OK Cancel

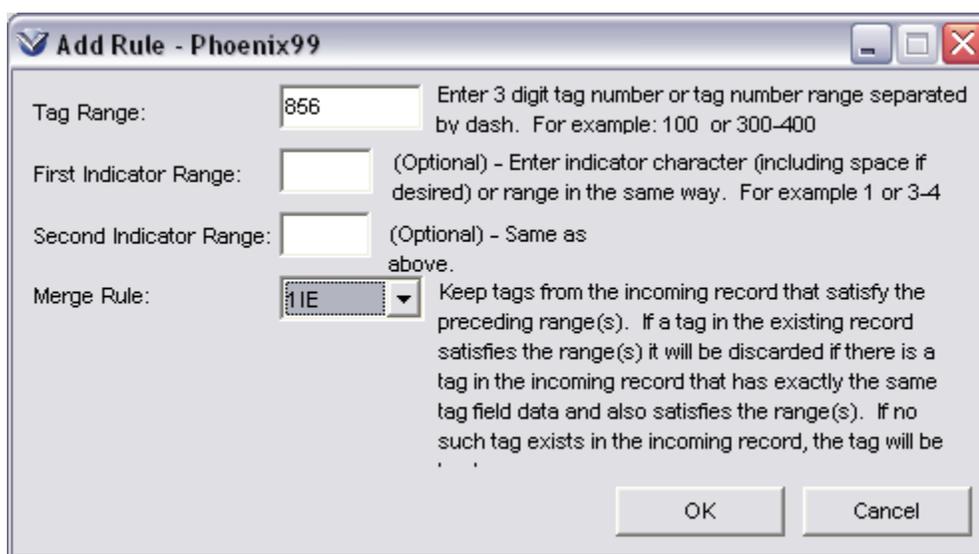
Hint: If you want ALL tags in the duplicate records to be merged according to the same rule, you do not need to specify any tags for the **Rules** list box. Simply provide the **Merge Name** and specify a **Default Rule**.

On the **Specify Default Rule** window, select the **Merge Rule**, which is the only field that is enabled.

Hint: A definition of the rule appears to the right of the dropdown menu when a rule is selected.

Click the **OK** button.

On the **Add Merge** window, click the **Add** button to define **exceptions** to your **Default Rule**. The **Add Rule** window will appear



Add Rule - Phoenix99

Tag Range: Enter 3 digit tag number or tag number range separated by dash. For example: 100 or 300-400

First Indicator Range: (Optional) - Enter indicator character (including space if desired) or range in the same way. For example 1 or 3-4

Second Indicator Range: (Optional) - Same as above.

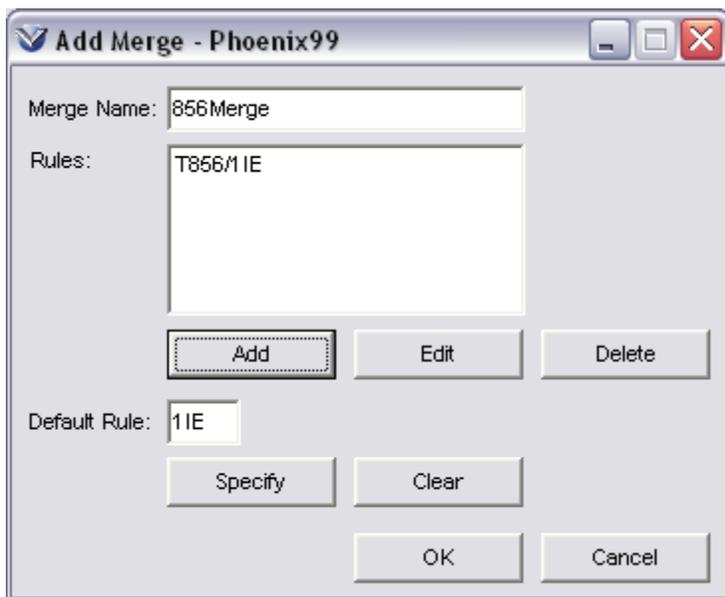
Merge Rule: Keep tags from the incoming record that satisfy the preceding range(s). If a tag in the existing record satisfies the range(s) it will be discarded if there is a tag in the incoming record that has exactly the same tag field data and also satisfies the range(s). If no such tag exists in the incoming record, the tag will be .

OK Cancel

Enter the tag range and any indicators of tags that are to be merged with a different rule than the default rule.

Choose the **Merge Rule** from the dropdown menu.

Click **OK**, the merge rule will appear in the **Add Merge** window.

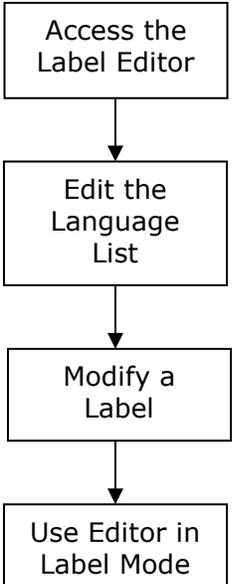


The screenshot shows a dialog box titled "Add Merge - Phoenix99". It has a standard Windows-style title bar with minimize, maximize, and close buttons. The dialog contains the following elements:

- Merge Name:** A text input field containing "856Merge".
- Rules:** A list box containing "T856M1E".
- Buttons:** Three buttons labeled "Add", "Edit", and "Delete" are positioned below the Rules list. The "Add" button is highlighted with a dashed border.
- Default Rule:** A text input field containing "11E".
- Buttons:** Two buttons labeled "Specify" and "Clear" are positioned below the Default Rule field.
- Buttons:** Two buttons labeled "OK" and "Cancel" are positioned at the bottom of the dialog.

Repeat the process for each tag or tag range for which you want to specify an exception to the Default Rule.

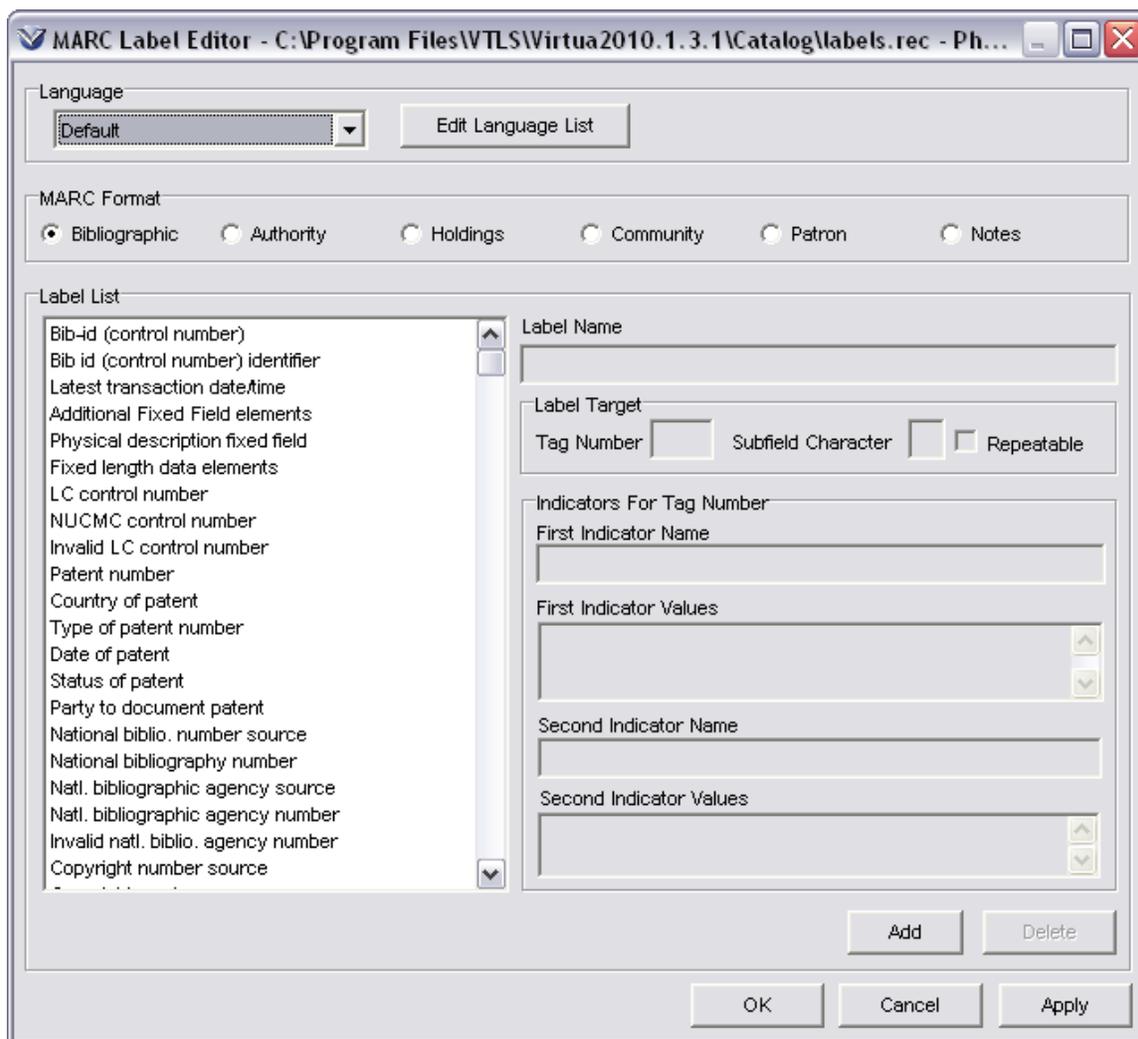
The MARC Label Editor

Recommended Workflow	Explanation
 <pre> graph TD A[Access the Label Editor] --> B[Edit the Language List] B --> C[Modify a Label] C --> D[Use Editor in Label Mode] </pre>	<p>Virtua provides a mode of editing MARC records called “Use MARC Labels”. This mode uses field labels instead of MARC tag numbers. These labels can be modified to reflect specific library needs. The MARC Label Editor allows libraries to add, delete, and edit the MARC tag labels available on the labeled workforms. These labels may also be translated into any language.</p> <p>Summary</p> <ul style="list-style-type: none"> • Open the Label Editor • Add a new language to the language list • Edit a tag label • Add a new tag label <p>Key Terms</p> <ul style="list-style-type: none"> • Label List • Label Target • Language List • MARC Label Editor

Access the MARC Label Editor

The **MARC Label Editor** gives you a user-friendly interface that allows you to add, modify, translate, or delete the MARC labels that appear in label mode in the MARC Editor.

On the Virtua menu bar, chose **Options → Label Editor**. The **MARC Label Editor** window appears.



Note: The file labels.rec, which contains the label definitions, must reside in the VTLS\Virtua\Catalog directory on each local workstation.

Elements of the MARC Label Editor Window

Element	Purpose
Language	Select an editing language and/or edit or add to the list of languages.
MARC Format	Select one of six formats to map or edit field labels.
Label List	List of field labels, in tag order, assigned to the selected MARC format.
Label Name	Allows you to edit a selected label from the Label List
Label Target	Displays tag number and subfield characters mapped to selected label.
Indicators for Tag Number	Displays indicator data for the selected tag.

Edit the Language List

You can translate the MARC tag labels into another language by adding the language to the Language list.

Click the **Edit Language List** button. The **Edit Languages** window appears.



Click the **New** button to add a language to the list. The name **New Language** appears in the **Language List** textbox.

Click the name, which now appears in the **Language Name** box.

Edit the name, using the same word for the language that appears on the Language menu in Virtua.

For example:

- use **Spanish** if the drop-down menu is in English.
- use **Espanola** if the drop-down menu has been translated into Spanish.

Close the panel by clicking on the **X** button in the upper right-hand corner of the panel.

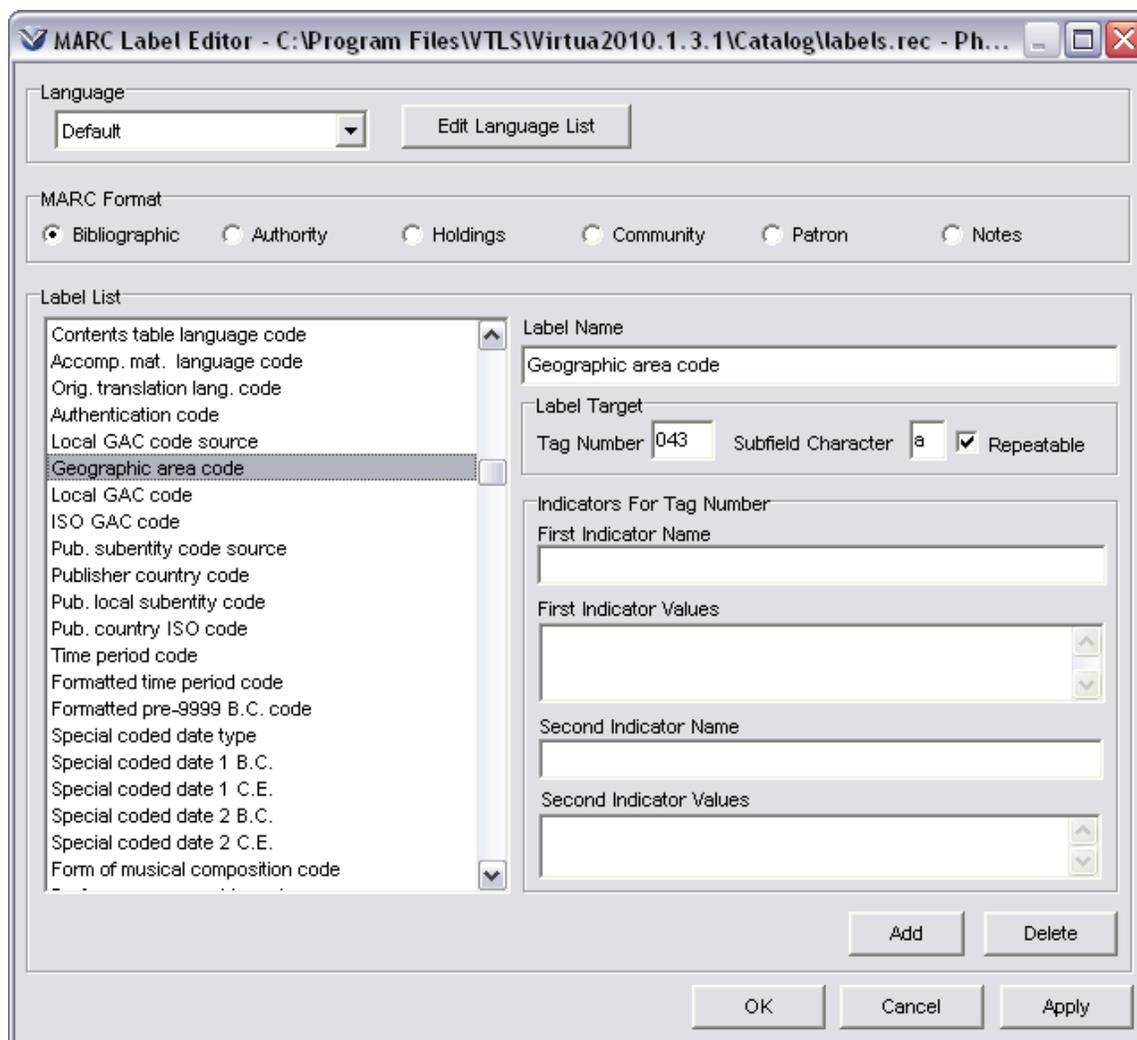
Modify or Translate a Label

Choose a language in the **Language** box.

Choose the type of **MARC Format** you need to edit.

Select the label you want to modify or translate from the **Label List**. The label appears in the **Label Name** box where it awaits editing.

Tip: The labels are in order by tag number and then subfield. Click on labels in the Label List until you find the correct label.



Edit the label in the **Label Name** box.

In the **Label Target** area, edit the Tag Number, to which the label will be mapped.

Click the **Apply** button to remain in the editor or the **OK** button to save the changes and exit the editor. The label file is saved only if changes have been made.

Note: Changing the language option under **Options** → **Language** will automatically change the language of the labels, provided they have been translated in the **Label Editor**.

For example:

- **If** you have translated labels into Chinese, they will appear in the MARC Editor in Chinese if you change the **Language Option** to Chinese.
- **If** the labels have not been translated into the chosen language, the labels will default to English.

Add a Label

Click the **Add** button in the **Label List** area.

The label **New Label** appears in the **Label List** and in the **Label Name** box where it awaits editing.

Edit the label in the **Label Name** box.

In the **Label Target** area, specify the **Tag Number**.

Add the next label by pressing the **ENTER** key or clicking **the Add** button.

When you are finished editing, click the **OK** or **Apply** button.

Delete a Label

Select the label to delete from the **Label List**.

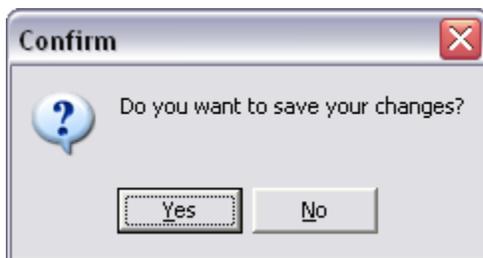
Click the **Delete** button. The software asks if you are sure you want to delete the label.

Click the **OK** button. The label is removed from the **Label List** and the next label below is highlighted.

- **If** there is no label below, the label above is highlighted.
- **If** there is no label below or above, all the controls below the MARC Format area become disabled.

Cancel

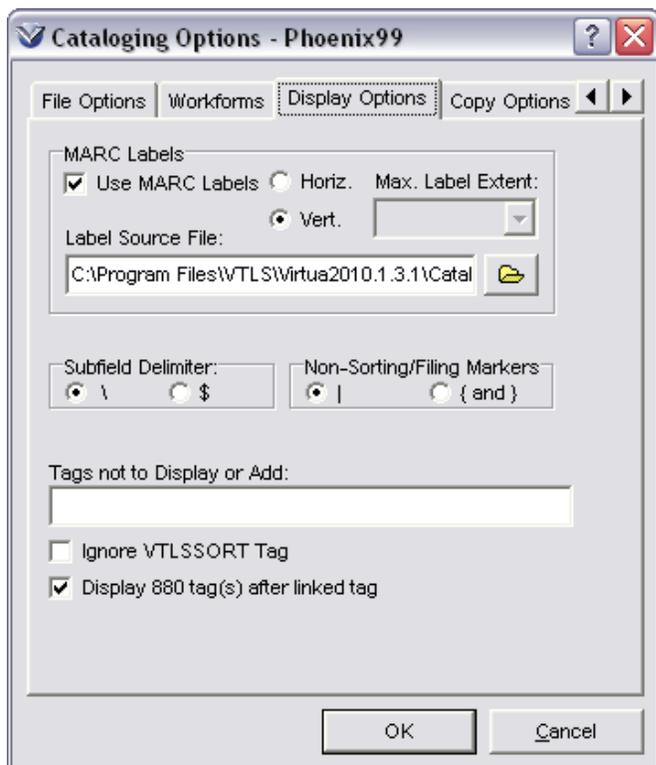
Click the **Cancel** button. A warning dialog appears if the user as has made changes. If changes have not been made, the window closes.



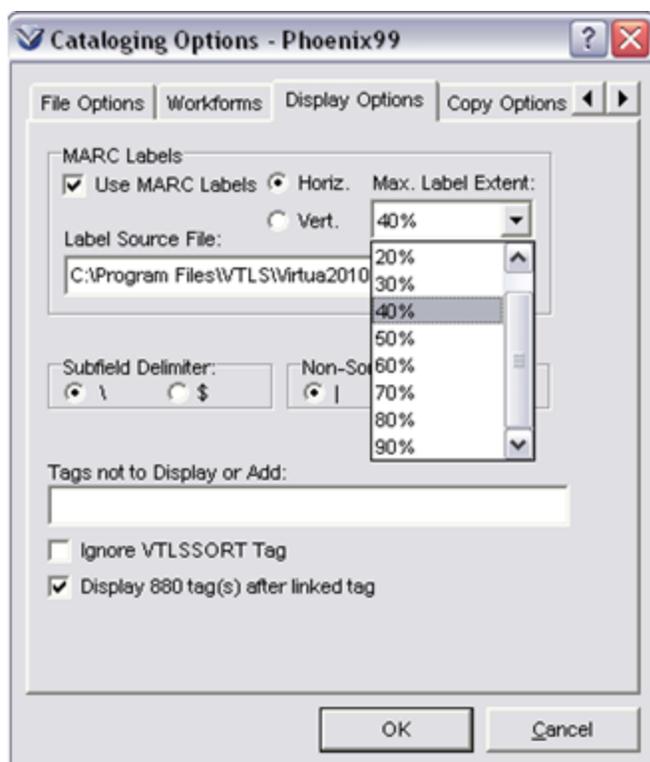
Use the MARC Editor in Label Mode

On the Virtua menu bar, click **Options** → **Cataloging Options**. The **Cataloging Options** dialog box appears.

Click the **Display Options** tab and select the check box labeled **Use MARC Labels**.



Select either horizontal (labels appear to the left of the tag) or vertical (labels appear above the tag).



Note: If you chose horizontal, the **Max. Label Extent** dropdown becomes active, allowing you to define how much of the **MARC Editor** window will be occupied by the label.

Horizontal Mode

Vertical Mode

Click the **OK** button.

Open a label workflow such as booklab.wfm or bring in an existing record. The **MARC Editor** appears. All editing functions available in standard mode work in label mode.

Add or edit the data for the labeled field.

Edit each indicator box. To do this, in each box

- Click the **left mouse button** to see the name of the indicator.
- Click the **right mouse button** to see the appropriate values for the indicator.

Save your work.

Authority Records

Recommended Outline	Explanation
<div data-bbox="209 422 435 548" style="border: 1px solid black; padding: 5px; margin-bottom: 10px;">Add an Authority Heading</div> <div data-bbox="209 611 435 737" style="border: 1px solid black; padding: 5px; margin-bottom: 10px;">Merge an Authority Heading</div> <div data-bbox="209 789 435 915" style="border: 1px solid black; padding: 5px;">Add Notes to an Authority Heading</div>	<p data-bbox="488 422 1430 590">Virtua MARC format for authority records is based on the USMARC authority format. With Virtua, you can easily add existing authority headings to bibliographic or authority records that you are creating or editing. This procedure for adding headings works with any heading under authority control:</p> <ul data-bbox="537 632 781 768" style="list-style-type: none"> • Authors • Subjects • Series titles • Uniform titles <p data-bbox="488 810 1430 947">Operational security settings in the Profiler allow libraries to restrict which staff have permission to edit and delete authority records. Permissions can be set separately for each authority record type (i.e. Author, Subject, etc.)</p> <p data-bbox="488 978 643 1010">Summary</p> <ul data-bbox="537 1031 1430 1272" style="list-style-type: none"> • Add an authority heading • Merge authority headings • Add Notes to authority headings • Distinguish between provisional and permanent authority records • Distinguish between types of Cross References (See, See Also) <p data-bbox="488 1304 659 1335">Key Terms</p> <ul data-bbox="537 1356 1000 1661" style="list-style-type: none"> • Authority Heading • Authority Notes • Authority Record • Cross-Reference • Established Heading • Permanent Authority Record • Provisional Authority Record • See Also Reference • See Reference

	<p>Profiler Parameters</p> <ul style="list-style-type: none">• Authority Messages• Additional Access Points• Heading Replacement Flag• MARC Heading Conflict Flag• Operational Security• Automatically Update Tags of Bibliographic Records• Common 1xx/6xx Authority Record <p>InfoStation Reports</p> <ul style="list-style-type: none">• Authorities List: Generates a list of authority records that meet the authority type, Cataloging source code, and date range criteria as specified in the configuration.• Cataloging Errors: Generates a list of cataloging errors that meet the date range and Virtua user criteria set in the report configuration.• Records by State: Returns a list of records in the selected state.• Indexed Words: Generates a list of indexed words in the bibliographic records in the database.• Subject Bibliography: Lets you select a set of subject authorities and produce a set of related bibliography entries.
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MARC Authority Record Format

An authority record is a tool librarians use to create standard names for the persons, places, titles, subjects, etc. that are found in bibliographic records. Authority records provide a controlled vocabulary and cross reference system for accessing bibliographic records.

In Virtua, authority records may be based on:

- Subjects
- Authors/Names
- Series Titles
- Uniform Titles
- Authors/Titles Series
- Special User-Defined Categories
- Subdivision (Subjects)
- Genres/Forms

Profiler Tip: 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. See *Defining Tags Indexed for User Defined Searches* in the *Virtua Profiler: Cataloging Parameters User's Guide* for more information.

Virtua provides several ways to view and search authority headings:

- **Browse Subject search:** Places you in an alphabetical list of all subject headings
- **Multiple Subject Thesaurus searches:** Places you in an alphabetical list of all subject headings for a specified thesaurus, e.g. LCSH, MeSH, NAL, Etc.
- **Keyword in Heading search:** Places you in an alphabetical list of subject headings containing the word or phrase searched.

Profiler Tip: The Multiple Subject Heading parameter lets you enable functionality related to multiple subject headings. By enabling and configuring this parameter, you can index multiple subject thesauri and make them available for searching in the OPAC. **Important:** Before you try to enable multiple subject headings, we recommend that you contact Customer Support, especially if you have ANY questions about the proper process. If the process is not executed correctly, damage to your database can occur. **Warning:** Once the Multiple Subject Headings parameter is enabled it is permanent. See *Setting the Parameter for Multiple Subject Headings* in the *Virtua Profiler: Cataloging Parameters User's Guide* for more information.

Common Authority Records for 1xx/6xx tags

Authority records for authors may also have corresponding subject authorities. Your library may decide to treat name and subject authority records in one of two ways. You may either:

- Have two separate authority records, one for the name authority and one for the subject authority
- Have one common authority record that is indexed under both author and subject and will be retrieved by either search.

In the *Virtua Profiler*, under the cataloging tab, you may set the parameter to enable common authority records.

Note: The use of a common authority record will only apply to permanent authority records in the system and not provisional authority records.

Note: If you do not wish to have the option of using common name/title and subject authority records, then you can enable the **Do Not Support Single Authority Record** parameter in the Cataloging Basic Options window in the *Virtua Profiler*. In that case you would always have separate name/title and subject authorities and the 008 would not be taken into account.

Permanent vs. Provisional Authority Records

In Virtua, authority records are of two types: **Permanent** and **Provisional**.

Permanent authority records are *intentionally* created as MARC authority records to:

- Establish an authoritative form of a heading in the 1xx field,
- Create any reference headings in the 4xx and 5xx fields, and
- Provide any other supporting information according to the MARC standard.

Tag	Indicator 1	Indicator 2	Indicator 3	Data
001				vtls000476912
003				NcFayC
005				20101011142357.0
008				081126n acannaabn b aaa
010				la n 79021164 lz sh 89001267 lz no 98029431
035				la (OCoLC)oca00254964
035				la (DLC)n 79021164
039			9	la 201010111423 lb staff lc 201007231408 ld staff lc 201006240838 ld staff lc 200811261011 ld kyoung ly 200701211850 lz VLOAD
040				la DLC lb eng lc DLC ld DLC ld MdU ld DLC ld InU ld DLC ld PPIU ld DLC ld OCoLC ld InU ld OCoLC
053			0	la PS1300 lb PS1348
100	1			la Twain, Mark, ld 1835-1910.
400	1			la Tvèn, Mark, ld 1835-1910
400	1			la Tuëñ, Mark, ld 1835-1910
400	1			la Tuwayn, Märk, ld 1835-1910
400	1			la Twayn, Märk, ld 1835-1910
400	1			la T'u-wen, Ma-k'o, ld 1835-1910

(z) Authority data (x) Author/Name

< > MARC 21 Authority: Authority OPAC

OPAC1

Provisional authority records are *automatically* created by Virtua because the term in question is in a 1xx, 4xx, 6xx, 7xx, or 8xx (NOT 240) field of a **bibliographic** record. Provisional Authority records:

- Exist because an authority heading is created whenever you add a bibliographic record to the database.
- Reside in the same authority file as permanent authority records
- Contain only a default 008/LDR, a 1xx tag, and a 001 tag.
- Can be changed to Permanent authority records by opening the provisional authority record in the MARC editor and re-saving it to the database.

Note: The **Heading Replacement Flag** parameter in the **Profiler** determines how Virtua handles MARC record headings that are similar to an existing authority heading.

- **If** you set this flag to **YES**, all headings in an incoming bibliographic record that match the sort form of an existing authority record, but are different in detail

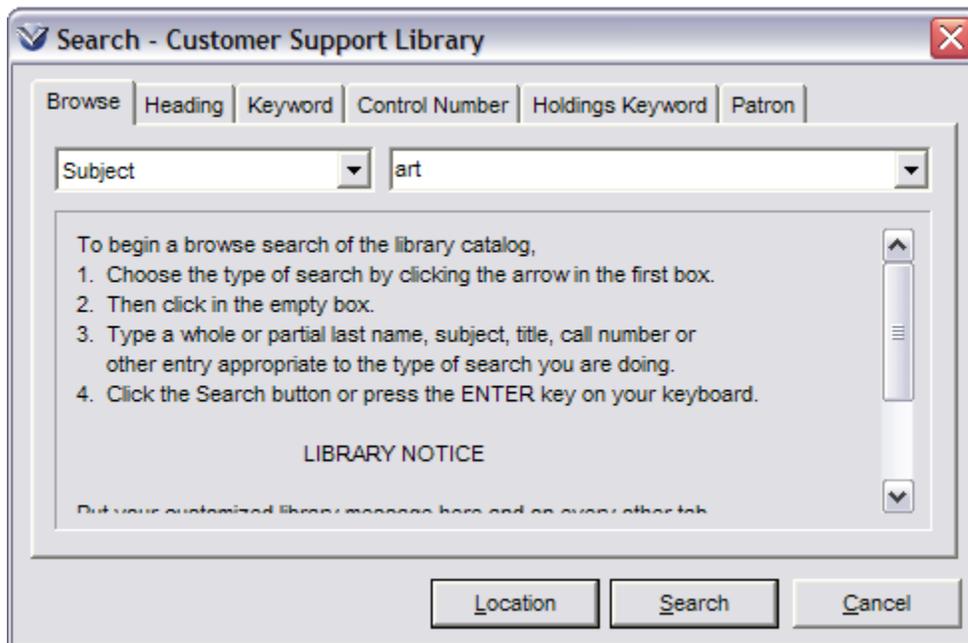
(capitalization, subfield coding, ending punctuation) are replaced by the 1xx of the existing authority record

- **If** you set this flag to **NO**, all headings in an incoming bibliographic record that match the sort form of an existing authority record, but are different in detail (capitalization, subfield coding, ending punctuation), are given a warning message of possible duplication.

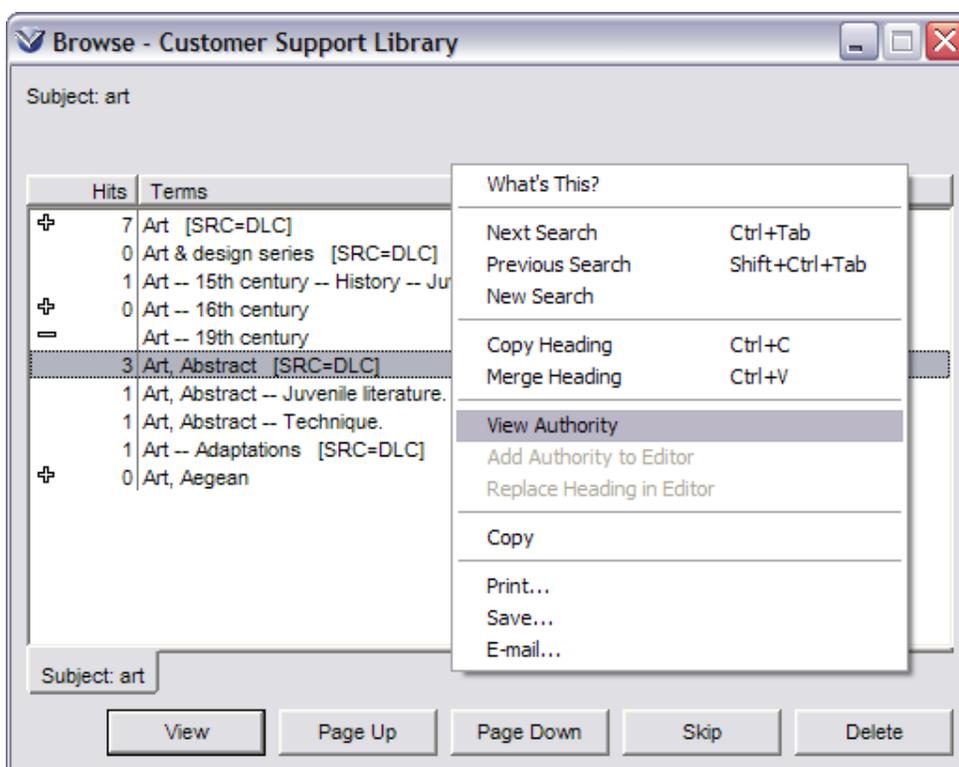
We suggest this parameter only be set to **Yes** with great discretion.

To view an authority record in the **MARC Editor**:

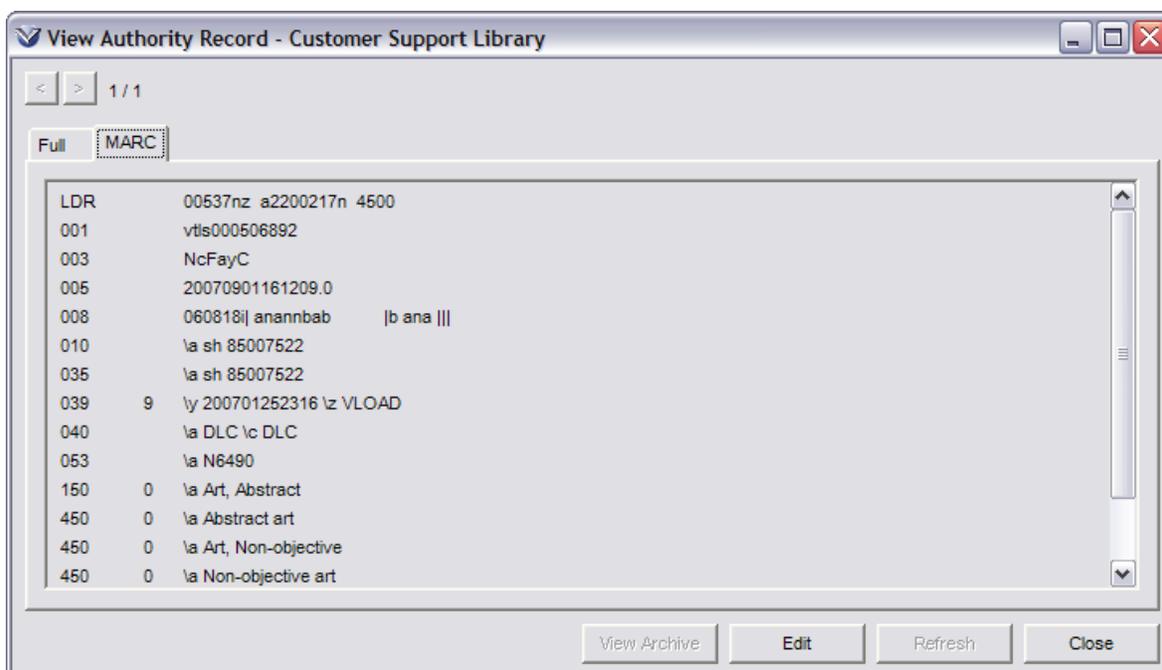
To open an authority record, do a **Browse** subject search in the OPAC



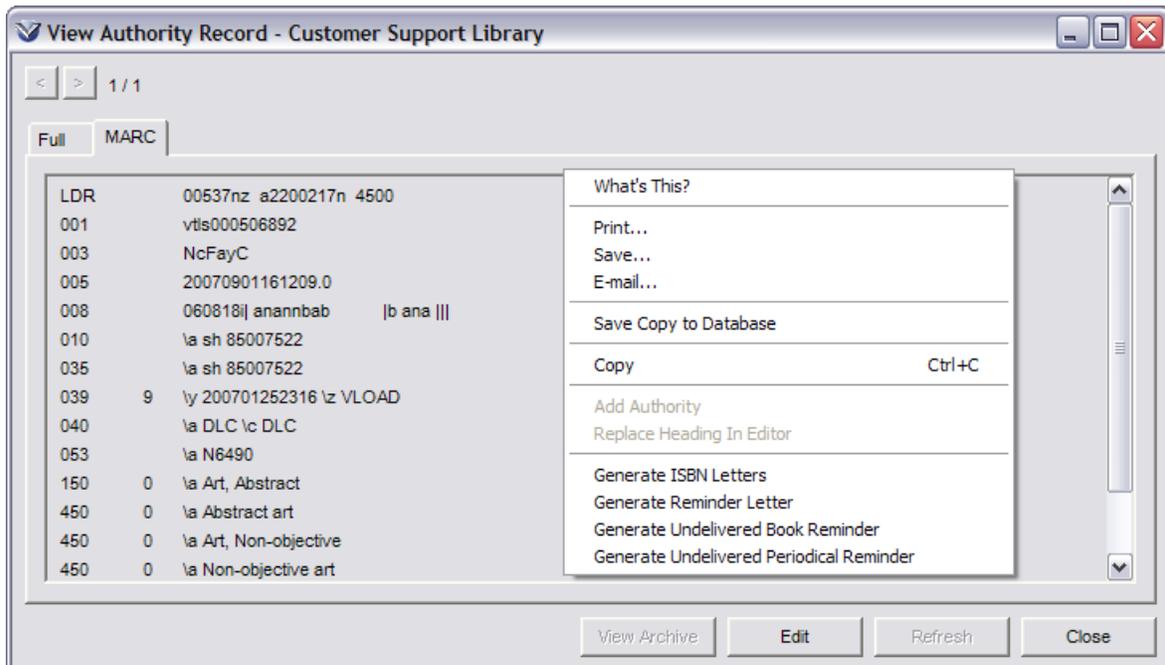
From the **Browse** screen, select the authority record and right-click to open the **View Authority Record** window.



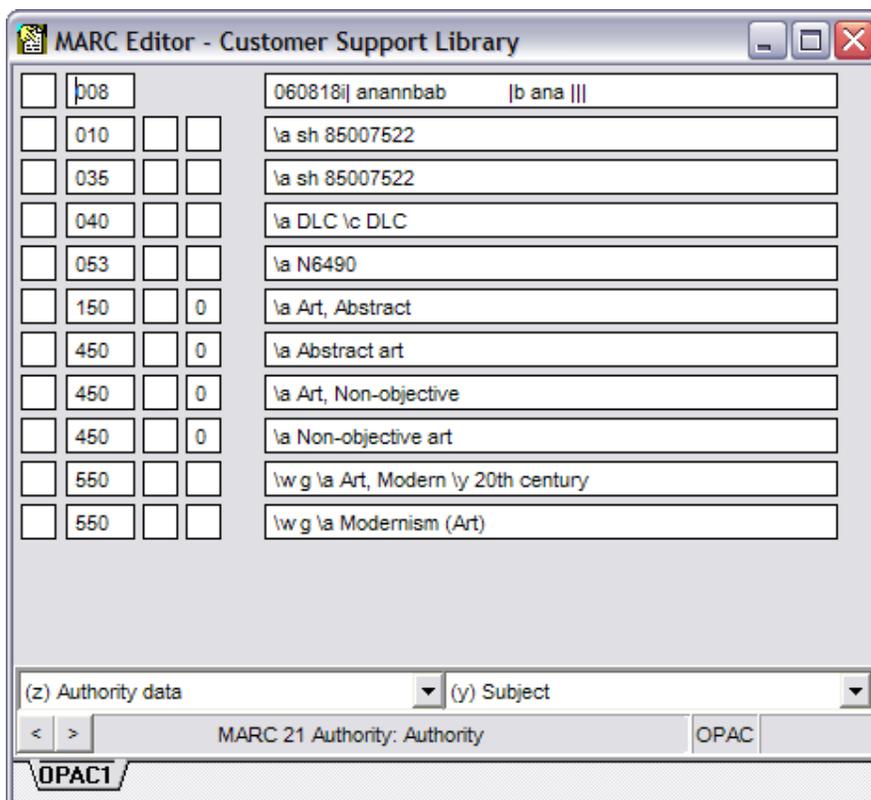
Select **View Authority**; the authority record will open in the **View Authority Record** window.



Use the right-click menu to display authority record options:



Click on **Edit** to open the record in the **MARC Editor**.



Tag	Purpose
1xx	Established Heading: Correct term established by agency (LC, etc.)
3xx	Complex see also references: Defines how term is used. The 360 tag will display as a note in the OPAC.
4xx	See references: Terms not used. These are cross-references that lead from an unauthorized heading to an authorized heading. They serve as other entry points: see 1xx heading from the 4xx heading.
5xx	See also references: Terms used to describe similar subjects or alternate names, broader, narrower terms. They lead from one authorized heading to another authorized heading. Note: Sub-field /w is used to define broader and narrower terms.
68x	MARC tags that contain notes defining the 1xx tag.

999 VTLS Tag

The 999 Virtua tag is automatically generated in a MARC authority record and contains two-locally defined fixed fields: Local Level and Bib Level. According to the MARC 21 format, there is no Bib Lvl (Leader 007) for authority records, but in Virtua there is a requirement for a locally defined Bib Lvl.

Bib level information is displayed at the bottom of the Authority record.

The screenshot shows the MARC Editor window titled "MARC Editor: 2 - Phoenix99". It displays a MARC 21 Authority record with the following fields:

001			vtls000506683
003			NcFayC
005			20080417154129.0
008			060818ij anannbabn a ana III
010			a sh 85007461
035			a sh 85007461
039		9	y 200701252316 z VLOAD
040			a DLC c DLC d DLC
053		0	a N
150			a Art

At the bottom of the window, there are dropdown menus for "(z) Authority data" and "(y) Subject". Below these are navigation buttons and a label "MARC 21 Authority: Authority". A button labeled "OPAC1" is visible at the bottom left.

The following Bib Level values are defined in Virtua for authority records to determine whether the record is an author, subject or title:

Value	Description
y	subject record (searchable as a subject)
x	author/name record (searchable as an author)
e	author/title (not series) record (searchable as an author)
t	series title record (searchable as a title)
u	uniform title record (searchable as a title)
f	author/name series record (searchable as an author)
g	author/title series record (searchable as an author)
z	special library-defined record
d	subdivision authority record (searchable as a subject)
w	genre/form record (searchable as a subject)

The following Bib Level values are defined in Virtua to distinguish between non-authoritative headings and authoritative headings that appear on the Browse window in the OPAC:

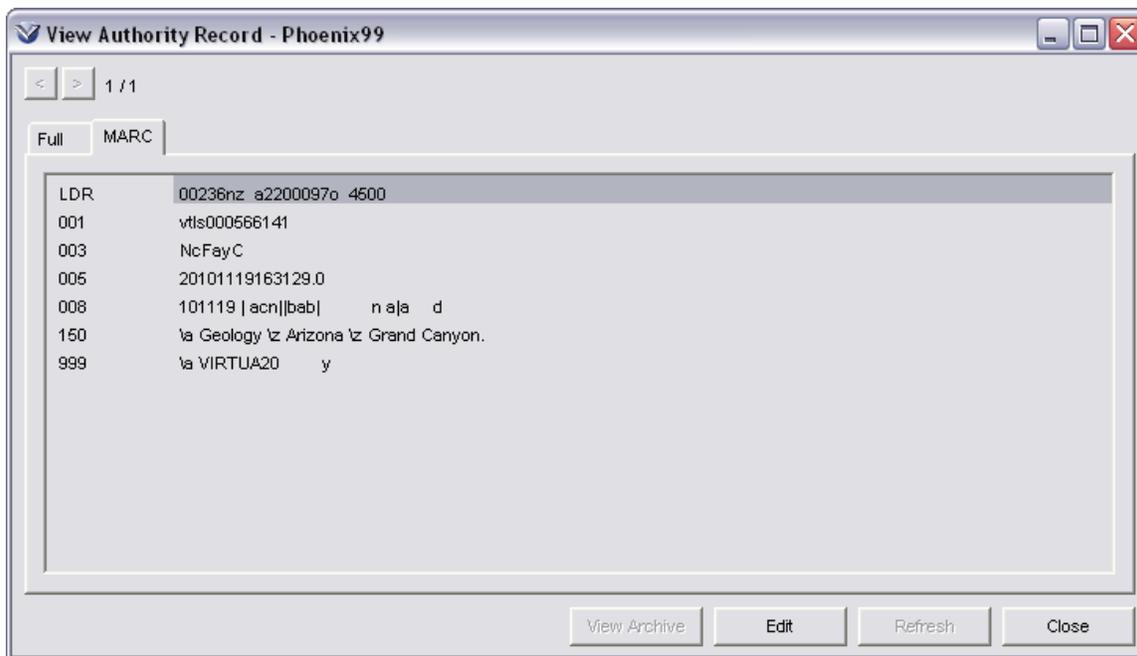
Value	Description
n	title record (searchable as a title but the authority record will not appear in the client)
o	name record (searchable as an author but the authority record will not appear in the client)
p	subject record (searchable as a subject but the authority record will not appear in the client)

The following Bib Level values are defined in Virtua to indicate an authority heading that is an Additional Access Point, formerly called a "pseudo":

Value	Description
i	AAP author/name record – represents the author portion of a combined author/title field (searchable as an author, but the tag is not displayed in the bibliographic record in the client).
k	AAP title record – represents the title portion of a combined author/title field (searchable as a title, but the tag is not displayed in the bibliographic record in the client).
l	AAP author/title record – represents the 1xx and 240 fields of a bibliographic record (searchable as an author, but the authority record will not appear in the client). The View Authority command is disabled for a heading with a Bib Level of l.
m	AAP title record – represents subfield \$a of a uniform title (searchable as a title, but the tag is not displayed in the bibliographic record in the client).

- h | AAP title series record - represents the title portion of a combined author/title series field (searchable as a title, but the tag is not displayed in the bibliographic record in the client).

Profiler Tip: Additional access points (AAPs) provide an additional link to a record on the **Browse** window. You can use the Additional Access Points parameter to determine how Virtua treats Additional Access Points (AAPs) in the browse list. See *Creating Additional Access Points* in the *Virtua Profiler: Cataloging Parameters User's Guide* for more information.



Example:

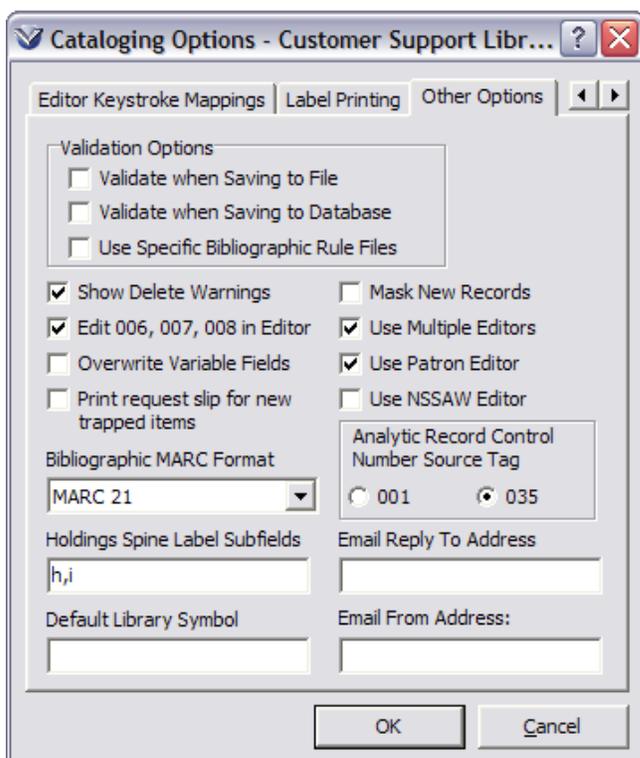
- The 999 VTLS tag indicates that this authority record:
- Is a provisional authority record (position 7=2)
- Is not part of an analyzed series (position 8=0)
- Is a subject record (y), searchable as a subject

008 Fixed Field Editor

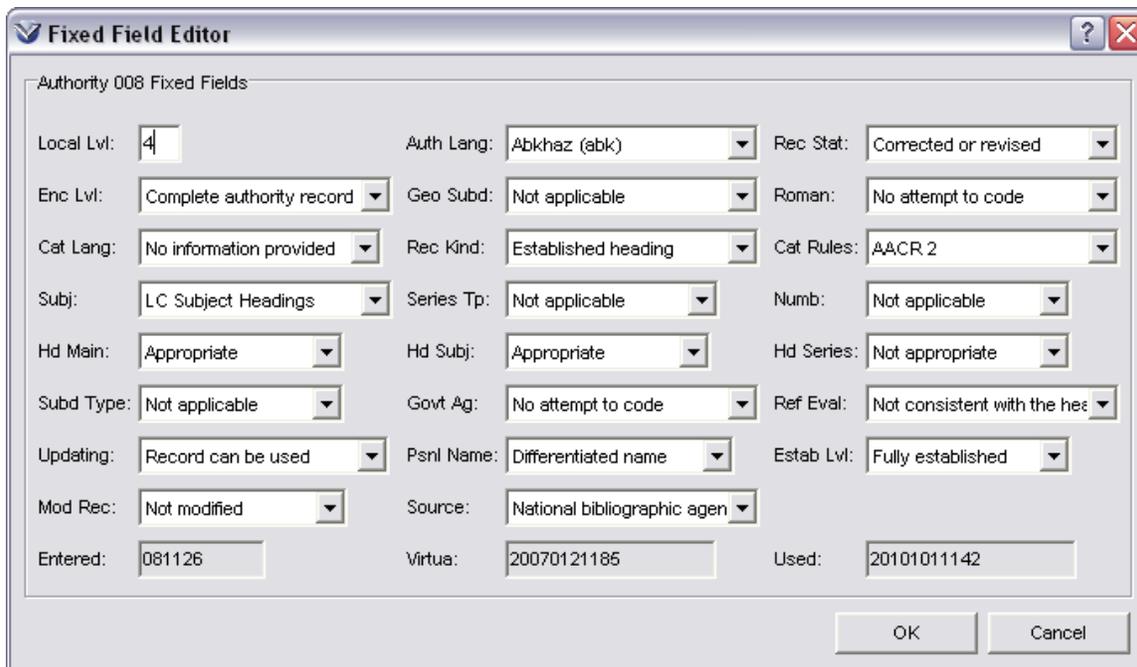
You have two choices for editing the fixed fields of a MARC authority record from the **MARC Editor** window.

- **If** your Cataloging Options are set with **Edit 006, 007, 008** in Editor **unchecked**, then clicking in any of these tags will open the tag the **Fixed Field Editor**.
- **If** your Cataloging Options are set with **Edit 006, 007, 008** in Editor **checked**, then these tags can be edited in the **MARC Editor** window.

Uncheck the Edit 006, 007, 008 tag in Editor option on the **Cataloging Options** window.



Click in the 008 field to bring up the **Fixed Field Editor** window:



The **Local Lvl** value found in the top left of the window, indicates how the record entered the Virtua system.

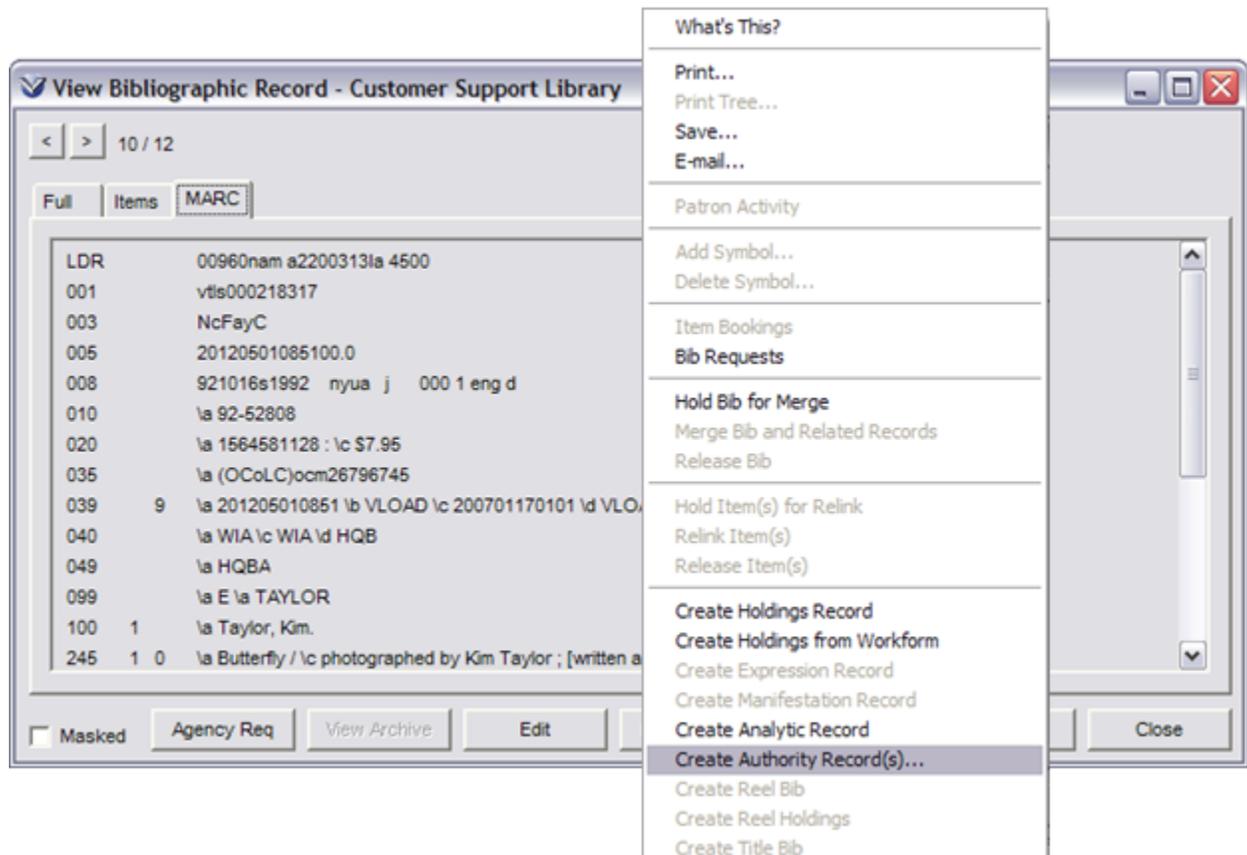
- 0 – transferred from a bibliographic utility (OCLC, RLG, etc.)
- 1 – copied from another Virtua database
- 2 – a provisional authority record
- 4 – created locally online
- 5 – loaded via a batch job

Note: Except for local lvl 2, the VTLS locally defined field local lvl is the same as for bibliographic records.

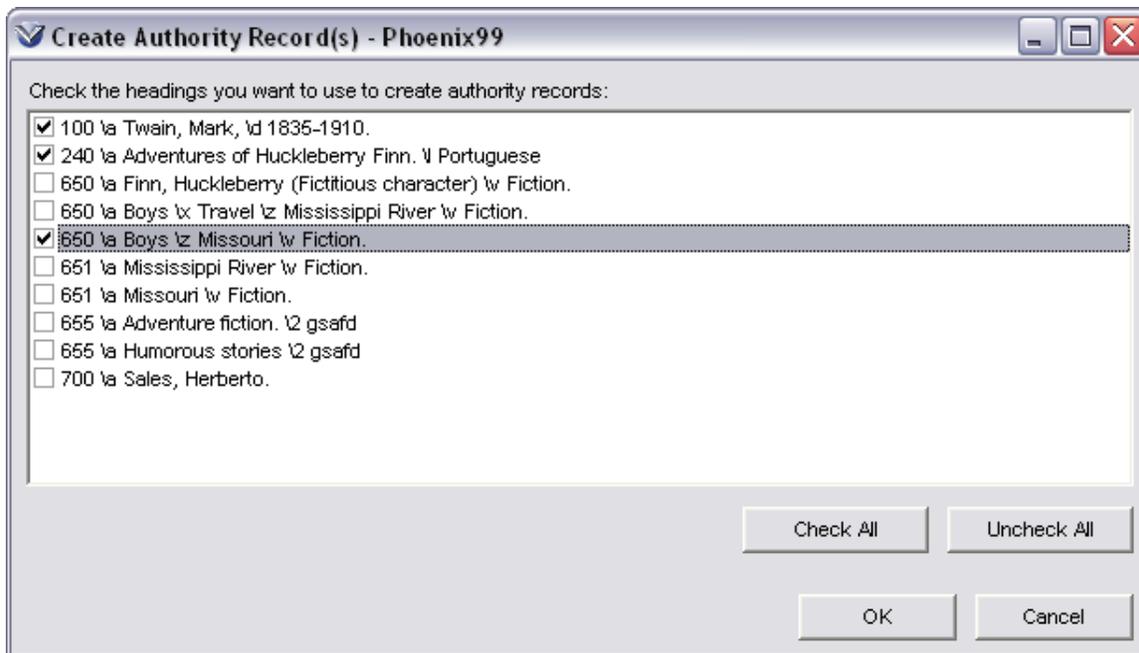
Create Authority Record from Bib Record Headings

You can create a *permanent* MARC authority record with data from heading fields on the bibliographic record.

From the **View Record** window, right mouse click to bring up the pop-up menu.



Select Create Authority Records(s). The Create Authority Record(s) window will appear.



Click in the checkboxes to select the authority records you wish to create.

Merge Authority Headings

Virtua lets you merge authority headings based on Bib Level values. The Merge Heading command is disabled for headings that are cross-references (4xx, 5xx) or AAPs (7xx) and for headings belonging to records with an authority Bib Level of 'n', 'o', 'i', 'k', 'l', 'm', or 'h'.

On the **OPAC** toolbar, click the **Search icon** .

Search for the incorrect heading.

On the **Browse** window, highlight the incorrect heading.

Click the right mouse button. The right click menu appears.

Choose **Copy Heading**.

Search for and highlight the correct heading, which you want to use to replace the incorrect heading.

Click the right mouse button.

Choose **Merge Heading** on the right-click menu.

Note: The resulting merged heading retains all the cross-references and notes from *both* original headings.

Alert: When a *permanent* authority record is merged into a *provisional* authority record, all tags from the *permanent* authority records are kept the same **except** for the **1xx tag**, which is changed to match the *provisional* record.

Temporary Merge and Override

If a MARC Authority record is active in the MARC Editor, you may temporarily override the Database Action load option set in the cataloging Load Options window for authority records when saving authority records from the MARC Editor. Two overrides are available.

- **Database Action | Merge** will temporarily set the action to ESU_Merge. Allows a provisional authority to stay as a provisional after modification.
- **Database Action | Override** will temporarily set the action to ESU_Over. If a 1xx/4xx conflict is found, Virtua will override the Error state and save the record to the database.

To temporarily set the Database Action:

With an **Authority Record** open in the **MARC Editor** window, right click to open the pop-up menu.

Select Database Action.

Select **Merge**

-OR-

Select **Override**.

When you save the record to the database, this setting will override any settings in the **Load Options** window

Add Notes to Authority Records

Notes about a 1xx heading may be added to an authority record.

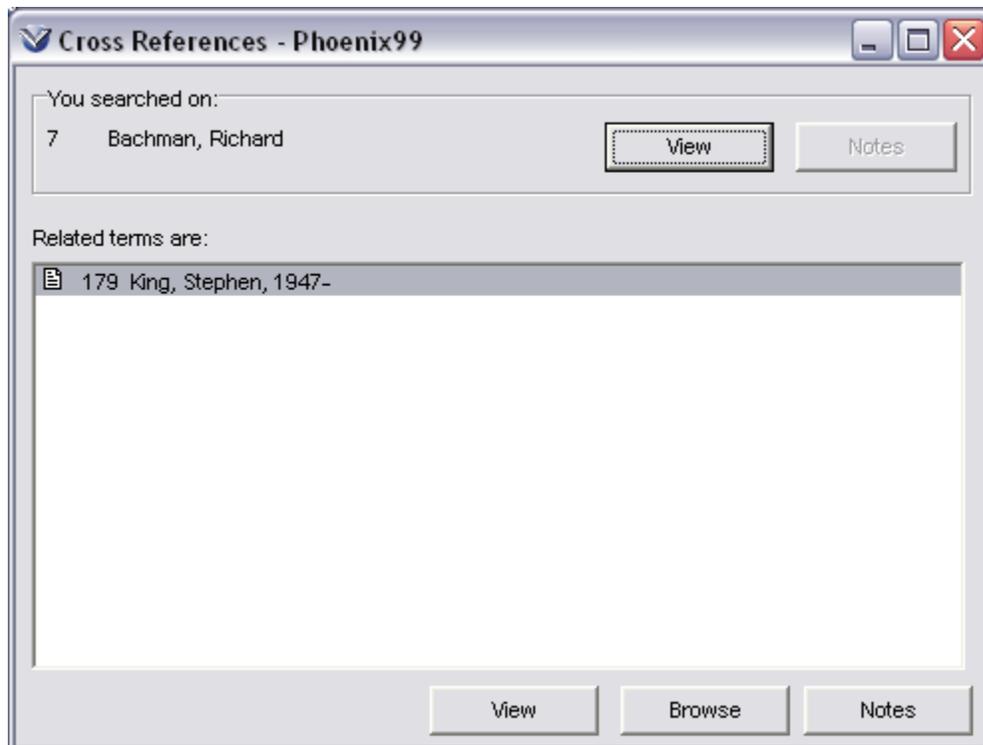
From the **Browse** window, highlight the cross-reference (indicated by the +) to which you want to add a note.

Right click and select **View Authority**.

In the **Marc Editor**, select **Edit**. The following note tags may be added:

Note Tag	Note Description
360	Complex see also reference – subject
667	Nonpublic general note
678	Epitome
680	Public general note
681	Subject example tracing note

A notepad icon will appear in the **Cross References** display window indicating that a note has been added.



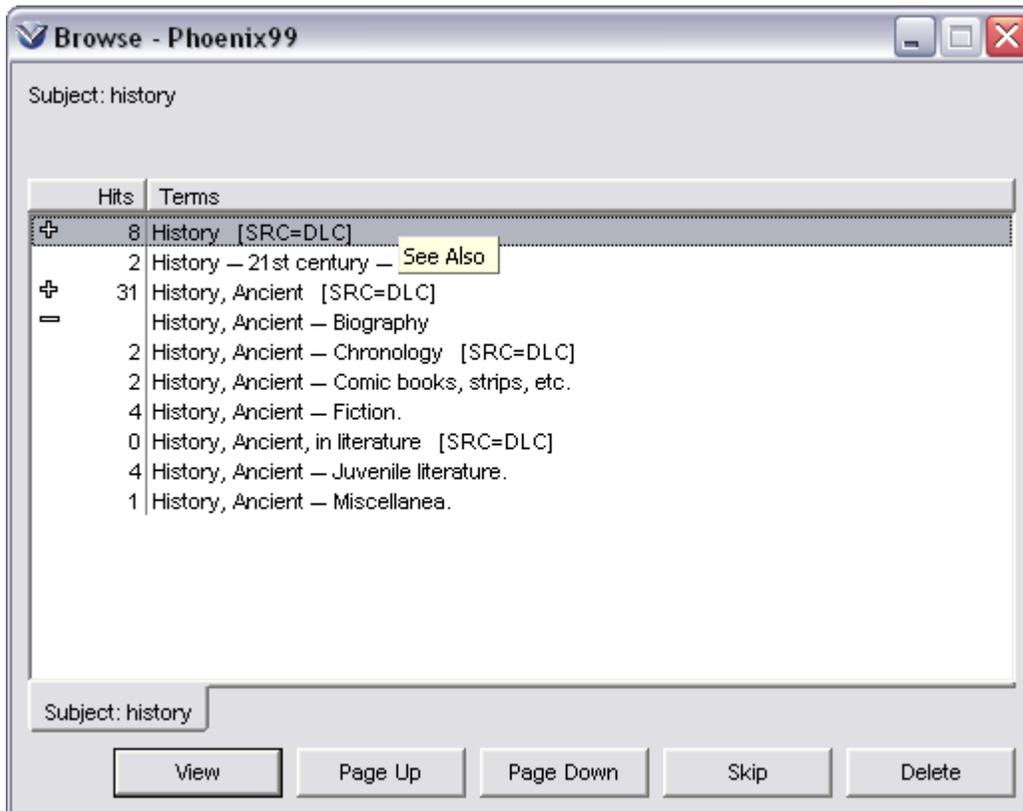
Creating Cross-References

Recommended Outline	Explanation
<div data-bbox="209 453 435 579" style="border: 1px solid black; padding: 5px; margin-bottom: 10px;">Add an Authority Heading</div> <div data-bbox="209 642 435 768" style="border: 1px solid black; padding: 5px; margin-bottom: 10px;">Merge an Authority Heading</div> <div data-bbox="209 821 435 947" style="border: 1px solid black; padding: 5px;">Add Notes to an Authority Heading</div>	<p data-bbox="488 453 1414 625">Virtua MARC format for authority records is based on the USMARC authority format. With Virtua, you can easily add cross-references to authority records that you are creating or editing. The procedure for adding cross references works with any heading under authority control:</p> <ul data-bbox="537 663 786 800" style="list-style-type: none"> • Authors • Subjects • Series titles • Uniform titles <p data-bbox="488 842 1435 978">Operational security settings in the <i>Virtua Profiler</i> allow libraries to restrict which staff have permission to edit and delete authority records. Permissions can be set separately for each authority record type (i.e. Author, Subject, etc.)</p> <p data-bbox="488 1016 646 1047">Summary</p> <ul data-bbox="537 1062 1430 1304" style="list-style-type: none"> • Distinguish between types of Cross References (See, See Also) • Add See references • Add See also references • Add narrower and broader terms • Add earlier and later terms • Understand 1xx/4xx Authority heading conflicts <p data-bbox="488 1341 667 1373">Key Terms</p> <ul data-bbox="537 1388 883 1661" style="list-style-type: none"> • 1xx/4xx Conflict • Authority Heading • Cross-Reference • Established Heading • Invalid Heading • Valid Heading • See Reference • See Also Reference

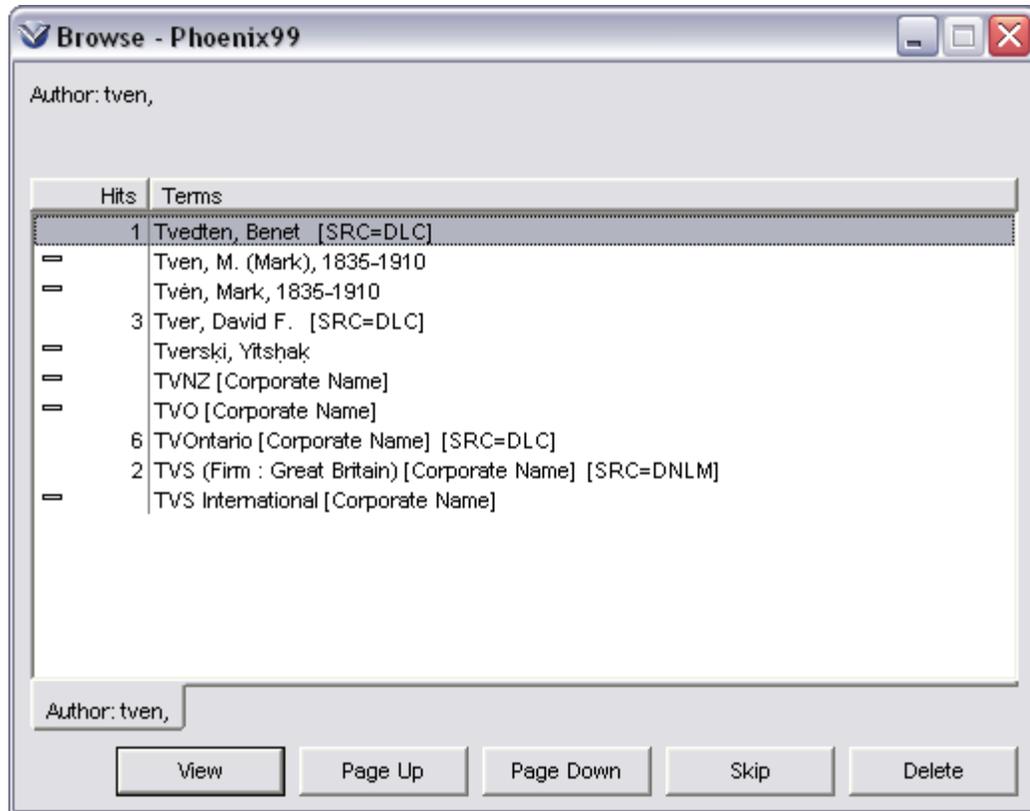
Viewing Authority Cross-References

The ability to provide cross-references is one of the main purposes of authority records. Here are some aspects of how Virtua handles cross-references:

See Also references are indicated by a + (plus sign) next to a heading. See Also references are generated by a **5xx tag** in an authority record

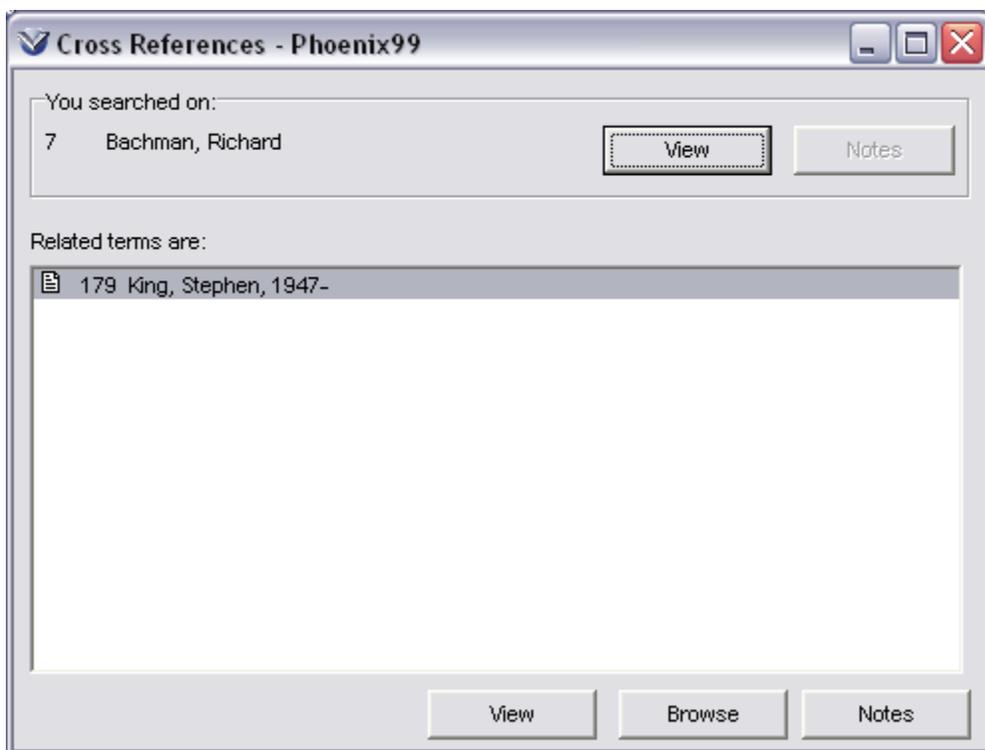


See references are indicated by a - (minus sign) next to a heading. See references are generated by a **4xx tag** in an authority record.



Note icons indicate that you can view notes associated with a cross-reference. Notes derive from specific tags in the authority record and include ALL the subfields found in those tags. A Notes icon appears

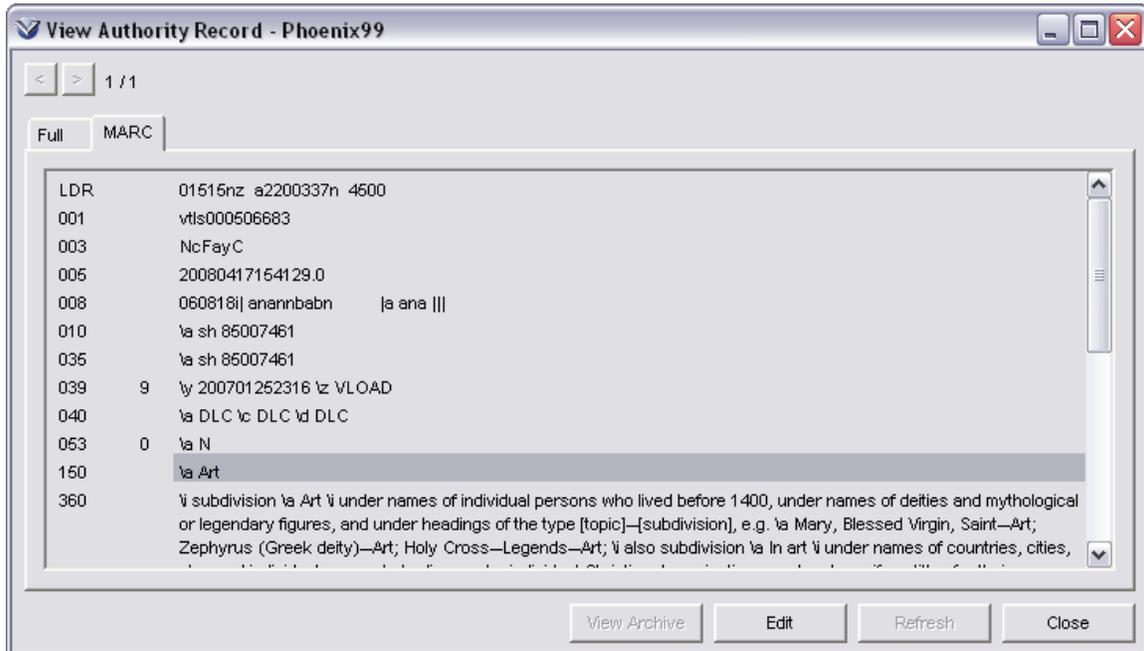
- If the record contains a 6xx tag with a second indicator of 9.
- If the record contains a 360 tag with a second indicator of 9.
- If the record contains a 678 tag, 680 tag, or 681 tag regardless of the second indicator.



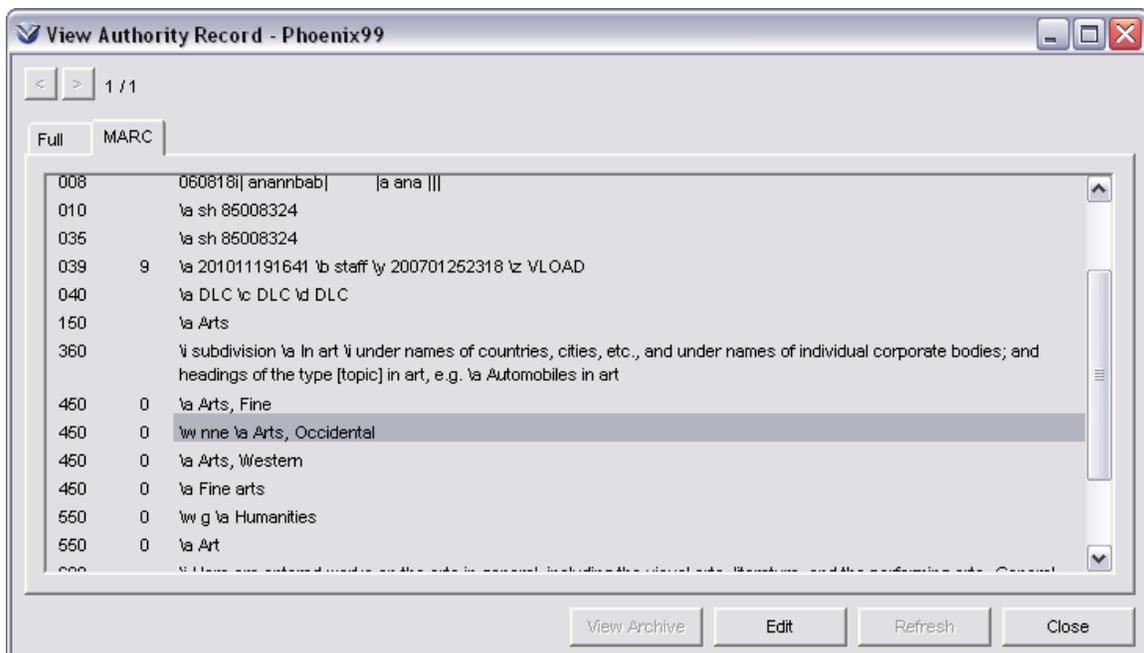
Cross-References

Cross-references are created when the subject heading in the **1xx tag** of one authority record appears in the **5xx tag** of another authority record.

The authority record for **Art** contains the term Art in the 150 tag.



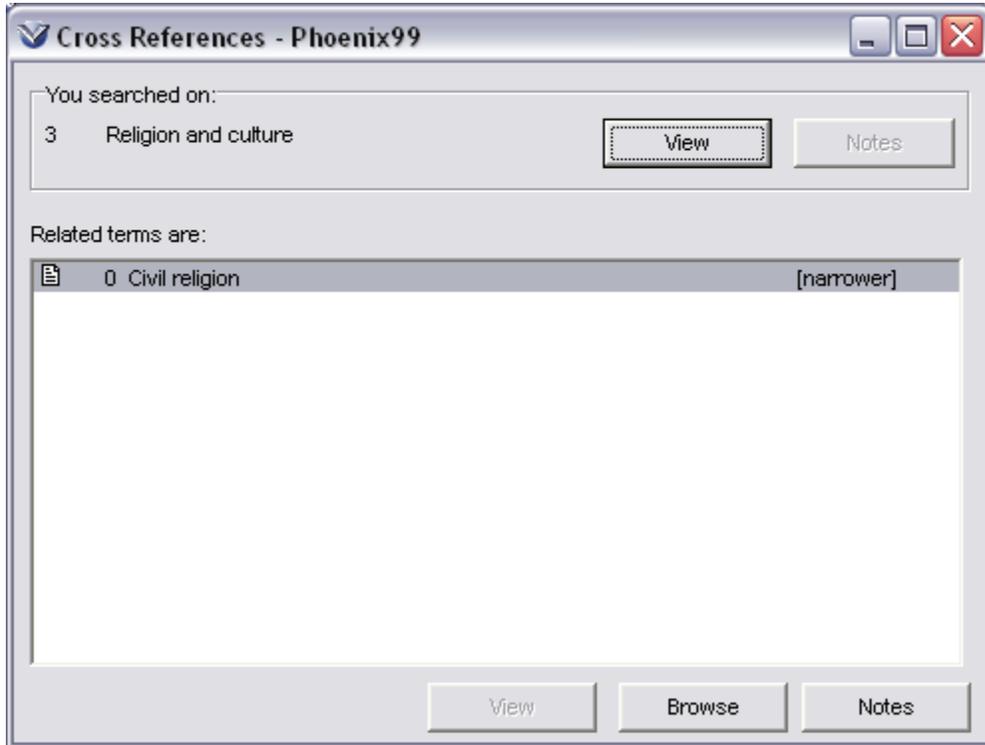
The authority record for **Arts** contains a cross-reference for Art in the 550 tag.



Earlier, Later, Broader, & Narrower Headings

Labels to the right of the heading indicate Broader, Narrower, Earlier, and Later references

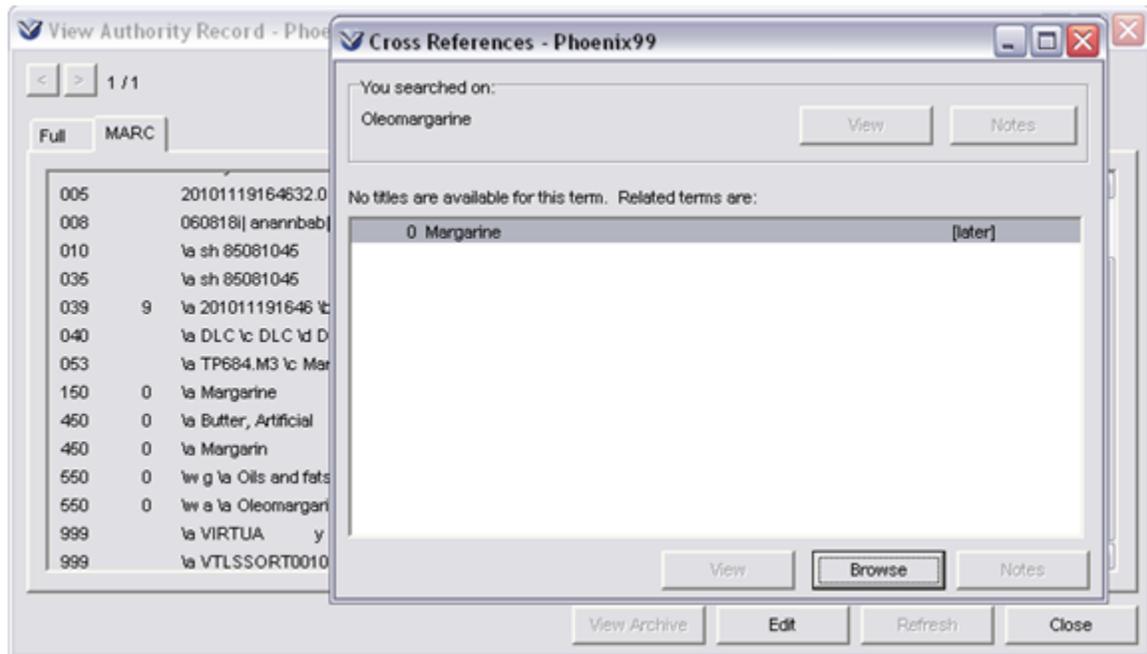
These labels are generated by a subfield **\w** in the 4xx or 5xx tag in an authority record.



Earlier Headings

When the established heading in the tracing field is an **earlier** name for the heading in the 1XX field, it is displayed as a **\w a** in a cross-reference.

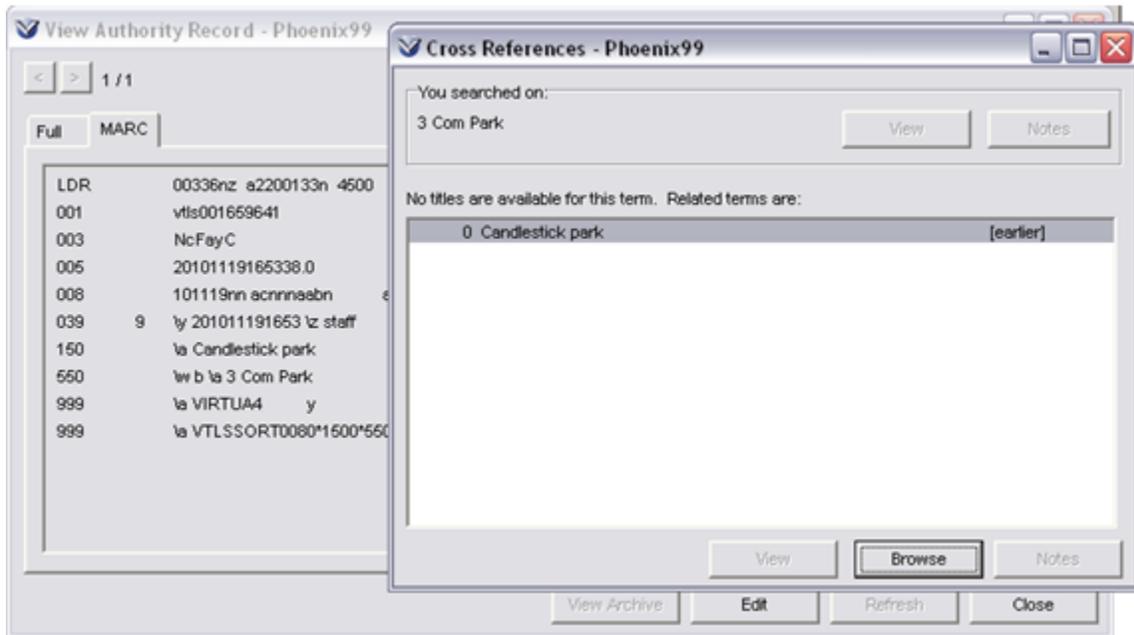
Example: 550 tag \w a \a oleomargarine



Later Headings

When the established heading in the tracing field is a **later** name for the heading in the 1xx field, it is displayed as a **\w b** in a cross-reference.

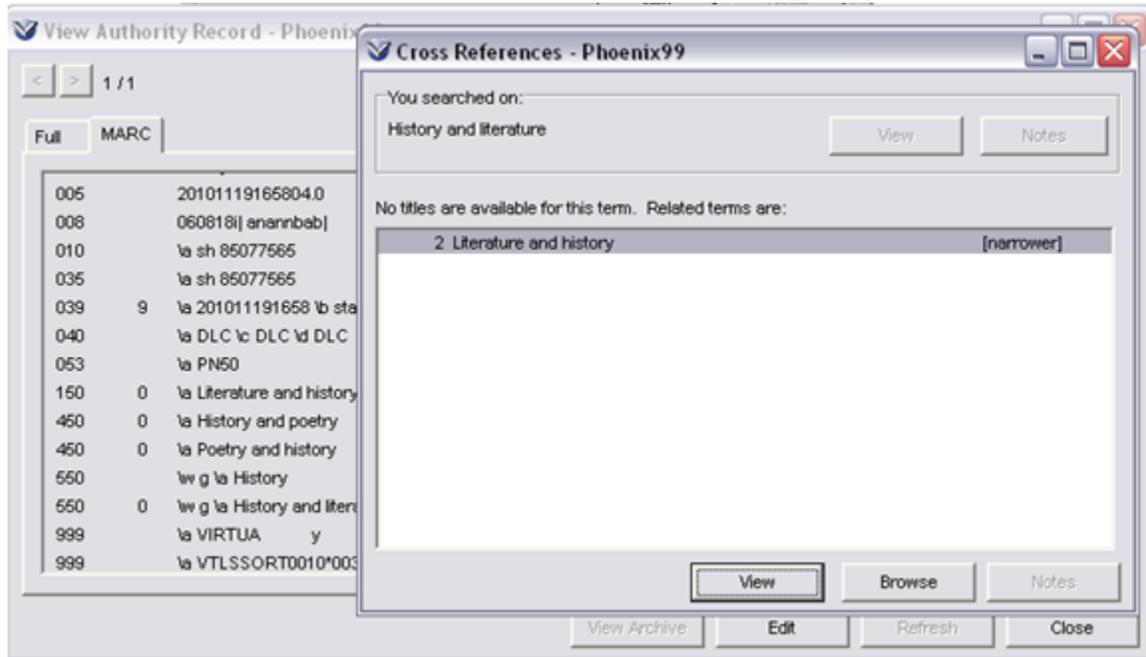
Example: 550 tag \w b \a 3Com park



Narrower Terms

The heading in the tracing field is a **narrower** term than the heading in the 1XX field. This is indicated by a **\w g** in the 550 tag of the record that contains the related term.

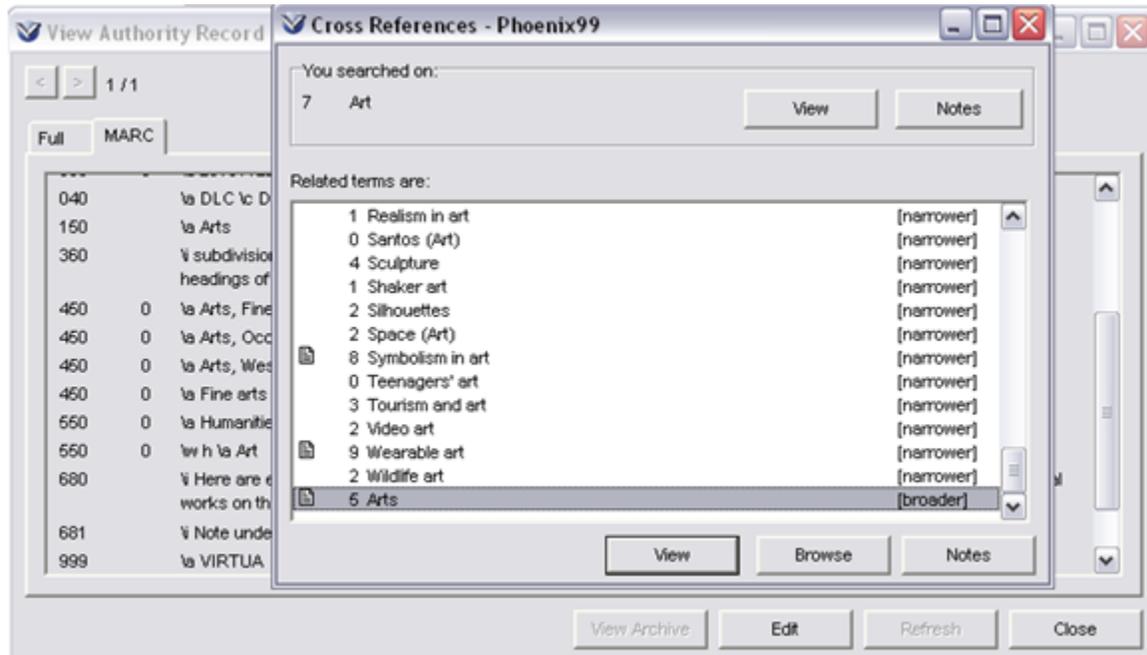
Example: 550 tag \a Literature and history. \w g



Broader Terms

The heading in the tracing field is a **broader** term than the heading in the 1XX field. A broader term is indicated by a **\w h** in the 550 tag of the record that contains the related term.

Example: 550 tag \a Arts. \w h



Authority Heading Conflicts

Authority heading conflicts occur when headings used in bibliographic records match the 4xx tags in authority records.

An authority heading conflict is as follows...

- **1xx tags** in authority records contain **valid** headings (terms that are used)
- **4xx tags** in authority records contain **invalid** headings (terms that are not used)
- **1xx, 7xx, 4xx, 8xx,** and **6xx tags** (subject headings) in bibliographic records are saved as 1xx tags in authority records when a new or edited bibliographic record is saved to the database, creating new authority records.
- Virtua cannot create an authority record with a **1xx tag** for the tag in the incoming bibliographic record if a **4xx tag** for that term already exists in another authority record.

This is called a 1xx/4xx conflict.

When Virtua attempts to create an authority record with a 1xx tag in (valid heading) for a tag in a bibliographic record

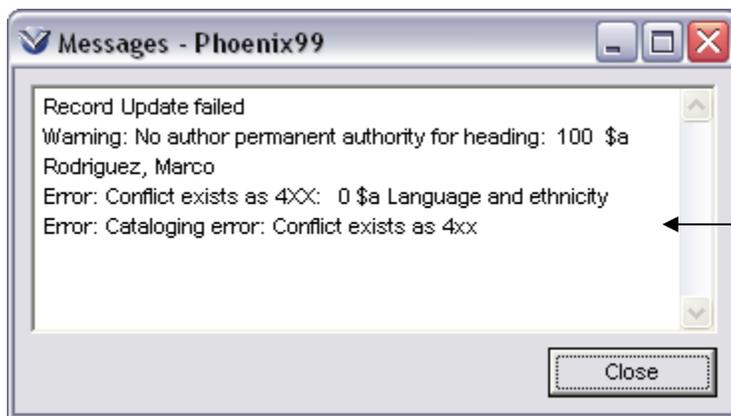
AND

The **same term** exists as a 4xx tag (invalid heading) in another authority record

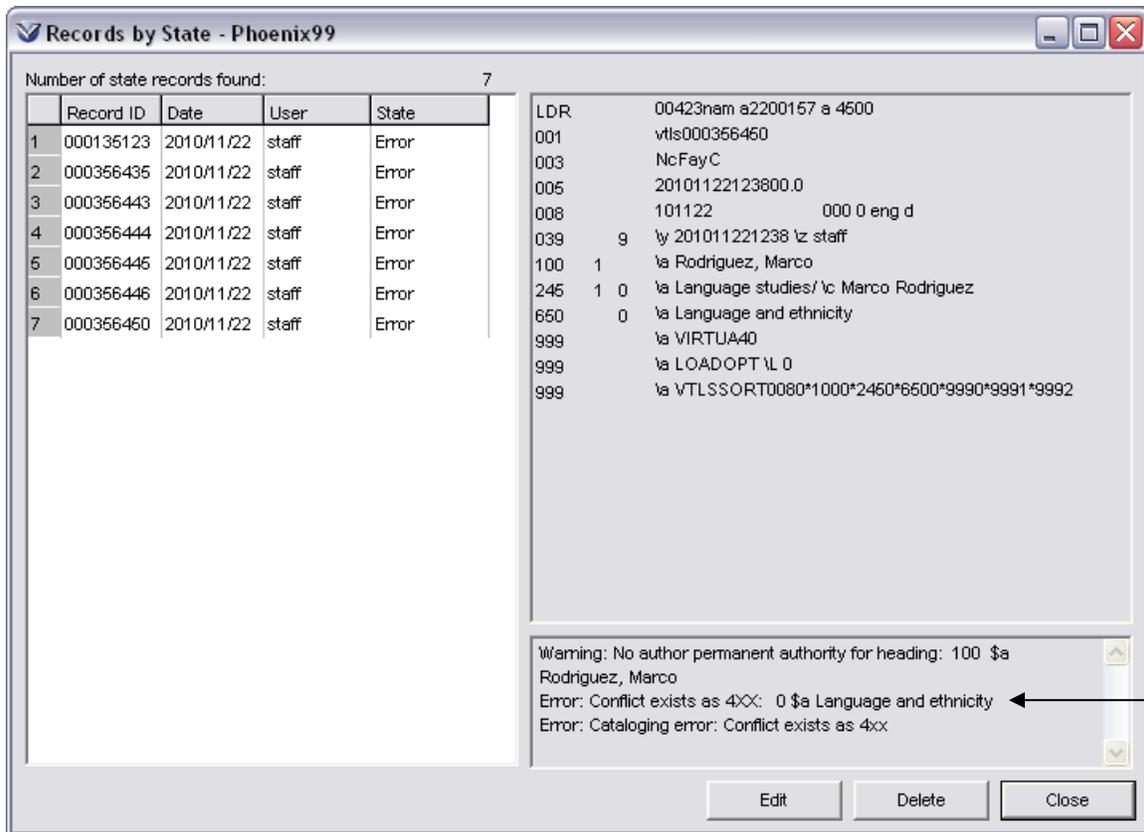
THEN

The **MARC Heading Conflict Flag** parameter in the Profiler determines what happens when the 1xx/4xx conflict occurs.

- **If** the MARC Heading Conflict Flag is set to **YES**, Virtua automatically replaces the bibliographic record's heading with the conflicting authority record's 1xx heading. The bibliographic record is saved to the database.
- **If** the MARC Heading Conflict Flag is set to **NO**, Virtua warns the cataloger of the conflict. The bibliographic record is put in **error state** because Virtua cannot resolve the conflict.



When the record is placed in error state, Virtua also identifies the heading causing the 1xx/4xx conflict on the **Records by State** window.



You will need to change **either** the bibliographic record **or** the authority record:

- Delete the term from the **4xx** tag of the **authority** record so that an authority record may be created for the term in the bibliographic record.

OR

- Change the **4xx** tag of the **authority** record to a 5xx tag (*see also*)

OR

- Edit the term in the tag of the **bibliographic** record to match the valid authority heading (the 1xx tag of the authority record containing the 4xx tag) so that the bibliographic record contains the valid term.

Tip: Turn on the display of blind references in the OPAC when searching for the correct term in the authority records. It may be that the valid term is not in use but has an authority record in the database.

Note: For a complete list of problems that will cause a record to go into error state, please see the *Cataloging User's Guide*.

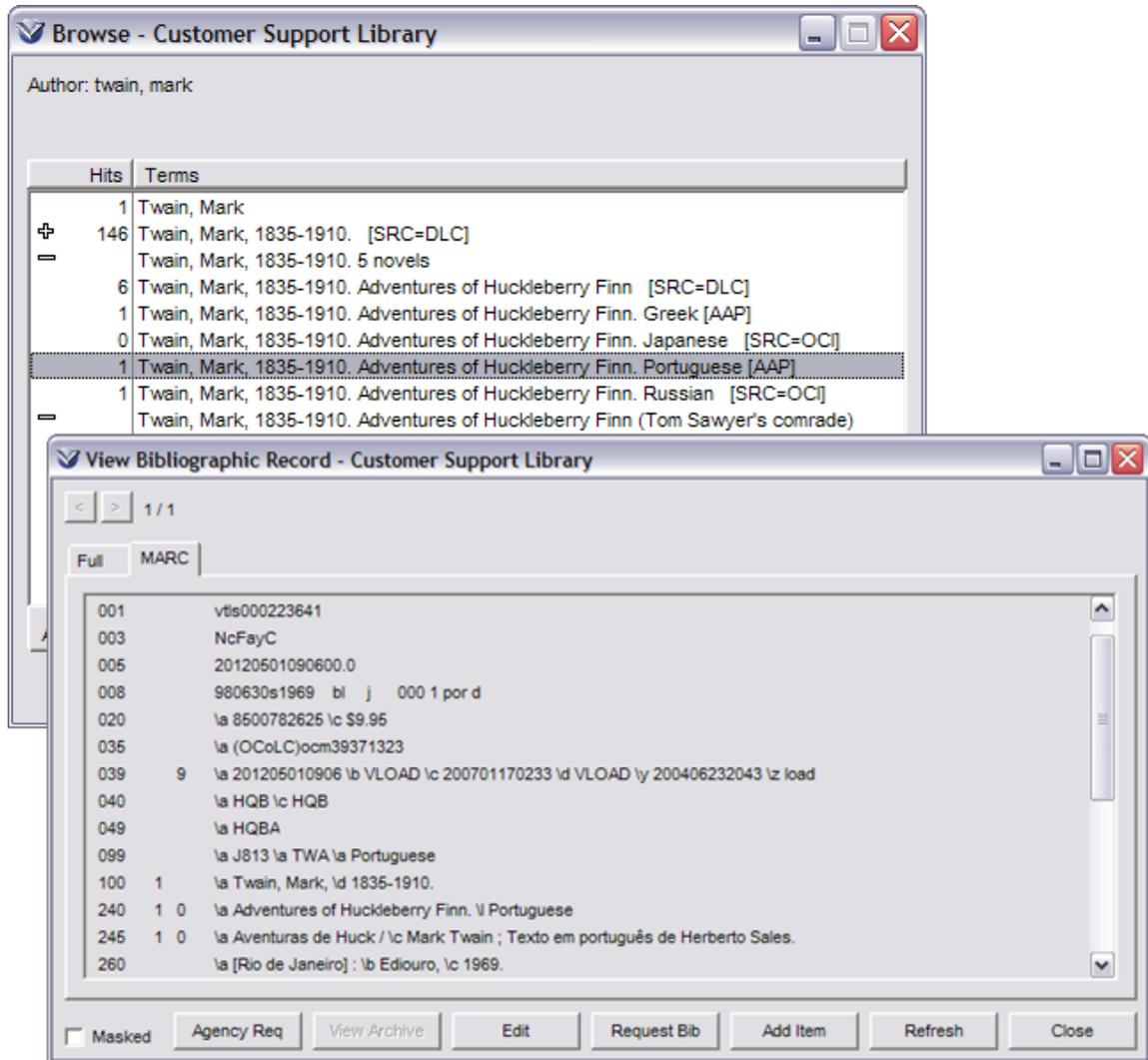
Additional Access Points

Additional Access Points (AAPs) provide an additional link to a record on the Browse results window. Often they will provide a link to a specific record when the main heading has several associated bibliographic records.

Profiler Tip: You can use the Additional Access Points parameter to determine how Virtua treats Additional Access Points (AAPs) in the browse list. See *Creating Additional Access Points* in the *Virtua Profiler: Cataloging Parameters User's Guide* for more information.

There are five types of additional access points:

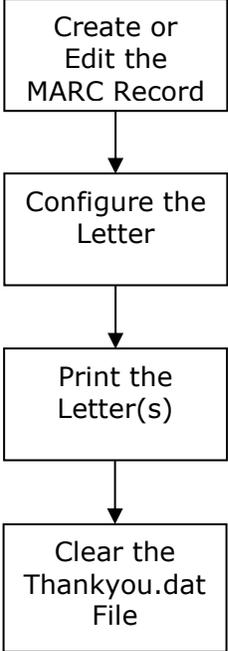
Tag in bib record	Purpose
1xx \a \t	Creates access point to the record that consists of the main entry name and the title of the work
7xx \a \t	Creates access point to the record that consists of the added entry name and the title of the work.
4xx/8xx \a \t	Creates access point to the record that consists of the Series entry name and the title of the work
Uniform title	Determines whether or not the 130 \a tag is used as an additional access point
1xx/240	Creates additional access points to a record for records with 1xx and 240 tags. (See example below.)



You can determine additional access points by setting the **Additional Access Points (AAP)** parameter in the **Profiler**.

Note: We recommend that you do not alter settings for this parameter on a production database. After you make changes to this parameter, you need to re-index your browse headings.

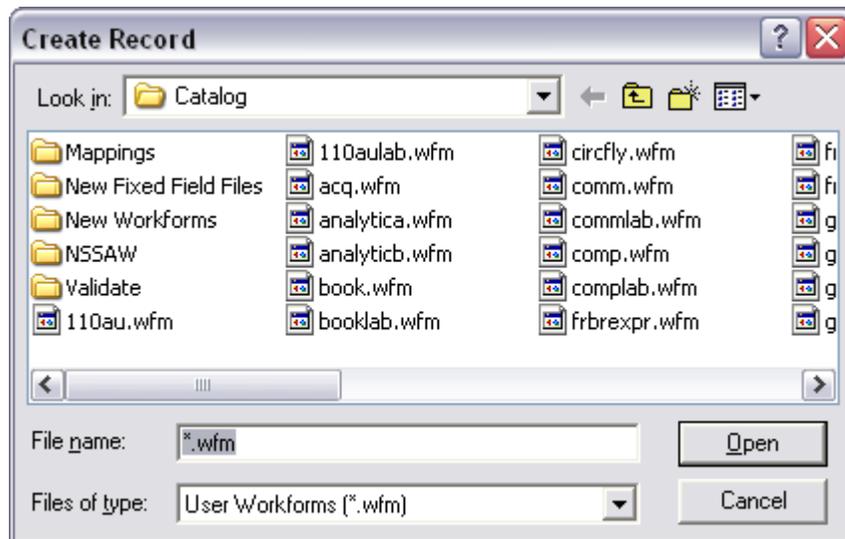
Gifts and Deposits Processing

Recommended Workflow	Explanation
 <pre> graph TD A[Create or Edit the MARC Record] --> B[Configure the Letter] B --> C[Print the Letter(s)] C --> D[Clear the Thankyou.dat File] </pre>	<p>When gifts or legal deposits are received, Virtua provides a way to both record and acknowledge receipt via the 541 tag of the MARC bibliographic record. The information from the subfields in the 541 tag are used to generate acknowledgment letters.</p> <p>Summary</p> <ul style="list-style-type: none"> • Add a 541 tag to a new or existing MARC record • Configure the Letter • Print the Thank you Letter • Clear the Thankyou.dat file <p>Key Terms</p> <ul style="list-style-type: none"> • (Immediate Source of Acquisition) 541 Tag • Unicode Editor • Text Editor • Thankyou.dat file

Create or Edit the MARC Record

On the Cataloging toolbar, click the **New Record** icon  or on the Virtua menu bar, click **File → Records → Create Record** or **Search** the OPAC for the MARC record that you wish to identify as a gift.

- **If** you selected a default workform in the **Cataloging Options** on the **Options** menu, then that workform will appear in the **MARC Editor**.
- **If** you did not select a default workform, then the **Create Record** window will appear allowing you to choose a workform.



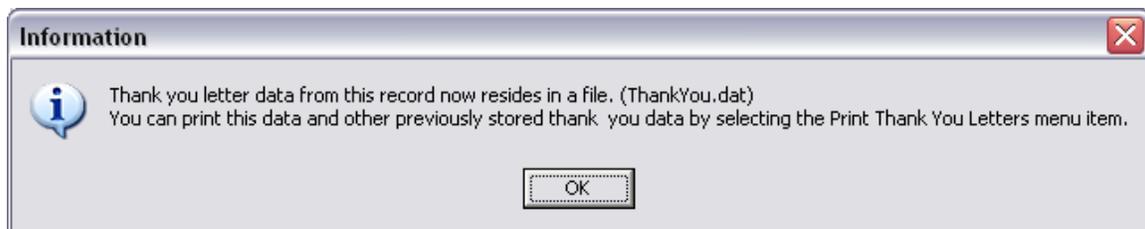
Complete and save the MARC record, adding a **541 tag** (Immediate Source of Acquisition), which contains information needed for the acknowledgment letter.

Subfield	Purpose	Needed for Thank You letter
\a	Source of acquisition (NR) Name of the person or organization that gifted the material.	Yes
\b	Address (NR)	Yes
\c	Method of acquisition (NR): for example, by gift, loan, or purchase.	Yes
\d	Date of acquisition (NR)	Yes
\e	Accession number (NR) The identification code assigned to materials acquired.	No
\f	Owner (NR) The individual or organization with legal custody over the materials.	No
\h	Purchase price (NR)	No
\n	Extent (R) The number of items acquired.	No
\o	Type of unit (R) The name of the unit of measurement, for example, cartons.	No
\3	Materials specified (NR)	No
\5	Institution to which field applies (NR)	No
\6	Linkage (NR)	No
\8	Field link and sequence number (NR)	No

Note: (NR) indicates that it is a non-repeating field.

Reopen the record in the **MARC Editor**.

On the Virtua menu bar, click **MARC Editor** → **Remember for Thank You Letter**. The **Information** dialog box will appear.



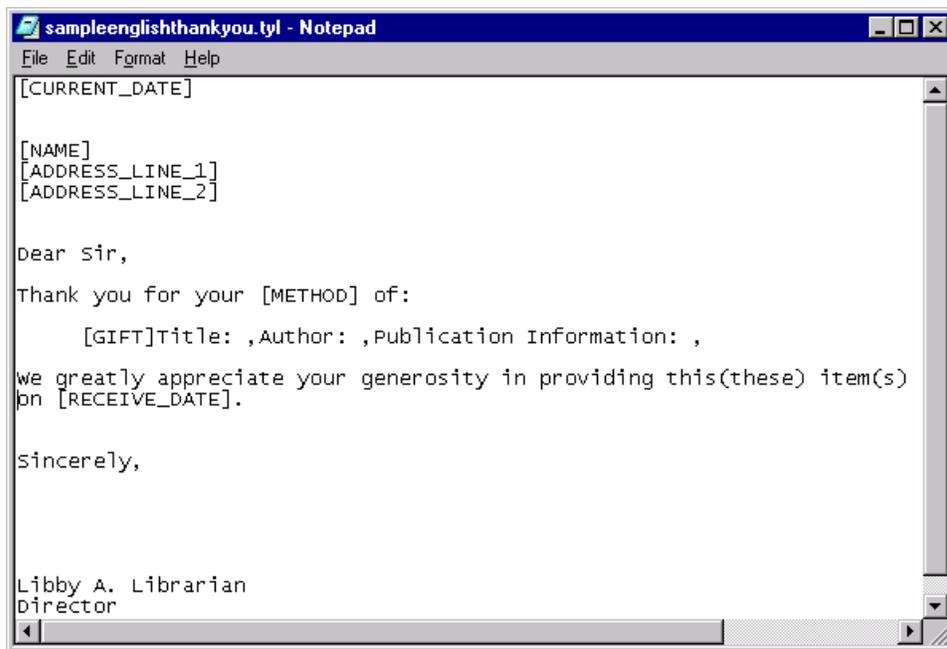
Note: When you choose **Remember for Thank You Letter**, the system will append the data in the 541 tag to the **ThankYou.dat** file. This allows all related bibliographic objects to be processed together, which prevents multiple letters being generated for the same gift.

Configure the Letter(s)

Before you can print an acknowledgement letter, you must configure the letter. Virtua provides a sample thank you letter in English, which can be edited or translated using a Unicode text editor:

- **If** you are using Windows 2000 or higher, you can use Notepad.
- **If** the letter file contains only characters in the ASCII range, you do not have to use a Unicode editor.

Note: Using the sample thank you letter template as a guide, your library might want to create a different letter template for each language you might need. You might also wish to indicate the language in the filename.



Using this template in conjunction with printing data pulled from the tags in the bibliographic record, this is what the printed letter would look like.

Note: The bracketed information indicates where the system finds the data to print. If any of the information needed for the gift letter is not provided in the bibliographic record(s), the line in the letter where that information would appear is omitted.

To edit the letter template file:

Open the template file **sampleenglishthankyou.tyl** using your favorite editor. If you have accepted the default location for the Virtua installation, the file resides in the **VTLS\Virtua\Catalog** directory on your PC.

Edit any text not surrounded by brackets [].

Save the file. If desired, assign it a different name, but always use the extension **.tyl** and put the file in the **\Catalog** directory.

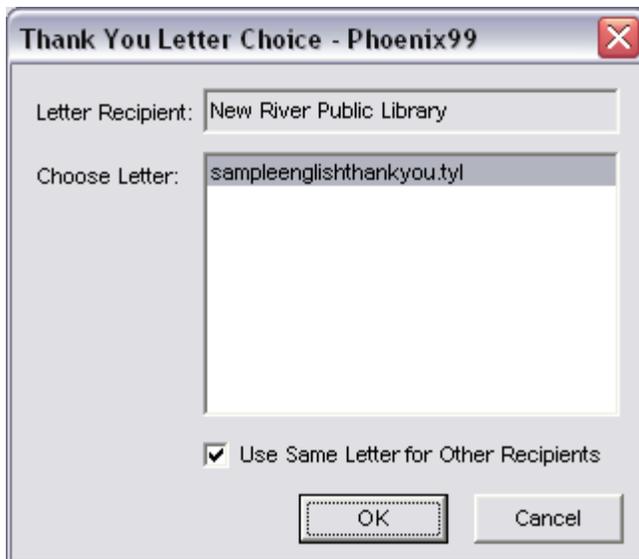
Print the Letter

You may choose to use the same letter template for all recipients, or you may choose to use different letter templates for each recipient in the **ThankYou.dat** file.

To print the same letter(s) for all recipients in the **ThankYou.dat** file:

Select **File → Print Thank You Letters** from the Virtua main menu.

The **Thank You Letter Choice** dialog box appears. The **Letter Recipient** textbox displays the name of the **first** recipient (derived from \a of tag 541) in the **ThankYou.dat** file.



Choose the letter template file that you want to print. You can have any number of files in this list, but only files with the extension **.tyl** appear.

Leave the check box **Use Same Letter for Other Recipients** checked to print the same letter for all recipients in the **ThankYou.dat** file.

Click the **OK** button. The **Print** dialog box appears.

Choose the number of copies you want to print.

Click the **OK** button. Virtua prints the letters, which will list all remembered bibliographic objects.

To print a different letter for each recipient in the ThankYou.dat file:

De-select the check box Use Same Letter for Other Recipients.

Print the first letter.

The **Thank You Choice** dialog box reappears, this time displaying the name of the second recipient.

Choose a different letter file.

Print the second letter.

The **Thank You Choice** dialog box will reappear for each recipient in the ThankYou.dat file.

Note: The check box remains de-selected only during the current printing of the series of letters. After the current printing, it returns to the default value, which is selected.

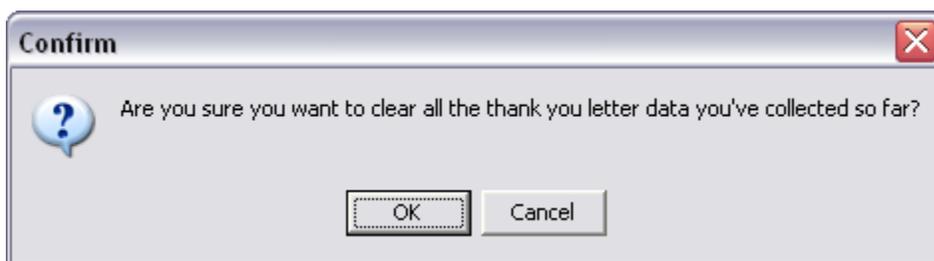
Clear the ThankYou.dat file

After you finish printing, you need to clear the data file ThankYou.dat of the bibliographic information saved for this printing.

Select **File** → **Clear Thank You Information** from the Virtua main menu.

The system asks you to confirm the action. Click **OK**. The thank you letter file is cleared. Now you are ready to start the gift/deposit receipt and acknowledgment process again for new material.

If, after you clear all thank you information, you try to print another thank you letter, the system will display the following dialog box:



Other Cataloging Functions

Recommended Outline	Explanation
<p data-bbox="256 369 396 436">Analytic Records</p> <div data-bbox="207 470 435 583" style="border: 1px solid black; padding: 5px; margin-bottom: 10px;">Create Analytic Records</div> <div data-bbox="207 638 435 751" style="border: 1px solid black; padding: 5px; margin-bottom: 10px;">Hyperlink Analytic Records</div> <div data-bbox="207 806 435 890" style="border: 1px solid black; padding: 5px; margin-bottom: 10px;">Generate 880 Tag</div> <div data-bbox="207 940 435 1054" style="border: 1px solid black; padding: 5px; margin-bottom: 10px;">Translate MARC Records</div> <div data-bbox="207 1100 435 1213" style="border: 1px solid black; padding: 5px;">Replace MARC Records</div>	<p data-bbox="490 369 1282 436">Virtua provides a number of additional features to aid catalogers with their tasks.</p> <p data-bbox="490 474 646 508">Summary</p> <ul data-bbox="539 520 1334 722" style="list-style-type: none"> • Create Analytic Records • Hyperlink Analytic Records • Generate an 880 tag • Replace MARC records • Translate records from UTF-8 to another character set <p data-bbox="490 798 665 831">Key Terms</p> <ul data-bbox="539 844 828 1050" style="list-style-type: none"> • Analytic Record • Character Sets • Child Analytic • Component Part • Parent Analytic • Special Statuses

Create Analytic Records

An Analytic record is a cataloging record for an individual issue with a distinctive title that is part of a larger bibliographic set. It may be part of a serial, a monographic series, or a

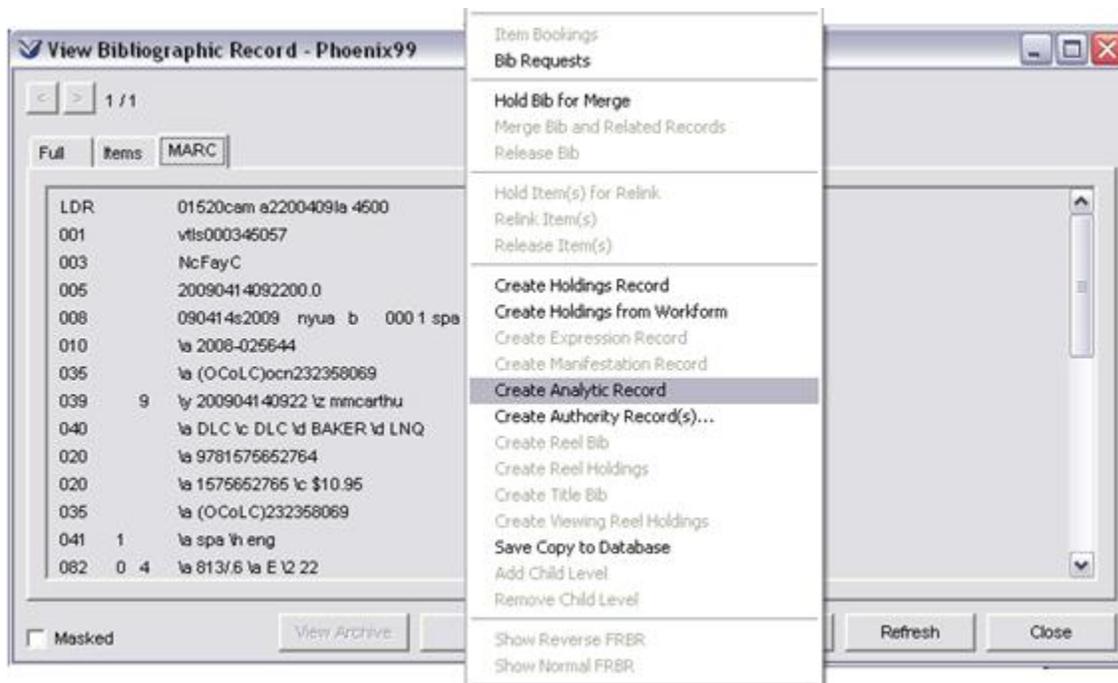
multi-volume work. Analytic records provide a means of further describing the individual entities in the set and linking them to the bibliographic record for the set.

Virtua allows you to create an analytic record for an individual title of a volume in a monographic series or serial based on the parent bibliographic record. You can then display the child analytic record (also called the component part) linked to the parent bibliographic record and vice versa.

Note: This option is enabled only if the record is a MARC 21 or CATMARC record with a bib level of m (monograph) or s (serials).

Open the parent bibliographic record in the **View Record** window.

Right mouse click and select **Create Analytic Record** from the pop-up menu



Virtua opens the **MARC Editor** with the 773 tag populated with data from the parent record.

773 tag subfields	Data from parent record
7 – Position 0	type of main heading
7 – Position 1	form of main heading
7 – Position 2	value of type fixed field - the type fixed field is the parent's leader 06
7 – Position 3	value of bib level field
w (control number)	035 tag \$a. If multiple 035 tags exist, the first 035 is used.
a (main entry)	1xx tag. All indexed subfields of the first 1xx tag are used.
b (edition)	<ul style="list-style-type: none"> • If the parent record contains a 250 tag \$a, that value is placed in \$b. • If the parent record contains a 250 \$e, that data is preceded by a comma and space and is appended to \$b. • If there is no \$b, one is created containing 250 tag \$e data.
d (publication)	260 tag \$a, \$b and \$c
k (series)	440 or 8xx tag. The 773 \$k is repeatable; a \$k is created for each 440 or 8xx tag found in the parent record.

s (uniform title)	240 tag (unless the first indicator is 0 or 1). All indexed subfields are used.
t (title)	245 tag \$a, \$b and \$l (unless the first indicator is 0).
x (ISSN)	022 \$a
z (ISBN)	021 or 020 \$a MARC 21 records - \$a of the first 020 tag is used CATMARC record - \$a of the first 021 tag is used
9	The 773 tag is NOT automatically assigned the parent record's serials number in the child record's 773 \$9. The user must do this manually

Edit as necessary and save the record to the database.

Hyperlink Analytic Records

Using the **MARC View Editor** in the *Virtua Profiler*, you can create to two types of hyperlink searches of analytic records:

- From the parent analytic record you can find all component part records
- From a component part record you can find the parent analytic record

Two types of control number searches are used to create these searches.

Parent Analytic Record search is used to find the parent analytic record from a component part record. Virtua uses the information in the 773 tag, subfield \$w of the component part record and searches bibliographic records for matches in the tag defined in the *Analytic Record Control Number Source Tag*.

Component Part Record search is used to find the component part record(s) from the parent analytic record. Virtua uses the information from the tag selected in the *Analytic Record Control Number Source Tag* from the parent analytic records and searches the database for 773 tags, subfield \$w to find all component part records.

To create a hyperlink from the parent analytic record to the child analytic record (component part):

In the **MARC View Editor**, open **View Bibliographic Record: Full Display**.

Configure **Analytical Children** view data for tag 035, subfield \$a.

Assign tag 035 subfield \$a as a search hyperlink, choosing **Control Number Link** as the search type.

When the hyperlink is clicked in the **OPAC**, the **Control Number Link** search takes the information from the **035 tag subfield \$a of the parent analytic record** and launches a search of the **773 tag subfield \$w of component part record(s)**. Any records which contain the value from the 035 tag of the parent record will be retrieved.

Note: This example assumes the **Client Cataloging Options/Other Options, Analytic Record Control Number Source Tag** is set to use the 035 tag. Adjust the directions accordingly if the 001 tag is used instead.

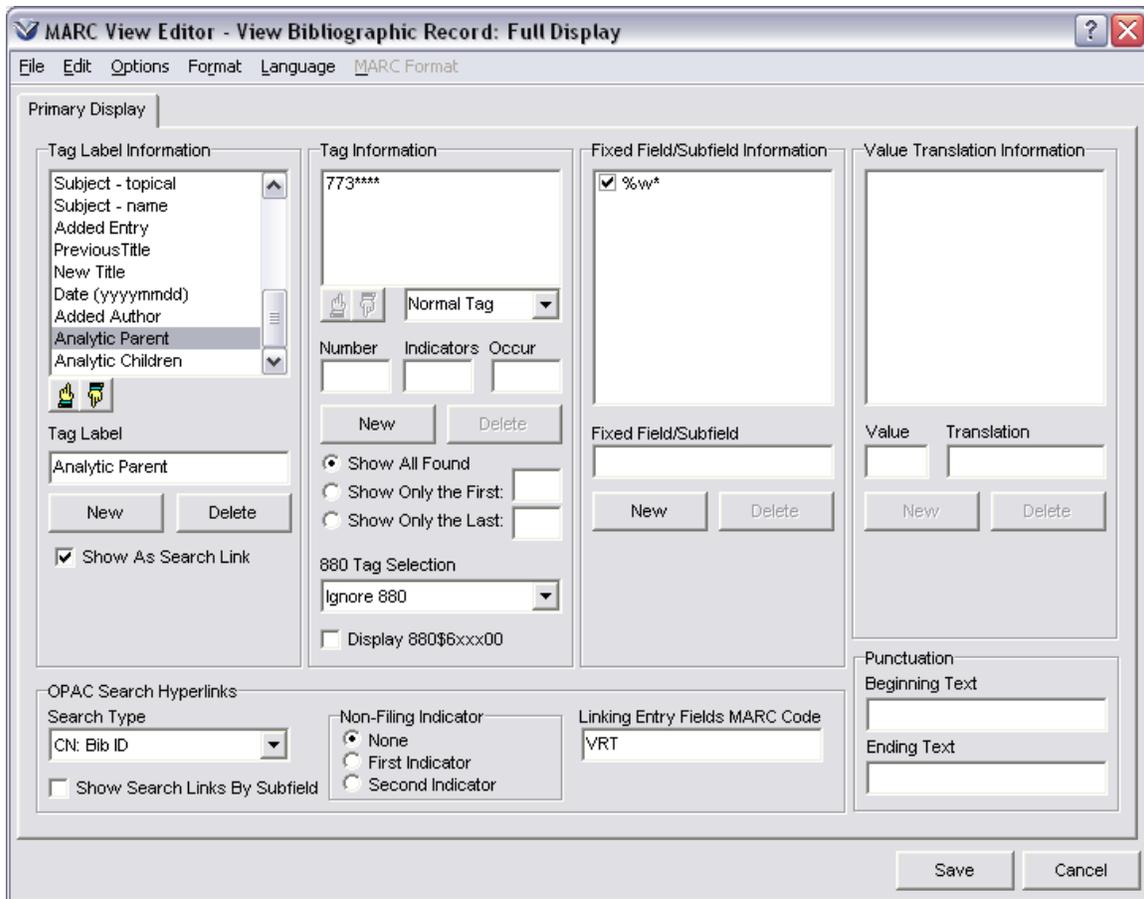
To create a hyperlink from the component part to the parent analytic record:

In the **MARC View Editor**, open **View Bibliographic Record: Full Display**.

Configure the **Analytic Parent** view data for tag 773, subfield \$w.

Assign subfield \$w of tag 773 as a search hyperlink, choosing **Local Number** as the search type.

When the hyperlink is clicked in the **OPAC**, the **Local Number** search takes the information from \$w of the 773 tag and launches a search of the 035 tag of all bibliographic records in the database. The record which contains the value from the 773 tag will be retrieved.

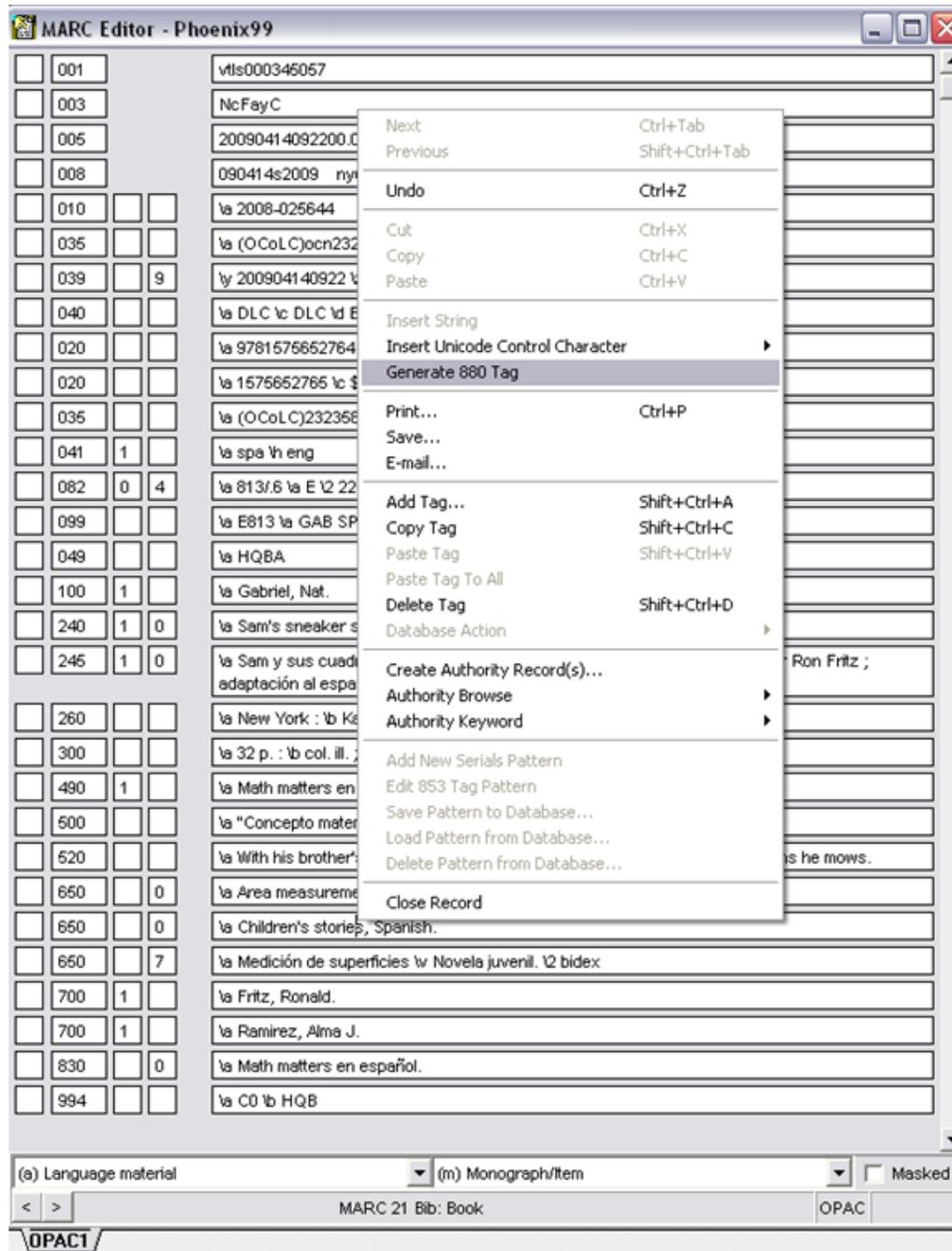


Generate 880 Tag

Virtua has the ability to generate 880 tags for the corresponding Romanized tags and to pair the Romanized tag with the 880 transliterations.

Place the cursor in the tag for which you wish to generate an 880 tag.

Right mouse click and select **Generate 880 tag**. The **Generate 880 tag** window will appear.



Virtua automatically does the following:

- Determines the next linking number if other 880 tags already exist in the record.
- Populates the linking subfield \$6 of the 880 tag and the corresponding Romanized tag with the linking number.
- If the Romanized tag you selected already has an 880 tag associated with it, the existing 880 tag linking number will be used in the linking subfield 6 of the new 880 tag.
- Populates the **Edit 880 Tag** window with the appropriate subfields.

Choose a script from the dropdown list in the **Edit 880 Tag** window.



Subfield	Data
a	

Enter the information in the appropriate subfields.

Save the information. The 880 tag will appear in the **MARC Editor** window.

Tag	Subfield	Value
001		vtls000346057
003		NcFayC
005		20090414092200.0
008		090414s2009 nyua b 000 1 spa
010		1a 2008-025644
035		1a (OCoLC)ocn232358069
039	9	1y 200904140922 1z mmcarthu
040		1a DLC 1c DLC 1d BAKER 1d LNQ
020		1a 9781575652764
020		1a 1575652765 1c \$10.95
035		1a (OCoLC)232358069
041	1	1a spa 1h eng
082	0 4	1a 813/6 1a E 12 22
099		1a E813 1a GAB SPANISH
049		1a HQBA
100	1	1a Gabriel, Nat.
240	1 0	1a Sam's sneaker squares. 1 Spanish
246	1 0	1a Sam y sus cuadrados de zapatos / 1c escrito por Nat Gabriel ; ilustrado por Ron Fritz ; adaptación al español por Alma B. Ramírez.
260		1a New York : 1b Kane Press, 1c c2009.
300		1a 32 p. : 1b col. ill. ; 1c cm.
490	1	1a Math matters en español
500		1a "Concepto matemático : el área - grados 1-3."
520		1a With his brother's help, Sam figures out how to measure the size of the lawns he mows.
650		1a Area measurement 1w Juvenile fiction.
650		1a 880-01 1a Children's stories, Spanish.
880		1a 650-01/(B 1a Cuentos infantiles, español
650		1a Medición de superficies 1w Novela juvenil. 12 bidex
700	1	1a Fritz, Ronald.
700	1	1a Ramirez, Alma J.
830		1a Math matters en español.

(a) Language material (m) Monograph/item Masked

MARC 21 Bib: Book OPAC Modified

OPAC

Note: Virtua displays 880 tags below their associated Romanized tags. If you do not wish to display the tags in this order, you may use the VTLSSORT tag to force the tags into a different order.

Replacing MARC Records

You can replace a MARC record with another MARC record and retain any holdings records or item records associated with the original bibliographic record. You might want to do this when you have created brief MARC records for acquisition purposes and wish to overwrite them with full MARC records.

To replace a MARC record with another MARC record:

Open the record you want to replace in the **MARC Editor**.

Open the replacement record in the **View Bibliographic Record** window.

From the **View Bibliographic Record** window, right click to open the pop-up menu.

Select the **Replace Record** in Editor option.

The record in the **View Bibliographic Record** window will *replace* the record in the **MARC Editor**.

Note: This option is only available if the record in the **View Record** window is a bibliographic record and the most recently opened record in the **MARC Editor** is a bibliographic record.

Translate Records

Your library may want to convert records in a local file that are encoded in a character set or code page other than Unicode. You might want to do this in anticipation of loading the records into your database at a later time. Records in a Virtua database must be in the UTF-8 character set.

Note: You can use v-load for translating and loading large numbers of records but you can use this function as an immediate way to convert local records even if you are not importing them.

Select **File → Records → Translate Records** from the menu bar. The **Batch Character Set Translation** window will appear.



Note: The **Batch Character Set Translation** window supports 17 character sets other than UTF-8.

Click the **Add** Button to choose the file(s) of local records you need to convert. The **Open File** dialog box will appear.

Select the file(s) to open and click the **Open** button. The path and file name of each file appears in the list box labeled **MARC Record Files**.

Note: All files must be in the same character set.

Click the down arrow in the **Source Character Set** pull-down list.

Choose the character set or code page that corresponds to ALL the record files in the list.

Click the **Convert** button.

Appendix A: Key Terms

1xx/4xx conflict: In authority records 1xx tags contain valid headings, and 4xx tags contain invalid headings (see references). When a bibliographic record is saved to the database, Virtua identifies all terms in the bibliographic record as valid headings and either links the bibliographic record to an existing authority record (via the 1xx tag of the authority record) or creates a new authority record with the term in the 1xx tag. But if the **same term** exists in another authority record as a 4xx tag, then Virtua cannot create an authority record for the term in the incoming bibliographic record. A 1xx/4xx conflict exists because the same term cannot be both a valid heading (1xx tag in an authority record) and an invalid heading (4xx tag in an authority record).

Analytic Record: Analytic records provide a means of further describing the individual titles in the serial, monographic series, or multi-volume set by creating a record for each individual title and linking them to the parent bibliographic record.

Authority Heading: terms (authors/names, titles, or subjects) that are stored in authority record fields and appear in an alphabetical index on the Virtua Browse window after a Browse search.

Authority Note: A 6xx tag added to an authority record containing notes about the 1xx heading.

Authority Record: type of MARC record that indicates the main (authoritative or established) name (form) of an author and lists variations of that name, OR indicates the main title of a book and lists variations of that title, OR indicates the main way to refer to a subject and lists variations of ways to refer to that subject.

Cataloging Options: A window in Virtua that allows the individual user to set various options for cataloging records, such as copy options, display options, default workforms, etc.

Character Set: A defined list of characters recognized by the computer hardware and software. Each character is represented by a number. The ASCII character set, for example, uses the numbers 0 through 127 to represent all English characters (upper and lower case) as well as special control characters. European ISO character sets are similar to ASCII, but they contain additional characters for European languages.

Child Analytic: A cataloging record for an individual title that is part of a larger bibliographic set (*see also* component part). It may be part of a serial, a monographic series, or a multi-volume work. The child analytic record is linked to the parent bibliographic record.

Component Part: A bibliographic item that is physically part of another bibliographic item such that the retrieval of the part is dependent on the physical identification and location of the host item (e.g., a chapter in a book, an article in a journal).

Cross Reference: heading that appears in a Browse index because it exists as a 4xx tag or a 5xx tag in the authority record for a valid heading. The valid heading is stored in the 1xx tag in the authority record. When selected by the user, cross-reference headings refer the user to the valid heading

Database Action: A setting for record loading that allows the user to dictate what will happen when the record is saved to the database, for example, overwrite an existing record, merge with an existing record, put any duplicate records in error state.

Duplicate Tests: The ability to determine whether a record being loaded into the database is a duplicate of a record that already exists in the system based on identical information in specified tags.

Established heading: a genre/form term heading that is equivalent to the heading contained in the 1XX field or the same record. It links headings within a system or from different thesauri or authority files.

Immediate source of Acquisition: the 541 tag of the bibliographic record. Virtua requires information from this tag to generate thank you letters for gifts.

Invalid Heading: heading or term that exists as a 4xx tag in a MARC authority record. It serves to refer the user from a heading that is not used (invalid) to a heading that is used (valid). It should not be present as a 1xx or 5xx in any other authority record.

Label List: list of all labels defined for the selected workflow.

Label Target: editable field containing the number of the MARC tag and indicators associated with the label.

Language List: feature of the MARC Label Editor that allows a library to support multiple translations of MARC Labels.

MARC Record: MACHine Readable Cataloging record.

MARC Record Format: Virtua uses four MARC record types defined by USMARC: bibliographic, holdings, authority, and Community information. MARC Records are structured according to the MARC standard: and each record contains a Leader, a Directory, tags, indicators, fixed fields, and variable fields.

MARC Editor: An editor accessible via the Cataloging subsystem of the Virtua Client that lets you edit records adhering to the MARC standard.

MARC Indicator: beginning with the 010 tag, all tags contain two indicators, each a single character. However, some tags use only one indicator, some both indicators and some do not use any indicators. When indicators are undefined, the character position will be blank.

MARC Label Editor: used to edit and or translate the default MARC field labels and mappings to suit local needs. Virtua does not supply labels for all MARC tags so default workforms that are modified to include additional tags may need to have labels for these tags defined in the label editor in order to use the workform in label mode.

MARC Tag: 3-digit number that identifies the kind of data that follows in a MARC record, e.g. the 245 tag marks the title information. Some tags are repeatable, for example, the 6XX subject added entries.

Merge Record: A cataloging or record-loading operation whereby the system follows specific user-defined rules to handle an incoming record that matches a record already in the database. The matching records will be merged; the incoming record will replace the database record but the new record will retain specified tags from the original database record.

Merge Rules: Rules that define which tags from an incoming record and which tags from a matching existing record will be retained in order to create a new record with elements of both records.

Online MARC Help: standard Windows online help that is available for every 2709 record format that Virtua supports. You can access it from the Help menu or by pressing F1 for a given tag in the MARC Editor.

Owning Location: permanent location, either physical or virtual, of an item. When the permanent location is also the shelving location, Virtua does not need to distinguish between Shelving Location and Owning Location. Nonetheless, Virtua does make the distinction and uses the Shelving Location to determine circulation properties and locations for filtering in the OPAC.

Parent Analytic: The bibliographic record for a serial, monographic series, or multi-volume set, to which are attached child analytic records describing the individual titles that comprise the set.

Permanent Authority Record: record explicitly created and processed as a MARC authority record where the authoritative form of a heading is in the 1xx field, any See reference headings are in the 4xx, any See also reference headings are in the 5xx fields, and any notes and series information are in the 6xx fields.

Provisional Authority Record: record that is an authority record only by virtue of being a bibliographic record with a 240 field or by virtue of having a term in one of the following fields: 1xx, 4xx, 6xx, 7xx, 8xx.

Record States: functionality in Virtua that allows libraries to assign flags or "states" to records to facilitate the viewing, storing, and editing of the records. The software supports record states for authority, bibliographic, and patron records. Record states may be used to review work by novice catalogers, hold records for overnight processing, or hold records in error state until cataloging problems are fixed.

See Also Reference: points from a related heading to another related heading, both of which are valid. On the Browse window, the plus (+) sign next to a heading indicates a See also cross-reference.

See Reference: points from an invalid heading to the valid, authoritative heading. On the Browse window, the minus (-) sign next to a heading indicates a See cross-reference.

Special Statuses: library-defined code and definition that may be applied to an item record. The code is used to describe a physical condition or location. Libraries can define these statuses in the Circulation parameters of the VSC. Examples: On Order, In Process, Missing, Billed for Replacement, At Bindery, Needs Repair.

Spine Label: label containing the call number that appears on the spine of the book. Virtua provides a delimited text file that can be imported into a label program or word processing program to produce spine labels.

Subfield: fields can contain a group of related information divided into sub-fields. In MARC records, subfields are marked with a delimiter followed by a subfield code indicating the type of information in the subfield. For example \c in the 300 field (Physical Description) indicates that the subfield for the physical dimensions of an item.

Text Editor: program such as Notepad or Wordpad that allows you to edit text files without adding formatting commands.

Thankyou.dat file: file that contains information from the 541 tag (immediate source of acquisition) of a MARC bibliographic record for an item received as a gift. This file is used to print thank you letters for gifts. Multiple records may be appended to the file. The file should be cleared after printing thank you letters to avoid duplicating thank you letters.

UNICODE (UTF-8): 8-bit transformation of Unicode that is the internal character set of all Virtua databases. Vload automatically converts any character set supported by our implementation of Unicode into the UTF-8 format.

UNICODE Editor: text editor that supports Unicode. If you are using Virtua release 31 or higher and your platform is Windows 2000, you can use Notepad. If you are using Virtua release 31 or higher and your platform is Windows 95 or Windows 98, you can use an editor such as SC UniCode, which you can download from the Internet.

Valid Heading: heading or term that exists as a 1xx tag and/or a 5xx tag in a MARC authority record. It may or may not also be present in one or more bibliographic records within a tag under authority control.

Validate: process of checking the tags, fields, and indicators of a MARC record to ensure they conform to the rules file for that type of record.

Vericat: cataloging validation program that is shipped with Virtua but is an optional installation. The program examines individual cataloging records by using a set of rules for each MARC format, or each specific format within the MARC bib format, to identify

non-conforming tags. The program may be activated upon saving a record or manually from an icon on the cataloging toolbar. In addition, catalogers can also define their own individual set of rules for each format. The rules for each format are contained in a text file that can vary from workstation to workstation.

VTLS-Defined Tags: the 039 and 999 tags of the MARC record used by VTLS for various purposes. For example the 039 tag is a non-editable tag that records information regarding when a record was last modified and which staff member modified it.

Workforms: pre-defined templates used to create bibliographic records.

Appendix B: List of InfoStation Reports for Cataloging

Cataloging Report Group	Notice	Function
Authorities List	N	List of permanent authority records (as opposed to provisional, or automatically generated, authority records) that meet the authority type, Cataloging Source Code, and date range criteria specified in the report configuration.
Bibliographic Record List	N	List of bibliographic records that meet the criteria specified in the report configuration.
Bibliographic Record Load and Extract	N	Allows you . . . Upload to the database a fixed-format or delimited file of bibliographic information and specify options to process the file and save the data in the MARC bibliographic record format. -OR- Download bibliographic records from the database and specify options to convert the data from the MARC record format to a fixed-format or delimited file.
Broad Cataloging Statistics	N	Summary of cataloging statistics for different record types.
Cataloger Productivity	N	Count of the bibliographic records cataloged by each Virtua user during the date range that you specify for the report configuration.
Cataloging Errors	N	List of cataloging errors that meet the date range and Virtua user criteria set in the report configuration.
Change Item Location by Call Number Range	N	Allows you change the location and shelf location in item records identified by the item-level call number range specified in the report configuration.
Indexed Words	N	List of indexed words in the bibliographic records in the database.

Item Barcode List	N	List of items identified by barcodes that fall within a barcode range specified in the report configuration.
Items Created List	N	List of items that were created within a specified date range or that have a barcode that falls within a specified barcode N range.
Number of Records in Database	N	Counts of bibliographic, item, holdings, and authority records in the database based on the criteria that you set in the report configuration.
Patron Record Load and Extract	N	Allows you . . . Upload to the database a fixed-format or delimited file of patron information and specify options to process the file and save the data in the VTLIS-defined 2709 patron record format. -OR- Download patron records from the database and specify options to convert the data from the 2709 patron record format to a fixed-format or delimited file.
Production of Records by User	N	For each user specified, counts of bibliographic, item, holdings, and authority records in the database that have been created, modified, and deleted and that meet the criteria that you set in the report configuration.
Record Extraction Utility	N	Extract records in ISO-2709 format from a VirtuaMARC 21 database.
Record Modification Utility	N	Allows you make global changes to records in the database.
Records By State	N	List of state records that meet the record state, record type, user, bibliographic level, and date range criteria that you set in the report configuration.
Subject Bibliography	N	Allows you select a set of subject authorities and produce a set of related bibliography entries.
URL Checker	N	Checks on the viability of URLs in bibliographic, item, and holdings records in your database.

Appendix C: Cataloging in a Consortium Environment

Authority Records

The **Edit Non Local Fields in Authority Records** parameter in the *Virtua Profiler* determines whether or not authority records may be edited at the institutional level.

1. When the 'Edit Non Local Fields in Authority Records' parameter is **checked**, the user has permission to:
 - modify any field in non-LC/NACO authority records
 - modify all the fields in LC/NACO authority records (records with a 010 tag)
2. When the 'Edit Non Local Fields in Authority Records' parameter is **not checked**, the user has permission to:
 - modify any field in non-LC/NACO authority records
 - modify only local fields (those with \5 with the content of the local 003 tag) in LC/NACO authority records (the user cannot modify non-local fields in LC/NACO records)

Item Records

Item records are unique to an institution and to a location within that institution.

- item records at locations or sublocations linked to the log-in institution will display first the list of item records
- when a user edits an item record, only those item classes, locations, and shelving locations defined in the Virtua Profiler for the log-in institution will appear in the pull-down lists on the Item Information window
- A user may view an item belonging to another institution but they will not be able to edit or delete the item record.
- The barcode number of the item must be unique across the consortium.

Patron Records

Patron records are shared between institutions. Certain tags, however, contain information allowing the records to be linked to a specific institution usually via an institution code in subfield 5.

- The following tags in patron records can contain consortium information:

Tag	Description
007 tag	Blocks
015 tag	Patron Barcode
016 tag	Alternate Patron Barcode
030 tag	Patron Type Code
035 tag	System Control Number
040 tag	Record Source
042 tag	Dates
043 tag	User-Defined Blocks
245 tag	Patron Type
247 tag	Patron's jurisdiction or home library
271 tag	E-mail Address
5xx tags	Note fields

- the barcode number and/or the alternate barcode number of the patron must be unique across the database
- When migrating patron data if the software detects duplicate patron barcodes (in the 015 tags) or alternate patron barcodes (in the 016 tags), it will prefix the barcodes with the institution's code in parentheses, creating a unique barcode.
- Barcodes with the institution prefix will be displayed as a list in the iPortal and client when a barcode with multiple institution prefixes is entered.

Editing Patron Records

In the consortium environment, the ability to edit patron records will depend on two factors:

- the institution that owns the patron record
- the institution code contained in the subfield \$5 of those tags that support the institution code.

Only staff at the institution that owns a patron record will be able to edit:

- global information, such as name and address.
- information that is specific to that institution, such as the patron barcode.

Staff at *any* institution can edit institution-specific information in a patron record as long as that information is specific to their institution as identified by their institution code in subfield \$5.

Appendix D: Authority Records

Virtua MARC format for authority records is based on the USMARC authority format. For details about the content designations of the format, see the USMARC Format for Authority Data.

MARC Tags

The **basic MARC authority structure** is as follows:

Tag	Purpose
1xx	established heading
4xx	see reference
5xx	see also reference
6xx	notes and series information

The **parallel content designation** for the 1xx, 4xx and 5xx tags is as follows:

Tag	Purpose
x00	personal name
x10	corporate name
x11	conference name
x30	title
x50	subject heading
x51	geographic name
x55	genre or form heading

Other important tags in the authority records are as follows:

Tag	Purpose
001	Authority ID(auth-ID)
010	Library of Congress control number
008	The fixed field display

Bibliographic Level (bib lvl)

The bibliographic level value has three purposes: The bib lvl:

- distinguishes between two records with the same 1xx field
- distinguishes between authoritative and non-authoritative headings
- can indicate Additional Access Point authority headings

Two Records with the Same 1xx Field

First, the bib lvl value distinguishes between two records with the same 1xx field. Currently, if you want an authority record for Mark Twain as a name AND as a subject, you need to have two authority records. The bib lvl value distinguishes between the two records.

The following bib level values are defined in Virtua:

Bib lvl value	Purpose
y	subject record (searchable as a subject)
x	author/name record (searchable as an author)
t	series title record (searchable as a title)
u	uniform title record (searchable as a title)
g	author/title series record (searchable as an author)
z	special library- defined record.
d	subdivision authority record (searchable as a subject)
w	genre/form record (searchable as a subject)

Authoritative and Non-Authoritative Headings

Secondly, the bib level value distinguishes between authoritative and non-authoritative headings that appear in the Browse window of the OPAC. If you try to view an authority record with any of the following bib level values, the software will display an error message:

Bib lvl value	Purpose
n	Title record (searchable as a title, but the authority record will not appear in the client)
o	Non- authoritative name record (searchable as an author, but the authority record will not appear in the client)
p	Non- authoritative subject record (searchable as a subject, but the authority record will not appear in the client)

Additional Access Point Authority Headings

Thirdly, the bib lvl value can indicate Additional Access Point authority headings as follows:

Bib lvl value	Purpose
i	AAP author/name record as distinct from the author portion of a combined author/title field (searchable as an author, but the authority record will not appear in the client)
k	AAP title record as distinct from the title portion of a combined author/title field (searchable as an a title, but the authority record will not appear in the client)
l	AAP author/title record as distinct from the 1xx and 240 fields of a bibliographic record (searchable as an author, but the authority record will not appear in the client)
m	AAP title record as distinct from subfield a of a uniform title (searchable as a title, but the authority record will not appear in the client)
h	AAP title series record as distinct from the title portion of a combined author/title series field (searchable as a title, but the authority record will not appear in the client)

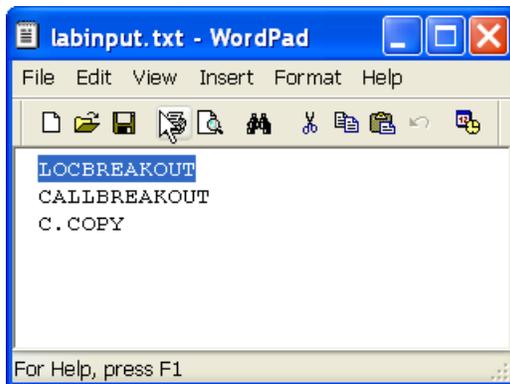
Appendix E: Generate Spine Labels Using Word XP ®

Recommended Workflow	Explanation
<pre> graph TD A[Edit the Spine Label Input File] --> B[Test the Spine Label Input File] B --> C[Convert the Spine Label Input File] C --> D[Define a Label File] D --> E[Merge the Input file with the Label File] </pre>	<p>Virtua saves spine label information to a text file that can then be used with a label program or a word processing program to generate labels.</p> <p>Virtua comes with a default label input text file called LabInput.txt along with your Virtua software. This file can be edited if needed to add or remove data elements. The default LabInput.txt file will create a label indicating only the location, call number, and copy number.</p> <p>Summary</p> <ul style="list-style-type: none"> • Locate the Spine Label text file • Open the file in a text editor • Identify data elements • Distinguish between data elements and text • Edit the Spine Label text file to add or remove data elements <p>Key Terms</p> <ul style="list-style-type: none"> • Spine Label • Data Elements • Text Editor

Edit the Spine Label Input File

Open a text editor: an editor can usually be found in Windows® under **Start** → **Programs** → **Accessories** → **Notepad**.

Select the **labinput.txt** file which is located at C:/Program Files/VTLS/Virtua/. The following default information should appear.



Add data elements in the order in which you want them to appear on the label.

Data Element	Purpose
ABBREVLOC	Abbreviated location
ACCESSION	Accession number
AUTHOR	Last name of author (bib record, first word in 1xx \a)
AV-ACCESSION	AV Accession number
BARCODE	Bar code number
BIB-ID	Bib ID
CALL	Call number (bib, holdings, or item inheritance)
CALL BREAKOUT	Call Number broken at spaces into multiple lines
CODE	Item class code
COLLECTIONCODE	Collection code description
COPY	Copy number: The C.COPY in the default file is a combination of inserted text, (C.) which can be edited, and an element name (COPY) that will result in the following output for copy number 2: C.2

COPYZEROPAD	Three digit copy number left padded with zeros
ENUMCHRONBREAKOUT	Enumeration & Chronology Units broken on white space
FULL-AUTHOR	Author name (bib record, entire contents of tag 100 \a if not empty; if empty, entire contents of tag 110 \a instead)
ITEMCALL	Item level call number
ITEMCALLBREAKOUT	Item level call number broken on white space
LCCALLBREAKOUT	Call number broken on white space, after the first letter and after each period in the main call number
LOC	Location (permanent)
LOCBREAKOUT	Location broken at spaces into multiple lines
NON-PARAMETERIZED	Non-parameterized shelf location
NOTECONTENTS	Note contents (505 \$a)
PHYSICAL-DESCRIPTION -EXTENT	Bib tag 300, full subfield \a
PREFIXCOLLECTIONCODE	Collection code prefix
TITLE	Title and statement of responsibility (bib record 245 \a \c)
UNIFORM-TITLE	Bib tag 130, full subfield \a
UNITS	Enumeration/Chronology/Units
VERBOSE-TITLE	Title (bib record tag 245 \a, \n, and \p)

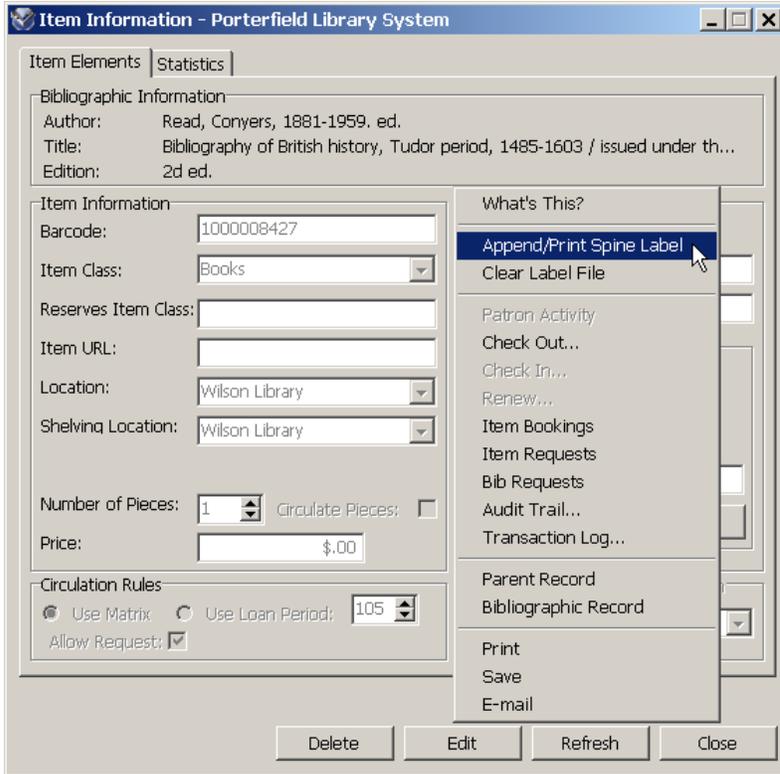
Save the file.

Test the Label Input File

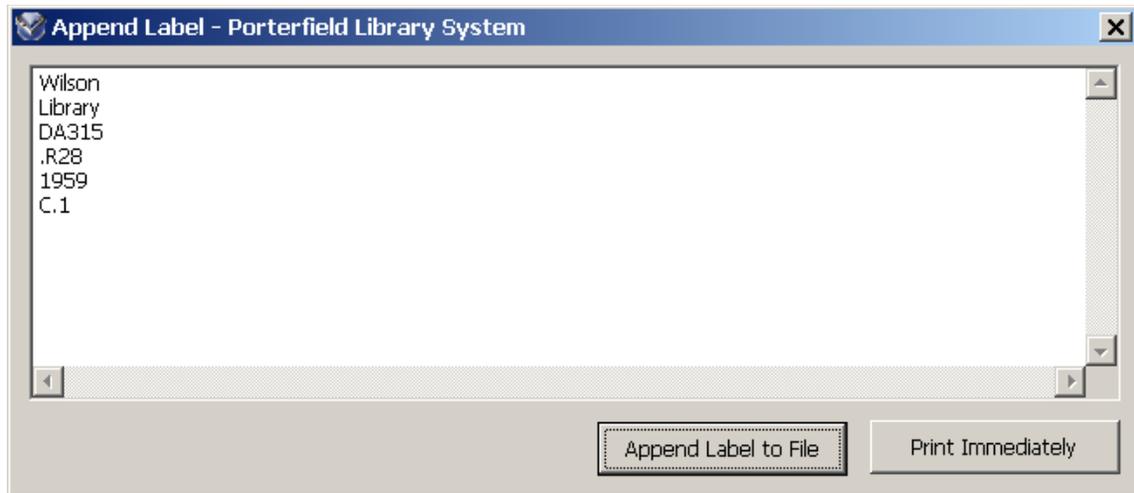
Search the **OPAC** for a record.

Open the associated **Item Record** in the **Item Information** window.

Right-mouse click to **Append/Print Spine Label** to the label file.



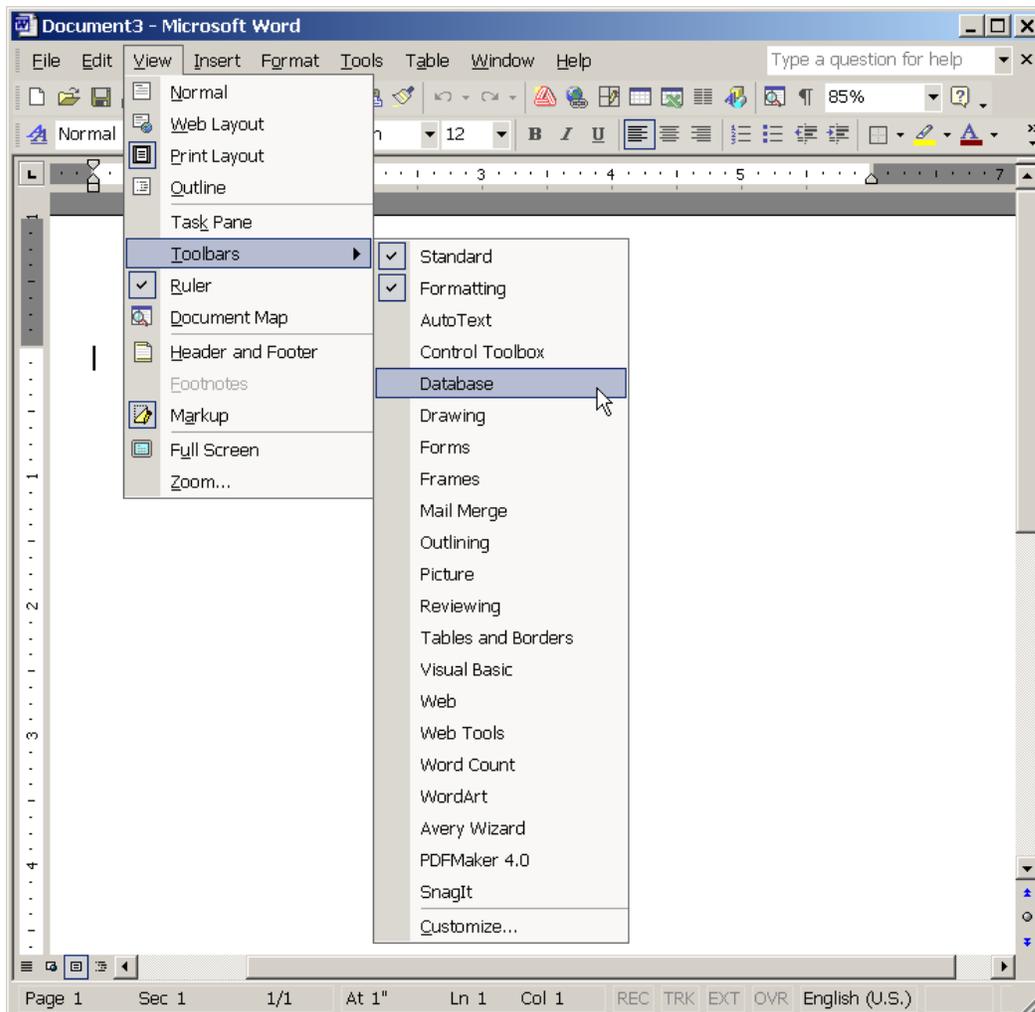
The label will appear in the **Append Label** window and will include any added data elements.



Convert SpineLab.txt file to Word Database

Before you can use the **SpineLabel.txt** file with Mail Merge in Word you must add a header row to the file. This row contains labels for the fields of data or it can be left blank. But Word requires that the first row not be a row of data.

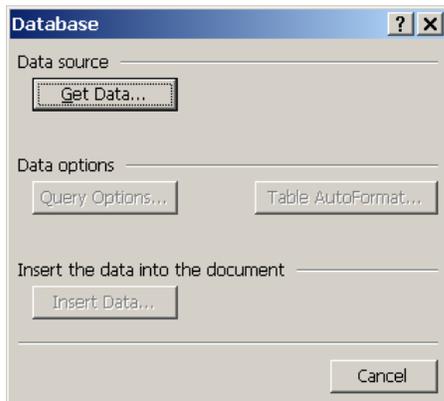
Open Microsoft® Word.



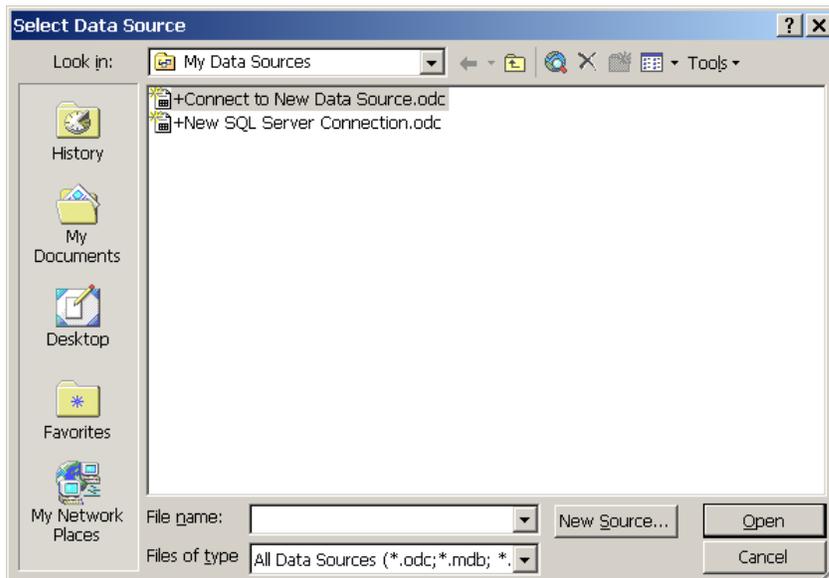
Select **View** → **Toolbars** → **Database** from the Word main menu. The **Database Toolbar** will appear.



Click the **Insert Database Icon**  on the **Database toolbar**. The **Database** window will appear.



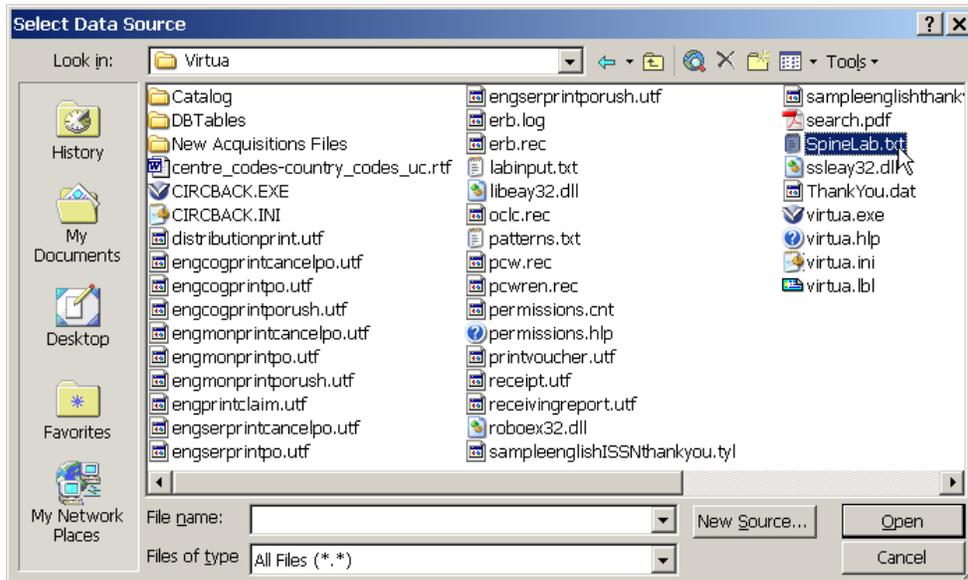
Click the **Get Data** button. The **Select Data Source** window will appear.



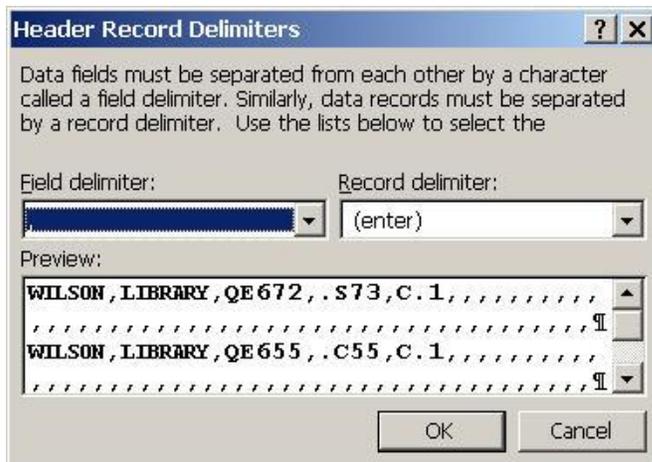
Under **Files of type**, select all files (*.*)

Navigate to your Virtua directory. The default location is:

C:/Program Files/VTLS/Virtua



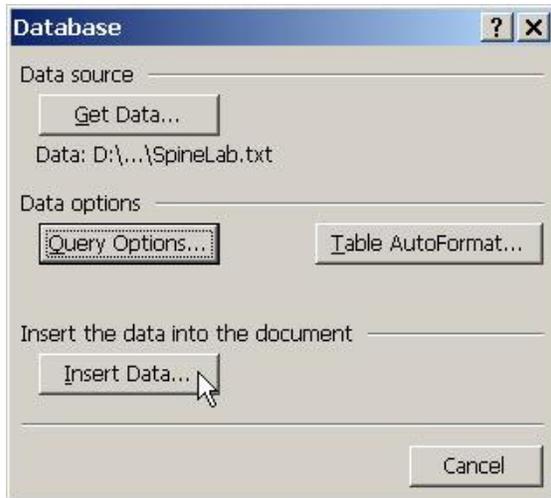
Select the **SpineLab.txt** file and click the **Open** button. The **Header Record Delimiters** window will appear.



The **Field Delimiter** should be set to a comma and the **Record Delimiter** should be set to (enter).

Click the **OK** button.

The **Database** window will appear with the path to the data identified under the **Get Data** button.



Click the **Insert Data** button. The **Insert Data** window will appear.



Select either **All** or a range of records and click **OK**. The data from the **SpineLab.txt** file will be imported into a Word table.

Note: The file does not contain a header row. In order to use your mail merge template, you will need to add a header row containing either no data or field names.

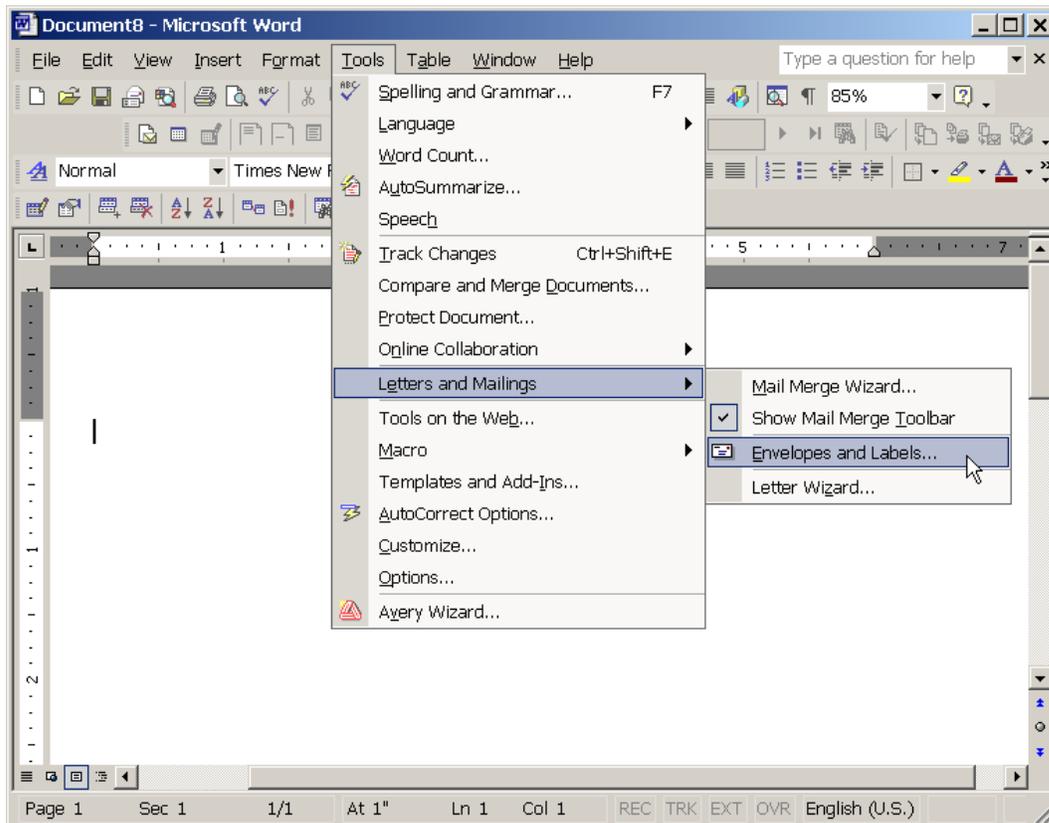
To add a row of field names to the database, position your cursor in the **first** cell of the table.

Select **Table → Insert → Rows Above** from the Word main menu. An empty row will appear at the top of the table.

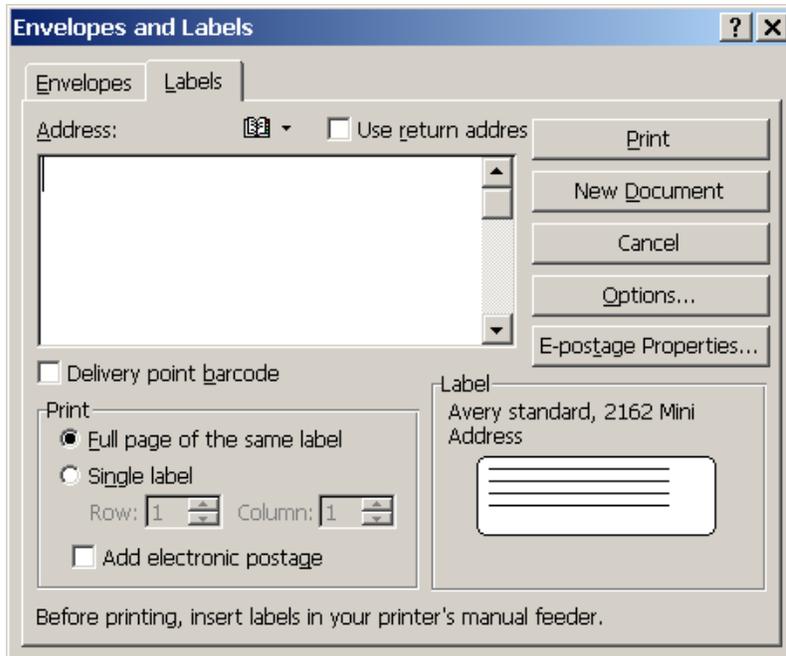
Define Label

Open a new document by selecting **File** → **New** from the Word main menu.

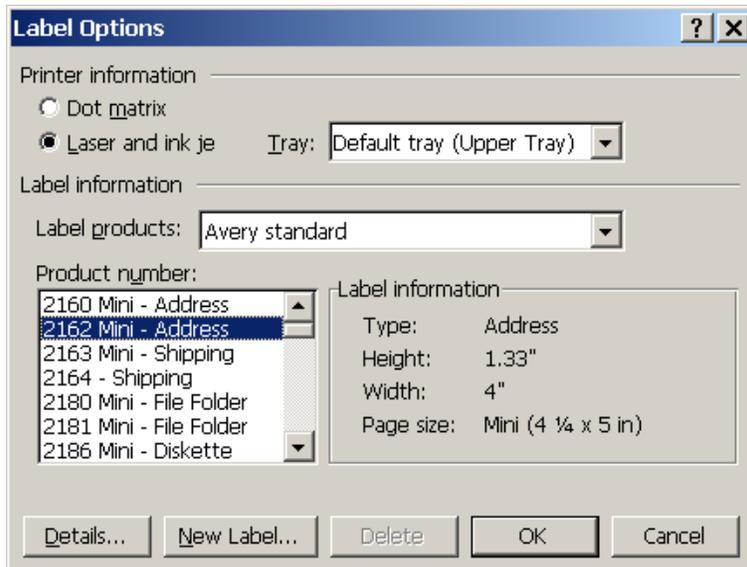
Select **Tools** → **Letters and Mailing** → **Envelopes and Labels** from the Word main menu.



On the **Envelopes and Labels** window, click the **Label** tab.



Select **Options**. The **Label Options** window will appear.



Select the appropriate manufacturer from the **Label products** dropdown menu and browse through the list of labels that appear in the **Product number** list box.

- **If** your label appears in the Product number list, click **Cancel**. You will not need to define a label.
- **If** your label does not appear in the Product number list, select **New Label** to define a custom label. The New Custom Label window will appear

Enter a name for the custom label in the **Label name** textbox.

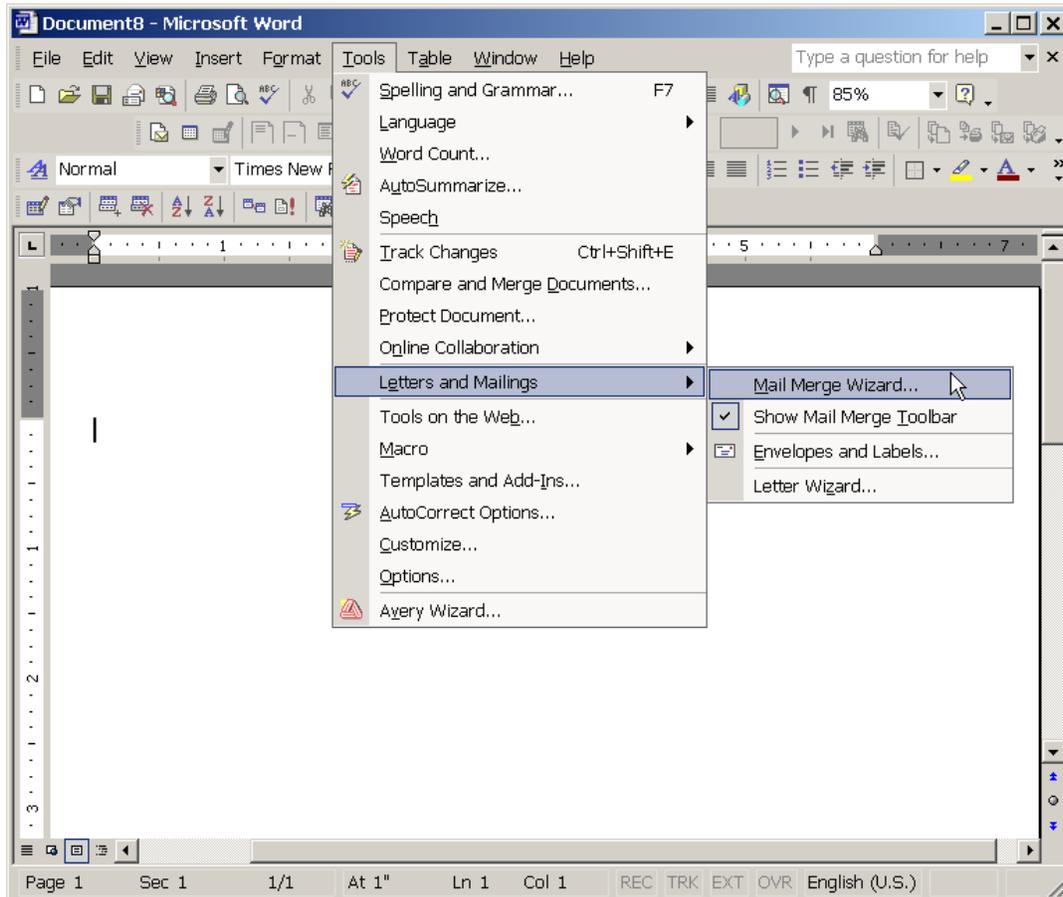
Note: This name will appear in the **Product number** list box on the **Label Options** window when you select **Custom** from the **Label product** dropdown menu.

Use the diagram in the preview box to set the measurements for your sheet of spine labels. Click **OK** when you have entered dimensions in each data entry box.

Merge the Records with the Label Template

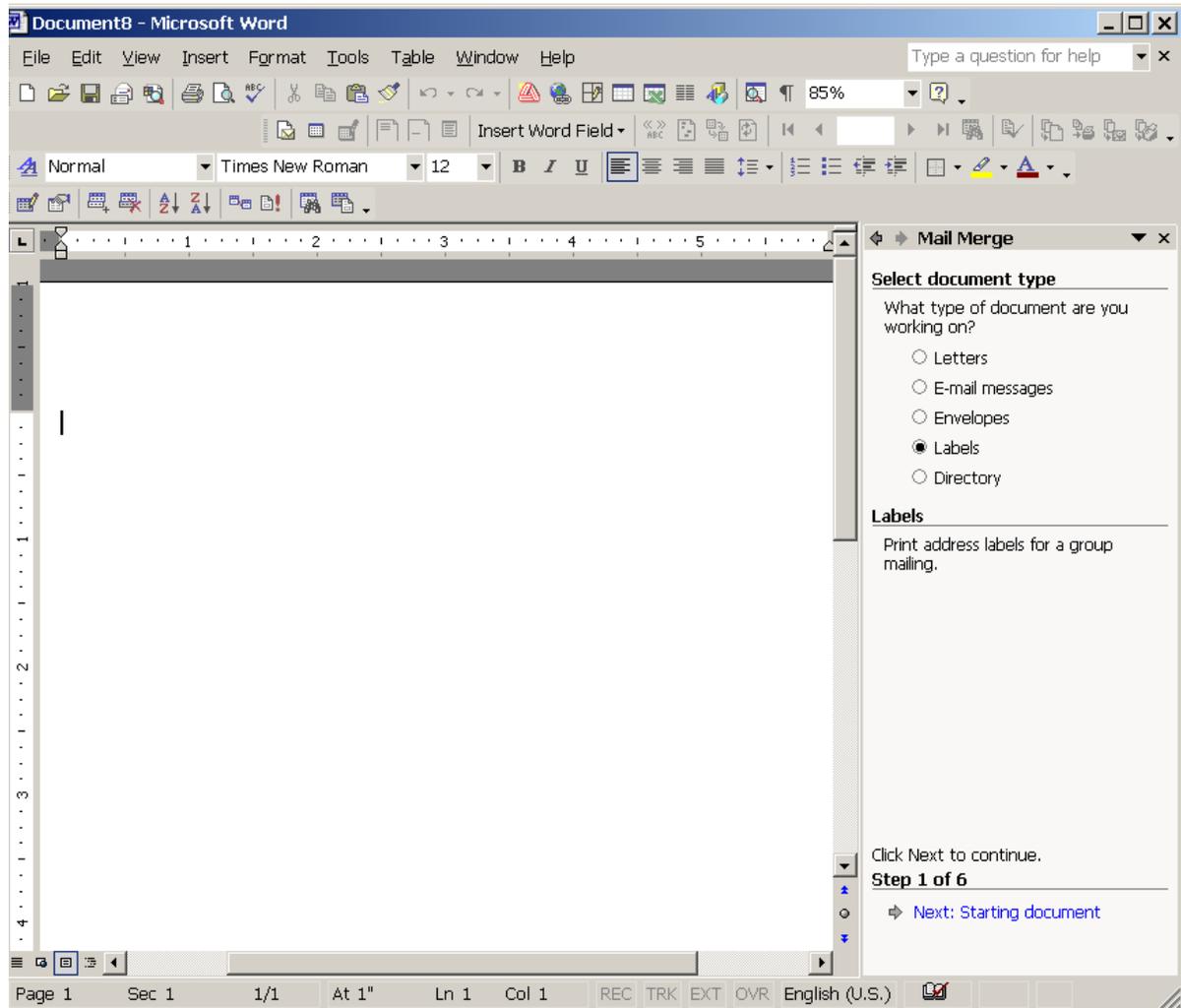
Open a new Word document.

Select **Tools** → **Letters and Mailings** → **Mail Merge**.

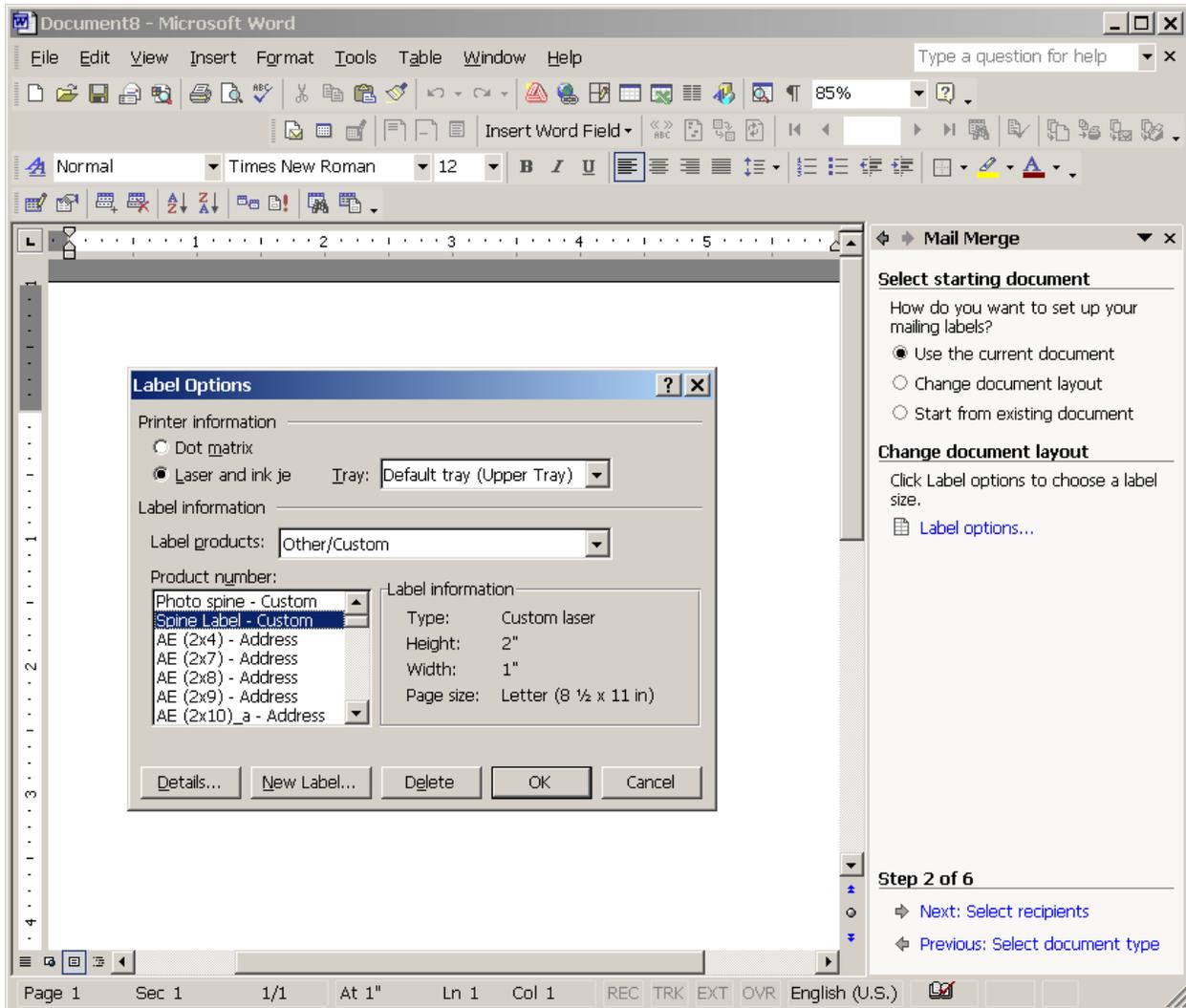


The **Mail Merge Helper** will appear as a side bar.

Select **Labels** from the **Select Document Type** option menu.



Click on **Next: Starting Document**.

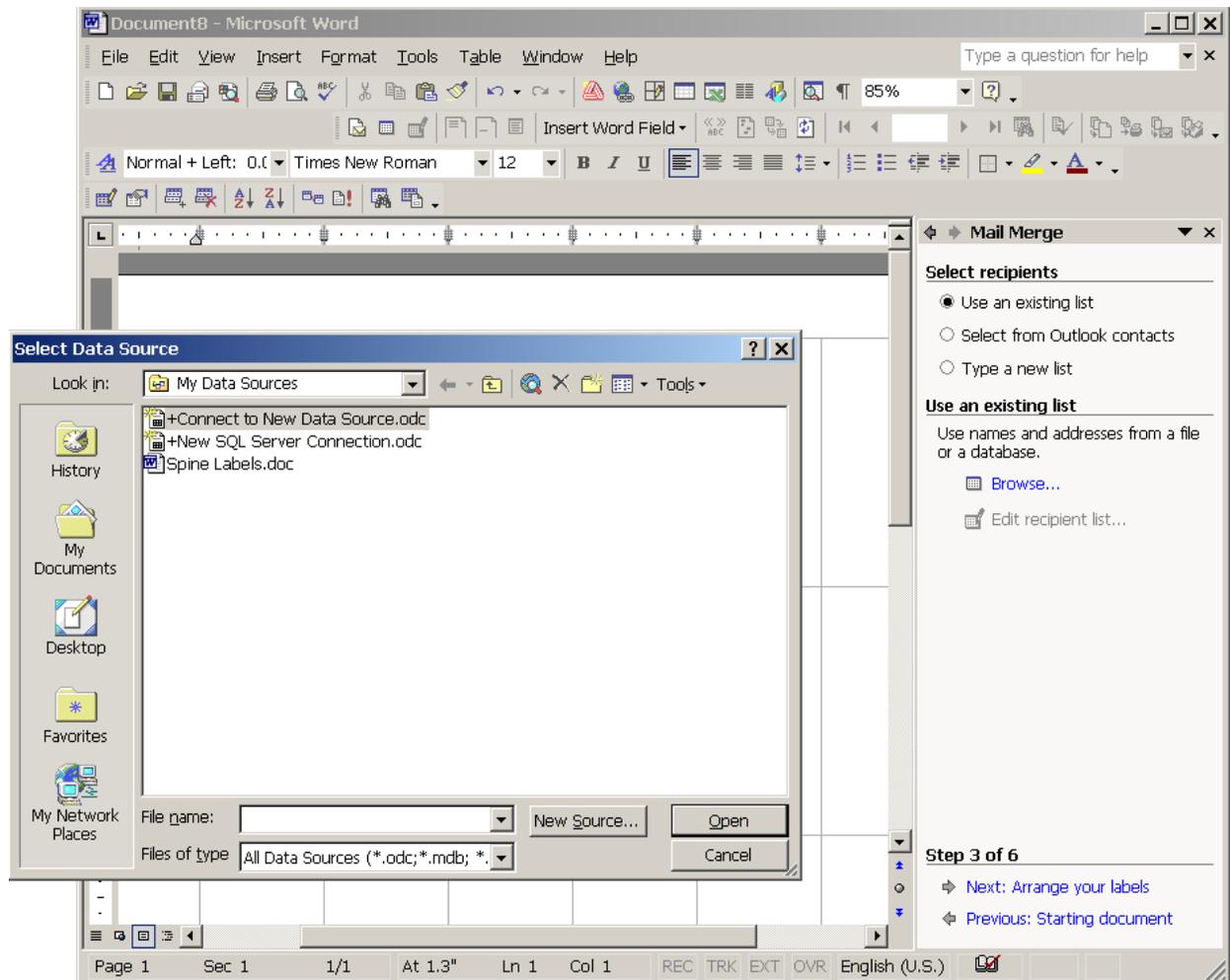


Select **Change document layout** and then click on the **Label** options link. The **Label Options** window will appear.

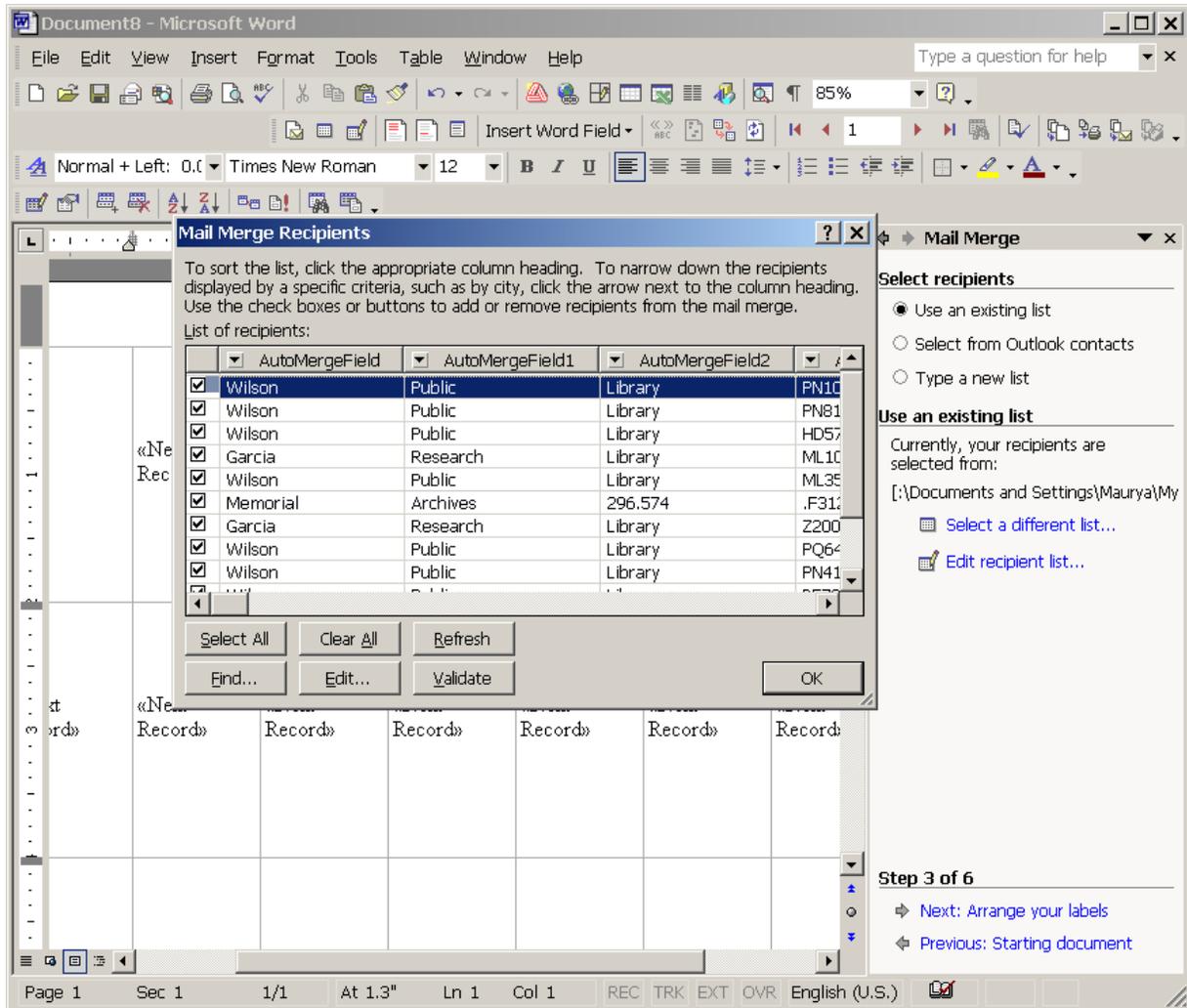
Select the label file from the menu of available labels and click **OK**.

Click the **Next: Select recipients** link.

From the **Mail Merge Helper** select **Use an existing list**, then click on the **Browse** link. The **Select Data Source** window will appear. This window defaults to the “My Data Sources” directory.



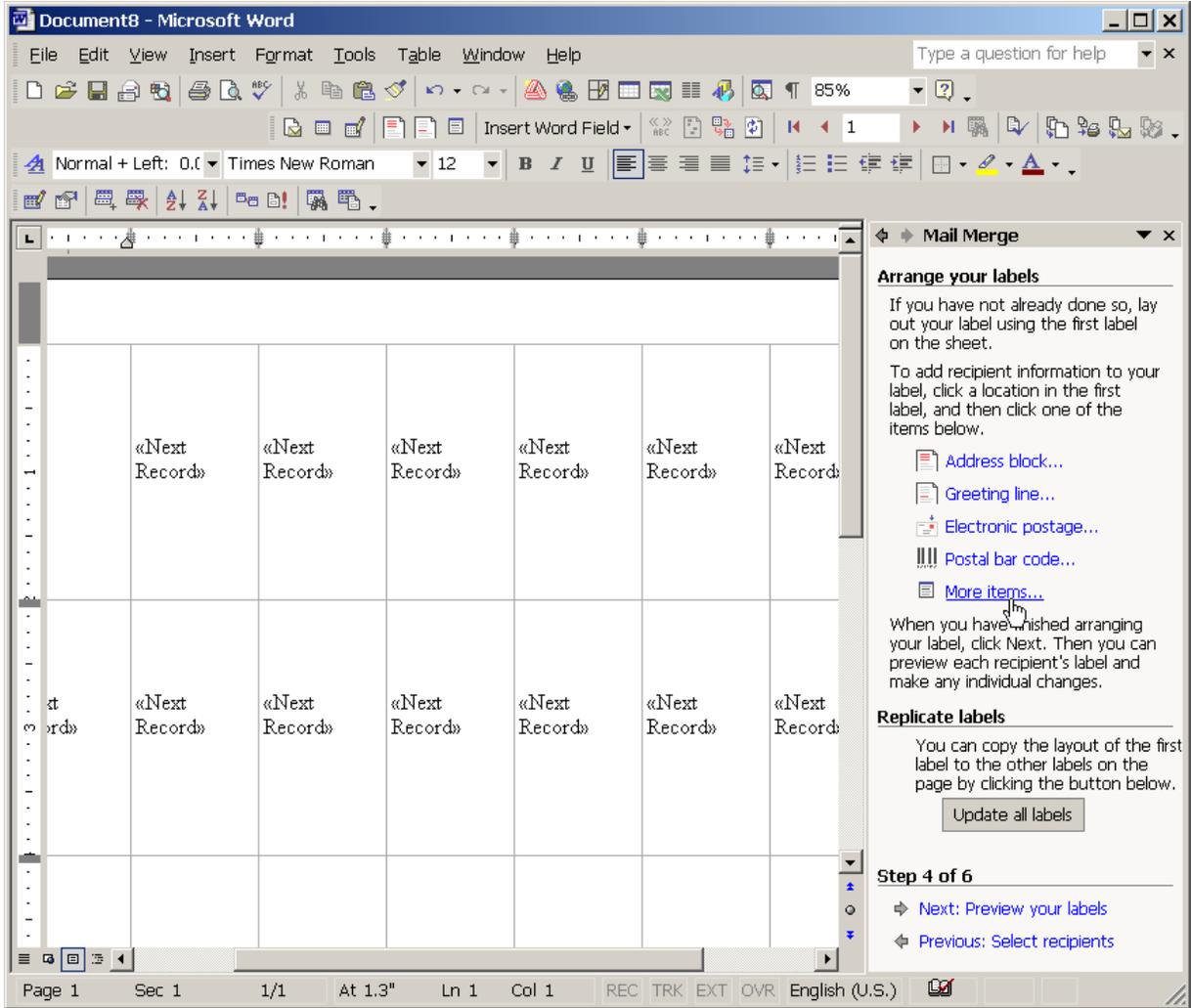
Select the **Spine label** file, navigating to the correct directory if you chose not to save the file under **My Data Sources**. The **Mail Merge Recipients** window will open displaying the first rows of data.



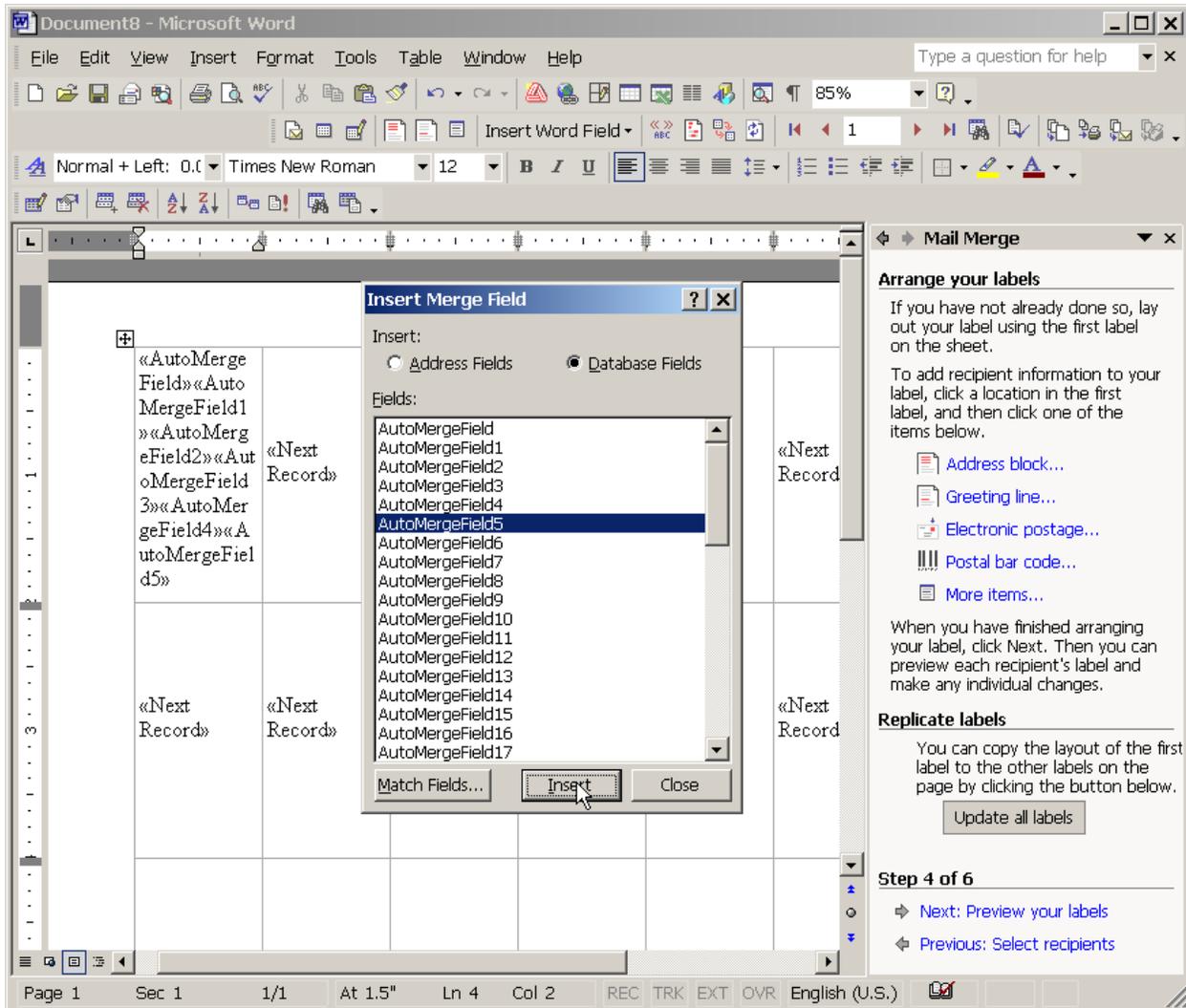
Note: If you chose not to name the header row, note the header name of the last column containing data.

Click the **OK** button, the mail merge command for **<<Next Record>>** will appear in each cell of the labels file.

Click the **Next: Arrange your labels** link.



Click the **More items link**. The **Insert Merge Field** window will open.



Select the first merge field you wish to include and click the **Insert** button. The field name will appear in the first cell of the label file. To add additional fields, select the next field you wish to appear and click the **Insert** button. The field name will appear next to the first field name in the first cell of the label file. Continue until all fields are added. The first cell in the label file should look something like this....

```
«Auto Merge Field»«Auto Merge Field1»«Auto Merge Field3»«Auto Merge Field4»«Auto Merge Field5»«Auto Merge Field6»«Auto Merge Field7»
```

In order for each column of information in the data file to appear on a separate line in the label, you will need to add a **hard return** at the end of each merge field. Place the cursor between the first and second field codes

```
<<AutoMergeField>>|<< AutoMergeField1>>
```

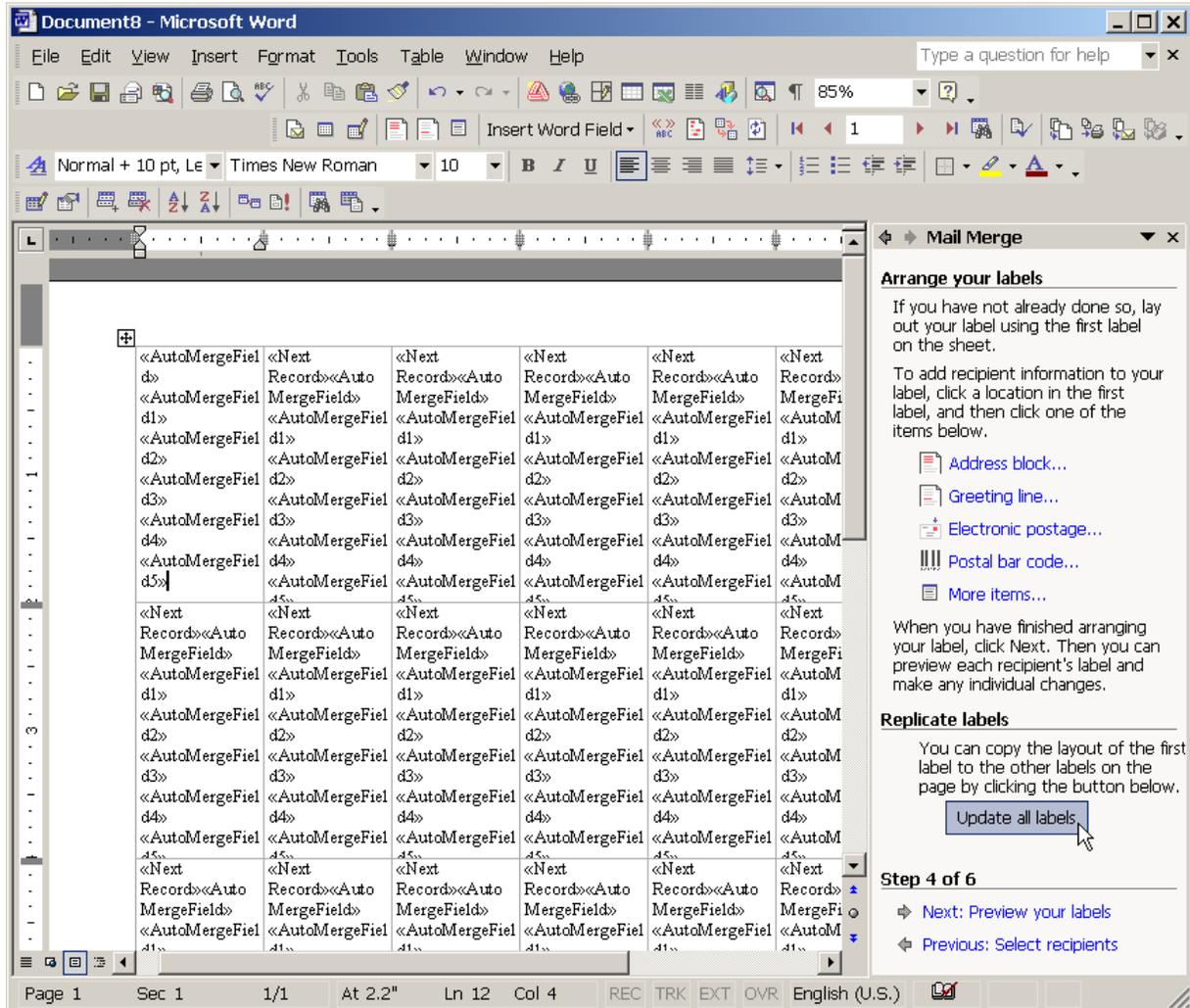
Hint: if word wrapping causes the data to run below the bottom of the cell, change the font to a smaller size while you edit the layout of the cell.

Hit the **Enter** key. Continue until all field codes are on separate lines. After you do so, the first cell in your label file should look something like this.....

```
«Auto Merge Field»
«Auto Merge Field1»
«Auto Merge Field3»
«Auto Merge Field4»
«Auto Merge Field5»
«Auto Merge Field6»
«Auto Merge Field
```

Note: The data will display correctly even though word wrapping causes the merge fields to run below the bottom of the cell.

Click the **Update all labels** button on the **Mail Merge helper** window. The field names will be copied into all of the cells in the label document.



Click the **Next: Preview your labels** link.

The screenshot shows the Microsoft Word Mail Merge task pane. The main window displays a table with two rows of data. The right-hand pane is titled 'Mail Merge' and shows 'Preview your labels' for 'Recipient: 1'. Below the preview, there are options to 'Find a recipient...' and 'Make changes' (including 'Edit recipient list...'). At the bottom of the task pane, it indicates 'Step 5 of 6' with 'Next: Complete the merge' and 'Previous: Arrange your labels'.

Wilson Public Library PN1042 .S65 C.1	Wilson Public Library PN81 J66 C.1	Wilson Public Library HD57 J6 C.1	Garcia Research Library ML105 .F349 C.1	Wilson Public Library ML3561.J3 F425 1977	Memorie Archives 296.574 .F312S 1964 C.2
Wilson Public Library PQ6416 .A3 1950	Wilson Public Library PN4121 .F516 C.1	Wilson Public Library BF724 .G58 C.1	Wilson Public Library 915.694.990.21 .G617 C.	Wilson Public Library BT21.2 .G6 C.1	

The data will appear in the cells of the label file. If the data is formatted correctly, click the **Next: Complete the merge**.

Note: If the data is not formatted correctly, click on the Previous: Arrange your labels link to return to the label file and change the formatting (e.g. font size).

The screenshot shows Microsoft Word in 'Mail Merge' mode. The main window displays a table with library call numbers. The 'Mail Merge' task pane on the right is titled 'Complete the merge' and provides instructions for personalizing labels. It includes a 'Merge' section with two options: 'Print...' and 'Edit individual labels...'. A mouse cursor is hovering over 'Edit individual labels...', and a tooltip 'Merge to new document' is visible. The status bar at the bottom indicates 'Page 1', 'Sec 1', '1/1', 'At 1.7"', 'Ln 6', 'Col 4', 'REC TRK EXT OVR', and 'English (U.S.)'.

Wilson Public Library PN1042 .S65 C.1	Wilson Public Library PN81 J66 C.1	Wilson Public Library HD57 J6 C.1	Garcia Research Library ML105 F349 C.1	Wilson Public Library ML3561.J3 F425 1977	Memorie Archives 296.574 .F312S 1964 C.2
Wilson Public Library PQ6416 .A3 1950	Wilson Public Library PN4121 F516 C.1	Wilson Public Library BF724 .G58 C.1	Wilson Public Library 91 5.694.990.21 .G617 C.	Wilson Public Library BT21.2 .G6 C.1	

Click on **Print** to print the labels,

OR

Click on **Edit individual labels** if you would like to see all labels in a Word document before you print.

Appendix F – Permalink Functionality

Overview of Permalink Functionality

Permalinks functionality can be purchased separately as an add-on to Virtua. Contact Innovative Customer Services for more information.

A **permalink** is a permanent web address (i.e., a URL) that points to specific content. A permalink remains unchanged indefinitely and continues to direct users to the specific content even if the physical location of the specific content is changed over time.

Innovative’s permalink functionality allows libraries to create permanent links to bibliographic and authority record content stored in a library’s database (or databases).

Note: In the future, Innovative may offer functionality that allows users to create permalinks to digital assets such as photographs, posters, articles, and other digital materials.

Libraries may wish to create permalinks that can be used. . .

- In citations within journal articles and other publications, to provide a permanent link to the referenced content.
- By databases to directly reference authority record and bibliographic record data in the database.
- By open access services to provide permanent links to aggregated content.
- In other similar services, such as VIAF (Virtual International Authority File).

A user that clicks on a permalink is directed to the Innovative permalink resolver, which resolves the URL and displays the digital content to the user in Chamo or in Innovative’s Drupal interface.

Note: Libraries that wish to use Innovative’s permalink functionality must first add permalink 024 tags to the bibliographic and authority records in their database(s). In the *System Management: Cataloging User’s Guide*, we describe several programs and scripts that can be used to add permalink 024 tags to bibliographic and authority records in batch.

Understanding the Permalink 024 Tag Format

When Virtua adds a permalink 024 tag to a bibliographic or authority record, the following format is used:

Advanced Cataloging Workflow-Based Reference Guide

Last Revised: Oct 2017

*Updated to 16.1

First indicator value = 7

Second indicator value = # (blank)

Subfield \$a = complete permalink URL (including the database code from 003 tag and the control number from the 001 tag)

Subfield \$2 = "permalink"

Sample permalink 024 tag data:

```
024 7# $a http://permalink.sn1.ch/bib/xxxxyyyyyyyyyy $2 permalink
```

Note that the control number from the 001 tag ("yyyyyyyyyy") is unique within the Virtua database, but may *not* be unique across several Virtua databases. Combining the 001 tag control number with the database code from the 003 tag ("xxxx") allows libraries to create permalinks for records stored in different Virtua databases.

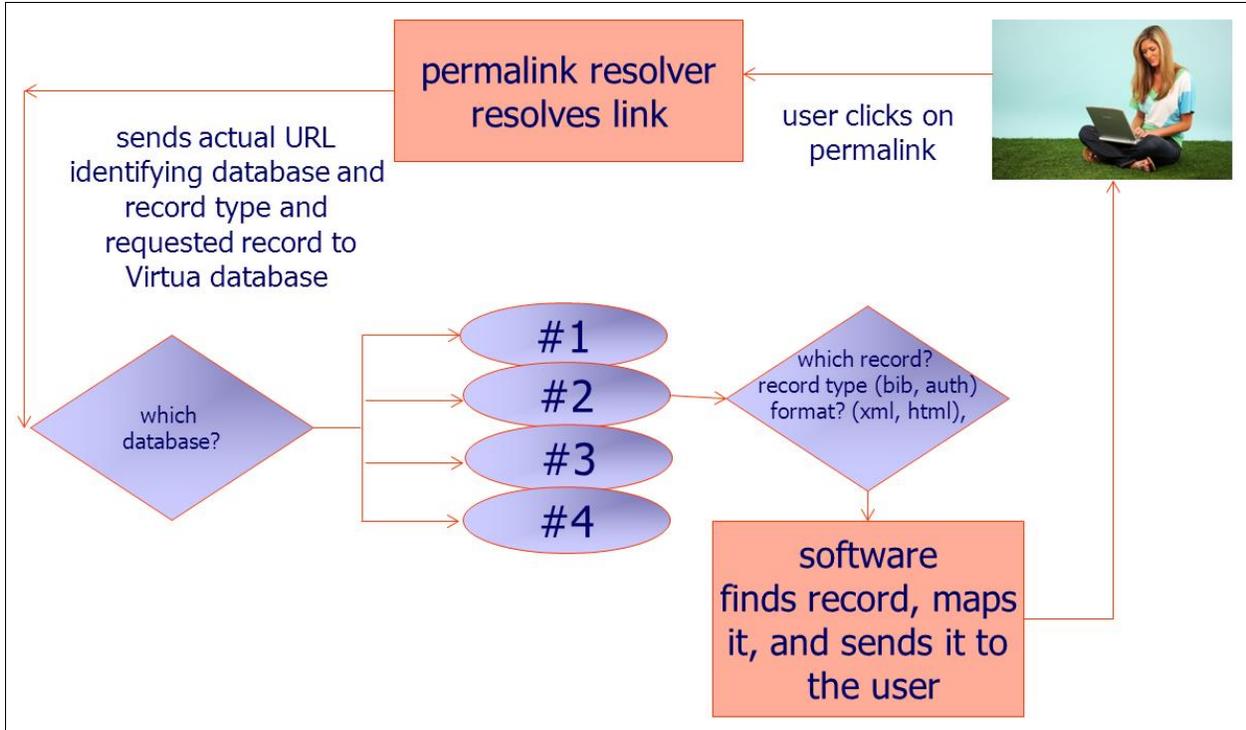
Virtua prevents users from deleting a permalink 024 tag from a bibliographic or authority record.

Workflow for Creating and Using Permalinks

Once you have run the script and programs described above to create permalink 024 tags in your database, you can begin to use permalinks.

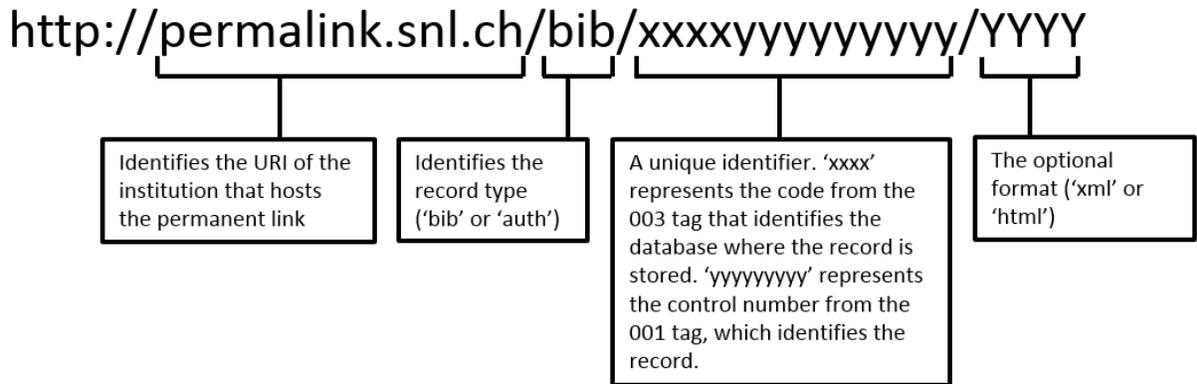
1. Place a permanent link to a bibliographic or authority record in the location of your choice. The URL for the hyperlink must follow the [permalink URL format](#) described below.
2. When a user clicks on the permalink in Chamo or in the Drupal interface, the Innovative permalink resolver intercepts the request.
3. The [permalink resolver](#) uses the permalink URL to identify the record that is being requested.
4. The digital content is displayed to the user via Chamo or via the library's Drupal interface.

See the diagram below for an illustration of this process.



Permalink URL Format

The diagram below describes the format for a permalink URL. This standard format allows the software to identify and retrieve a specific record from a database.



Understanding the Permalink Resolver

When a user clicks on the permalink, the Innovative permalink resolver intercepts the request, resolves the link, and the record is displayed to the user via Chamo or via the library's Drupal interface.

As described above, the permalink URL must conform to the following format:

http://permalink.sn1.ch/bib/xxxxyyyyyyyy/YYYY

When a user clicks on a permalink, the Innovative permalink resolver uses the following process to identify and display the bibliographic or authority record:

- The "**permalink.sn1.ch**" portion of the URL identifies the institution to which the permanent link belongs.
- The next portion of the URL, "**bib**" or "**auth**", specifies whether the requested record is a bibliographic record or an authority record.
- The following portion of the URL, "**xxxx**", is the code from the 003 tag of the record that identifies the database where the record is stored. This allows the software to handle permalinks to records that reside in different library databases.
- The next portion of the URL, "**yyyyyyyy**", specifies the unique control number from the 001 tag of the target record.
- The final portion of the URL, "**YYYY**", is optional and specifies the record format ("html" or "xml"). **Note:** Additional formats (DC, Mods, or Mads) may be supported in the future. As of March 2015, Chamo supports only the html format.

Using each component of the permalink URL, the permalink resolver is able to identify the exact record that is to be displayed to the user.

Configuring Your Web Server

Get the latest copy of the **resolver.php** script from Innovative Customer Services.

The **resolver.php** script expects the permalink path (everything after the host address) to be provided in a request parameter named 'url'. The web server must be configured to take care of this. To do this in apache2, enable the url rewrite module (mod_rewrite) and add the following lines inside the appropriate VirtualHost field:

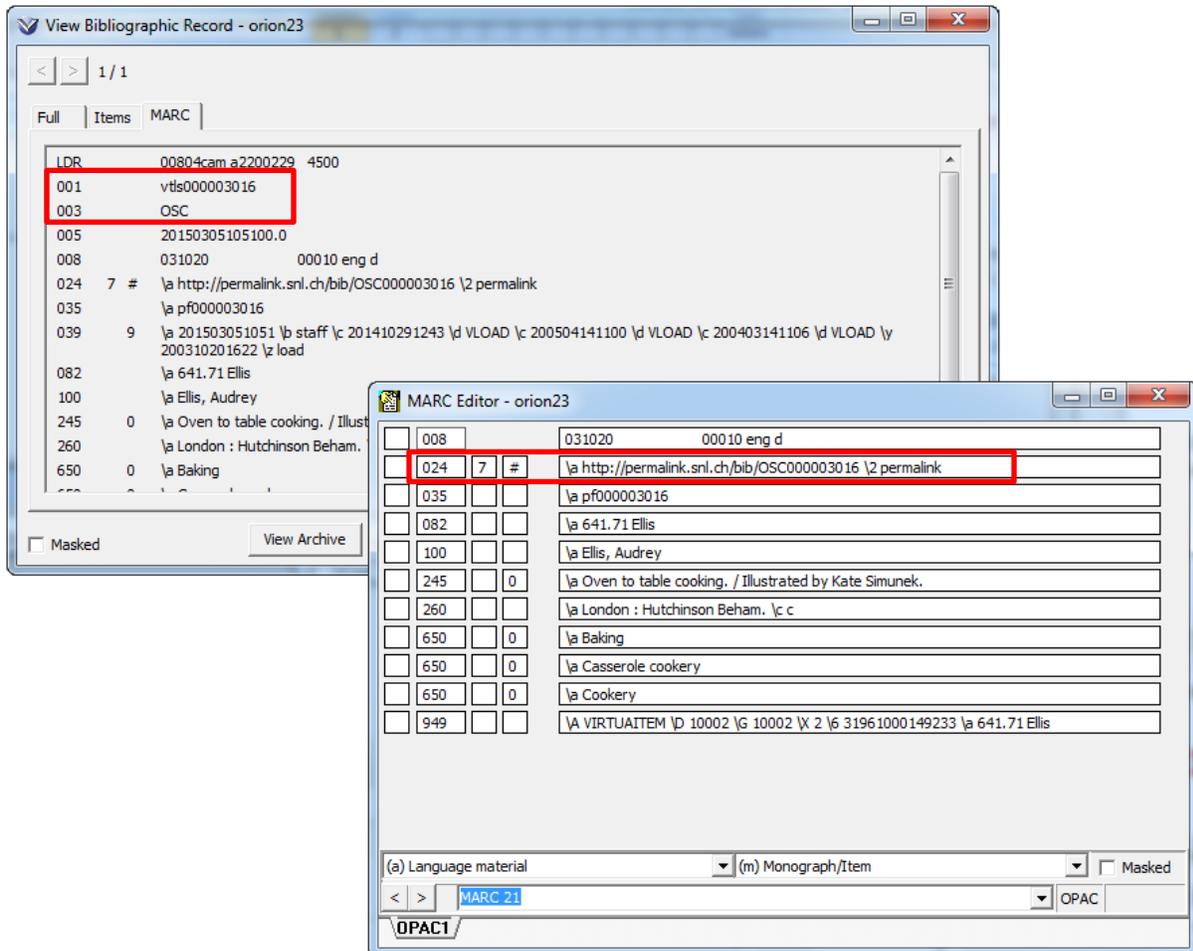
```
RewriteEngine On
RewriteCond %{REQUEST_FILENAME} !-d
RewriteCond %{REQUEST_FILENAME} !-f
RewriteCond %{REQUEST_FILENAME} !-l
RewriteRule ^(.*)$ /resolver.php?url=$1 [QSA,L]
```

Restart apache2 after making these changes.

Viewing Permalinks in the Chamo Interface: An Example

Permalink 024 tags that are cataloged properly in the bibliographic record are automatically displayed in Chamo.

In the example below, a permalink 024 tag has been added to the bibliographic record for the title *Oven to Table Cooking*.



In this example, the permalink 024 tag data is:

```
024 7# $a http://permalink.sn1.ch/bib/OSC000003016 $2 permalink
```

'OSC' represents the code from the bibliographic record 003 tag, which identifies the database where the record is stored.

'000003016' represents the control number from the bibliographic record 001 tag, which identifies the record.

When you search for the title *Oven to Table Cooking* in Chamo, the permalink is displayed on the Item Details screen.

The screenshot shows the VTLIS Chamo interface. At the top, there are navigation links: Login, Cart, Heading Search, Reserves Search, Search History, Clear Session, and Mobile Chamo. A search bar is present with a 'Search' button and a link to 'Advanced Search'. The main content area displays the title 'Oven to table cooking. / Illustrated by Kate Simunek.' and the author 'Ellis, Audrey'. Below this, it indicates 'Record 1 of 1' and provides navigation links: '< Previous', 'Next >', and 'Return to search'. A red box highlights the 'Permalink' field, which contains the URL 'http://permalink.snl.ch/bib/OSC000003016'. Other options include 'No requests for this item. Request', 'Add To Cart', and 'Total Ratings: 0'. At the bottom, there is a table with tabs for 'Copies', 'MARC Record', 'Details', and 'Additional Information'. The 'Copies' tab is active, showing a table with columns: Location, Call Number, Units, Copy Number, Barcode, Status, and a 'Request' button. The table contains one row: 'Adult Non-Fiction Shelves', '641.71 Ellis', 'Units', '0', '31961000149233', 'Available', and 'Request'. Below the table are buttons for 'Add To Cart', 'Select All', and 'Clear All'.

Location	Call Number	Units	Copy Number	Barcode	Status	
Adult Non-Fiction Shelves	641.71 Ellis		0	31961000149233	Available	Request

Clicking on the permalink URL directs you to the digital content at its permanent location.

Appendix G - Changes in this Guide

Changes for Version 16.1

No changes were made.