

**Workflow-Based  
Reference  
Guide**



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# **Basic Cataloging**

WORKFLOW-BASED REFERENCE GUIDE  
**Basic Cataloging**

2017

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# Introduction to Basic Cataloging

The purpose of this workflow-based reference guide is to provide a basic introduction to the features and workflows for the Cataloging subsystem of the Virtua™ ILS – Integrated Library System. The intention of this guide is to highlight the various methods and functions and to provide concise, intuitive instructions for performing tasks related to cataloging library materials and manipulating records.

Whether performing original cataloging or importing records this guide will outline the steps needed to perform these functions, as well as covering the settings and configurations required to save the records into your database.

# Understanding Menu & Toolbars

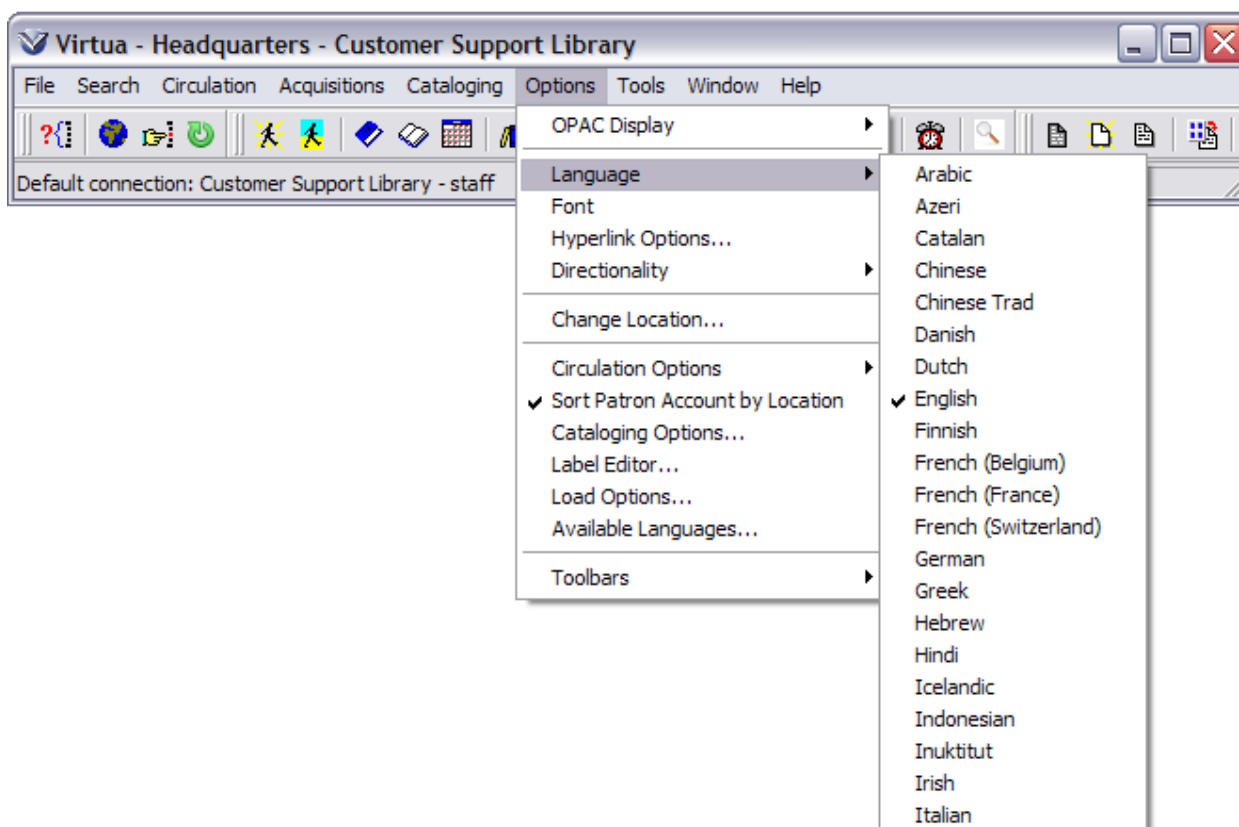
## Language and Directionality Options

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.

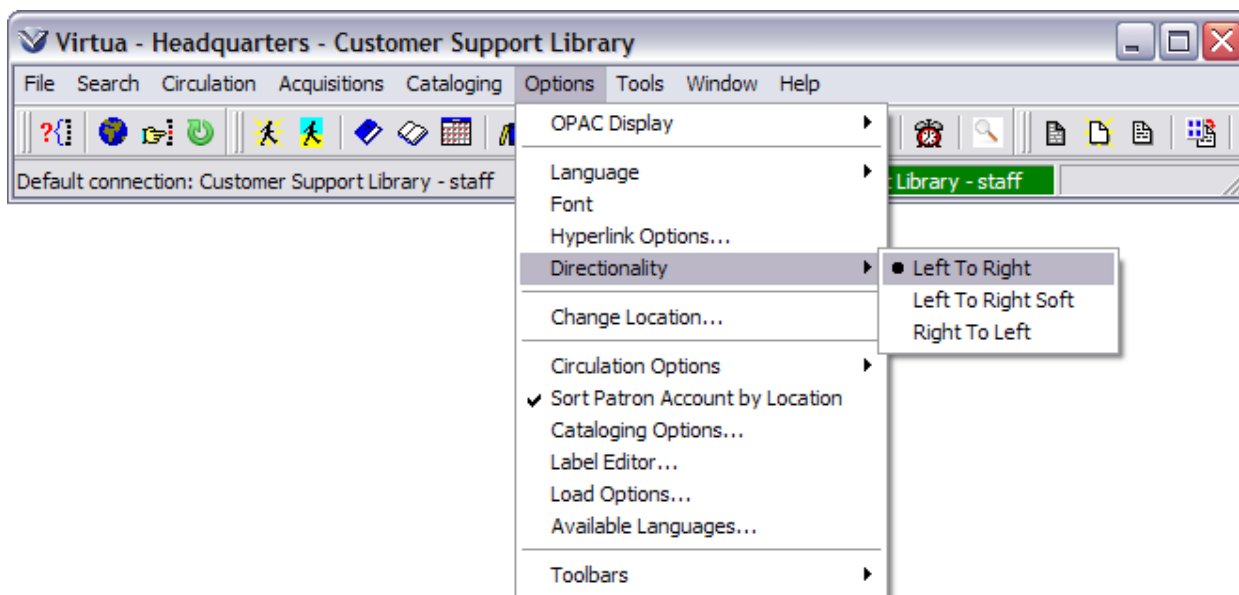


## Directionality

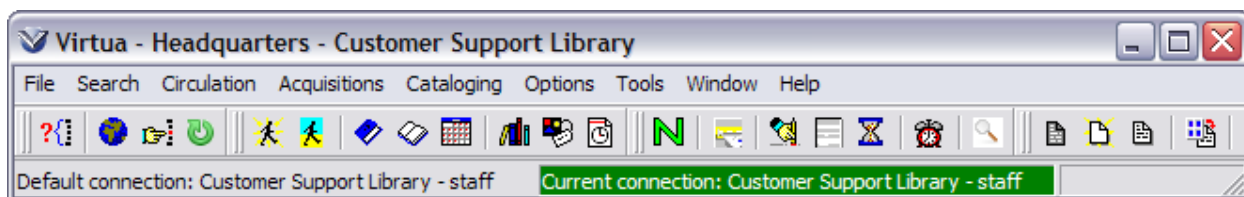
Select Left to Right soft and all text, regardless of directionality, will left justify









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
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			Insert 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

### 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.

001	<input type="checkbox"/>	vtls000253299
003	<input type="checkbox"/>	NcFayC
005	<input type="checkbox"/>	20070118000500.0
008	<input type="checkbox"/>	040927s2005 nyub 000 1 eng
010	<input type="checkbox"/>	va 2004.022563
020	<input type="checkbox"/>	va 0316011770 : lc \$30.95
035	<input type="checkbox"/>	va (DLC)2004022563
039	<input type="checkbox"/>	9 va 200701180005 vb VLOAD vc 200506080849 vd btaylor vc 200506080837 vd btaylor vc 200503071748 ly 200503071748 lz mmcarthu
040	<input type="checkbox"/>	va DLC vc DLC vd GcMBT
082	<input type="checkbox"/>	0 0 va 813/.6 v2 22
099	<input type="checkbox"/>	va F va KOSTOVA
100	<input type="checkbox"/>	1 va Kostova, Elizabeth.

### 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.

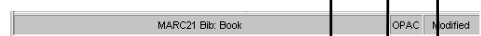
### Tracking Tabs:

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



### Information Bar:

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

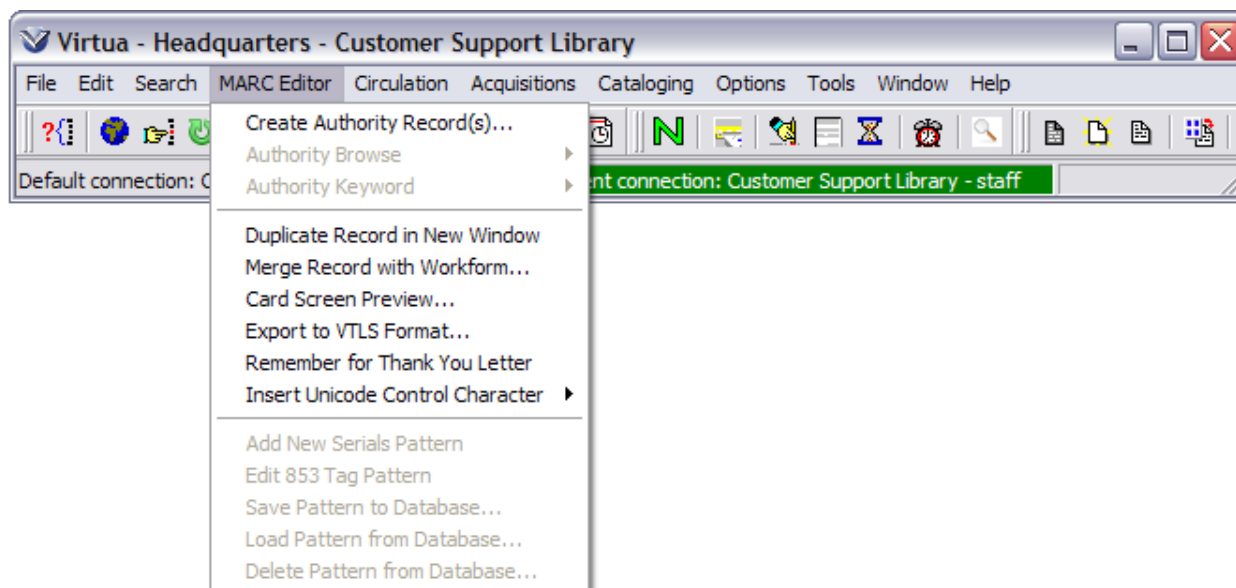


The type of record being created or edited: USMARC Bib: Book.

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.

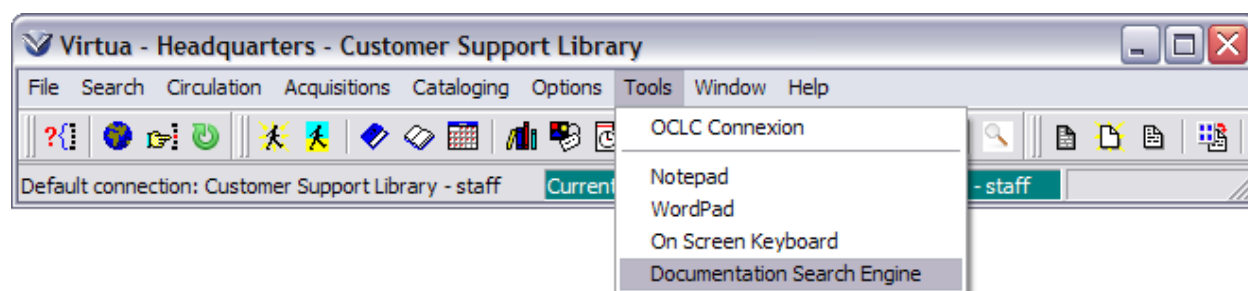
## MARC Editor Menu Options



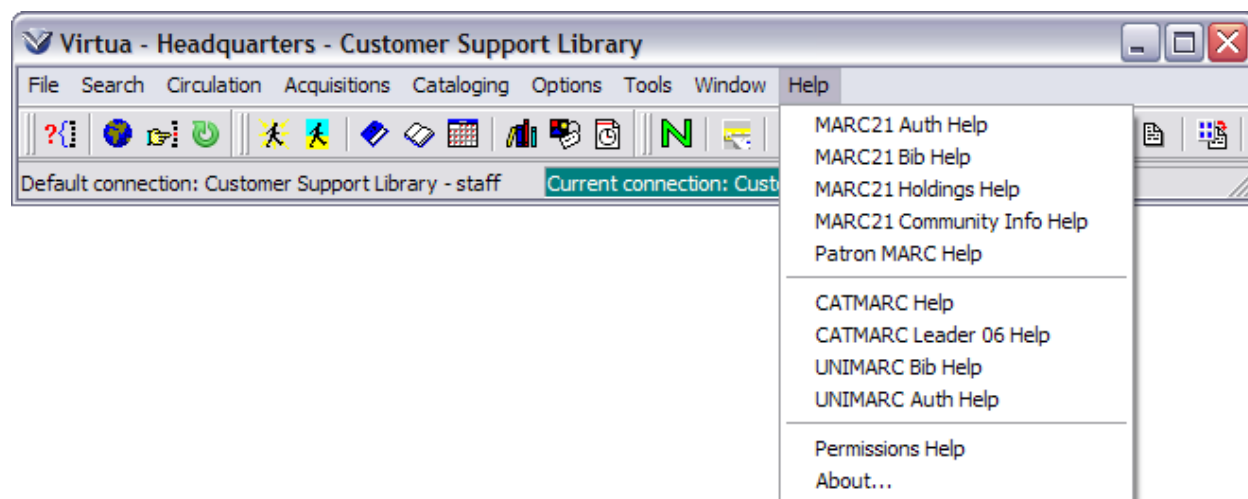
- **Create Authority Records:** Allows you to create authority from selected headings information in an open MARC record.
- **Authority Browse:** Opens the Browse Search window populated with the information from the selected tag.
- **Authority Keyword:** Opens the Keyword Heading Search window populated 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.

# Documentation and Help

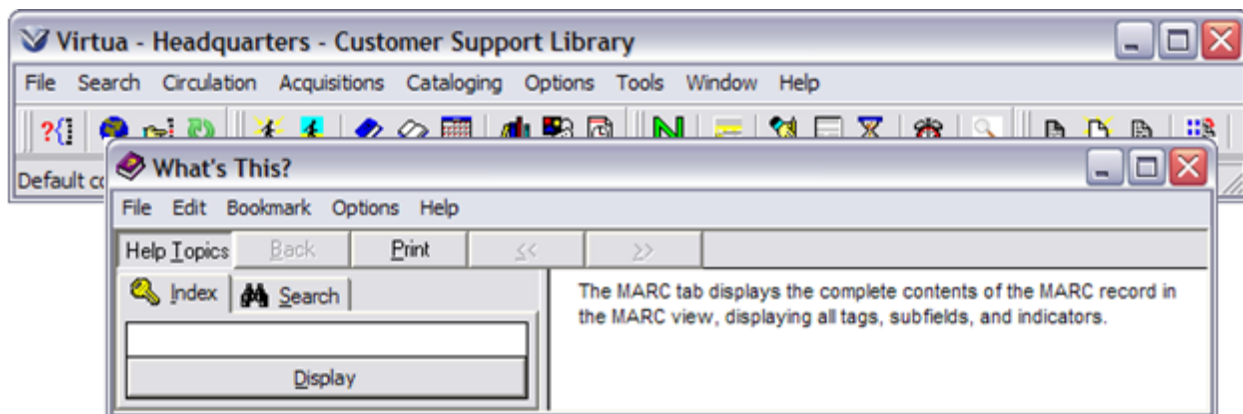
**Virtua Users Guides** are available in searchable .pdf format from the **Tools** menu; click on the **Tools** menu, then select **Documentation Search Engine**. The Documentation Search Engine appears on your Tools menu by default, it is functional only if the Virtua documentation has been installed 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*.



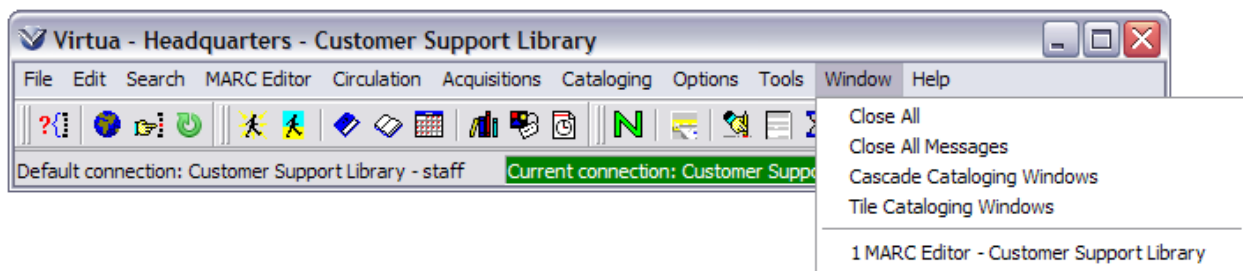
The **Help** Menu links to detailed information about **MARC 21, CATMARC, SWEMARC, and UNIMARC Format**.



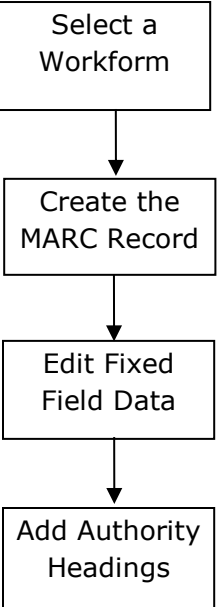
**Feature specific help** is available; from the window for which additional information about a feature is wanted, using the **F1** key or right mouse click will bring forward more information regarding that portion of the window.



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



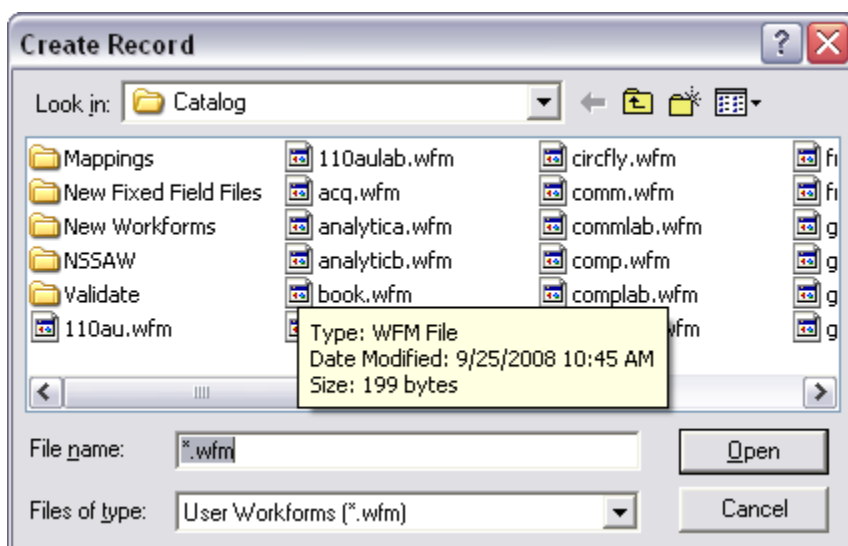
# Original Cataloging Workflow

Recommended Workflow	Explanation
 <pre> graph TD     A[Select a Workform] --&gt; B[Create the MARC Record]     B --&gt; C[Edit Fixed Field Data]     C --&gt; D[Add Authority Headings]   </pre>	<p>Cataloging in Virtua has enhanced user interfaces, including user-friendly MARC tag labels, pre-set workforms, and updated fixed-field data with drop-down menus.</p> <p><b>Summary</b></p> <ul style="list-style-type: none"> <li>• Create a MARC record using workforms</li> <li>• Edit Fixed Field Data (006, 007, &amp; 008 tags)</li> <li>• Archive Records</li> </ul> <p><b>Key Terms</b></p> <ul style="list-style-type: none"> <li>• Bib level</li> <li>• Fixed Field Editor</li> <li>• Fixed Fields</li> <li>• MARC Editor</li> <li>• MARC Labels</li> <li>• Masked record</li> <li>• Subfield</li> <li>• Workforms</li> </ul> <p><b>Profiler Parameters</b></p> <ul style="list-style-type: none"> <li>• Generate 035: Determines whether or not Virtua automatically generates an 035 tag for bibliographic and authority records</li> <li>• Value for the 003: Sets the value of the 003 tag for records exported from the Virtua database or displayed in the MARC Editor</li> <li>• Do not update 005 tag with local field update in authority records</li> <li>• Cataloging Tag Permissions: Allows you to give specific users different permissions on different tags or ranges of tags.</li> </ul>

Recommended Workflow	Explanation (cont.)
	<p><b>InfoStation Reports</b></p> <ul style="list-style-type: none"> <li>• <b>Broad Cataloging Statistics:</b> Returns information about Virtua’s Cataloging subsystem, such as statistical information related to MARC records.</li> <li>• <b>Cataloger Productivity:</b> Generates a count of the original bibliographic records cataloged by each Virtua user during a specified date range.</li> <li>• <b>Bibliographic Record Load and Extract:</b> lets you . . . <ul style="list-style-type: none"> <li><b>Upload</b> to the database a fixed-format or delimited file of bibliographic information and specify options to process the file and save the data in the MARC bibliographic record format.</li> <li>-OR-</li> <li><b>Download</b> bibliographic records from the database and specify options to convert the data from the MARC record format to a fixed-format or delimited file.</li> </ul> </li> <li>• <b>Number of Records in Database:</b> Counts of bibliographic, item, holdings, and authority records in the database based on the criteria that you set in the report configuration.</li> <li>• <b>Production of Records by User:</b> 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.</li> <li>• <b>Record Extraction Utility:</b> Extract records in ISO-2709 format from a Virtua MARC 21 database.</li> <li>• <b>Record Modification Utility:</b> Lets you make global changes to records in the database.</li> <li>• <b>URL Checker:</b> Checks on the viability of URLs in bibliographic, item, and holdings records in your database.</li> </ul>

## Add a New Record

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. The list of available workforms is as follows:

<b>Use with MARC Tag Numbers</b>	<b>Use with MARC Labels</b>	<b>Type of workform</b>
book.wfm	booklab.wfm	Bib Record - Book
comp.wfm	complab.wfm	Bib Record - Computer file
map.wfm	maplab.wfm	Bib Record - Map
mixed.wfm	mixedlab.wfm	Bib Record - Mixed Mat.
music.wfm	musiclab.wfm	Bib Record - Music
vis.wfm	vislab.wfm	Bib Record - Visual Mat.
seril.wfm	serillab.wfm	Bib Record - Serials record
holds.wfm	holdslab.wfm	Serials Holdings record
patron.wfm		Patron record
vendo.wfm	vendolab.wfm	Vendor record
comm.wfm	commlab.wfm	Community Info Record
110au.wfm	110aulab.wfm	Authority record
circfly.wfm		Circ-on-the-fly



Open the workflow by clicking **Open**. The **MARC Editor** will appear with the workflow loaded.

<input type="checkbox"/>	008			101202	000 0 eng d
<input type="checkbox"/>	010	<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	020	<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	040	<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	090	<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	100	<input type="checkbox"/>	1		
<input type="checkbox"/>	245	<input type="checkbox"/>	1		
<input type="checkbox"/>	250	<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	260	<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	300	<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	490	<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	500	<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	650	<input type="checkbox"/>	0		
<input type="checkbox"/>	999	<input type="checkbox"/>	<input type="checkbox"/>	1a	VIRTUA40

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

< >    MARC 21 Bib: Book    New Record    Modified

Untitled1

**Note:** The bib level of the record and therefore fixed field editor will vary depending on the selected workflow.

## Edit the MARC Record

Click on any field to edit the contents of that field.

**Note:** Virtua allows you to create keyboard shortcuts for commonly used phrases.

**Example:** You could assign **Alt+B** to insert the string "*Includes bibliographical references*".


Right mouse click or use the **Catalog** menu bar icons to cut, copy, and paste information.

Next	Ctrl+Tab
Previous	Shift+Ctrl+Tab
<hr/>	
Undo	Ctrl+Z
<hr/>	
Cut	Ctrl+X
Copy	Ctrl+C
Paste	Ctrl+V
<hr/>	
Insert String	
Insert Unicode Control Character	▶
Generate 880 Tag	
<hr/>	
Print...	Ctrl+P
Save...	
E-mail...	
<hr/>	
Add Tag...	Shift+Ctrl+A
Copy Tag	Shift+Ctrl+C
Paste Tag	Shift+Ctrl+V
Paste Tag To All	
Delete Tag	Shift+Ctrl+D
Database Action	▶
<hr/>	
Create Authority Record(s)...	
Authority Browse	▶
Authority Keyword	▶
Generate ISBN Letters	
<hr/>	
Add New Serials Pattern	
Edit 853 Tag Pattern	
Save Pattern to Database...	
Load Pattern from Database...	
Delete Pattern from Database...	
<hr/>	
Close Record	

**Note:** Virtua allows you to decide whether variable field data is in the MARC Editor is overwritten by your keystrokes.

- **If** the Cataloging Option **Overwrite Variable Fields** is selected in the Virtua client, then variable field data is immediately overwritten by your next keystrokes.
- **If** the Cataloging Option **Overwrite Variable Fields** is NOT selected in the Virtua client, then variable field data will not be deleted as you type.

## Add a Tag

Select **Edit** → **Add Tag** from the **Menu** bar, click the **Add Tag** icon , or right mouse click, and then choose **Add Tag** to add a tag to a MARC record. The **Add Tag** window appears.



The screenshot shows a dialog box titled "Add Tag - Phoenix". It has a standard Windows window title bar with a question mark and a close button. The dialog is divided into two main sections. The first section, "Tag Identification:", contains two input fields: "Enter Tag Number:" with the value "250" and "Enter Tag Indicators:" which is currently empty. The second section, "Tag Position:", contains two radio button options: "Place in sorted order" (which is selected) and "Place after current cursor". At the bottom of the dialog are two buttons: "OK" and "Cancel".

Enter the desired tag number in the **Enter Tag Number** box.

**Note:** The Enter Tag Indicator field will be grayed out if indicators are not used with that tag.

Tab to, or click in, the **Enter Tag Indicators** box.



This screenshot shows the same "Add Tag - Phoenix" dialog box, but with the focus shifted to the "Enter Tag Indicators" field, which now contains the number "4". The "Enter Tag Number" field now contains "245". The "Tag Position" section and the "OK" and "Cancel" buttons remain the same as in the previous screenshot.

Enter the proper indicators for the tag or leave the indicator spaces blank. If the first indicator is blank and the second has a value, use the space bar to indicate a blank.

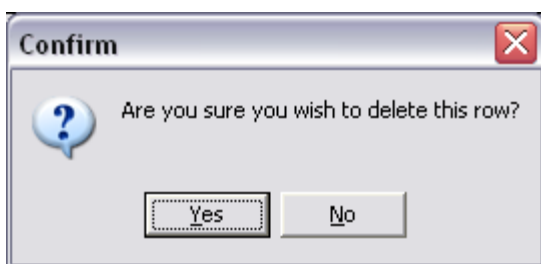
Select where you want the tag placed in the record; either below the current tag or in sorted order.

Click the **OK** button.

### Delete a Tag

Place the cursor in the tag, indicator, or data box of the field that you want to delete.

Select **Edit** → **Delete Tag** from the Menu bar, click the **Delete Tag** icon , or right mouse click, and then choose **Delete Tag**. The Confirm window appears



Confirm that you want to delete the tag by clicking the **Yes** button.

Or you can delete multiple tags at once with the check boxes to the left of the indicators. This can also be used for copying and pasting tags and the undelete function.

001			vtls000008772
003			VRT
005			20070208140300.0
008			020319s1977 nyu 00110 eng
010			{a 77-13774
020			{a 0814454526 : {c \$14.95
035			{a ocm03310403 870910
039		9	{a 200702081403 {b VLOAD {y 200211071755 {z VLOAD
040			{a DLC {c DLC {d VMW
043			{a n-us---
050	0		{a KF1659 {b .L36
082			{a 346/.73/0652
100	1	0	{a Lane, Marc J.
245	1	0	{a Legal handbook for small business / {c Marc J. Lane.
260	0		{a New York : {b Amacom, {c c1977.
300			{a 181 p. ; {c 22 cm.
500			{a Includes index.
650		0	{a Small business {x Law and legislation.
999			{a VIRTUA50

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

< > MARC 21 Bib: Book OPAC

OPAC1

## Undo Changes

To undo any changes to field(s) in the **MARC Editor** prior to saving the record:

Right click and select **Undo** from the right-click pop-up menu or use the combination shortcut keys **CTRL+Z**.

The contents of the last edited field will revert to the original contents.

To undo changes to previously edited field(s), select **Undo** or press **CTRL+Z** again.

Continue until all desired fields are restored to their original contents.

## Copy a Tag Between Records

Open another record in the **MARC Editor**. Note there are now two tabs at the bottom of the **MARC Editor**.

<input type="checkbox"/>	008			080610s2008 nyu 000 1 eng
<input type="checkbox"/>	010	<input type="checkbox"/>	<input type="checkbox"/>	\a 2007-038941
<input type="checkbox"/>	020	<input type="checkbox"/>	<input type="checkbox"/>	\a 1416552510 : \c \$33.00
<input type="checkbox"/>	020	<input type="checkbox"/>	<input type="checkbox"/>	\a 9781416552512
<input type="checkbox"/>	035	<input type="checkbox"/>	<input type="checkbox"/>	\a (OCoLC)ocn154662628
<input type="checkbox"/>	040	<input type="checkbox"/>	<input type="checkbox"/>	\a DLC \c DLC \d BTCTA \d BAKER \d YDXCP \d JTE \d NPL
<input type="checkbox"/>	043	<input type="checkbox"/>	<input type="checkbox"/>	\a n-us-fl
<input type="checkbox"/>	049	<input type="checkbox"/>	<input type="checkbox"/>	\a HQBA
<input type="checkbox"/>	082	0	0	\a 813/.54 \2 22
<input type="checkbox"/>	099	<input type="checkbox"/>	<input type="checkbox"/>	\a F \a KING
<input type="checkbox"/>	100	1	<input type="checkbox"/>	\a King, Stephen, \d 1947-
<input type="checkbox"/>	245	1	0	\a Duma Key / \c by Stephen King.
<input type="checkbox"/>	260	<input type="checkbox"/>	<input type="checkbox"/>	\a New York : \b Scribner, \c 2008.
<input type="checkbox"/>	300	<input type="checkbox"/>	<input type="checkbox"/>	\a 611 p. ; \c 25 cm.
<input type="checkbox"/>	501	<input type="checkbox"/>	<input type="checkbox"/>	\a MARCIVE 06/10/08
<input type="checkbox"/>	650	<input type="checkbox"/>	0	\a Accident victims \v Fiction.
<input type="checkbox"/>	650	<input type="checkbox"/>	0	\a Supernatural \v Fiction.
<input type="checkbox"/>	651	<input type="checkbox"/>	0	\a Florida Keys (Fla.) \v Fiction.


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

< > MARC 21 Bib: Book OPAC

OPAC1 OPAC2


Place the cursor in the tag, indicator or data box of the field that you want to copy.

**Note:** You do not need to select the text in the tag, indicator or data box. The copy function copies the contents of the entire tag.

Select **Edit → Copy Tag** from the Menu bar or click the **Copy** icon  on the Cataloging toolbar.

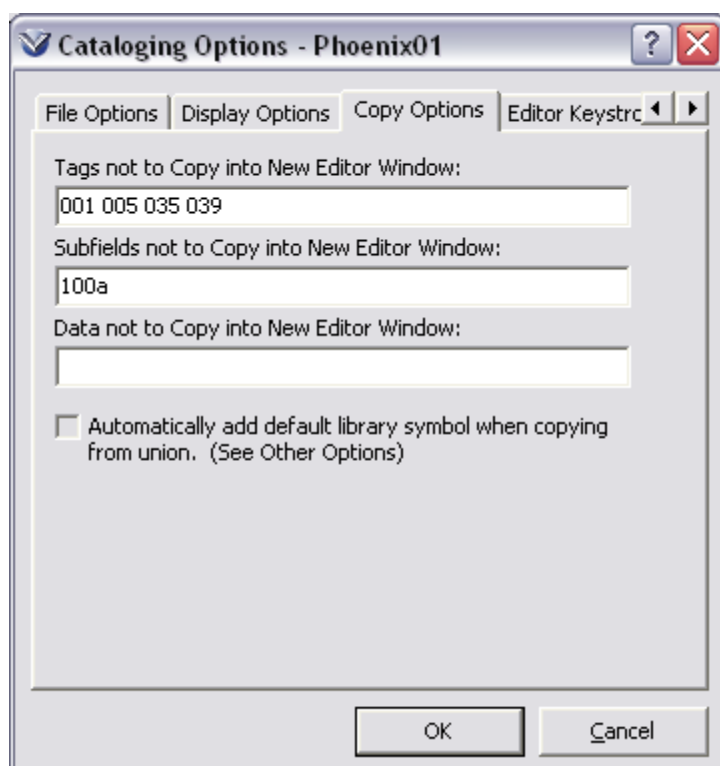
Switch to the other record by clicking the **Other Record** tab.

Place your cursor in the field that you want **above** the tag that you are about to paste.

Select **Edit → Paste Tag** from the Menu bar or click the **Paste** icon  on the **Cataloging** toolbar. The tag is pasted into the record.

**Note:** To specify subfields/data NOT to Copy into a New Editor Window, in Virtua go to Options and then Cataloging Options. In the Copy Options tab of this window there are two options:

- Subfields NOT to Copy into a New Editor Window - The subfields of the tags that you specify here will not appear in a new MARC Editor window if you choose Duplicate Record in New Window.
- Data NOT to Copy into a New Editor Window - The data contained in the tags and/or subfields that you specify here will not appear in a new **MARC Editor** window if you choose Duplicate Record in New Window. However, the tags and subfields themselves **WILL** still appear.



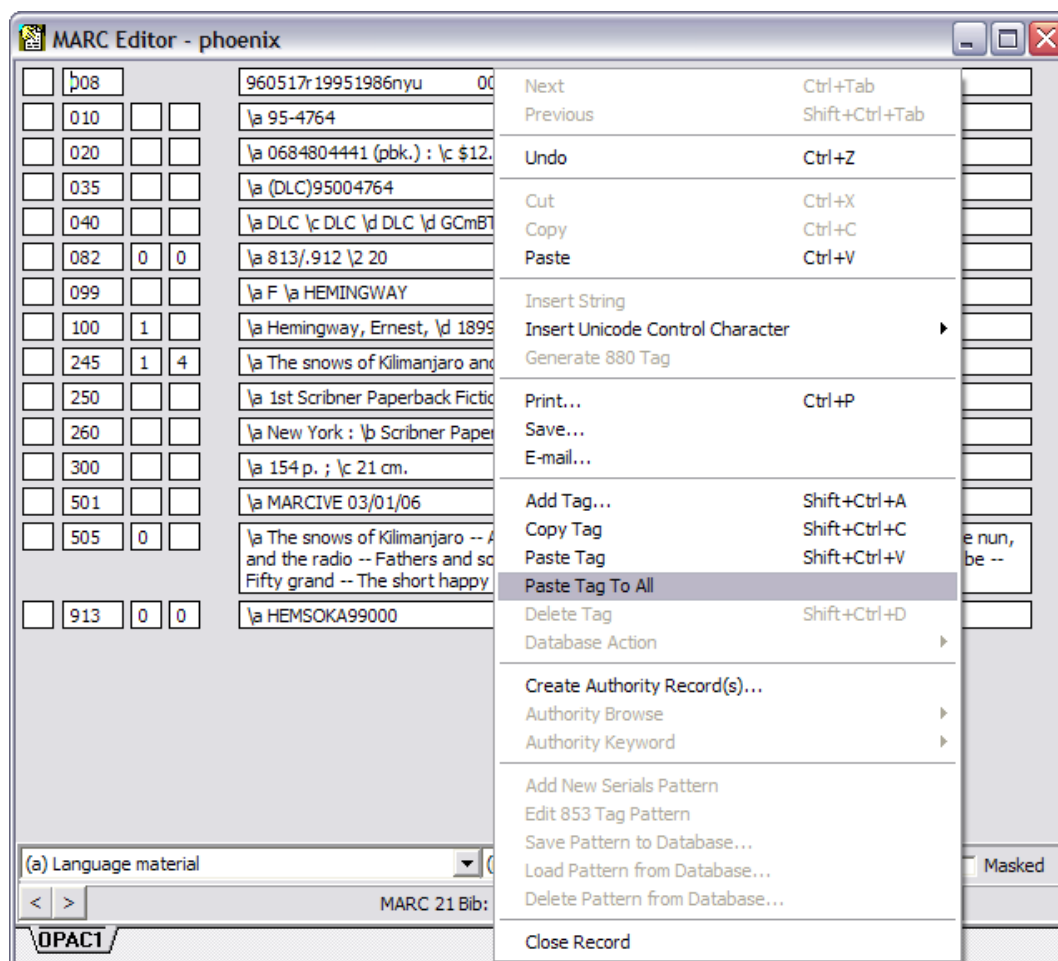
## Copy a Tag to Multiple Records

In the **MARC Editor** window, open the record you want to copy **from**, and all the records you want to copy **to**.


Select the record you want to copy **from**, and right mouse click to copy the tag.

Close the record you copied **from**.

From any record open in the **MARC Editor**, right mouse click and select **Paste tag to all**.



The tag will be pasted into **ALL** Bibliographic records in the **MARC Editor** window.

Hit the **F11** key or the **Save to Database**  icon on the **Cataloging** toolbar, or **File** → **Save to Database** to save the records.



## Edit Fixed Fields using the Fixed Field Editor

Depending on how cataloging options are set in the Virtua client, you may either edit the 006, 007, and 008 tags directly in the **MARC Editor** window, or have Virtua open the **Fixed Field Editor** window to display a labeled workform for entering fixed field information.

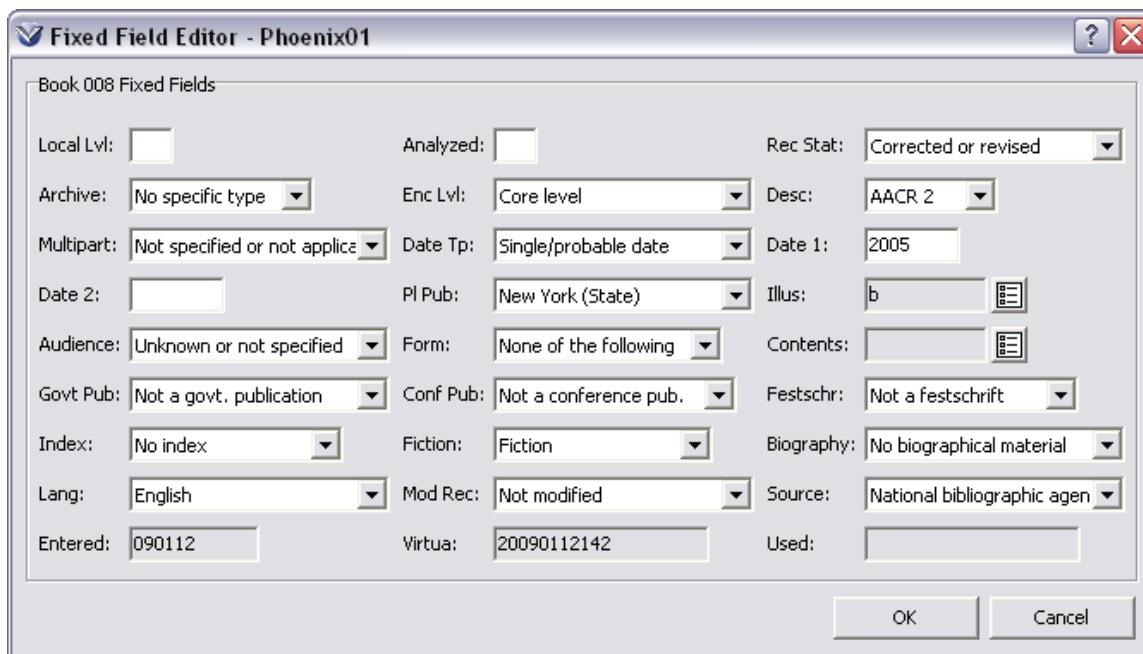
### The 008 Fixed Fields

On the Cataloging toolbar, click the **008** icon , or click in the data area of the 008 tag.

The Fixed Field Editor appears, displaying (for example) the fixed field layout for books. The order of the display, starting in the first row and going left to right, is as follows:

- Unique VTLIS-defined fields
- Leader values
- 008 values in numeric order

**Note:** The **Fixed Field Editor** will vary according to the Type and Bib Level of the record.



The screenshot shows the 'Fixed Field Editor - Phoenix01' window. The title bar includes a checkmark icon, the text 'Fixed Field Editor - Phoenix01', and help and close buttons. The main area is titled 'Book 008 Fixed Fields' and contains a grid of fields for editing. The fields are arranged in a grid and include:

Local Lvl: <input type="text"/>	Analyzed: <input type="checkbox"/>	Rec Stat: <input type="text" value="Corrected or revised"/>
Archive: <input type="text" value="No specific type"/>	Enc Lvl: <input type="text" value="Core level"/>	Desc: <input type="text" value="AACR 2"/>
Multipart: <input type="text" value="Not specified or not applica"/>	Date Tp: <input type="text" value="Single/probable date"/>	Date 1: <input type="text" value="2005"/>
Date 2: <input type="text"/>	Pl Pub: <input type="text" value="New York (State)"/>	Illus: <input type="text" value="b"/>
Audience: <input type="text" value="Unknown or not specified"/>	Form: <input type="text" value="None of the following"/>	Contents: <input type="text"/>
Govt Pub: <input type="text" value="Not a govt. publication"/>	Conf Pub: <input type="text" value="Not a conference pub."/>	Festschr: <input type="text" value="Not a festschrift"/>
Index: <input type="text" value="No index"/>	Fiction: <input type="text" value="Fiction"/>	Biography: <input type="text" value="No biographical material"/>
Lang: <input type="text" value="English"/>	Mod Rec: <input type="text" value="Not modified"/>	Source: <input type="text" value="National bibliographic agen"/>
Entered: <input type="text" value="090112"/>	Virtua: <input type="text" value="20090112142"/>	Used: <input type="text"/>

At the bottom right of the window are 'OK' and 'Cancel' buttons.


## The 006 & 007 Tags and Fixed Fields

**The 006 tag:** When a cataloged item has more than one characteristic format, such as a computer file and a book, you can code the 008 as one format and the 006 as the other.

**Note:** The 006 duplicates some elements of the 008.

**The 007 tag:** Describes additional physical characteristics of the item being cataloged. The value in the first position (00) of the 007 determines the specific layout to be used. For example, if position 00 has a value of a, the layout is the Map layout.

### To add a 006 or 007 tag:

Select **Edit → Add Tag** from the **Menu** bar, click the **Add Tag** icon , or right mouse click, and then choose **Add Tag** to add a tag to a MARC record. The **Add Tag** window appears.



In the **Tag Number** box, enter 006 or 007.

Edit the Tag Position.

Click the **OK** button. The **MARC Editor** adds the 006 or 007 tag, displaying two data boxes and no indicator box

**To edit the fixed fields of the 006 or 007 tag:**

Using your mouse or the arrow key on your keyboard, place your cursor in the **first** data box (position 00) of the 006/007 tag.

Type a value to represent the **category of material** for the tag. You can right mouse to see the pop-up menu of available choices.

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

Click in the **second** data box of the 006 field. The **Fixed Field Editor** appears, displaying the 006 fixed fields for the category of material selected in position 00.

The screenshot shows the MARC Editor - Phoenix99 window with a MARC record and a Fixed Field Editor dialog box open.

**MARC Editor - Phoenix99**

001	vtis000253299
003	NcFayC
005	20070118000500.0
008	040927s2005 nyub 000 1 eng
010	
020	1a 0316011770 : 1c \$30.95
035	1a (DLC)200-4022563
039	9
	1a 200701180005 1b VLOAD 1c 200506080849 1d btaylor 1c 200506080837 1d btaylor 1c 200503071748 1y 200503071748 1z mmcarthu

**Fixed Field Editor**

Book 008 Fixed Fields

Local Lvl:	<input type="text"/>	Analyzed:	<input type="text"/>	Rec Stat:	Increase from prepublicat
Archive:	No specific type	Enc Lvl:	Full level	Desc:	AACR 2
Multipart:	Not specified or not applic	Date Tp:	Single/probable date	Date 1:	2005
Date 2:	<input type="text"/>	Pl Pub:	New York (State)	Illus:	b <input type="text"/>
Audience:	Unknown or not specified	Form:	None of the following	Contents:	<input type="text"/>
Govt Pub:	Not a govt. publication	Conf Pub:	Not a conference pub.	Festschr:	Not a festschrift
Index:	No index	Fiction:	Fiction	Biography:	No biographical material
Lang:	English (eng)	Mod Rec:	Not modified	Source:	National bibliographic agen
Entered:	040927	Virtua:	20050307174	Used:	20070118000

008 Position: 6: Publication Status

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

MARC 21 Bib: Book OPAC

**Note:** If you try to edit this field before you choose a value for position 00, the system displays an error message. Because the fields are different for each category of material, until the categories are defined, the system does not know which fixed fields to display.

Edit the fields as needed, using your mouse or the **Tab** key on your keyboard to place the cursor.

Click the **OK** button to save your changes.

## Edit Fixed Fields in the MARC Editor Window

Cataloging Options may be set in the Virtua client to allow you to edit fixed fields directly in the **MARC Editor** window.

### To edit a 006, 007, or 008 Tag in the MARC Editor window:

Click in the field that you wish to edit.

Move the cursor at least one space. Centered at the bottom of the **MARC Editor** window, you will see information related to the fixed field position directly to the right of the cursor.

Tag	Value
001	vtls000253299
003	NcFayC
005	20070118000500.0
008	040927s2005 nyub 000 1 eng
010	1a 2004-022563
020	1a 0316011770 : 1c \$30.95
035	1a (DLC)2004022563
039	1a 200701180005 1b VLOAD 1c 200506080849 1d btaylor 1c 200506080837 1d btaylor 1c 200503071748 1y 200503071748 1z mmcarthu
040	1a DLC 1c DLC 1d GCMBT
082	1a 813/.6 12 22
099	1a F 1a KOSTOVA
100	1a Kostova, Elizabeth.
245	1a The historian : 1b a novel / 1c Elizabeth Kostova.
250	1a 1st ed.
260	1a New York : 1b Little, Brown and Co., 1c 2005.
300	1a ix, 642 p. : 1b map ; 1c 24 cm.

008 Position: 8: Date 1

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

MARC 21 Bib: Book OPAC

OPAC1

Move the cursor to the desired position and edit the record.

## Mask Record

Under certain circumstances, you may wish to set record masking so that a particular record does not display in the OPAC. One example would be if you do not wish items on order to display.

To mask a record, click the **Masked** check box on either the **MARC View Editor** window or on the **View Bibliographic Record** window. The bibliographic record will not display in the OPAC.

## Add Authority Headings

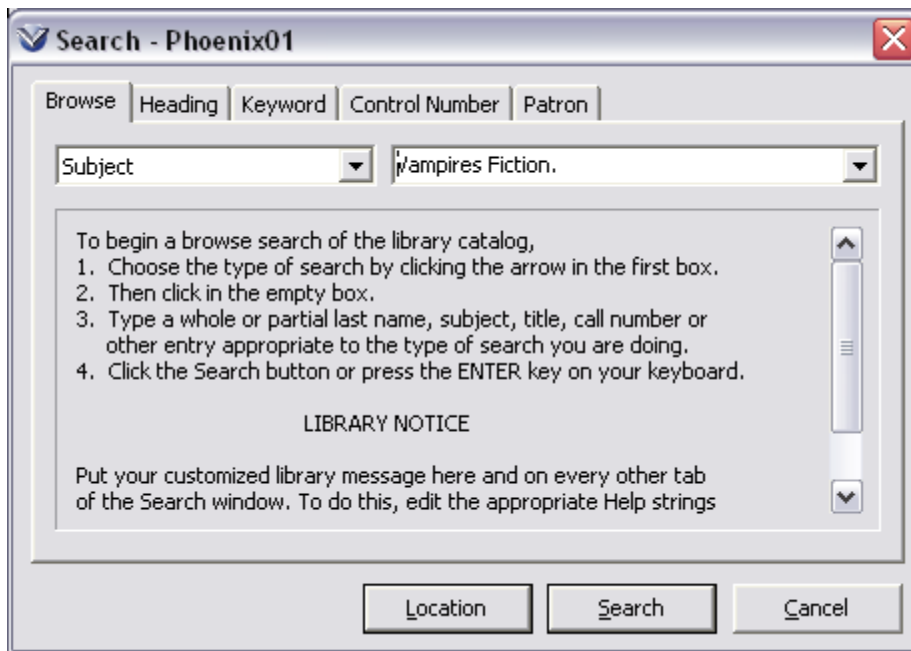
In the **MARC Editor**, open the bibliographic record to which you want to add an authority heading.

Place the cursor in the tag containing the heading that you want to search.

Select either **Authority Browse** or **Authority Keyword** from the right mouse pop-up menu.

- **If** you choose Authority Browse, the **Search** window will open with the Browse tab active.
- OR-
- **If** you choose Authority Keyword, the **Search** window will open with the Heading tab active.

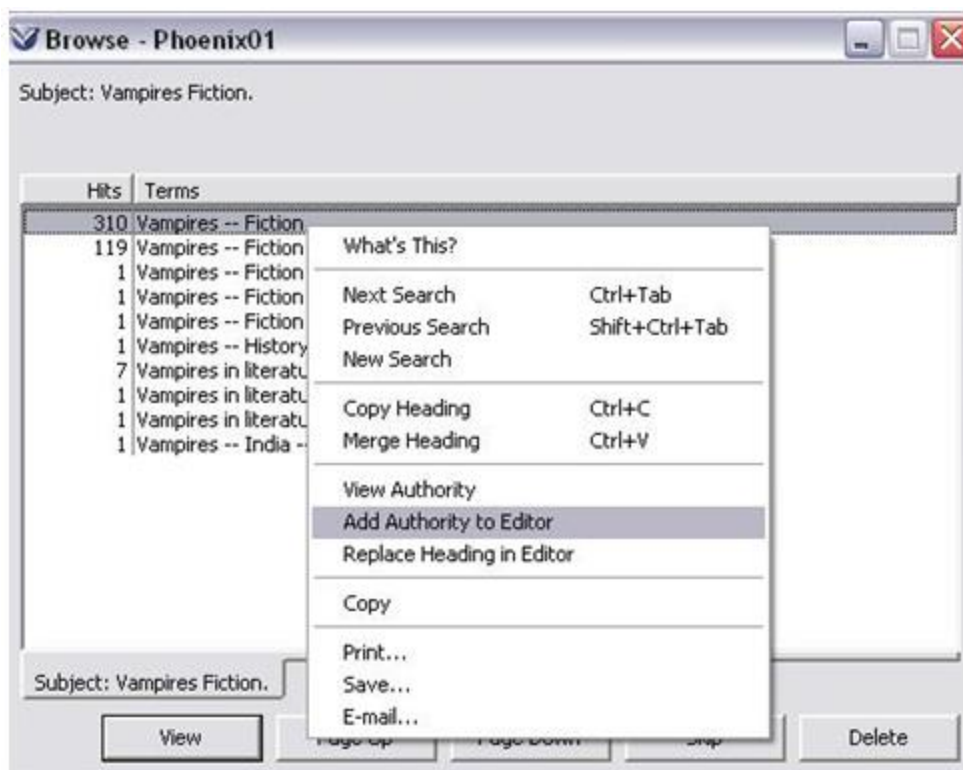
The **Search** window is populated with the information from the selected tag in the MARC record. Edit the search string if necessary and click the **Search** button.



- If you perform a **Browse** search, the search results will appear in the **Browse** window.
- If you perform a **Heading** search, the search results will appear in the **List of Headings** window.

Highlight the desired term on the **Browse** window or **List of Headings** window.

Click the right mouse button to see the pop-up menu.



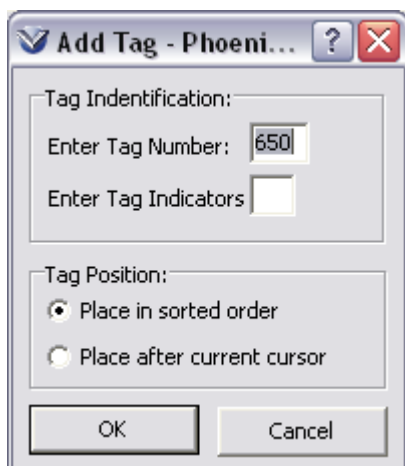
If desired, choose **View Authority** to view the authoritative heading on the authority record.

**Note:** In the case where the heading on the **Browse** window is a See reference or an AAP title, the Add Authority and Replace Heading options will be disabled. Instead of clicking either of those options, choose **View Authority**. On the **View Authority Record** window, navigate to the record with the desired heading, right click, and then choose either the Add Authority or Replace Heading option.

Choose **Add Authority to Editor** or **Replace Heading in Editor**.



The **Add Tag** dialog box appears.



Enter relevant data in the **Add Tag** dialog window such as tag number, indicators, position, and click **OK**.

- If you selected **Add Authority to Editor**, the valid authority heading was added to your record in the specified tag in the **MARC Editor**.  
-OR-
- If you selected **Replace Heading in Editor**, the valid authority heading replaced the existing heading that your cursor is on in the **MARC Editor**.

**Note:** Virtua allows one authority record to be used in the following manner:

- 1) As both a name and subject. If the 008/14 and 008/15 are both "aa" and the 1xx tag is 100, 110, or 111, the authority is used as both an author and a subject.
- 2) As both a title and subject. If the 008/14 and 008/15 are both "aa" and the 1xx tag is 130, the authority record is used as both a title and subject.

## Authority Control Headings Suggestions

Suggested authority control headings may be viewed while a bibliographic record is edited on the **MARC Editor** window. This workflow is available for the following UNIMARC and MARC21 tags: 1xx, 6xx, and 7xx.

To view suggested authority control headings:

Position the cursor in the tag data area of an eligible bibliographic record tag.

Press **Shift + Ctrl + S** to display the **Heading Suggestion** window.

Valid headings whose lead characters match those entered in the tag data appear.

The screenshot shows the MARC Editor window for 'Customer Support Library'. The main window contains a list of MARC fields with their corresponding values. A dialog box titled 'Heading Suggestions - Customer ...' is open, displaying a list of suggestions for the current field. The suggestions include 'Butterflies {DLC}', 'Butterflies as pets {DLC}', 'Butterflies as pets -- Juvenile literature.', 'Butterflies -- Behavior.', 'Butterflies -- Canada, Eastern.', 'Butterflies -- Color -- Juvenile literature.', 'Butterflies -- Comic books, strips, etc.', and 'Butterflies -- Development -- Juvenile literature.' The 'Butterflies {DLC}' suggestion is selected.

Field	Value
001	vtls000232553
003	NcFayC
005	20070117194100.0
008	001006r20001988nyuab j 001 0 eng d
020	\a 0789458322 : \c \$18.95
035	\a bl 00012911
039	\a 200701171941 \b VLOAD \y 200406232045 \z load
040	\a NjBwBT \c NjBwBT
082	\a 595.78 \2 21
099	\a J595.78 \a W
100	\a Wh
245	\a But
246	\a But
260	\a Ne
300	\a 63
440	\a DK e
500	\a Origin
500	\a Includ
501	\a MARC
520	\a Photographs and text explore the behavior and life cycles of butterflies and moths, examining mating rituals, camouflage, habitat, and growth from pupa to larva to adult.
650	\a Butterflies \v Juvenile literature
650	\a Moths \v Juvenile literature.
650	\a Butterflies
650	\a Moths.
913	\a WHABMOT98000
999	\a VIRTUA50

Dialog Box: Heading Suggestions - Customer ...

Type additional characters or select a heading from the list:

- Butterflies {DLC}
- Butterflies as pets {DLC}
- Butterflies as pets -- Juvenile literature.
- Butterflies -- Behavior.
- Butterflies -- Canada, Eastern.
- Butterflies -- Color -- Juvenile literature.
- Butterflies -- Comic books, strips, etc.
- Butterflies -- Development -- Juvenile literature.

Bottom Bar: (a) Language material (m) Monograph/Item Masked  
 < > MARC 21 Bib: Book OPAC Modified  
 OPAC1

Select a heading from the list.

The screenshot shows the MARC Editor window for 'Customer Support Library'. The main window contains a list of MARC tags and their corresponding values. A dialog box titled 'Heading Suggestions - Customer ...' is open, displaying a list of suggestions. The suggestion 'Butterflies -- Behavior.' is selected in the dropdown menu. The dialog has 'OK' and 'Cancel' buttons.

Tag	Value
001	vtls000232553
003	NcFayC
005	20070117194100.0
008	001006r20001988nyuab j 001 0 eng d
020	\a 0789458322 : \c \$18.95
035	\a bi 00012911
039	\a 200701171941 \b VLOAD \y 200406232045 \z load
040	\a NjBwBT \c NjBwBT
082	\a 595.78 \2 21
099	\a J595.78 \a W
100	\a Wh
245	\a But
246	\a But
260	\a Ne
300	\a 63
440	\a DK eyewitness books
500	\a Originally published: New York : Knopf, 1988. (Eyewitness books).
500	\a Includes index.
501	\a MARCIVE 03/01/06
520	\a Photographs and text explore the behavior and life cycles of butterflies and moths, examining mating rituals, camouflage, habitat, and growth from pupa to larva to adult.
650	\a Butterflies \v Juvenile literature
650	\a Moths \v Juvenile literature.
650	\a Butterflies
650	\a Moths.
913	\a WHABMOT98000
999	\a VIRTUA50

Dialog Box: Heading Suggestions - Customer ...

Type additional characters or select a heading from the list:

Butterflies -- Behavior.

OK Cancel

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

MARC 21 Bib: Book OPAC Modified

OPAC1

Click **OK** to add the selected heading to the tag that is active in the **MARC Editor** window.

The screenshot shows the MARC Editor window after the 'Heading Suggestions' dialog box has been closed. The tag 650 now includes the selected heading 'Butterflies \x Behavior.'.

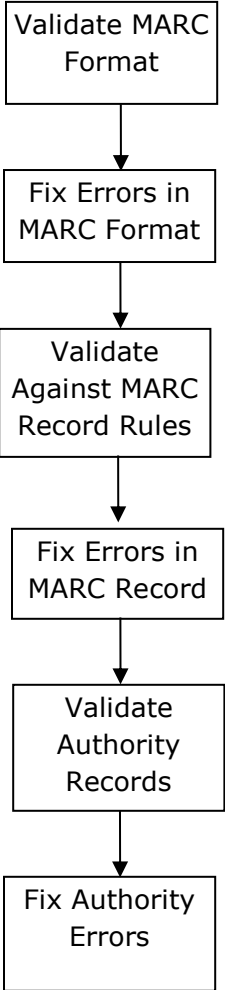
Tag	Value
650	\a Butterflies \v Juvenile literature.
650	\a Moths \v Juvenile literature.
650	\a Butterflies \x Behavior.
650	\a Moths.
913	\a WHABMOT98000
999	\a VIRTUA50

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

MARC 21 Bib: Book OPAC Modified

OPAC1

# Record Validation

Recommended Workflow	Explanation
 <pre> graph TD     A[Validate MARC Format] --&gt; B[Fix Errors in MARC Format]     B --&gt; C[Validate Against MARC Record Rules]     C --&gt; D[Fix Errors in MARC Record]     D --&gt; E[Validate Authority Records]     E --&gt; F[Fix Authority Errors]   </pre>	<p>Virtua validates MARC records in several ways based on options set in the Virtua Client and parameters set in the <i>Virtua Profiler</i>. The following types of MARC record validation are available:</p> <ol style="list-style-type: none"> <li>1. <b>VERICAT:</b> MARC format validation available in the Virtua Client.</li> <li>2. <b>Record Validation Rules:</b> Pre-defined MARC rules in the Profiler that can be set to Off, Warn, or Error state.</li> <li>3. <b>Authority Messages:</b> Four parameters in the Profiler that define how authority records and/or informational messages are handled.</li> </ol> <p><b>Summary</b></p> <ul style="list-style-type: none"> <li>• Validate a record using Vericat</li> <li>• Understand Record Validation options in the Profiler</li> <li>• Understand Authority Record parameters affect how bibliographic records may be changed by the system when saving a record to the database.</li> <li>• Understand record validation messages</li> </ul> <p><b>Key Terms</b></p> <ul style="list-style-type: none"> <li>• Error State</li> <li>• MARC Editor</li> <li>• Validation Rules</li> <li>• Vericat</li> </ul> <p><b>Profiler Parameters</b></p> <ul style="list-style-type: none"> <li>• Record Validation Rules</li> <li>• Authority Messages</li> </ul>


## Record Validation Using VERICAT

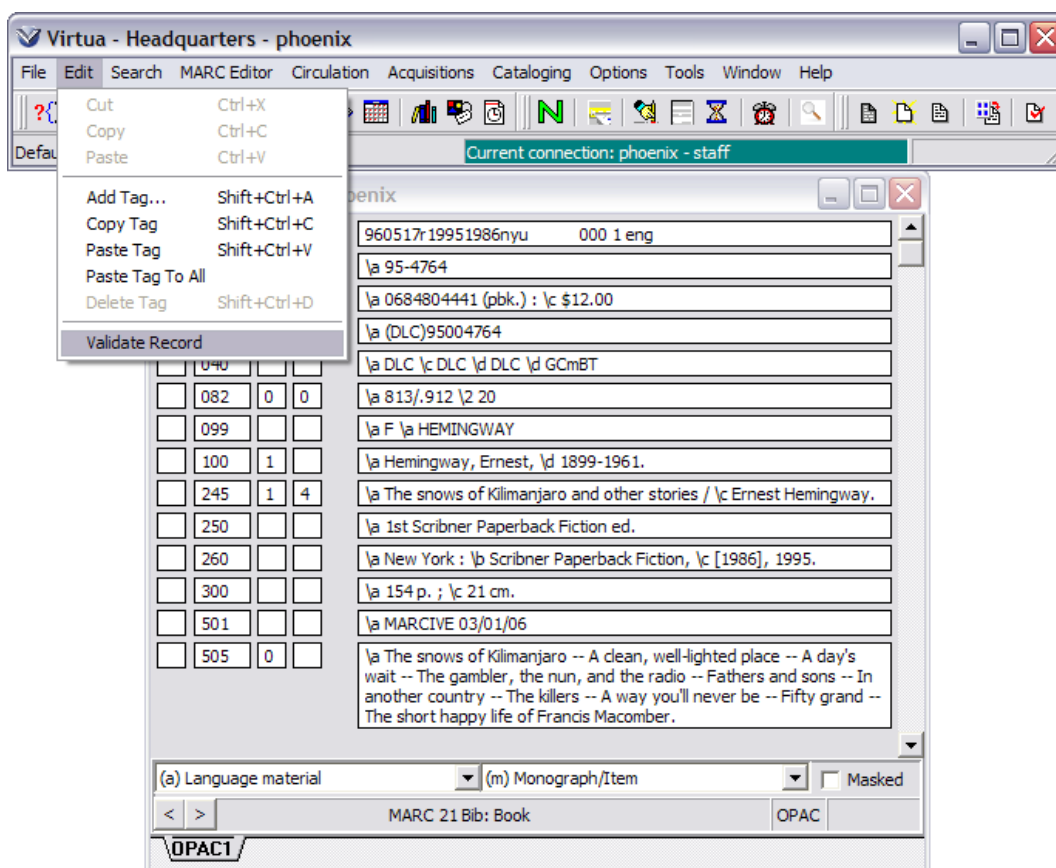
VERICAT is a program available with Virtua that validates records based on MARC format rules for tags, indicators, and subfields. It is possible to edit the Vericat rules files to reflect local practices. If you have VERICAT installed on your workstation, there are two ways in which you can validate Bibliographic records prior to saving them:

1. From the Edit Menu when the **MARC Editor** window is open
2. When saving a MARC record to a file or database if the appropriate Cataloging Options are set.

**Note:** UNIMARC validation is supported.

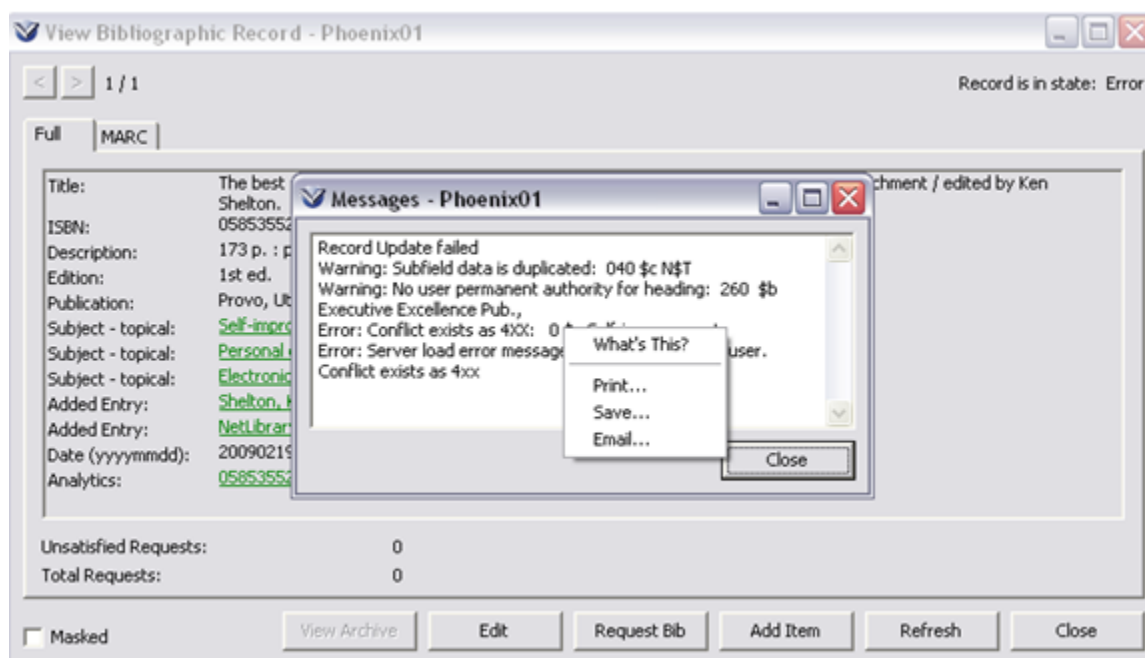
### Use VERICAT from the Edit Menu

Select **Edit** → **Validate Record** or the **Validate Record** icon  on the **Cataloging** toolbar to validate the record displayed in the **MARC Editor**.



When the validation program finishes checking for any rules violations, a window appears listing any error messages from the rules file.

To print, save, or e-mail validation errors, perform a right mouse click from the **Record Validation Errors** window to bring up the pop-up window for these options.

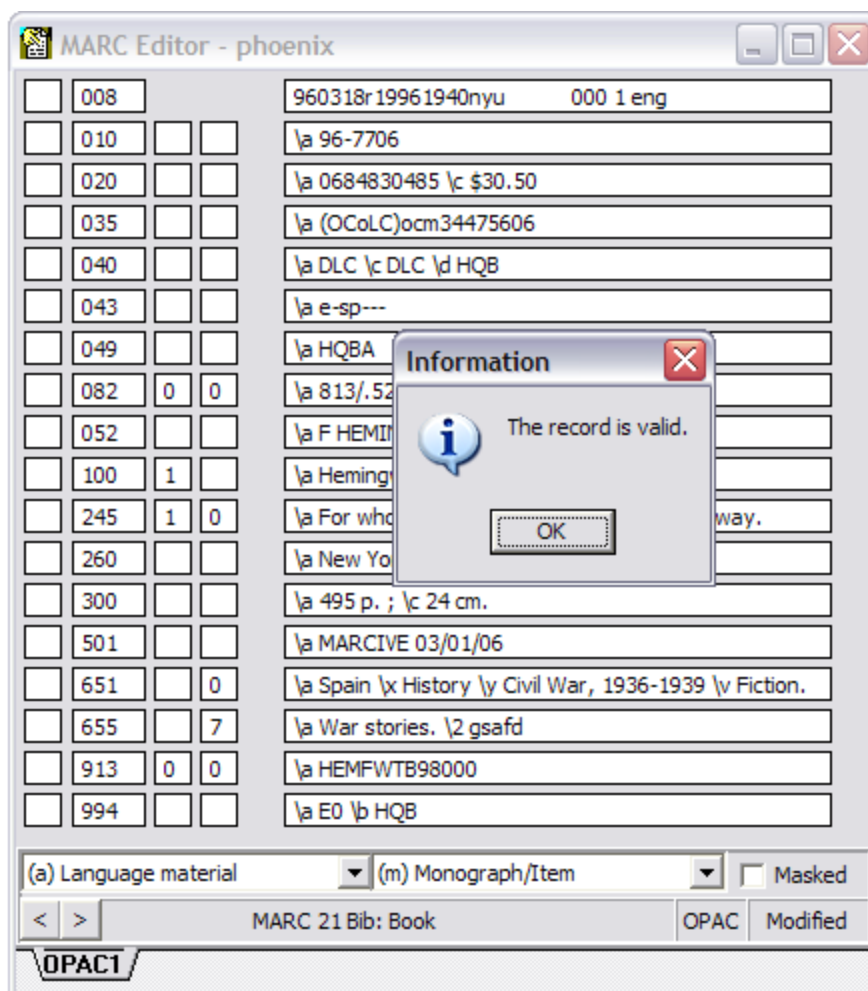


**Note:** If you select Copy, you have to highlight what you're copying in order for it to paste somewhere. It doesn't automatically select the whole message.

Once Validation is complete, click the **OK** button to return to the MARC Editor window.

Correct the errors in the record.

Click the **Validate Record** icon again. If the validation program finds no errors, Virtua prompts you that the record is valid.



The screenshot shows the MARC Editor - phoenix window. The main area displays a MARC record with fields 008 through 994. An 'Information' dialog box is overlaid on the record, displaying a blue information icon and the text 'The record is valid.' with an 'OK' button.

Field	Value
008	960318r19961940nyu 000 1 eng
010	\a 96-7706
020	\a 0684830485 \c \$30.50
035	\a (OCoLC)ocm34475606
040	\a DLC \c DLC \d HQB
043	\a e-sp---
049	\a HQBA
082	0 0 \a 813/.52
052	\a F HEMIN
100	1 \a Heming
245	1 0 \a For who way.
260	\a New Yo
300	\a 495 p. ; \c 24 cm.
501	\a MARCIVE 03/01/06
651	0 \a Spain \x History \y Civil War, 1936-1939 \v Fiction.
655	7 \a War stories. \2 gsafd
913	0 0 \a HEMFWTB98000
994	\a E0 \b HQB

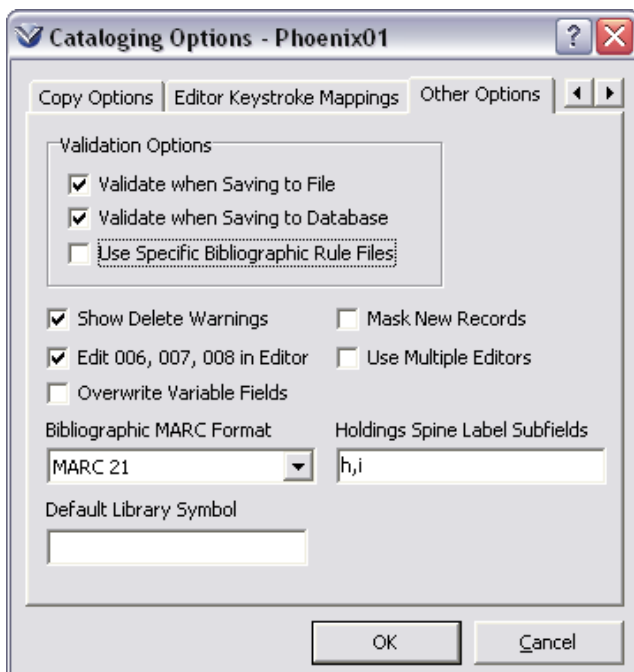
At the bottom of the window, there are dropdown menus for '(a) Language material' and '(m) Monograph/Item', a 'Masked' checkbox, and buttons for '<' '>' 'MARC 21 Bib: Book' 'OPAC' and 'Modified'. A 'OPAC1' label is visible in the bottom left corner.

## Use VERICAT by Setting Cataloging Options

The Virtua client will automatically perform a MARC record format check when a MARC record is saved to a file or to the database under the following conditions:

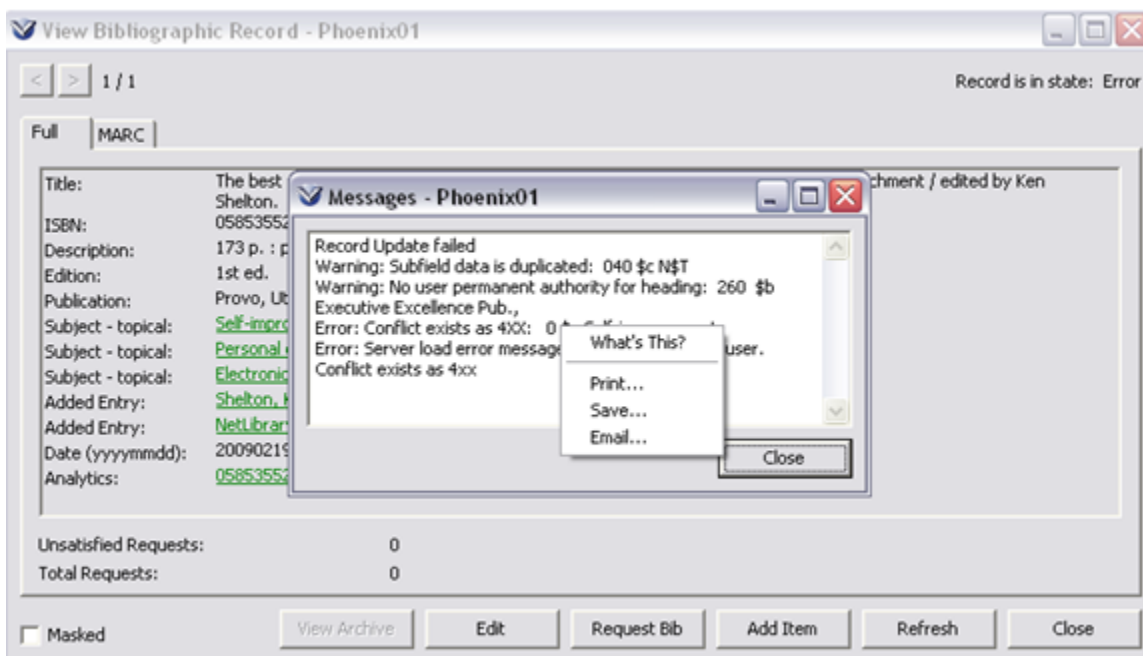
- **If** VERICAT is installed on the workstation
- **AND**
- **If** the appropriate validation options are checked in the Cataloging Options window.

**Note:** If you set up VERICAT to automatically validate records, all MARC format errors must be fixed before Virtua will allow you to save the record to the database.



When a MARC record is saved, Vericat checks for errors. If errors are detected, a message will appear in the **Record Validation Errors** window.

A right mouse click on the **Record Validation Errors** window allows you to print, save, or email the errors.

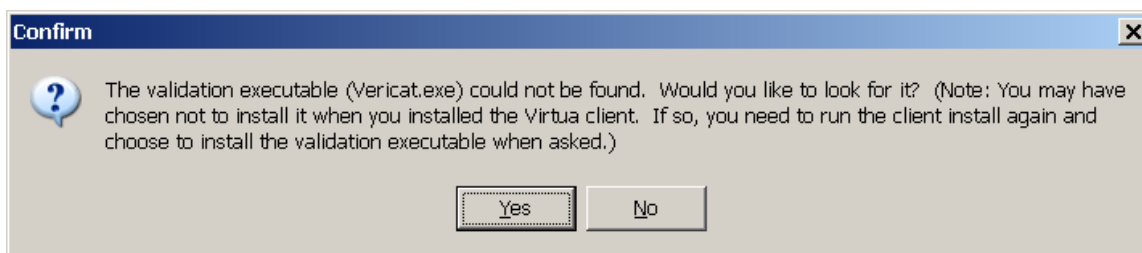




## Messages When VERICAT Is Not Installed

If you try to use VERICAT and the program has not been installed on your workstation, the following messages will appear prompting you to search for the program.

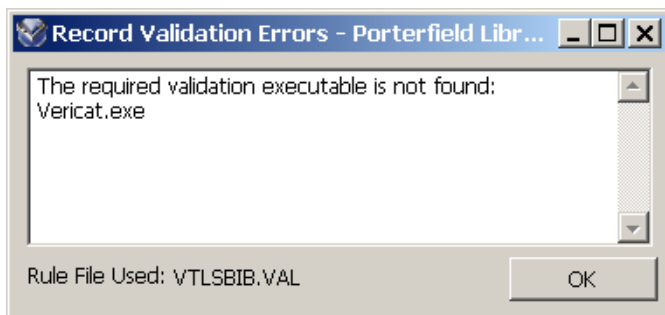
The **Confirm** window will display a message prompting you to look for the program.



If you click the **Yes** button, Windows® will open the standard browse window so that you can navigate to the VERICAT program. It is typically installed under:

**C:/Program Files/Vericat/Vericate.exe**

In addition, the **Record Validation Errors** window will display a message stating that the VERICAT program could not be found.



## Record Validation using Profiler Settings

When MARC records are saved to the database, the Virtua server performs two types of data checks based on parameters set in the *Virtua Profiler*. Unlike VERICAT, which is a program installed on individual workstations, the parameters set in the Profiler reside on the server and affect ALL records saved to the database.

### Record Validation Rules

Virtua checks the validity of MARC record data based on the bibliographic record checks listed in the Record Validation Rules parameter in the *Virtua Profiler*.

Depending on the Action set in the parameter, if the system detects an error, it will:

- **Off:** Do nothing
- **Warn:** Display a diagnostic message
- **Error:** Put the record in Error state

Rule ID	Validation Rule	Action
100007	Subfield required: 010 \a	Warn
100008	Valid LCCN: 010 \a	Off
100009	Valid LCCN - Prefix: 010 \a	Warn
100010	Valid LCCN - Hyphen: 010 \a	Error
100011	Valid LCCN - Digits: 010 \a	Error
100012	ISBN Valid - Numeric: 020 \a	Warn
100013	ISBN Valid - Check Digit: 020 \a	Warn
100014	ISBN Valid - Numeric: 760 \z	Warn

Help Save Cancel

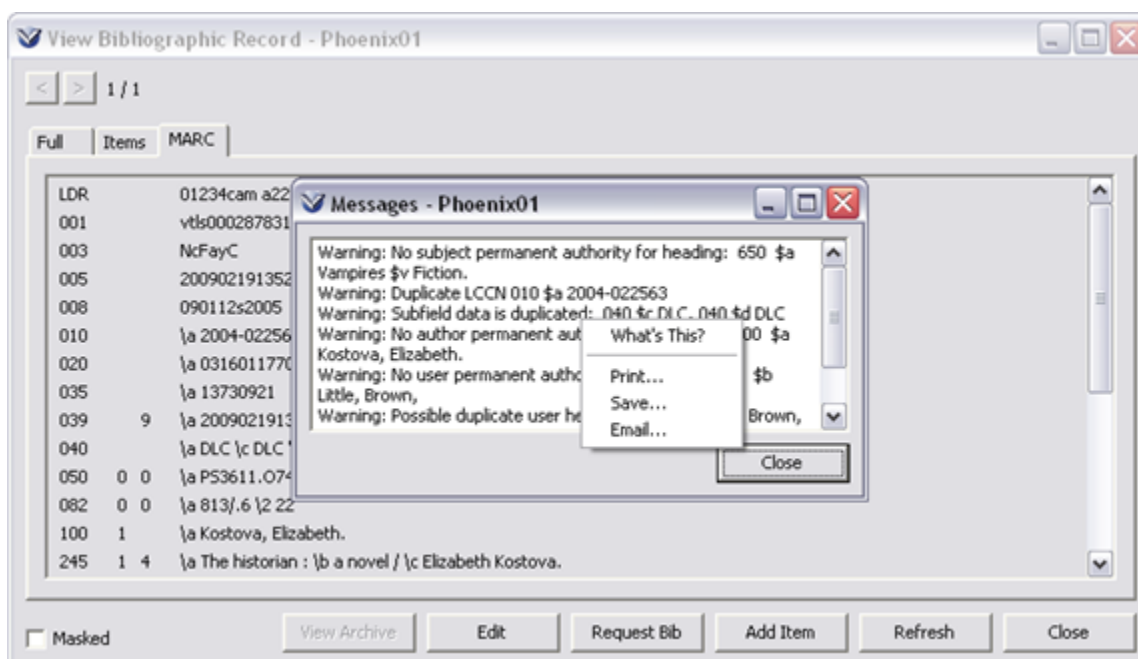
LastModified at 1/27/2009 11:45:45 AM by Root User

## Authority Messages

The server also performs checks related to authority headings. These are based on the settings in the Authority Messages parameter in the *Virtua Profiler*.

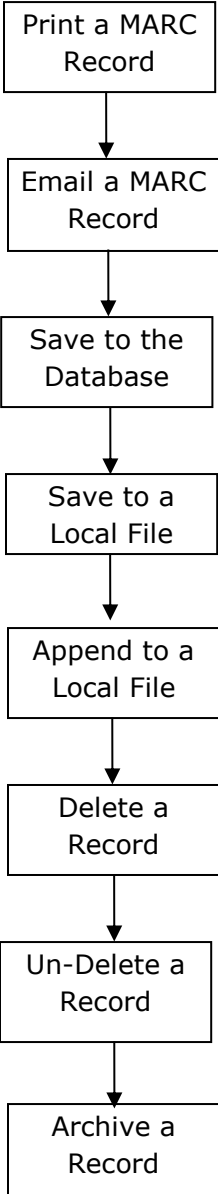
- **Authority Message:** Can be set to report headings that do not have a permanent authority record
- **Heading Replacement Flag:** Can be set to automatically correct possible duplicate headings.
- **MARC Heading Conflict Flag:** Can be set to automatically replace 1xx tags in the bibliographic record with the correct authority heading when the 1xx tag in the bibliographic record is an existing 4xx tag (see reference) in an authority record.
- **New Heading Message:** You can determine which tags will generate a new heading message when authority records are created in the database.

Authority Messages will appear in the **Messages** window when a record is saved to the database.



Messages can be printed, saved or emailed from the right mouse click pop-up menu.

# Print, Save or E-Mail the Record

Recommended Workflow	Explanation
 <pre> graph TD     A[Print a MARC Record] --&gt; B[Email a MARC Record]     B --&gt; C[Save to the Database]     C --&gt; D[Save to a Local File]     D --&gt; E[Append to a Local File]     E --&gt; F[Delete a Record]     F --&gt; G[Un-Delete a Record]     G --&gt; H[Archive a Record] </pre>	<p>Virtua allows MARC records to be printed, emailed, or you can save your record several ways. You can:</p> <ul style="list-style-type: none"> <li>• Save it in textual format</li> <li>• Save it to the database (F11).</li> <li>• Save it as a new local file</li> <li>• Append it to an existing local file of MARC records</li> </ul> <p>In addition, depending on permissions and/or parameters set in the <i>Profiler</i>, you may be able to:</p> <ul style="list-style-type: none"> <li>• Archive records</li> <li>• Delete records</li> <li>• Un-delete records</li> </ul> <p><b>Summary</b></p> <ul style="list-style-type: none"> <li>• Print a MARC record</li> <li>• Email a MARC record</li> <li>• Save MARC records a number of ways</li> <li>• Archive a MARC record</li> <li>• Delete a MARC record</li> <li>• Un-delete a MARC record</li> </ul> <p><b>Key Terms</b></p> <ul style="list-style-type: none"> <li>• MARC Editor</li> </ul> <p><b>Profiler Parameters</b></p> <ul style="list-style-type: none"> <li>• Allow Undelete for MARC Records</li> <li>• Archive Bibliographic Records flag</li> </ul>

## Print, Save, Email, MARC Records

From the **View Record** window, the **MARC Editor** window, and the **Statuses** tab, you can right mouse click to print, email, or save the contents of the record in three possible formats.

- List of Titles
- Full
- MARC

**Note:** Do not confuse this **Save** function with the **Save Record** or **Save to Database** functions, which saves the record in the 2709 MARC communication formats.

## Print the Record

**To access the Print function, from the Full, MARC, or Statuses tab:**

Right mouse click and choose **Print** on the pop-up menu.

The **Print Dialog** box appears:



In the **MARC Editor**, you can choose to print information in three textual formats: Full, MARC, or List of Titles.

To print more than one copy of the document, choose the number of copies in the **Print** window.

Click the **OK** button.

## E-mail the Record

To access the E-mail function, from the Full, MARC, or Statuses tab:

Right mouse click and select **E-mail** from the pop-up menu or select **File → E-Mail** from the Virtua main menu.

The **E-mail Records** dialog box appears:

Select the **Bibliographic Records Format** you wish to e-mail.

Enter the e-mail address of the recipient in the **Send-to** text box.

Enter a subject line for the e-mail in the **Subject** text box.

Click the **OK** button.

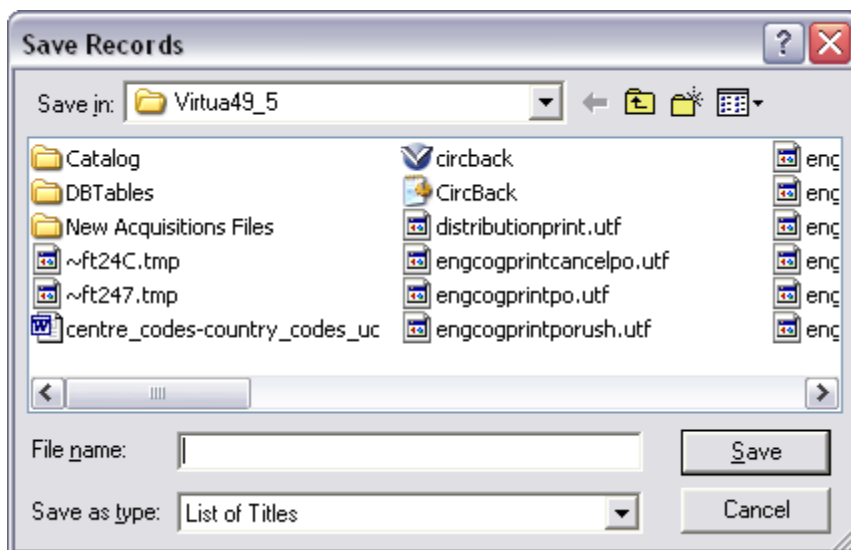
## Save the MARC Record in Textual Format

To access the Save function, from the Full, MARC, or Statuses tab:

**Note:** Do not confuse this **Save** function with the **Save Record** or **Save to Database** functions, which saves the record in the 2709 MARC communication formats.

Right mouse click and choose **Save** on the pop-up menu or select **File → Save** from the Virtua main menu.


The **Save Record** dialog box appears.



Enter a file name and click the **Save** button.

## Save Records in MARC Format

### Save the Record to the Database

Click the **Save to Database** icon , press the **F11** key, or select **File → Save To Database** from the Virtua menu bar.

**Note:** When a new record is saved, a bib-ID is system-assigned. This control number, which is used primarily to track a library's check-out history, is displayed in the 001 tag with a "vtls" prefix.

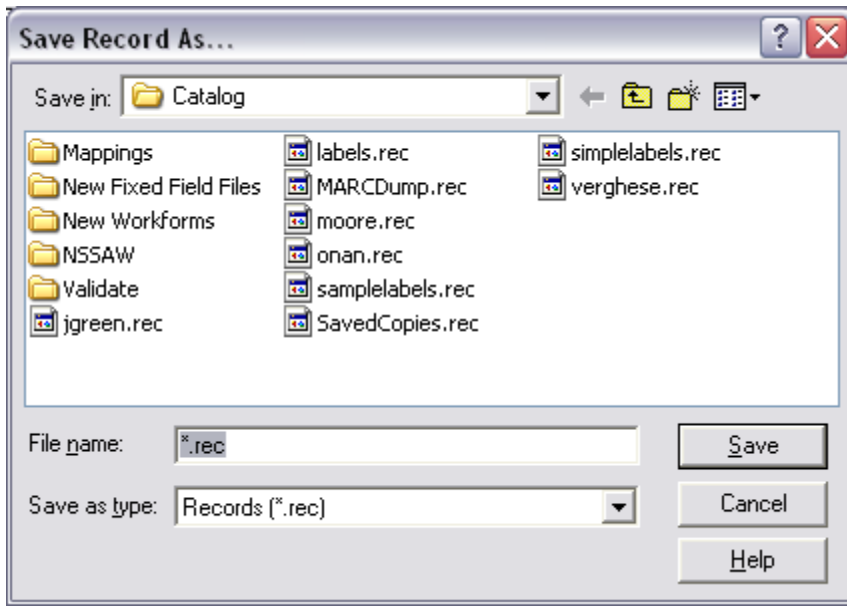
The record is saved immediately to the database, and the **View Record** window appears displaying the MARC tab view of the record you just edited.

**Note:** When the record is saved to the database, VERICAT and the record validation parameters set in the Profiler may be used to validate the record. Error and/or informational messages may appear and depending on your settings, you may need to fix errors before the record will be saved.

### Save Record as a New File

Select **File** on the Virtua menu bar.

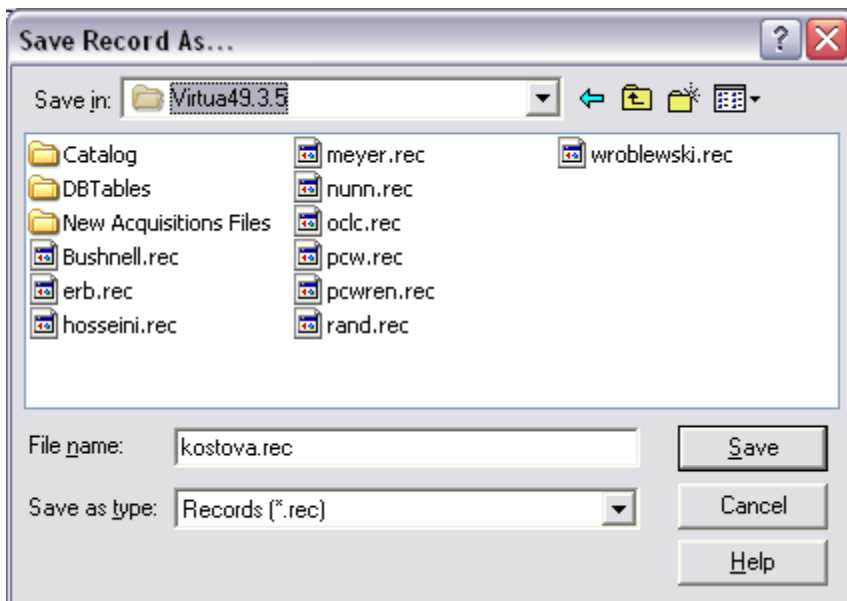
Choose **Save Record As**. The **Save Record As** window appears.



Select the appropriate directory (the default directory will be where you saved the last file).

Type the \*.rec file name to save to in the **File name** textbox.

**Note:** if you save MARC records without adding the extension, Virtua adds the .rec extension.



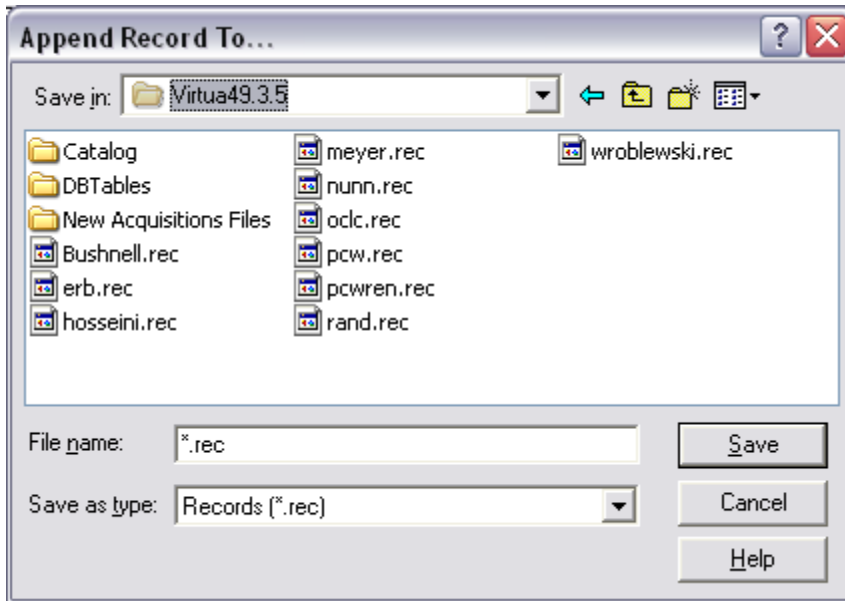
Click the **Save** button.



## Append Record to an Existing File of MARC Records

Select **File** on the Virtua menu bar.

Choose **Append Record To**. The **Append Record To** window appears.



Select the appropriate directory (the default directory will be where you saved the last file).

Select an existing local file to append to.

Click the **Save** button.

## Delete Bibliographic Records

Users with proper permissions can delete a bibliographic record from the database.

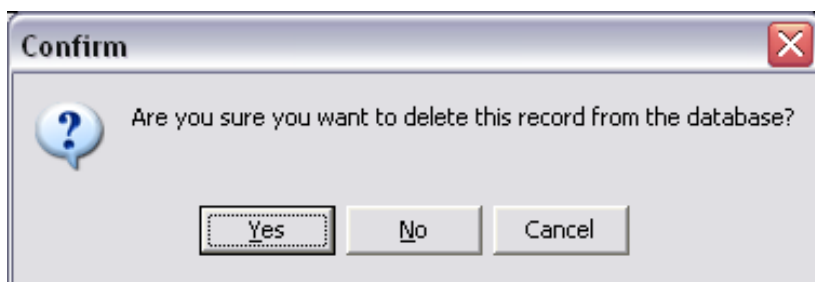
Search the **OPAC** for the record to be deleted.

Display the **View Bibliographic Record** window.

Click the **Edit** button. The record appears in the **MARC Editor**.

Go to **File → Delete Record from Database** on the Virtua menu bar.

A Confirmation window appears:



Click **YES** to confirm the deletion.

**Note:** You cannot delete a bibliographic record from the database if item records or holdings records are attached to the record. For union catalog users, Virtua also prevents the deletion of a bibliographic record if it contains a library symbol.

**Note:** You are able to delete bibliographic records with **Acquisition** status tabs.

## Undelete Bibliographic Records

If the **Allow Undelete for MARC Records** option is turned on in the *Virtua Profiler*, users with proper permissions will be able to undelete MARC records in record state Deleted.

**Profiler Tip:** If the **Allow Undelete for MARC Records** option is turned **off**, records are deleted immediately from the database and **CANNOT** be recovered. The default setting is off. See *Setting the Cataloging Basic Options Parameter: About the Allow Undelete for MARC Records Setting* in the *Virtua Profiler/Cataloging Parameters User's Guide* for more information.

### To undelete a record in the Virtua Client:

Select **Search by State** from the **Search** pull-down menu on the Virtua client main menu.

Select **Deleted Records** as the State on the **Search By State** window.

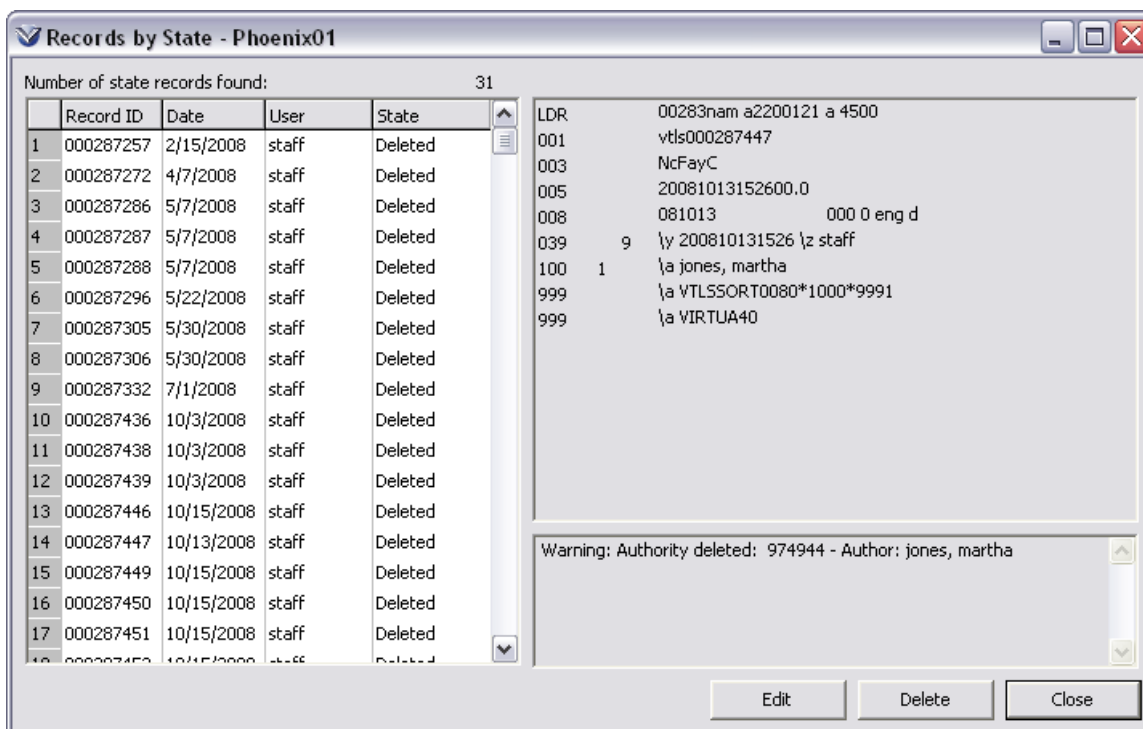
The screenshot shows a dialog box titled "Search by State - Phoenix01". It contains several search criteria:

- Find records of type:** Bib
- System ID:
- In state: Deleted (dropdown menu is open showing Deleted, Error, and Becky's State)
- Cataloged by user:
- With a bib level in:
- With a type in:
- Imported from file:
- Validation Rule Number:
- Cataloged on or after: 2/19/2009
- Cataloged on or before: 2/19/2009

Buttons for Search and Cancel are located at the bottom.

Click the **Search** button.

The **Records by State** window will appear.

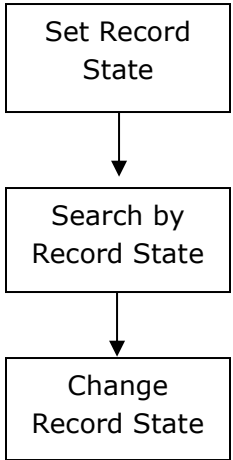


Select the record you wish to undelete.

Click the **Edit** button to bring the deleted record into the **MARC Editor**.

Press **F11** to re-save the record to the database.

# Record States

Recommended Workflow	Explanation
 <pre> graph TD     A[Set Record State] --&gt; B[Search by Record State]     B --&gt; C[Change Record State]   </pre>	<p>To aid your library or union catalog in the management of cataloging tasks, Virtua offers a feature called record state management. Record states allow your library to create and assign flags or states to records to specify how these records are viewed, stored, or edited.</p> <p>The software supports record states for:</p> <ul style="list-style-type: none"> <li>• Authority records</li> <li>• Bibliographic records</li> <li>• Patron records</li> </ul> <p>The software <b>does not</b> support record state for</p> <ul style="list-style-type: none"> <li>• Holdings records</li> <li>• Item records</li> </ul> <p>In a future release you will be able to generate a report using InfoStation® that describes the status of records in a given state in the database.</p> <p><b>Summary</b></p> <ul style="list-style-type: none"> <li>• Set Record States</li> <li>• Search for records in a given state.</li> <li>• Set the record state as a load option in the Client.</li> </ul> <p><b>Key Terms</b></p> <ul style="list-style-type: none"> <li>• Load Options</li> <li>• Record States</li> </ul>

## About Record States

Virtua allows the user to assign states to cataloging records as they are saved to the database. The following states are available:

Two states are system assigned and cannot be edited or deleted:

- **Error:** Indicates that the record has not been completely processed because of some error that the system encountered. The record must be corrected and reprocessed.
- **Process Immediately:** The record is saved directly to the database and does not have a record state assigned.

Six states can be edited or deleted in the *Virtua Profiler*. The record states that come with Virtua are:

- **Review 1:** First level of the review process
- **Review 2:** Second level of the review process
- **Review 3:** Third level of the review process
- **Review 4:** Fourth level of the review process
- **Overnight:** Record will not be processed immediately upon being saved to the database. Instead, a program executed during the evening will process a batch of records together.
- **Wait:** Indicates that the cataloger of the record is not currently working on the record, but intends to come back and finish it later.

Additional record states may be added in the *Virtua Profiler*:

For example, you might want to review the work of a junior cataloger. You can create a record state with their name and assign a senior cataloger to review their work. Once the work has been reviewed, the senior cataloger can save the records to the database.

**Profiler Tip:** You can define record states, edit or delete the default states, and define additional states via the Record States parameter. See *Configuring Record States: Working with the Record States Parameter in the Virtua Profiler/Cataloging Parameters User's Guide* for more information.

## Setting Record States

Select **Options** → **Load Options** from the Virtua Main menu.

Click the **General** tab.

The screenshot shows a dialog box titled "Load Options - Phoenix01" 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 active. Inside the dialog, there are four rows of settings:

- Character Set: [Empty dropdown menu]
- Date Entered Flag: [Empty dropdown menu]
- Load Options File: [Empty text field]
- Record State: [Dropdown menu showing "Process immediately" and "Becky's State" options]

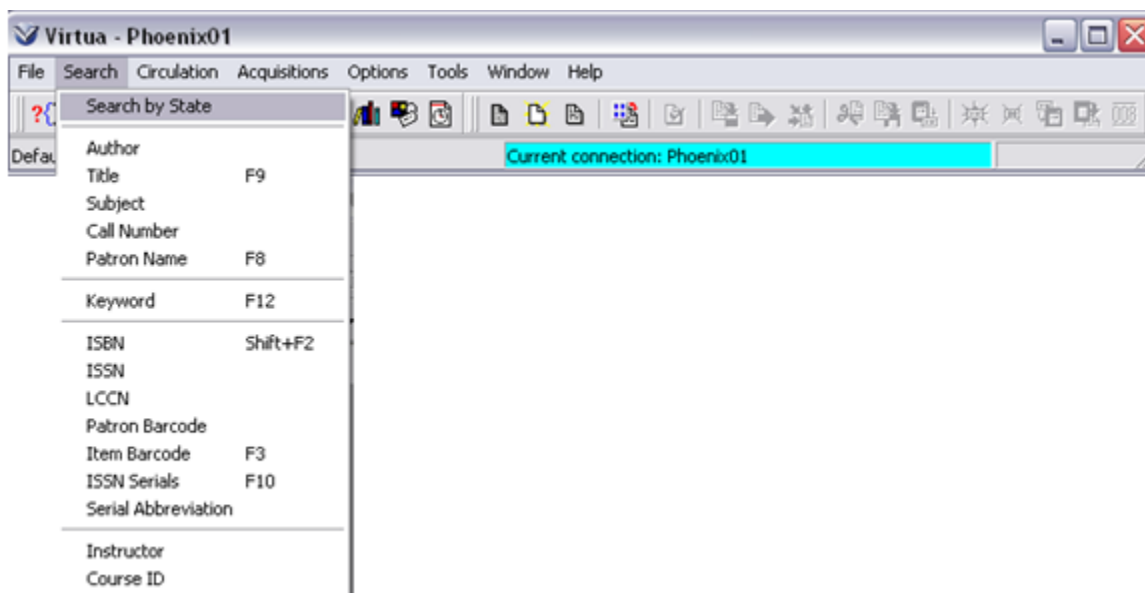
At the bottom right of the dialog are two buttons: "OK" and "Cancel".

Click the **Record State** check box to enable the drop down and select one of the options.

Click **OK**. All records saved to the database **from the configured workstation** will be saved with the selected state. This setting is persistent and will remain in effect on this workstation until changed.

## Search by Record States

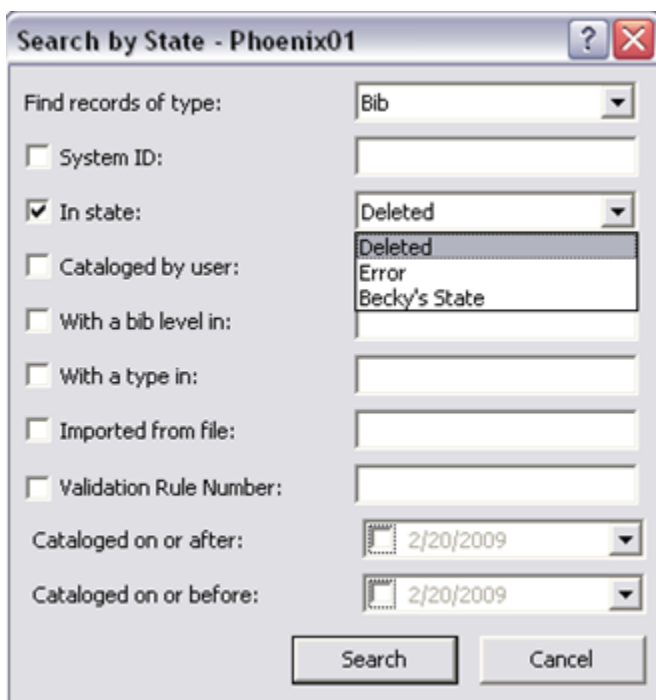
Select **Search** → **Search by State** from the Virtua main menu.



Select a record type, such as bibliographic records, from **Find records of type**.

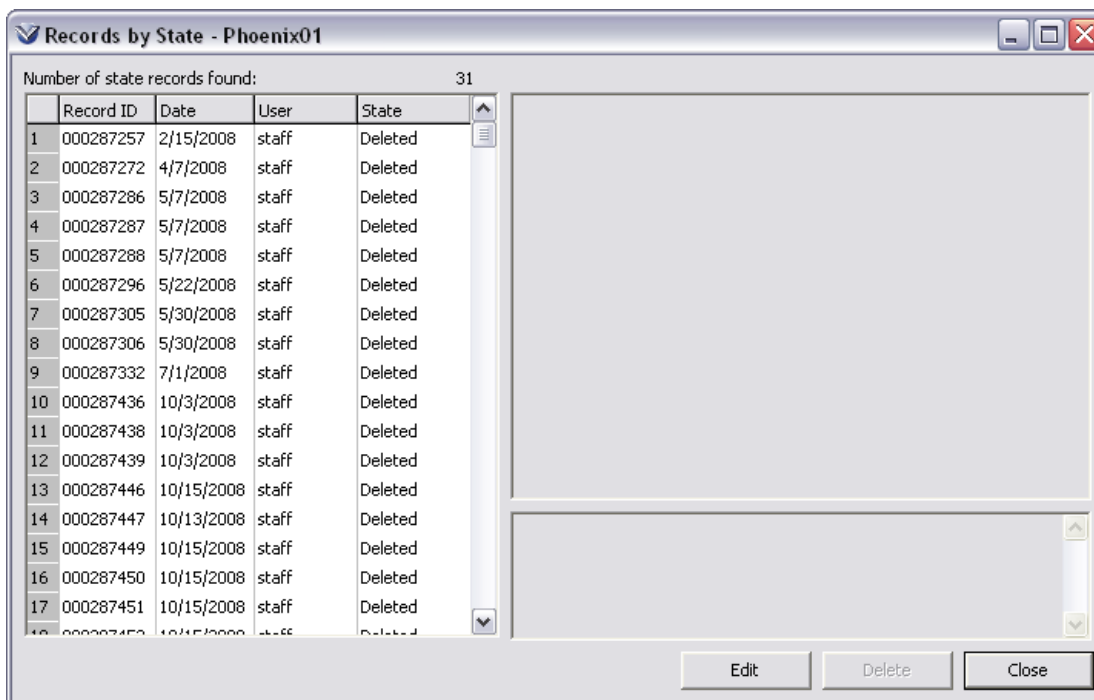
Click the **In State** check box to enable the drop-down list.

Select a type of state such as **Deleted**.

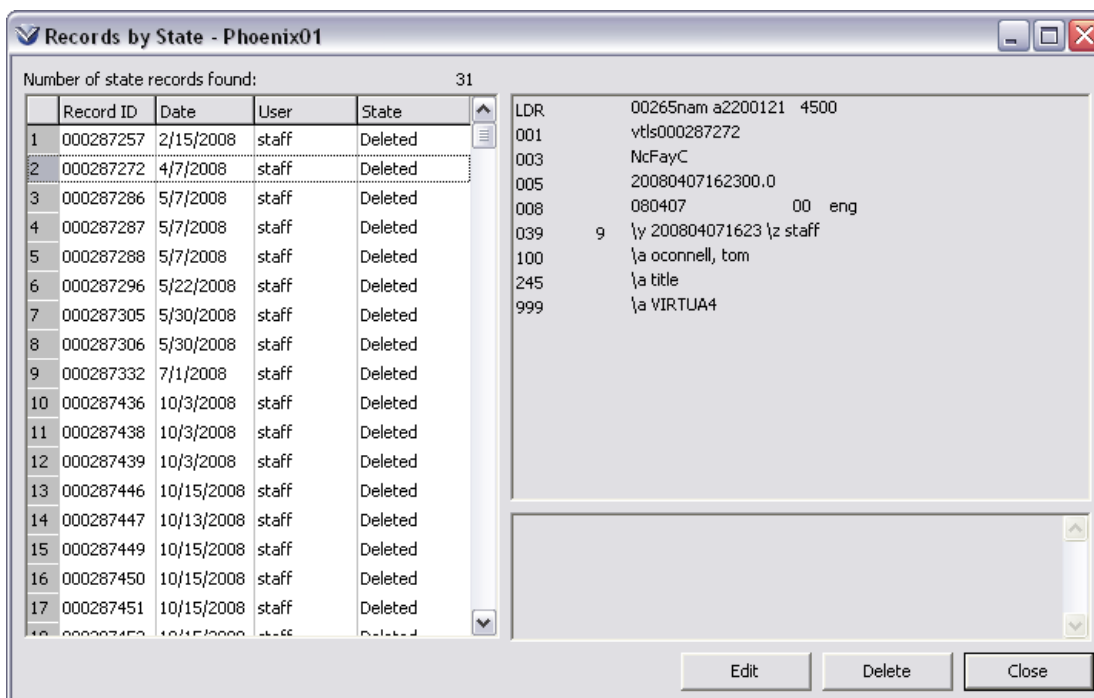




Click the **Search** button. The **Records by State** window will appear.



From the search results, select the record to edit. A view of the MARC record will appear on the right side of the window.



Click **Edit** to bring the record into the **MARC Editor**.

## Errors When Saving MARC Records

If an error occurs that prohibits you from saving a record to the server (e.g. 1xx/4xx conflict), the record is removed from the **MARC Editor** and it is placed in Error State.

**Note:** One common reason for records in error state is a **1xx/4xx conflict**. When a bibliographic record is saved to the database, Virtua identifies all terms (e.g. 6xx tags) 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 (see reference), 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). For more information on 1xx/4xx conflicts see the *Cataloging: Configuration and Authority Control* Training Manual.

### To correct the record:

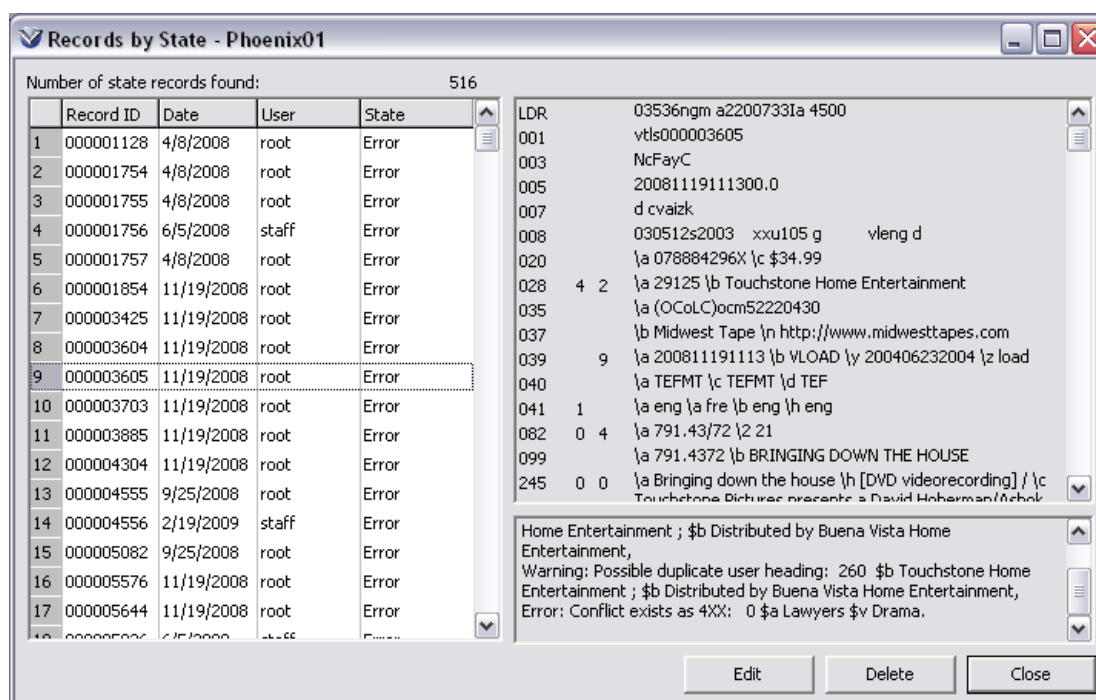
From the Virtua client, select **Search** → **Search by State**.

Select a record type from the **Find records of type** dropdown.

Click the **In State** check box and select **Error** from the dropdown.

Limit the search by a date range (optional).

Click the **Search** button. The **Records by State** window will appear.



**Note:** The bottom right corner of the screen may contain information about why the record went into Error State. If it does not, you may need to run the **Cataloging Errors InfoStation Report** to identify the error.

Select the record and click the **Edit** button to bring the record into the **MARC Editor**.

Correct the record and save.

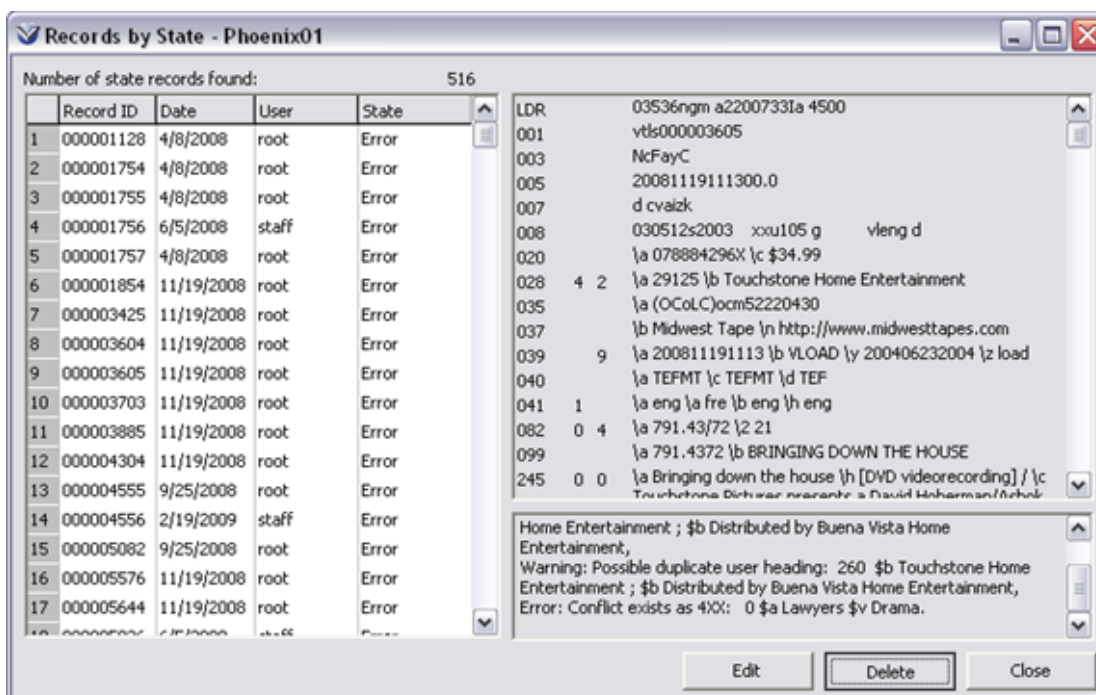
## Delete State Records

From the **Records by State** window it is possible to delete records that are in a record state.

Select the record that you wish to delete. The MARC record will appear in the right-hand window.

Click the **Delete** button.

- **If** the record was an existing record in the database, the record will revert to the original.
- **If** the record is in error state record with no base record, it disappears entirely.



## Change Record States

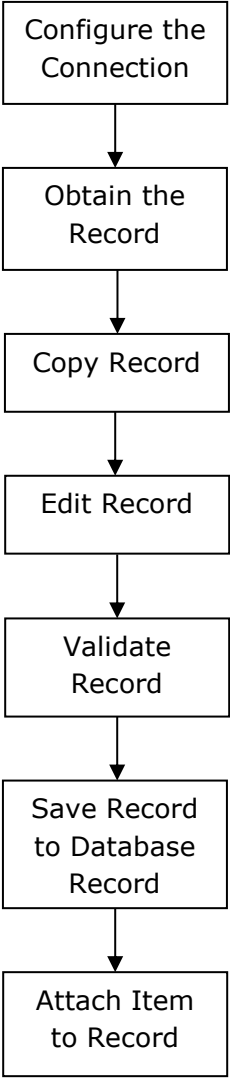
Select **Options** → **Load Options** for the Virtua Main menu. Click on the **General** tab.

Select the **state to which you want to save the record** or select **Process Immediately** to save the record to the database

From the **Record States** window, click on **Edit** to open the record to be changed in **MARC Editor**.

Review or correct the record. Save the record. The record will be saved with the state set on the **General** tab of the **Load Options** window.

# Copy Z39.50 Records Workflow

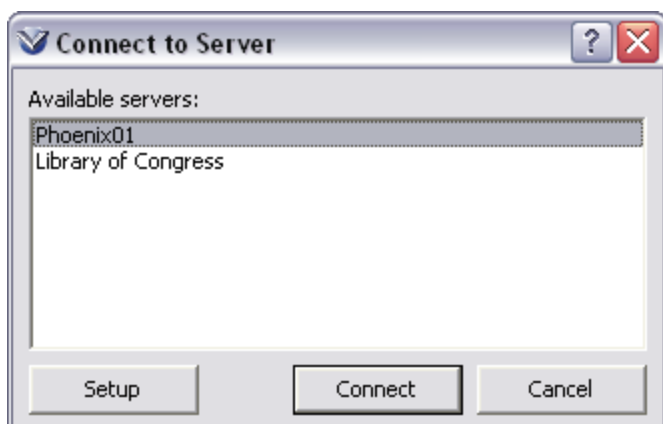
Recommended Workflow	Explanation
 <pre> graph TD     A[Configure the Connection] --&gt; B[Obtain the Record]     B --&gt; C[Copy Record]     C --&gt; D[Edit Record]     D --&gt; E[Validate Record]     E --&gt; F[Save Record to Database Record]     F --&gt; G[Attach Item to Record] </pre>	<p>The Z39.50 workflow enables you to copy MARC records from other Z39.50 databases into your Virtua database. One example of a Z39.50 database from which you might obtain records is the Library of Congress.</p> <p><b>Z39.50</b> refers to the International Standard, ISO 23950. The standard specifies a client/server-based protocol for searching and retrieving information from remote databases.</p> <p>A list of Z39.50 servers, is maintained by IndexData, a software library that provides the necessary infrastructure for creating Z39.50 targets (servers) and origins (clients): <a href="http://www.indexdata.dk/targettest/">http://www.indexdata.dk/targettest/</a></p> <p><b>Summary</b></p> <ul style="list-style-type: none"> <li>• Configure a Connection to a Z39.50 database</li> <li>• Connect to a Z39.50 database</li> <li>• Obtain a record from a Z39.50 database</li> <li>• Duplicate the record in Virtua</li> <li>• Save the Record to a Virtua database</li> </ul> <p><b>Key Terms</b></p> <ul style="list-style-type: none"> <li>• Duplicate Record</li> <li>• Host Name</li> <li>• Multiple Connections</li> <li>• Port</li> <li>• Profile Name</li> <li>• Z39.50</li> </ul> <p><b>Profiler Parameters</b></p> <p><b>Tags to be Deleted:</b> specifies tags and/or subfields to be deleted from incoming records based on the source of record (003 tag).</p>

## Configure a Connection

To configure a new connection, all existing connections must be closed first.

To close the existing connection, select **File → Close Connection** from the Virtua main menu.

Click on **File → New Connection**. The **Connect to Server** window appears.



To add databases to the connection list, click on the **Setup** button to display the **Server Setup** dialog box.

Click the **New** button to create a new connection.

Type in the Profile name, Description (name appears in the Connection List box), Host name or IP address of the database, and enter the port number of the database.

- **Attribute Configuration** - allows you to add any non-standard Z39.50 use attributes for use when searching non-Virtua databases.

To add a use attribute, enter the following information in the New Attribute area:

- **Search Type:** From the drop-down box, select Browse, Keyword, or Both to specify with which search type(s) the use attribute should be associated.
- **Attribute:** In the text box, type the number representing the use attribute to be used for the search.
- **Name:** In the text box, type a text string that will appear for the use attribute on the Search window.

When you have entered all of the required information, click the **Add** button. The new attribute information you entered will appear in the information box immediately above the New Attribute area. When you connect to the configured server, the attribute name(s) will appear on the appropriate tab(s) of the OPAC Search window.

The default database textbox should either be empty or contain the name of the database provided by the library or bibliographic utility.

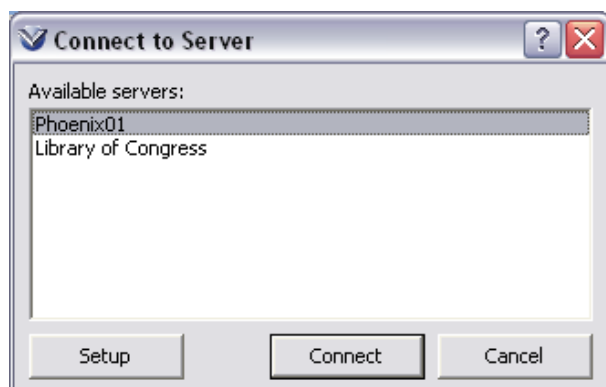
**Note:** Configure the Default Load Character Set to specify in which character set the server you are configuring will store its records. If MARC 21 is selected, record will be converted to UTF8 when downloaded to your server.

**Note:** The *Connect as a Generic Z39.50 Client (requires Guest login)* option allows you to connect to an older Virtua database with a newer Virtua client. As a Guest, you have privileges that are determined by the Guest User Profile, which you can configure via the *Virtua Profiler*.

Click **Save** and then **OK** to return to the **Connect to Server** window.

## Obtain Record from Z39.50 Database

Select **File → New Connection** on the Virtua menu bar to connect to your local database. The **Connect to Server** window will appear.



Select the appropriate database and click the **Connect** button.

Select **File → New Connection** on the Virtua menu bar to connect to a Z39.50 database.

You may repeat this process to open more databases.

You must set as the default, the Z39.50 database you wish to obtain records **from**. Select **File → Connection List** from the main menu. The **Connection List** window will appear.




**Note:** The last database to be connected is the default database unless changed.

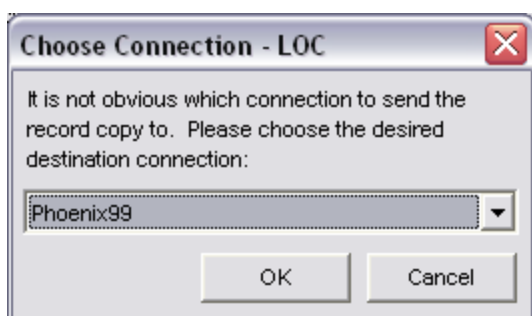
Click **Close** to exit out of the **List of Connections** window.

Search the **OPAC** for the desired record.

## Copy to Local Database

Open the record in the **MARC Editor**. Click the **Save Copy to Database**  icon.

If two connections are open Virtua will automatically save the record into the other database. If more than two connections are open, Virtua will display the following window:



From the dropdown menu, chose the Virtua database to which you wish to add the record.

Click **OK** to save the copied record.

## Edit the MARC Record

See [Record Validation](#) for more information.

## Validate the Record

See [Record Validation](#) for more information.

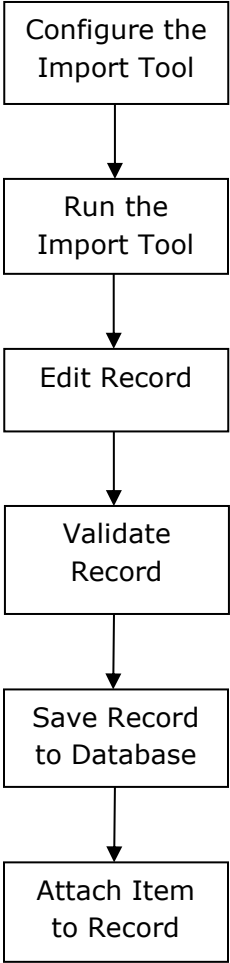
## Save the Record

See [Record Validation](#) for more information.


## Add Item Record

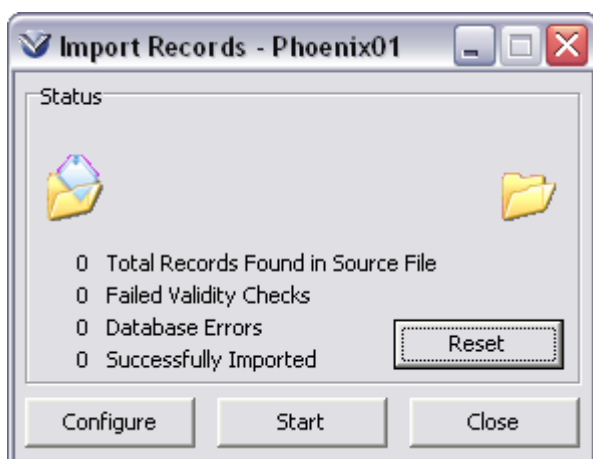
See [Record Validation](#) for more information.

# Bibliographic Utility Workflow

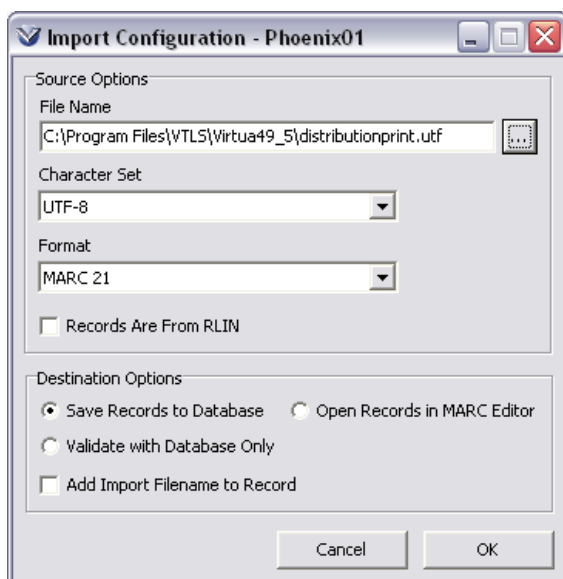
Recommended Workflow	Explanation
 <pre> graph TD     A[Configure the Import Tool] --&gt; B[Run the Import Tool]     B --&gt; C[Edit Record]     C --&gt; D[Validate Record]     D --&gt; E[Save Record to Database]     E --&gt; F[Attach Item to Record] </pre>	<p>The bibliographic utility workflow is used for importing into Virtua a file of MARC records that resides on a locally accessible drive. These records may have been downloaded from OCLC or another bibliographic utility or may have been received from a vendor or other source. Provided the records are in MARC 2709 format, they may be imported into Virtua using the Import Records Tool.</p> <p><b>Summary</b></p> <ul style="list-style-type: none"> <li>• Configure the Import Tool</li> <li>• Import records into Virtua using Import Tool</li> <li>• Automatically save records to the database</li> <li>• Open records in the MARC Editor</li> </ul> <p><b>Key Terms</b></p> <ul style="list-style-type: none"> <li>• 2709 MARC Communications Format</li> <li>• Character Set</li> <li>• Import Records</li> <li>• Import Tool</li> <li>• UNICODE (UTF-8)</li> </ul> <p><b>Profiler Parameters</b></p> <ul style="list-style-type: none"> <li>• <b>Value for 003:</b> Sets the value of the 003 tag for records exported from the Virtua database or displayed in the MARC Editor.</li> <li>• <b>Tags to be Deleted:</b> Determines which tags are automatically deleted from records, as they are loaded to your database.</li> </ul>


## Configure the Import Tool

Click the **Import Record** icon  on the cataloging toolbar or, select **File → Records → Import Records** on the Virtua menu bar. The **Import Records** window appears.



Click the **Configure** button. The **Import Configuration** window appears.



Under **Source Options**, select the name of the file containing the 2709 MARC communications format records. Click the  button to browse for the file.

Select the **Character Set** of the incoming records. Virtua supports UTF-8 (Unicode) character sets. All other character sets must be translated into UTF-8 (Unicode) format.

**Note:** If records are encoded in a character set that Virtua does not support, you will not be able to preview them until you translate them to the Unicode (UTF-8) character set

When importing RLIN records, check the **Records are from RLIN** checkbox as some RLIN records have surrounding characters that must be compensated for and others don't.

Under **Destination Options**, you have three options. You may select **one** of the following

- Save Records to Database
- Open Records in MARC Editor or
- Validate with Database only

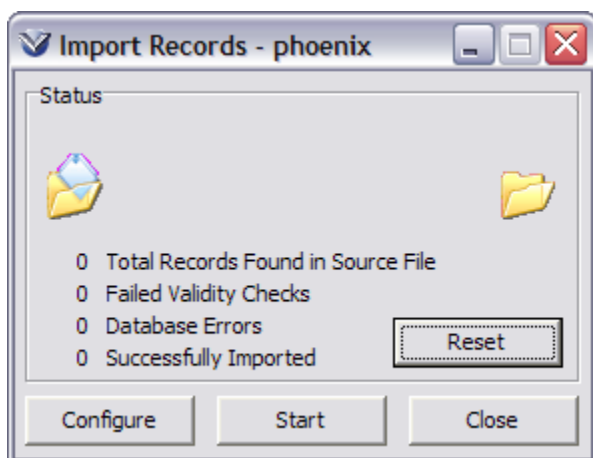
Check **Add Import File Name to Record** if you want the filename to appear in the 856 subfield /n tag of the record

Click the **OK** button.

## Run the Import Tool

Click the **Start** button in the **Import Records** window. The animation at the top of the window indicates Virtua is waiting for records. The animation will not stop even after all the records have been successfully imported.

The **Import Records** window keeps track of the number of records successfully loaded, records that fail validity checks, and the number of database errors.



When the number of records ceases to increment, click the **Stop** button.

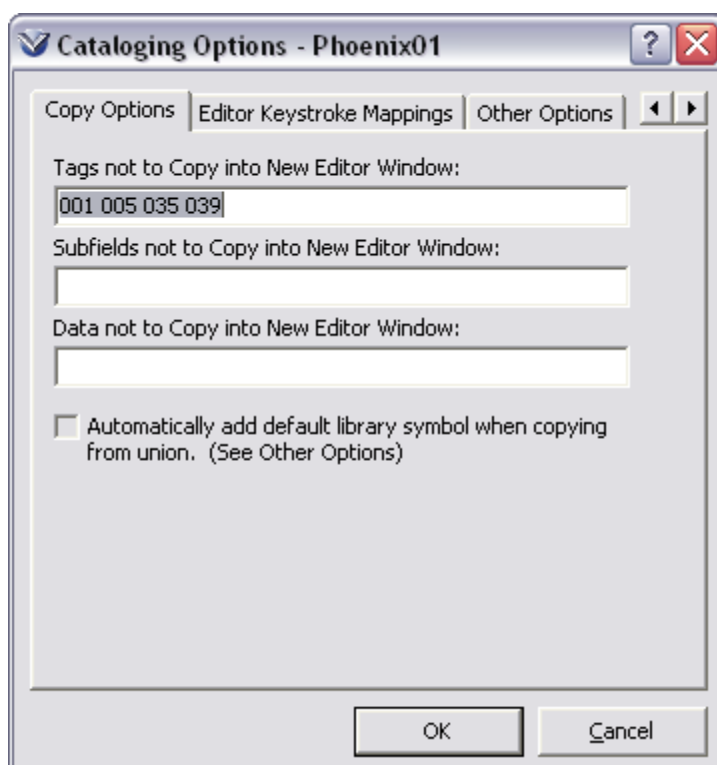
**Note:** To stop the Import process before all records are loaded, click the **Stop** button on the **Import Records** window. When you restart the batch load process, Virtua detects and loads any records that were not saved to the database prior to the stoppage.

## Edit the MARC Record

See [Original Cataloging Workflow: Edit the MARC Record](#). Validation may be performed: see [Record Validation](#) for more information.

## Save the Record

When saving a record from a bibliographic utility, the Virtua client takes the information from the 001 and 003 tags of the incoming record and moves it to the 035 tag of the record. This allows you to save information about the origin of the record.



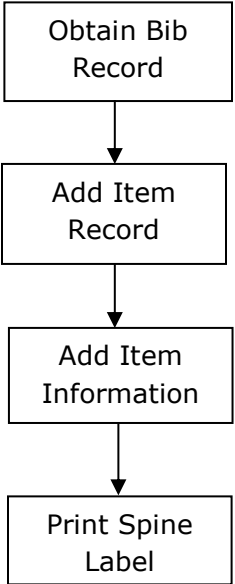
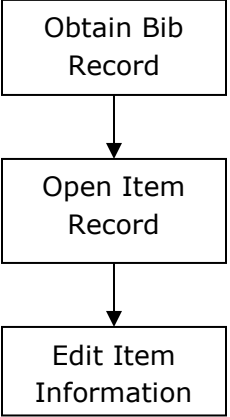
## Add Item Record

From the **View Record** window, click the **Add Items** tab. The **Item Information** window appears displaying default values for the mandatory item elements.

Modify Item record data. See [Record States: Change Record States](#) for more information.

Save Item record.

# Item Records

Recommended Workflow	Explanation
<p><b>Add Item Records</b></p>  <pre> graph TD     A[Obtain Bib Record] --&gt; B[Add Item Record]     B --&gt; C[Add Item Information]     C --&gt; D[Print Spine Label]   </pre> <p><b>Edit Item Records</b></p>  <pre> graph TD     E[Obtain Bib Record] --&gt; F[Open Item Record]     F --&gt; G[Edit Item Information]   </pre>	<p>An item record is a record that describes a physical or virtual piece in your library's collection. The item can consist of a single piece, such as a book, or of multiple pieces in one or more physical formats, such as a multi-CD set with an accompanying printed pamphlet.</p> <p><b>Summary</b></p> <ul style="list-style-type: none"> <li>• Open and edit an Item Record</li> <li>• Add a new Item Record</li> <li>• Relate specific item information to its corresponding tab</li> <li>• Add Statuses to an Item</li> <li>• Add Notes to an Item</li> <li>• Generate a Spine Label</li> </ul> <p><b>Key Terms</b></p> <ul style="list-style-type: none"> <li>• Circulation Notes</li> <li>• Item Class</li> <li>• Item Record</li> <li>• Owning Location</li> <li>• Shelving Location</li> <li>• Spine label</li> <li>• Units</li> </ul> <p><b>Global Settings</b></p> <ul style="list-style-type: none"> <li>• Library Names</li> <li>• Status Displays</li> </ul>

Recommended Workflow	Explanation (cont.)
	<p><b>Circulation Parameters</b></p> <ul style="list-style-type: none"> <li>• <b>System:</b> Item Class Definitions, Delete/Waive Flags, Long Loan Flag</li> <li>• <b>Cataloging:</b> For Items With No Item-level Call Number, Retain Old Call Number When Relinking</li> </ul> <p><b>InfoStation Reports</b></p> <ul style="list-style-type: none"> <li>• <b>Change Item Location by Call Number Range:</b> Lets you change the location and shelf location in item records identified by the item-level call number range specified in the report configuration.</li> <li>• <b>Item Barcode List:</b> Generates a list of items identified by barcodes that fall within a barcode range specified in the report configuration.</li> <li>• <b>Items Created List:</b> Generates a list of items that were created within a specified date range or that have a barcode that falls within a specified barcode N range.</li> </ul>

## Add Item Record

The item record is vital for the proper functioning of Circulation and for generating spine labels. The **Item Information** window gives details about a physical or virtual piece in a library collection. While all copies of one title may have identical bibliographic information, other types of information are unique and differ from copy to copy.

From the **View Bibliographic Record** window, click the **Add Items** button. The **Item Information** window appears displaying default values for the mandatory item elements.

The screenshot shows the 'Item Information - phoenix' window with the following fields and values:

- Bibliographic Information:**
  - Title: Gothic classics / edited by Tom Pomplun.
  - Publisher: Mount Horeb, Wis. : Eureka Productions, 2007.
  - Description: 144 p. : ill. ; 25 cm.
- Item Information:**
  - Item ID: 918421
  - Barcode: 31781041121276
  - Barcode Type: Regular
  - Item Class: Book
  - Reserves Item Class: (empty)
  - Item URL: (empty)
  - Location: Hope Mills
  - Shelving Location: Hope Mills
  - Number of Pieces: 1
  - Circulate Pieces: (checkbox unchecked)
  - Price: \$ 16.95
  - EPN Number: (empty)
  - Accession Number: (empty)
  - AV Accession Number: (empty)
  - Collection Code: (empty)
- Call Number:**
  - Copy: (empty)
  - Call #: F GOTHIC
  - 2nd Call #: (empty)
- Units:**
  - Free Text: (radio button unchecked)
  - Enumeration and Chronology: (radio button unchecked)
  - None: (radio button checked)
  - Edit: (button)
- Preservation and Conservation:**
  - Code: (empty)
- Non-Parameterized Shelf Location:**
  - Location: (empty)
- Circulation Rules:**
  - Use Matrix: (radio button checked)
  - Use Loan Period: 0
  - Allow Request: (checkbox checked)

At the bottom of the window, there are buttons for 'Delete', 'Save', 'Refresh', and 'Close', along with a 'Masked' checkbox.

When you click the **Add Item** Button, the **Item Information** window contains an area at the bottom of the window to create multiple items. This area does not display when you select View Item from the **View Bibliographic Record** window.



**Note:** When adding the first item to a holdings record, the location value is taken from subfield \$b of the 852 tag in the holdings record instead of the login location.

## Item Elements Tab

The **Item Elements** tab contains bibliographic, item, and call number information, and circulation rules.

- **Barcode:** Displays the barcode assigned to this item. Enter an alphanumeric string up to 50 characters long. This field is optional, but an item cannot circulate without a barcode.

**Profiler Tip:** The Generate Item Barcode Using Prefix setting lets you determine whether Virtua will automatically generate barcodes for item records and whether the barcodes will have an alphanumeric prefix. See *Setting the Cataloging Basic Options Parameter: About the Generate Item Barcode Using Prefix Setting* in the *Virtua Profiler/Cataloging Parameters User's Guide* for more information.

- **Item Class:** Item records have 2 item classes. The main item class determines how the item circulates in Regular circumstances. The Reserves Item Class is set in the *Virtua Profiler* for each Item Class and will automatically be assigned when the book is placed on Reserve.

**Profiler Tip:** Using the Item Class Definitions parameter, you can define settings for each item class used in your library. See *Working With Class Item Definitions* in the *Virtua Profiler: Circulation Parameters User's Guide* for more information.

- **Shelving Location:** All item records contain two location fields: Location and Shelving Location. The distinction between the two is that the shelving location always determines what circulation parameters are applied during a transaction. This is the field that should be displayed in the item list box of an Items tab in a **View Record** window. This value represents the actual physical location of the item.

The image shows a screenshot of a web interface with two dropdown menus. The top dropdown is labeled 'Location:' and has 'Headquarters' selected. The bottom dropdown is labeled 'Shelving Location:' and also has 'Headquarters' selected. A black arrow points from the right towards the 'Shelving Location' dropdown menu.

**Note:** The **Location** drop-down list is limited to locations that are valid login locations for the current user (as specified via the User Profiles parameter in the *Virtua Profiler*).

**Profiler Tip:** The Location Names parameter lets you define library locations and represent the physical and/or virtual locations of library materials. Using the Location Names parameter, you can set up both main locations and sublocations. Library locations and their codes reside in the Location Names

parameter, which is located on the Global Settings tab of the *Virtua Profiler*. See *Working With Class Item Definitions* in the *Virtua Profiler: Global Settings User's Guide* for more information.

The **At Shelving Location Until** check box is active only if the **Shelving Location** and the **Location** fields contain different values. The assumption is that if the **Shelving Location** is different from the **Location**, this is a temporary condition. The **At Shelving Location Until** date field displays the date that the item is due to be moved from the shelving location to the owning location. This field appears only if the shelving location is different from the permanent location. If the item is on reserve, the At Shelving Location date is the end date of the reserve active period.

The screenshot shows a form with three fields. The first field is labeled 'Location:' and has a dropdown menu with 'Headquarters' selected. The second field is labeled 'Shelving Location:' and has a dropdown menu with 'East Regional' selected. The third field is labeled 'At Shelving Location Until' and has a date '9/23/2013' selected. A checkmark is visible to the left of the 'At Shelving Location Until' label.

- **Non-Parameterized Shelf Location:** Lets you choose a shelf location that is associated with the item but that is not associated with Virtua's existing parameterized shelving location functionality. Non-parameterized shelf locations must be defined in the *Virtua Profiler* (Under **Cataloging**, see '**Non-Parameterized Shelf Locations**'). If no locations are defined, the feature is disabled on the Item-Information window.

**Profiler Tip:** The Non-Parameterized Shelf Locations parameter lets you specify shelf locations that are not parameterized. The shelf locations configured in the *Virtua Profiler* will populate a drop-down list on the Item Information window in the client. In this way, you can associate a non-parameterized shelf location with the current item. See *Setting Non-Parameterized Shelf Locations* in the *Virtua Profiler: Cataloging Parameters User's Guide* for more information.

- **Call Number:** Displays the call number assigned to the item. This primary call number may be inherited from a parent bibliographic or holdings record.

**Profiler Tip:** The Virtua Cataloging subsystem offers several configurable settings to adjust the system's call number settings to match your library's needs. See *Setting Call Number Parameters* in the *Virtua Profiler/Cataloging Parameters User's Guide* for more information.

- **Units:** This is a free text field for use with a multi-volume work. It performs the same function as the 866 tag in the holdings record. To have a Units column display in the **View Record** window, configure the **View Record/View Holdings Record** view (Items tabular display) in the Profiler.

- **Price:** Displays the price of the item. Enter a number ranging from 0 (zero) through 9999.99. This field is used for billing a patron for the replacement of an item that has not been returned.

**Profiler Tip:** When a patron checks out an item and does not return it within the specified period of time, your library can bill the patron for the replacement cost of the item. See *Working with the Location + Item Matrix: About Item Replacement Values* in the *Virtua Profiler/Circulation Parameters User's Guide* for more information.

- **EPN Number:** An optional alphanumeric identification number that you can assign to an item and later search for via a control number search. [The EPN is the Bib ID of the associated record in the French Union Catalog (SUDOCS) shared by all the universities in France.] The EPN Number must be unique, and has a maximum length of 24 characters.
- **Accession Number:** An optional alphanumeric identification number that you can assign to an item and later search for via a control number search. The Accession Number *must be unique*, and has a maximum length of 35 characters.
- **AV Accession Number:** Displays the AV accession number assigned to this item. Type or scan in an alphanumeric string of up to 35 characters. The AV accession number *does not have to be unique*.
- **Collection Code:** Displays the collection code associated with the item. This element is optional as your library may not use collection codes to organize items in its collections. To choose a collection code, click the arrow in the drop-down list and make a selection. The list contains all of the collection codes defined in the Collection Code Definitions parameter on the Cataloging tab in the *Profiler*.

**Profiler Tip:** The Collection Code parameter is an optional parameter that can be used to help you keep track of items in your collection. See *Configuring Collection Codes* in the *Virtua Profiler/Cataloging Parameters User's Guide* for more information.

- The **Lamination** field provides a drop-down list of values to describe the state/type of lamination: No lamination (0), Paperboard (1), Plastic (2), and Other (3). The default value is 0 (zero) for all items, including those created from the Acquisitions subsystem.

## Statistics Tab

The **Statistics** tab contains information grouped by bibliographic information, record information, and circulation statistics.

- **Bibliographic Information:** displays up to three fields from the linked parent bibliographic record. You cannot edit this information on the **Item Information** window, but you can configure the header in the Item Information view in the **MARC View Editor** in the *Profiler*.

- **Circulation Statistics:** Circ count, temp circ count, etc. is maintained by the software. Last Inventory Count is not yet available.

## Notes Tab

The **Notes** tab displays public and staff notes and check-in and check-out alerts regarding the associated item. The maximum size for a note is limited to 250 characters.

## Status Tab

If the item has acquired a special or system-defined circulation status, the **Status** tab will appear on the **Item Information** window in view mode.

- **To Location:** is used by the status *In Transit* only. It displays the In Transit To destination location of the item.
- **Report:** displays the number of times this status has appeared on a report. The software automatically increments the value of this field.

**Profiler Tip:** The Status Displays parameter lets you control various aspects of special and system-assigned statuses. Using the Status Displays parameter, you can set up special statuses and modify *some* aspects of system-assigned statuses. See *Setting Up Item Statuses* in the *Virtua Profiler: Global Settings User's Guide* for more information.

**Profiler Tip:** In the client, Virtua will use the values you set on the Lost/Damaged tab of the Location + Item Matrix to calculate the total price billed to a patron's account to replace a lost or damaged item. These default values will appear on the Process Lost/Damaged Item window when, on the Activity tab of the Patron Information window, you click the Lost button or Damaged button. You will be able to edit the values on the Process Lost/Damaged Item window. You will also be able to see the values on the Acquisitions tab of the Item Information window in the client.

To set the values for the depreciation rate, maximum depreciation, binding cost, lamination cost, and surcharge on the Lost/Damaged tab for the location/item class combination, see *Setting Values in the Location + Item Matrix: Setting Values on the Lost/Damaged Tab* in the *Virtua Profiler: Circulation Parameters User's Guide* for more information.

## Acquisitions Tab

The **Acquisitions** tab displays bibliographic and acquisitions information for the item. On the **Acquisitions** tab of the item record, acquisitions information is linked to the item record. The fields listed are: cost, purchase order number, order line number, vendor name, and receipt date.

To prevent non-acquisitions users from being able to access Acquisitions information, new Operational Security permissions have been added to the *Virtua Profiler*. These permissions will control which users will be able to see the **Acquisitions** tab on the **Item Information** window and the **Statuses** tab on the **View Bibliographic Record** window.

Item Information - Phoenix99

Item Elements | Notes | Statistics | Status | **Acquisitions**

**Bibliographic Information**

Author: Kostova, Elizabeth.  
 Title: The historian : a novel / Elizabeth Kostova.  
 Edition: 1st ed.

**Acquisitions Information**

Purchase Order Id: 6251  
 Purchase Order Line Number: 1  
 Receipt Date:  Use Date: 2010/12/02  
 Invoice Number:  
 Vendor: Holm Publishing  
 Invoice Unit Price:  
 Invoice Currency:  
 Invoice Unit Discount:  
 Invoice Unit Fee:

Masked    Delete    Save    Refresh    Close

## Barcode History Tab

The **Barcode History** tab displays information about barcodes that have been previously assigned to an item, and only appears when the Maintain Item Barcode History parameter is enabled.

**Profiler Tip:** The Maintain Item Barcode History setting controls whether Virtua maintains a history of the item barcodes that have been assigned to any given item. See *Setting the Cataloging Basic Options Parameter: About the Maintain Barcode Item History Setting* in the *Virtua Profiler/Cataloging Parameters User's Guide* for more information.

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

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

Item Information - Phoenix99

Item Elements | Statistics | Status | Acquisitions | Barcode History

Bibliographic Information

Author: Kostova, Elizabeth.  
Title: The historian : a novel / Elizabeth Kostova.  
Edition: 1st ed.

Old Barcode	First Used Date	Last Used Date
	2010/12/02 1:44:41 PM	2010/12/02 1:46:12 PM
vtls2345	2010/12/02 1:46:12 PM	2010/12/02 1:49:17 PM

Masked

Delete Edit Refresh Close

## Add or Modify Item Information

The screenshot shows a web-based form titled "Item Information - phoenix". The form is divided into several sections:

- Bibliographic Information:** Author: Kostova, Elizabeth. Title: The historian : a novel / Elizabeth Kostova. Edition: 1st ed.
- Item Information:** Item ID: 726859. Barcode: 31781039017379. Barcode Type: Regular. Item Class: Book. Reserves Item Class: (empty). Item URL: (empty). Location: Cliffdale. Shelving Location: Cliffdale.
- Call Number:** Copy: (empty). Call #: F KOSTOVA. 2nd Call #: (empty).
- Units:** Radio buttons for Free Text, Enumeration and Chronology, and None (selected). An Edit button is present.
- Preservation and Conservation:** A checkbox is unchecked. Code: (empty).
- Non-Parameterized Shelf Location:** A checkbox is unchecked. Location: (empty).
- Circulation Rules:** Radio buttons for Use Matrix (selected) and Use Loan Period (0). Allow Request: checked.

At the bottom of the form, there are buttons for Masked, Delete, Save, Refresh, and Close.

Enter a barcode of up to 50 alphanumeric characters.

**Note:** Virtua will automatically assign barcode and copy numbers to multiple items if the increment barcode and copy number boxes are checked.

Accept or change the default item values where applicable.

**Note:** Putting a value greater than 1 in the Number of Pieces box will trigger check-in and check-out alerts.

Create multiple items if desired.

Click the **Save** button.



Click the **Refresh** button on the **View Bibliographic Record** window. If this is the first item record attached to the bibliographic record, an **Item** tab appears.

### Add Item Notes

Virtua allows the user to add two types of notes to item records; Circulation Notes and User-defined Notes. Both types of notes are keyword searchable.

### Circulation Notes

Click on the **Notes** tab. If there is not a Notes tab, click the **Edit** button, a **Notes** tab will appear.

The screenshot shows a window titled "Item Information - phoenix" with a tabbed interface. The "Notes" tab is selected. The window is divided into several sections:

- Item Elements**: Notes (selected), Statistics, Status, Acquisitions, Other Elements
- Bibliographic Information**:
  - Author: Kostova, Elizabeth.
  - Title: The historian : a novel / Elizabeth Kostova.
  - Edition: 1st ed.
- Notes**:
  - Public Notes:** Includes CD-ROM.
  - Staff Notes:** Copy of CD-ROM in storage.
  - Checkout Alert:** (Empty)
  - Checkin Alert:** Check for CD in pocket.

At the bottom of the window, there is a "Masked" checkbox and four buttons: "Delete", "Save", "Refresh", and "Close".

<b>Note</b>	<b>Description</b>
Public Note	Note that appears in the OPAC
Staff Note	Note that can only be viewed from the Notes Tab
Checkout Alert	Note that pops up on "alert" during checkout/renewal of an item.
Checkin Alert	Note that pops up on "alert" during the checkin process.

Click the **Edit** button. The **Item Information** converts to edit mode, and a **Save** button replaces the **Edit** button on the window.

Select the **Notes** tab. Add, modify, or delete text in the **Public Notes** and **Staff Notes** fields as you would in any text box.

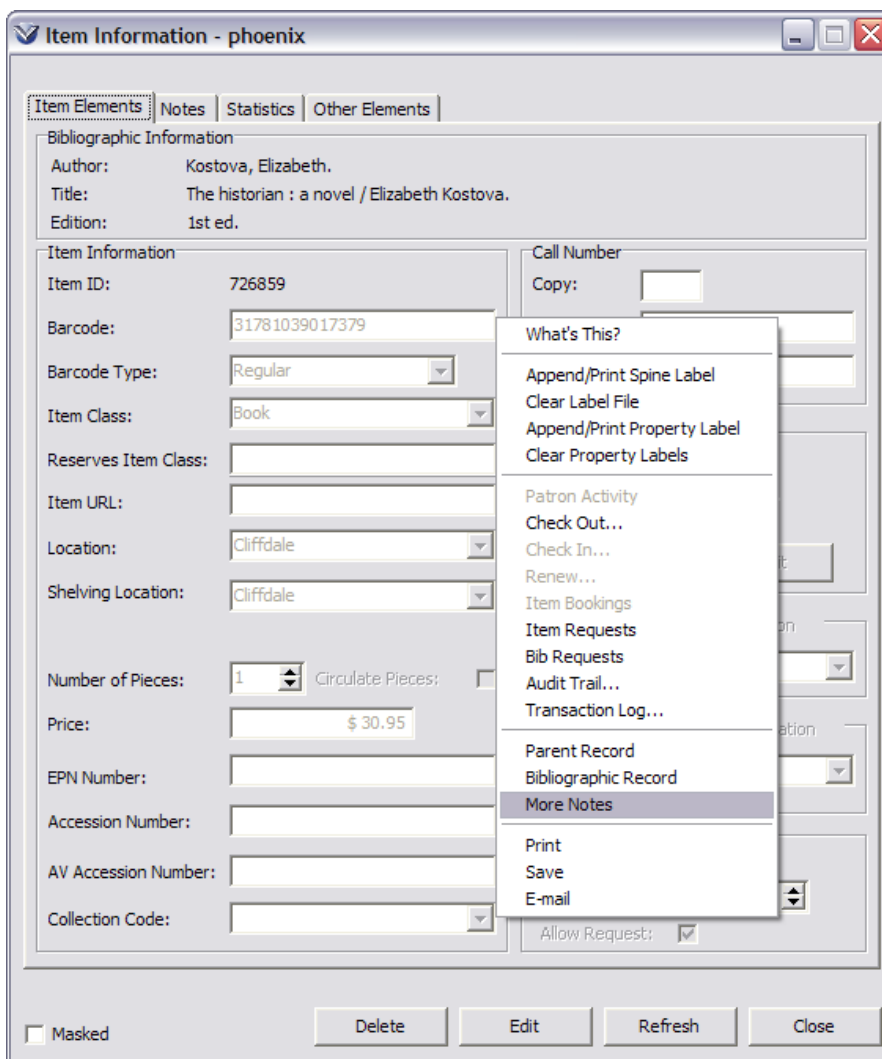
Click the **Save** button to save your changes.

## Add Copy-Specific Notes

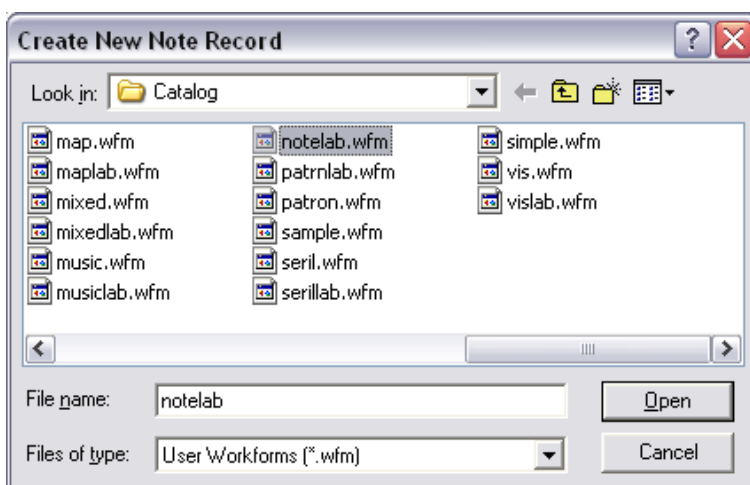
Copy-specific notes are additional notes that may be added to item records to provide additional information about an item. You may also add copy-specific notes to holdings records.

On the **Item Information** window, click the **Edit** button.

From the right-click pop-up menu, select **More Notes**.

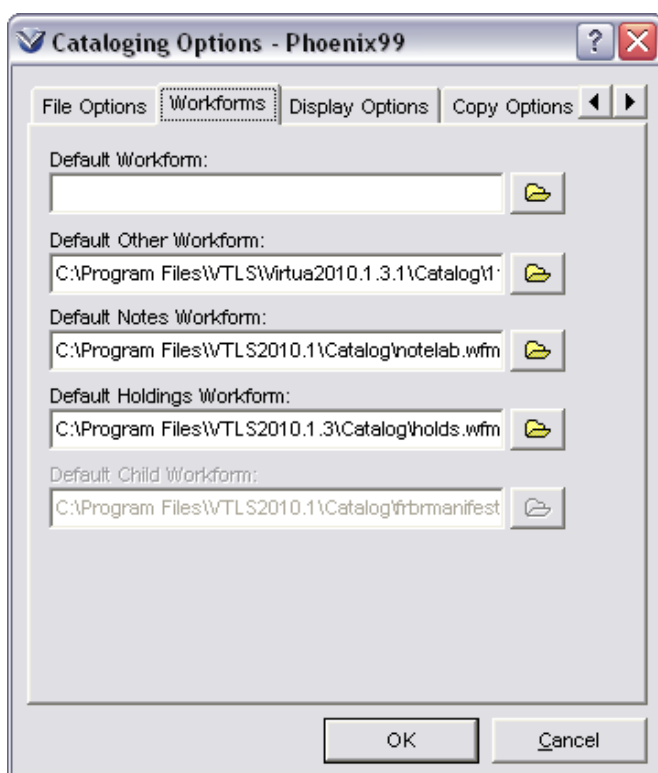


A window will open allowing you to navigate to the appropriate cataloging workflow.



Select the notelab.wfm workform and click **Open**. The workform will appear in the **MARC Editor**.

**Note:** The Default Workform option on the **File Options** tab of the **Cataloging Options** window allows you to decide which workform will appear in the MARC Editor automatically when creating a new copy-specific Notes record for a holdings or item record. If you do not select a default workform to appear by default, the Create Record window will appear so that you can choose one.



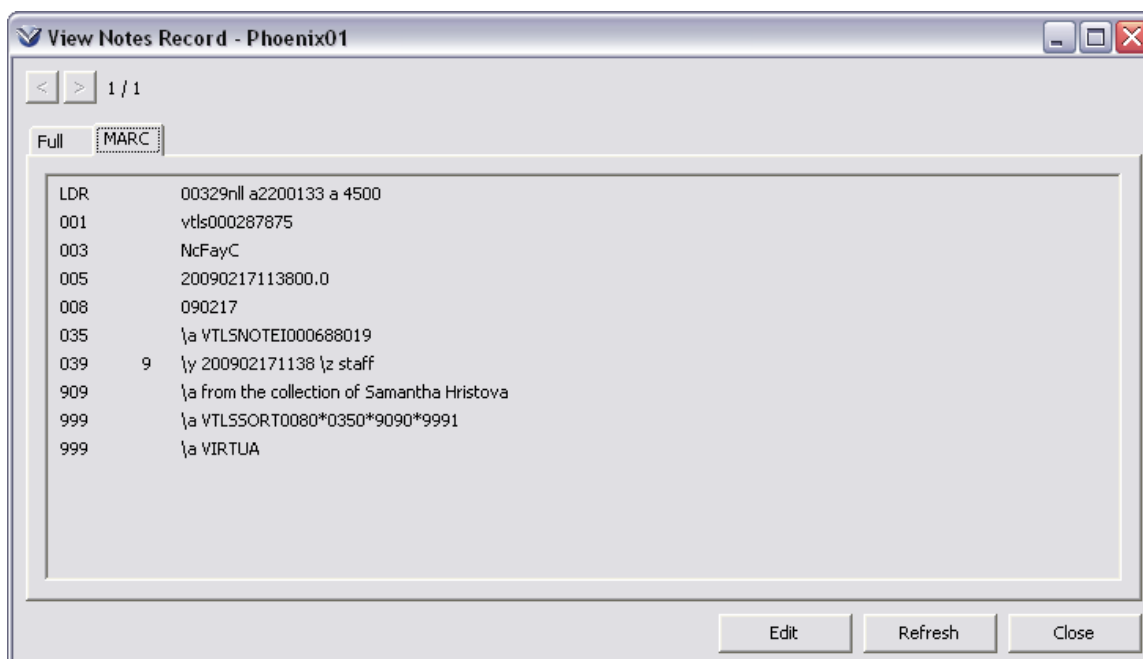
The screenshot shows the MARC Editor interface with the following data:

Tag	Subfield	Value
008		990220
035	a	VTLSNOTEI000862036
909	a	
910	a	
911	a	
912	a	
913	a	
914	a	
915	a	
916	a	
917	a	
918	a	

- Note fields are repeatable
- Note fields may be labeled by editing the tags in the **Label Editor**
- Additional note fields may be added to the workform.
- 035 tag, Subfield \$a contains the system id of the item. This information is system generated and should not be changed.

Enter copy-specific notes in the appropriate categories.

To save the record, select **File → Save Record** from the Virtua menu or use the **F11** key. The **MARC Editor** window will close and note tags that do not contain data will be removed from the record.



### To add copy-specific notes to an item record:

On the Item Information window, click the **Edit** button.

From the right-click pop-up menu select More Notes, which will either open a default workflow or allow you to choose one.

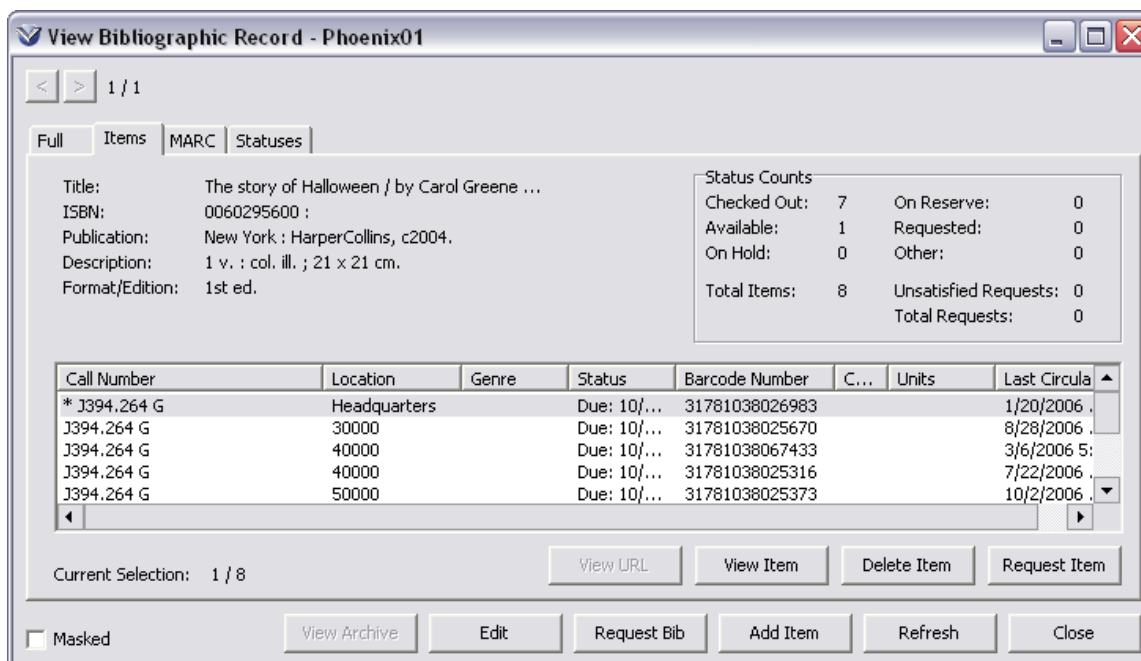
Create and save the Notes record as appropriate.

Copy-specific notes records for items have the following features:

- The 035 tag is automatically created with the prefix "VTL5NOTEI" followed by the item ID (9 digits zero-filled).
- The type of record field (leader position 06) contains an "I" to indicate that the record type is Note.
- The bibliographic level field (leader position 07) contains an "I" to indicate that the bibliographic level is Note.

## View Copy-Specific Notes

The presence of a copy-specific note is indicated on the **View Bibliographic Record** window by an asterisk to the left of the item information.



To view copy-specific notes, double click on the item or highlight the item and click the **View Item** button. The **Item Information** window will appear.

If there are notes for this item, the following message appears in bold on the upper right corner of the **Item Information** screen: **"\* Copy-specific Notes Exist"**.

**Item Information - Phoenix99** \* Copy-specific Notes Exist

Item Elements | **Notes** | Statistics | Status | Acquisitions | Barcode History

**Bibliographic Information**  
 Author: Kostova, Elizabeth.  
 Title: The historian : a novel / Elizabeth Kostova.  
 Edition: 1st ed.

**Item Information**

Item ID: 1121239  
 Barcode: vtlis3333  
 Barcode Type: Regular  
 Item Class: Book  
 Reserves Item Class:  
 Item URL:  
 Location: Headquarters  
 Shelving Location: Headquarters

Call Number  
 Copy:  
 Call #: F KOSTOVA  
 2nd Call #:

Units  
 Free Text  
 Enumeration and Chronology  
 None  
 Edit

Number of Pieces: 1 Circulate Pieces:  
 Price: \$.00  
 EPN Number:  
 Accession Number:  
 Lamination: None

Preservation and Conservation  
 Code:  
 Non-Parameterized Shelf Location  
 Location:

Circulation Rules  
 Use Matrix  Use Loan Period: 7  
 Allow Request:

Masked Delete Save Refresh Close

To view the notes, right mouse click on the **Item Information** window and select **More Notes**.



**Item Information - Phoenix01**

\* Copy-specific Notes Exist

Item Elements | Notes | Statistics | Status

Bibliographic Information

Author: Greene, Carol.  
 Title: The story of Halloween / by Carol Greene ; illustrated b  
 Edition: 1st ed.

Item Information

Barcode: 31781038026983  
 Item Class: Book  
 Reserves Item Class:  
 Item URL:  
 Location: Headquarters  
 Shelving Location: Headquarters

Call Num  
 Copy:  
 Call #:  
 2nd Call #:  
 Units  
 Fre  
 Enu  
 Nor

Number of Pieces: 1 Circulate Pieces:   
 Price: \$ 21.89

Circulation Rules

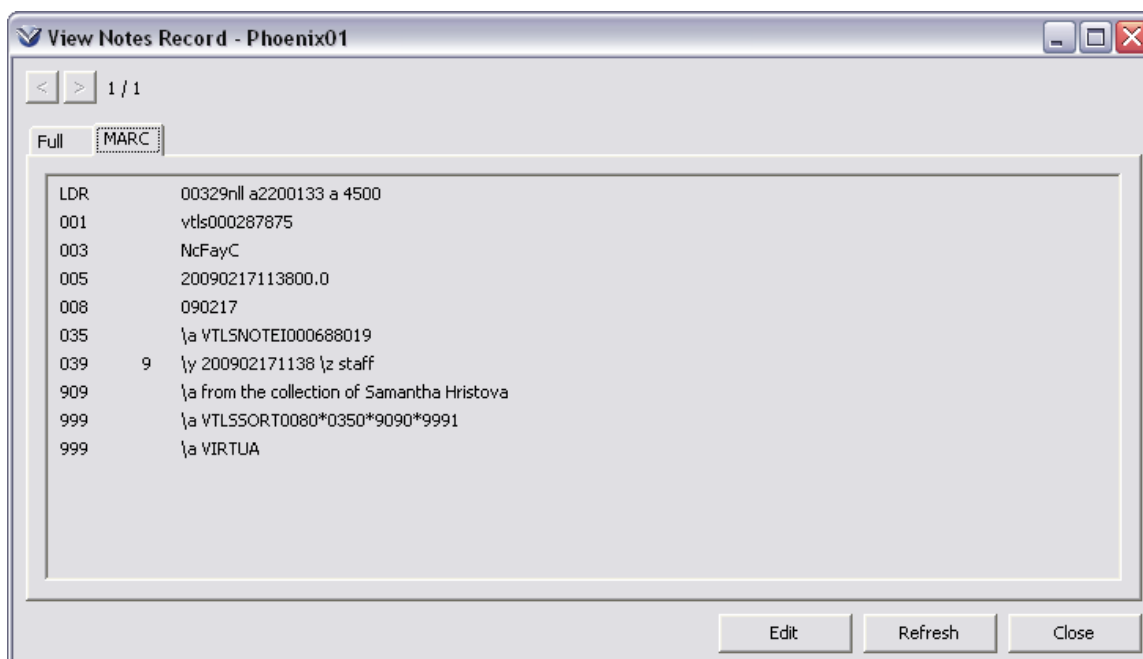
Use Matrix  Use Loan Period: 0  
 Allow Request:

Present  
 Code:  
 Non-Parameterized Shelf Location  
 Location:

What's This?  
 Append/Print Spine Label  
 Clear Label File  
 Patron Activity  
 Check Out...  
 Check In...  
 Renew...  
 Item Bookings  
 Item Requests  
 Bib Requests  
 Audit Trail...  
 Transaction Log...  
 Parent Record  
 Bibliographic Record  
 More Notes  
 Print  
 Save  
 E-mail

Delete Save Refresh Close

The **View Notes Record** window will open displaying the copy-specific notes.



Click the **Edit** button to add more notes.

If copy-specific notes do NOT already exist for an item record, you may add them.

## Copy-Specific Notes for Holdings

If copy-specific notes exist for a holdings record, on the Holdings tab of the View Bibliographic window, an asterisk (\*) will appear to the left of the location name for the holdings line.

### To view existing copy-specific notes:

From the right-click pop-up menu on the **View Holdings Record** window, select **More Notes**.

If copy-specific notes exist, they appear in the **View Notes Record** window.

If copy-specific notes do NOT already exist for a holdings record, you may add them.

### To add copy-specific notes to a holdings record:

On the **View Holdings Record** window, from the right-click pop-up menu select **More Notes**, which will either open a default workform or allow you to choose one.

Create and save the Notes record as appropriate.

Copy-specific notes records for holdings have the following features:

- The 035 tag is automatically created with the prefix "VTLSNOTEH" followed by the holdings ID (9 digits zero-filled).
- The type of record field (leader position 06) contains an "I" to indicate that the record type is Note.
- The bibliographic level field (leader position 07) contains an "I" to indicate that the bibliographic level is Note.

## Item Statistics

Click on the **Statistics** tab to view circulation statistics for the item.

**Note:** The **Statistics** tab will not appear when you are creating the item record. You must save the item record first.

The screenshot shows a window titled "Item Information - Phoenix99" with a tabbed interface. The "Statistics" tab is selected. The window contains the following information:

**\* Copy-specific Notes Exist**

Item Elements | Notes | **Statistics** | Status | Acquisitions | Barcode History

**Bibliographic Information**

Author: Kostova, Elizabeth.  
 Title: The historian : a novel / Elizabeth Kostova.  
 Edition: 1st ed.

**Record Information**

Item ID:	1121239	Last Modified:	2010/12/02
Barcode Date:	2010/12/02	by Operator ID:	9
Date Created:	2010/12/02		

**Circulation Statistics**

Circ Count:	0	In House Circ Count:	0
Temp Circ Count:	0	Temp In House Circ Count:	0
Since:	2010/12/02	Since:	2010/12/02
Reserve Count:	0	Last Inventory Date:	
Temp Reserve Count:	0	Last Circulation Date:	
Since:	2010/12/02		

Masked

Buttons: Delete, Save, Refresh, Close

On the **Statistics** tab, the statistical data elements are organized into three logical groups:

<b>Group</b>	<b>Description</b>
Bibliographic Information	Displays up to three fields linked from the parent Bibliographic record. You cannot edit the information but you can change the information that displays by modifying the View in the Profiler.
Record Information	Displays system data about the item record.
Circulation Statistics	You cannot reset Temporary Circulation or Temporary Reserve counts. Last Inventory Date is not you available.

## Add Item Status

### From the Status Tab of the Item Information window:

Click on the **Status** tab of the **Item Information** window.

Click the **Edit** button. The **Item Information** window converts to edit mode, a **Save** button has replaced the **Edit** button.

**Item Information - Phoenix99** \* Copy-specific Notes Exist

Item Elements | Notes | Statistics | **Status** | Acquisitions | Barcode History

Bibliographic Information

Author: Kostova, Elizabeth.  
 Title: The historian : a novel / Elizabeth Kostova.  
 Edition: 1st ed.

Statuses

Status	Date Added / Checked ...	Location / Due Date	To Location	Report #
In Processing	2010/12/02	Headquarters		0

Add    Modify    Delete

Masked    Delete    Save    Refresh    Close

Select the **Add** button; a dialog box appears for adding statuses.

**Add New Status**

Status:

Location:

OK    Cancel

Click the **Save** button to save your changes.

## EPN Number Field in the Item Record

The EPN Number field on the **Item Elements** tab of the **Item Information** window displays the EPN Number associated with the item. The EPN Number is a library-assigned control number. A EPN Number control number search allows you to search on the EPN Number value (for details, see the *OPAC User's Guide*).

## Item ID Field in the Item Record

The Item ID field on the **Item Elements** tab of the **Item Information** window in the client is read-only.

The item ID is being displayed more prominently because for some customers, the ID will serve as the auto-generated accession number.

The screenshot shows the 'Item Information - Phoenix99' window with the 'Item Elements' tab selected. The window title is 'Item Information - Phoenix99' and it includes a note '\* Copy-specific Notes Exist'. The 'Bibliographic Information' section shows: Author: Kostova, Elizabeth.; Title: The historian : a novel / Elizabeth Kostova.; Edition: 1st ed. The 'Item Information' section contains the following fields: Item ID: 1121239; Barcode: vtts3333; Barcode Type: Regular; Item Class: Book; Reserves Item Class: ; Item URL: ; Location: Headquarters; Shelving Location: Headquarters; Number of Pieces: 1; Circulate Pieces: ; Price: \$.00; EPN Number: ; Accession Number: ; Lamination: None. The 'Call Number' section includes: Copy: ; Call #: F KOSTOVA; 2nd Call #: . The 'Units' section has radio buttons for Free Text, Enumeration and Chronology, and None (selected), with an Edit button. The 'Preservation and Conservation' section has a Code dropdown. The 'Circulation Rules' section has radio buttons for Use Matrix (selected) and Use Loan Period (7), and a checked Allow Request checkbox. The 'Non-Parameterized Shelf Location' section has a Location dropdown. At the bottom are buttons for Masked, Delete, Save, Refresh, and Close.

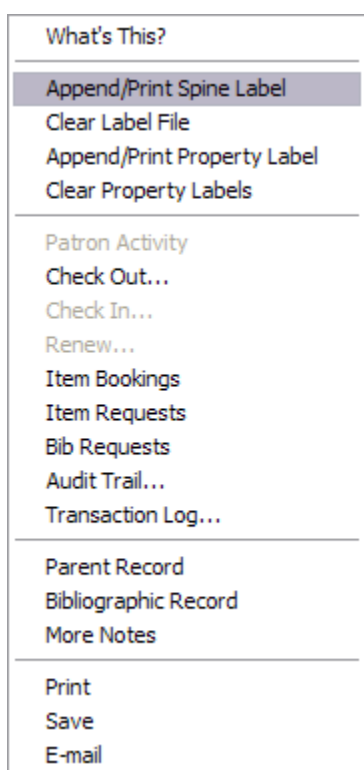
## Barcode Type Field in the Item Record

Use the **Barcode Type** drop-down list on the **Item Elements** tab to select a barcode type of Regular, RFID, or Both. In this way, the information may be stored, displayed, and used in SQL searches.

## Generate Individual Item-Level Spine Labels

Customize the **LabInput.txt** file to contain the codes of the data elements that you want to appear on the spine label.

On the **Item Information** window, click the right mouse button. The pop-up menu appears



Choose **Append/Print Spine Label**. Virtua extracts the data elements from the item record and its parent bibliographic record and displays the **Append Label** form

Edit the data elements of the label as needed

Click the **Print Immediately** button to print just the label in the window. The label will print using your default printer.

**Note:** You can also use a third-party program to print multiple spine labels. This is described in Appendix B: Generating Spine Labels Using Word 2000 ® and Appendix C: Generating Spine Labels Using Word XP ® of the Cataloging Configuration and Authority Control training guide.

### **Print Spine Labels from Holdings Record**

Spine labels can be printed from the View Holdings Record window by selecting the Append/Print Spine Label option, which is accessible from the pop-up menu and the View Holdings pull-down main menu.

This feature uses two files:

**HoldLabInput.txt** - Default spine label input text file

**HoldSpineLab.txt** - System-generated spine label output text file

**Note:** Holdings spine labels (via the **HoldLabInput.txt** template) can accommodate other record data besides the call number from the 852 tag.

### **Re-link an Item Record**

Occasionally an item record may be accidentally attached to the wrong bib record. Rather than deleting the item record it is possible to link it to the correct bib record.

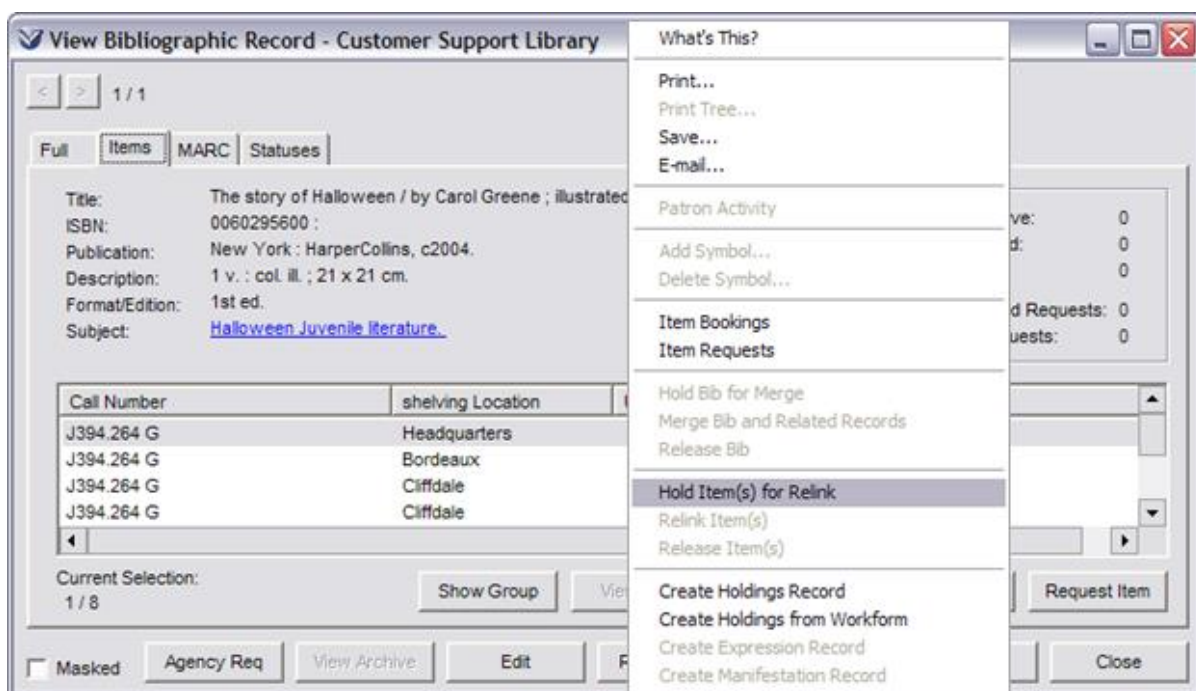
**Note:** You can use the relink function when multiple connections are open, but you cannot relink item records across databases.

**Note:** You can relink items without barcodes.

In the **View Bibliographic Record** window, open the record that has the incorrect item attached.

Highlight the incorrect item(s), right mouse click and select **Hold Item(s) for Relink** from the menu.





In the **View Record** window, open the record to which the item should be attached.

Right mouse click and select **Relink Item(s)**. The item is now attached to the correct bibliographic record.

**Note:** When relinking items with no Item-level Call Number, you can choose to retain the old Call Number when relinking. This is a parameter set in the *Profiler*.

## Merge a Bibliographic Record

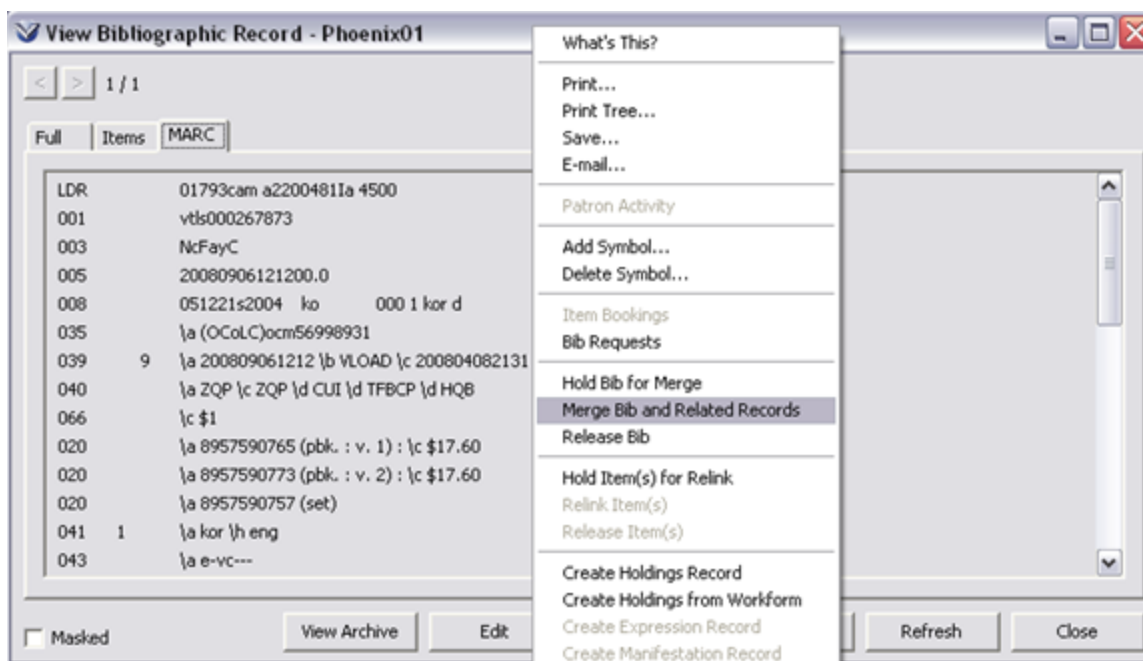
Occasionally you may have two bibliographic records, both with items attached, that you wish to merge into one record. Rather than re-link multiple item records and then delete one of the bibliographic records, you may merge the bibliographic records and retain the item records from both bibliographic records.

In the **View Bibliographic Record** window, open the bibliographic record that you wish to delete.

Right mouse click and select **Hold Bib for Merge** from the menu.

In the **View Bibliographic Record** window, open the record to which the item(s) should be attached.

Right mouse click and select **Merge Bib and Related Records**. The item is now attached to the correct bibliographic record.



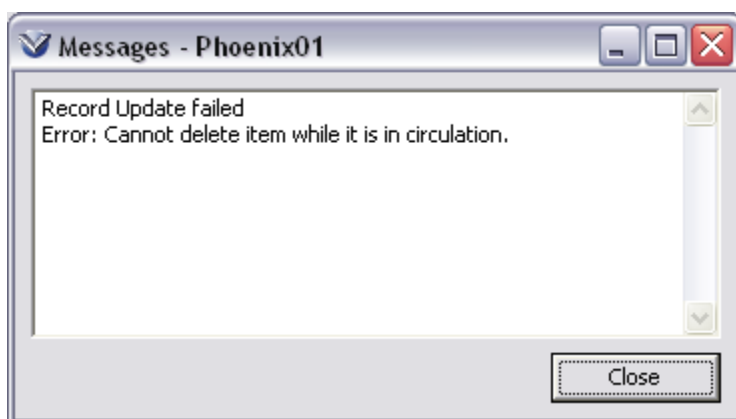
**Note:** If you select the incorrect record and wish to release the record from being merged, select **Release Bib** from the pop-up menu.

## Delete Item Records

Only users with proper permissions may delete item records. When the software receives a request to delete an item record, the software checks for the following:

- Current circulation transactions
- Current fees
- Outstanding requests
- Library-defined statuses

If any of these elements exist, the system will display an error message similar to the one below.



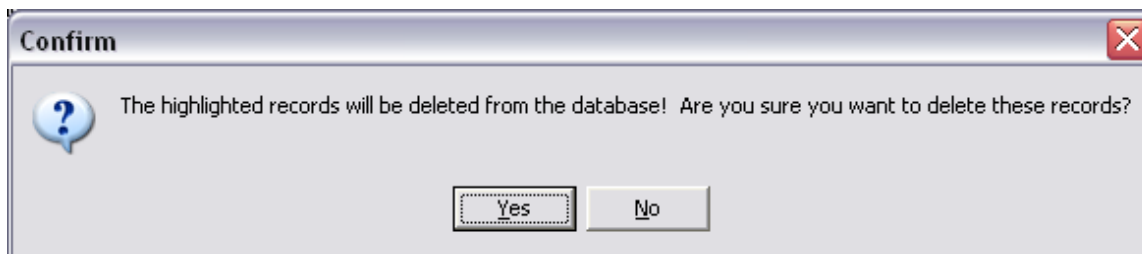
**To delete an** item record from the database:

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

Click the **Items** tab. Highlight the item you want to delete.

Click the **View Item** button. The **Item Information** window appears.

Click the **Delete** button. A **Confirm** dialog box appears.



Click the **OK** button.

**If** no circulation transactions exist, the process continues. Otherwise, an error message describing the problem appears.

**Profiler Tip:** Circulation Basic Options consist of a variety of circulation settings that control various aspects of the Circulation subsystem. On the Circulation Basic Options window, you can set the following Delete/Waive Flags: *Delete Special Status* and *Delete Outstanding Requests*. See *Working with Circulation Basic Options: About Delete/Waive Options in the Virtua Profiler/Circulation Parameters User's Guide* for more information.

## Use Batch Item Editor

Users with proper permissions can use the **Batch Item Editor** to...

- Make batch changes to and deletions of item records from the **Item Elements** tab.
- Add, modify, or delete item statuses from the **Statuses** tab.

### Select Items to Batch Edit

To access the **Batch Item Editor** from the Virtua Main menu select **File** → **Records** → **Edit Item Records**.

For any **Batch Item** update, you must first specify item barcodes of the records to be modified in the **Item Barcodes for Modification** using one of the following methods:

- Type each item barcode in the Item Barcode field, and then press **Enter**.
- OR
- Click the **Load From File** button, and in the **Open [File]** dialog box, select a local file of item barcodes.

**Note:** You cannot mask item records from *this* Batch Item Editor.

## Modify Item Elements

On the **Item Elements** tab of the **Batch Item Editor**, complete the fields for the elements to be modified.

Click the **Save** button.

## Delete Item Records

On the **Item Elements** tab of the **Batch Item Editor**, click the **Delete** button.

Confirm the deletion.

**Profiler Tip:** Circulation Basic Options consist of a variety of circulation settings that control various aspects of the Circulation subsystem. On the Circulation Basic Options window, you can set the Allow Withdrawal of Checked Out Items setting, which determines whether Virtua allows the deletion of checked out items (e.g., items with the status Long Overdue) via Withdrawal lists in the Batch Item Editor. For this feature to work properly, the Delete Special Status check box should also be selected. If you want Virtua to allow deletion of checked out items via the Withdrawal workflow, select this Allow Withdrawal of Checked Out Items check box; if you do NOT want Virtua to allow deletion of checked out items via the Withdrawal workflow, de-select this check box.

## Load From List

The **Load From List** option allows you to select records to be modified or deleted by specifying a *Withdrawal Copy Saved List* that was created in Chamo.

Click the **Load From List** button on the **Batch Item Editor** window and type the name of the *Withdrawal Copy Saved List* in the **Search For Saved List** window.

If the list is found in Chamo *and* the workflow type is "Withdrawal," the barcodes of the items in the list that qualify for deletion are automatically added to the Item Barcodes For Modification list box. When a saved list is loaded for withdrawal, the list name will appear in the lower left corner of the Item Elements tab.

**Profiler Tip:** The *Cannot Delete Item* flag in the Item Class Definitions parameter and Collection Codes parameter is used to prevent an item that carries that item class or collection code from being deleted. See *Working with Item Class Definitions in the Virtua Profiler/Circulation Parameters User's Guide* and *Configuring Collection Codes in the Virtua Profiler/Cataloging Parameters User's Guide* for more information.

## Shelving Location

The **At Shelving Location Until** check box is active only if the **Shelving Location** and the **Location** fields contain different values. The **At Shelving Location Until** date field displays the date that the item is due to be moved from the shelving location to the owning location. This field appears only if the shelving location is different from the permanent location.

In the **Batch Item Editor**, the **Remove At Shelving Location Until date** check box (*when selected*) removes the **At Shelving Location Until** date. In this way, Virtua supports the owning location and the shelving location being different on a permanent basis. If the **Remove At Shelving Location Until date** check box is *not selected* the shelving location is temporary.

The screenshot shows a form with the following fields and options:

- Location:** Bellefonte
- Shelving Location:** Bordeaux
- At Shelving Location Until** 9/24/2013
- Remove At Shelving Location Until date**

## Add, Modify, or Delete Item Statuses

On the **Statuses** tab of the **Batch Item Editor**, select a status and location from the drop-down boxes.

The screenshot shows the 'Batch Item Editor - Phoenix01' window with the 'Statuses' tab selected. The interface is divided into three main sections for adding, modifying, or deleting statuses. Each section includes a dropdown for the status and a dropdown for the location. The 'Modify' and 'Delete' sections also feature a checkbox for 'Only if latest status'. A 'Status Update Queue' area on the right contains a 'Delete' button. At the bottom of the window, there are 'Save', 'Delete', and 'Close' buttons.

Select conditions for modifying or deleting if necessary.

Click the **Add to Queue** button

Repeat process for each new status you want to add, modify, or delete.

Click the **Save** button.

**Note:** If you select the **Only if Latest Status** check box and the specified item records do not meet the criteria, the problem records will be placed in the Virtua directory in a text file named ItemStatuses.txt with the following information for your review:

- The action that was to occur (i.e. Modify or Delete).
- The status specified in the Batch Item Editor for deletion or modification.
- The problem items' current last status.
- The item barcodes of those items that could not be updated.



## Add Notes

On the **Notes** tab of the **Batch Item Editor** window, type a note in the appropriate text box (Public Notes, Staff Notes, Checkout Alert, or Checkin Alert).

The screenshot shows the 'Batch Item Editor - clay68' window with the 'Notes' tab selected. The window contains four text boxes for notes: 'Public Notes', 'Staff Notes', 'Checkout Alert', and 'Checkin Alert'. Below these is a 'Deletion' section with four checkboxes: 'Public Notes', 'Staff Notes', 'Checkout Alert', and 'Checkin Alert'. At the bottom, there is a checkbox for 'Notify (and do not update) when last item is Unserviceable' and buttons for 'Save', 'Delete', and 'Close'.

Select a check box in the **Deletion** area of the window if you wish to delete existing notes from item records being edited.

Click the **Save** button. Virtua adds and/or deletes the specified note(s) to each item record being edited.

## Item Record Masking

Item records can be masked. In this way, certain users will not be able to view them. If you have permission to mask item records, you may do so by selecting the Masked check box at the bottom of the **Item Information** window.

The screenshot shows the 'Item Information - Phoenix99' window. At the top right, it says '\* Copy-specific Notes Exist'. The window has several tabs: 'Item Elements', 'Notes', 'Statistics', 'Status', 'Acquisitions', and 'Barcode History'. The 'Item Elements' tab is active.

**Bibliographic Information:**  
 Author: Kostova, Elizabeth.  
 Title: The historian : a novel / Elizabeth Kostova.  
 Edition: 1st ed.

**Item Information:**  
 Item ID: 1121239  
 Barcode: vtlis3333  
 Barcode Type: Regular  
 Item Class: Book  
 Reserves Item Class:  
 Item URL:  
 Location: Headquarters  
 Shelving Location: Headquarters

**Call Number:**  
 Copy:  
 Call #: F KOSTOVA  
 2nd Call #:

**Units:**  
 Free Text  
 Enumeration and Chronology  
 None  
 Edit

**Preservation and Conservation:**  
 Preservation and Conservation  
 Code:

**Non-Parameterized Shelf Location:**  
 Non-Parameterized Shelf Location  
 Location:

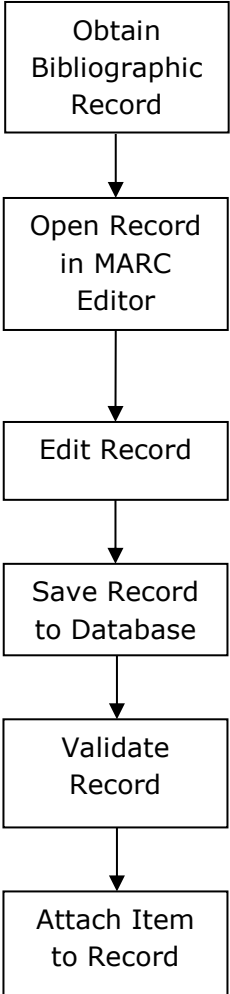
**Circulation Rules:**  
 Use Matrix  
 Use Loan Period: 7  
 Allow Request:

**Masked:**  Masked

Buttons: Delete, Save, Refresh, Close

Once an item record has been masked, you can view it in Virtua only if you have permission to view masked records. If you do NOT have permission to view masked records, Virtua treats the masked records as if they do not exist in your database.

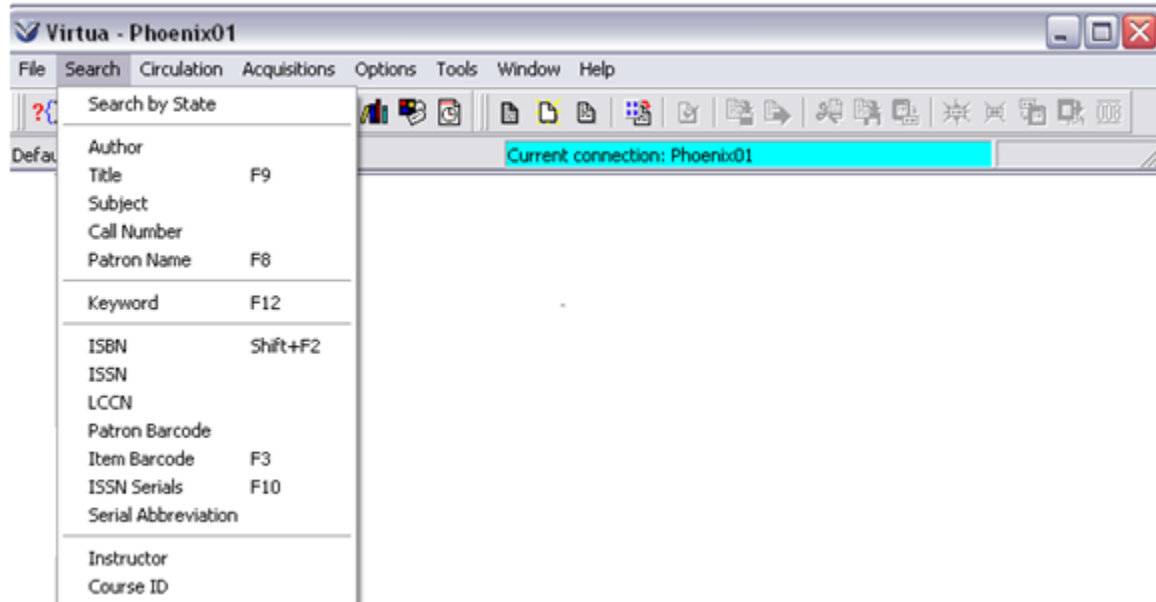
# Existing Record Workflow

Recommended Workflow	Explanation
 <pre> graph TD     A[Obtain Bibliographic Record] --&gt; B[Open Record in MARC Editor]     B --&gt; C[Edit Record]     C --&gt; D[Save Record to Database]     D --&gt; E[Validate Record]     E --&gt; F[Attach Item to Record] </pre>	<p>Virtua provides a user-friendly interface for cataloging material. This section will review the basics of using the MARC Editor.</p> <p><b>Summary</b></p> <ul style="list-style-type: none"> <li>• Edit a record</li> <li>• Add tags</li> <li>• Delete Tags</li> <li>• Copy Tags between records</li> <li>• Save a record to the database</li> <li>• Add an Item Record</li> <li>• Save or Delete Bibliographic Records</li> <li>• Print, Save, or E-Mail Bibliographic Records</li> </ul> <p><b>Key Terms</b></p> <ul style="list-style-type: none"> <li>• Bib Level Options</li> <li>• Leader</li> <li>• MARC Editor</li> <li>• MARC Indicator</li> <li>• MARC Tag</li> <li>• Type Options</li> <li>• Validate</li> <li>• Vericat</li> </ul>

	<p><b>Profiler Parameters</b></p> <ul style="list-style-type: none"><li>• <b>Allow Undelete of MARC Records:</b> allows users to restore deleted MARC records. (User Record State permissions on the Global tab of the Profiler must also be set to allow editing for the record state Deleted.)</li><li>• <b>Call Number:</b> Determines how Virtua handles call numbers</li><li>• <b>MARC Format Flag:</b> Determines the MARC format used by your library</li></ul> <p><b>InfoStation Report</b></p> <ul style="list-style-type: none"><li>• <b>Bibliographic Record List:</b> Generates a list of bibliographic records that meet the criteria set in the report configuration.</li></ul>
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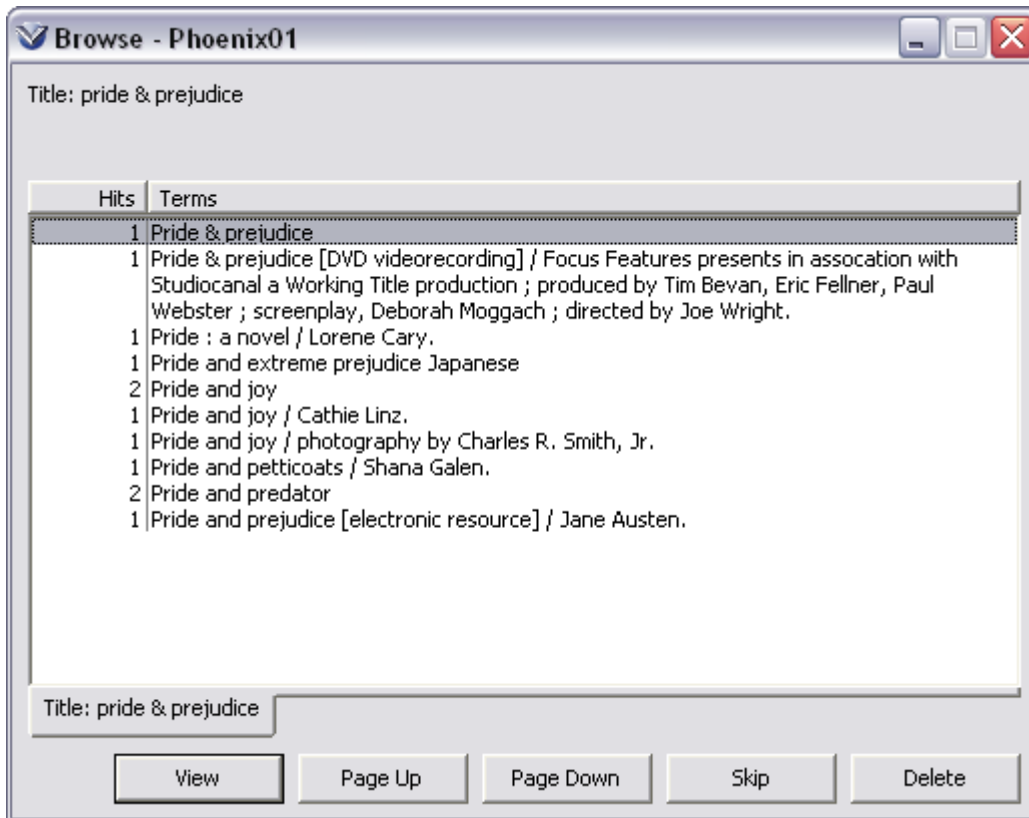
## Obtain a Bibliographic Record

Search the **OPAC** to verify that a bibliographic record exists.



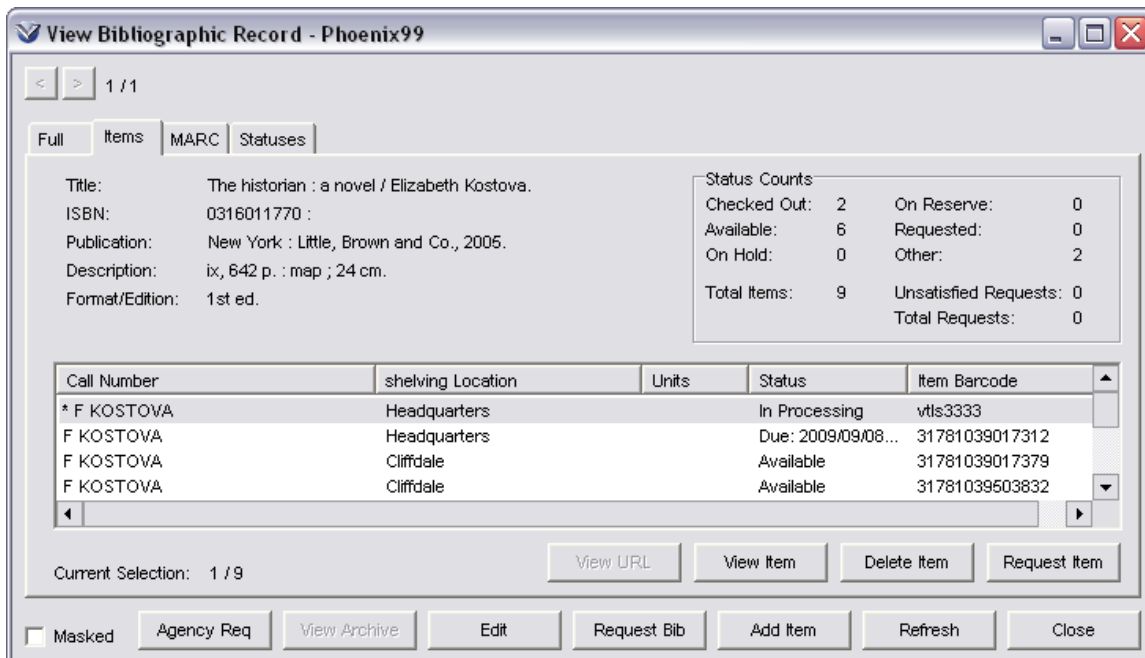
- **If** an exact match for the search term is found, the search term will be highlighted.
- **If** an exact match for the search term is not found, Virtua highlights the term above where your search term would fall in the index.

To see the **View Records** window from a list of records, double click on the title or click on the title and then click the **View** button.



## Open Record in MARC Editor

From the **View Bibliographic Record** window, click on the **Edit** button.



The record will be retrieved into the **MARC Editor**.

The screenshot shows the MARC Editor - Phoenix99 interface. The window title is "MARC Editor - Phoenix99". The interface is divided into several sections:

- Tags, Fields and Indicators:** A list of MARC tags and their corresponding values. The tags include 001, 002, 005, 006, 010, 020, 030, 035, 040, 082, 090, 100, and 240. The values include "vtls000253299", "NrcFay.", "200701180005C0.0", "040927s2005 nyub 030 1 eng", "la 2004-022563", "la 031E011770 lc \$30.55", "la (DLC)2004022563", "la 2007011800C5 lb VL GAD lc 200506080849 ld btaylor lc 2005C6080837 ld btaylor lc 200503071748 ly 2005USU/1 /48 lz mmcartru", "la DLC lc DLC ld GcmBT", "la 813/6 l2 22", "la F la KOSTOVA", "la Kostova, Elizabeth.", and "la The historian : lb a novel /lc Elizabeth Kostova.".
- Type and Bib Level:** Two dropdown menus at the bottom left, one for "(a) Language material" and one for "(m) Monograph/item".
- Information Bar:** A field at the bottom center containing "MARC 21 Bb: Book".
- Tracking Tabs:** A button at the bottom left labeled "OPAC1".
- Other elements:** A "Masked" checkbox at the bottom right, and "OPAC" and "OPAC1" buttons at the bottom.

## Modify the MARC Record

### Using the MARC Editor, you can:

- Add or delete MARC tags
- Edit the MARC Record
- Copy tags between records
- Modify fixed field values
- Change the Type and Bib Level Options

**Note:** Virtua allows you to decide whether variable field data is in the MARC Editor is overwritten by your keystrokes.

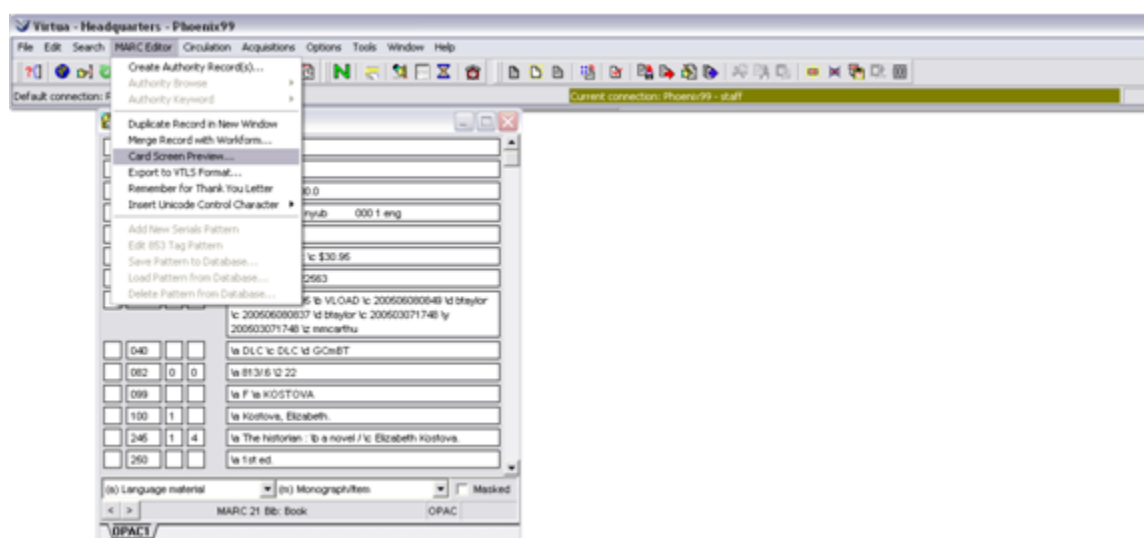
- **If** the Cataloging Option **Overwrite Variable Fields** is selected in the Virtua client, then variable field data is immediately overwritten by your next keystrokes.
- **If** the Cataloging Option **Overwrite Variable Fields** is NOT selected in the Virtua client, then variable field data will not be deleted as you type.

## Preview the Record

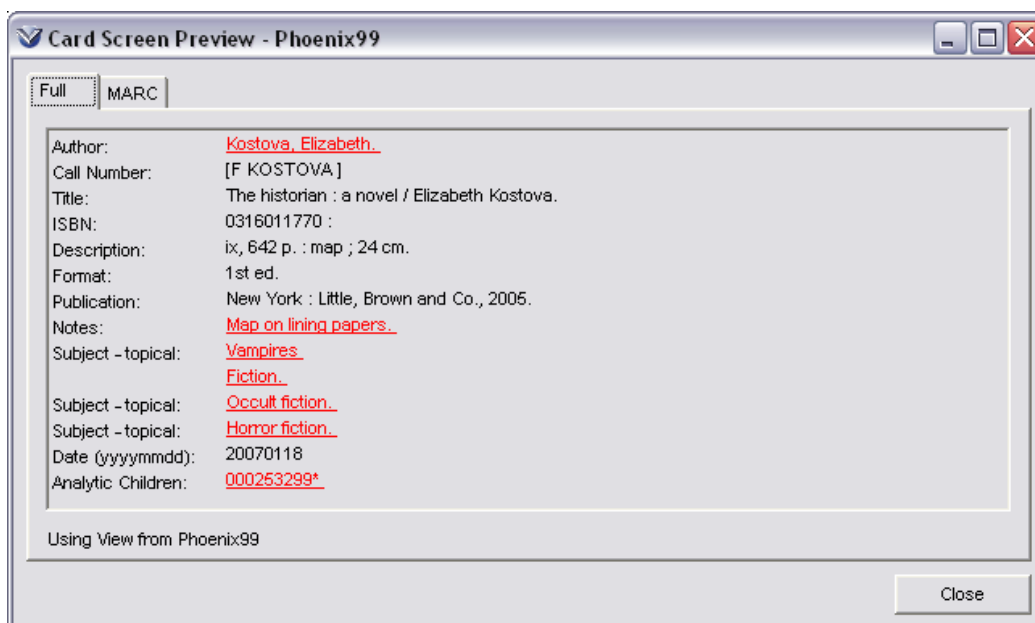
When editing a record, you might find it useful to preview the record, to see how it will appear to the public in the OPAC.

### To preview a record:

On the Virtua menu bar, click **MARC Editor** dropdown menu.



Choose **Card Screen Preview**. The **View Record** window appears displaying the record, as it will appear in the **OPAC**.



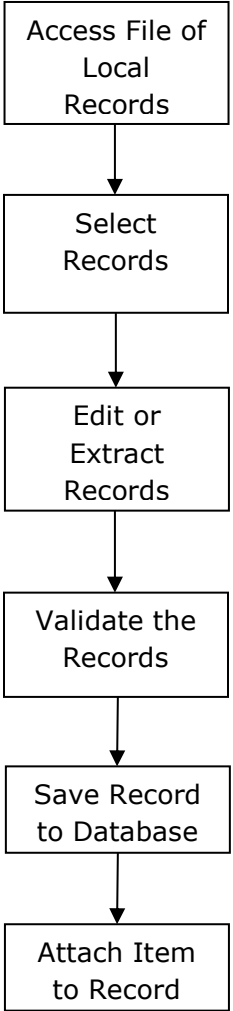


## Validate the Record


Virtua uses rules that are based on the MARC21 format for tags, indicators, and subfields in determining whether or not a record is valid. It is possible to edit the rules files to reflect local practices. Validation is only possible if **Vericat** has been installed on your system.

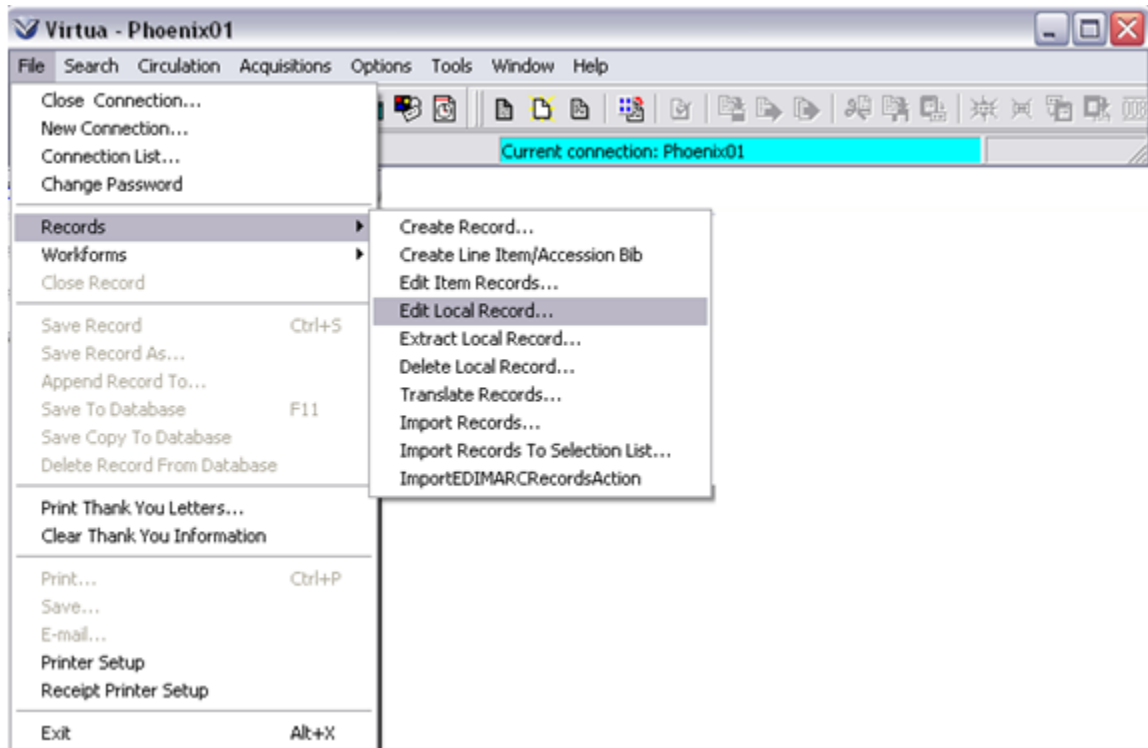
*For details on modifying records see [Record Validation](#).*

# Local Records Workflow

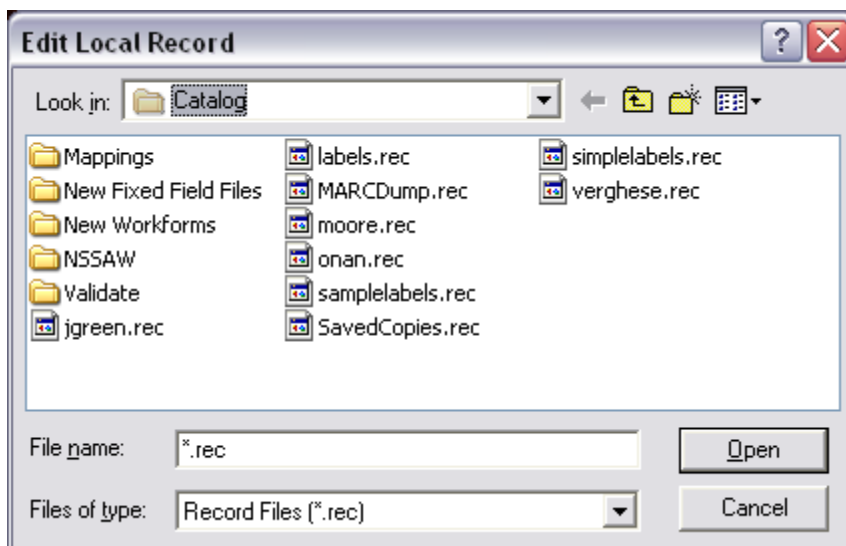
Recommended Workflow	Explanation
 <pre> graph TD     A[Access File of Local Records] --&gt; B[Select Records]     B --&gt; C[Edit or Extract Records]     C --&gt; D[Validate the Records]     D --&gt; E[Save Record to Database]     E --&gt; F[Attach Item to Record]           </pre>	<p>Local records are files that contain MARC communication records and that reside on your local PC or a local network hard disk.</p> <p><b>Summary</b></p> <ul style="list-style-type: none"> <li>• Open a file of local records</li> <li>• Select records to retrieve</li> <li>• Open records in the MARC Editor</li> <li>• Delete individual local records</li> <li>• Delete the entire local record file</li> </ul> <p><b>Key Terms</b></p> <ul style="list-style-type: none"> <li>• Extract Records</li> <li>• Local Records</li> </ul>

## Access Local Records

Click the **Edit Local Record** icon  on the **Cataloging** toolbar or select **File** → **Choose Records** → **Edit Local Record**.



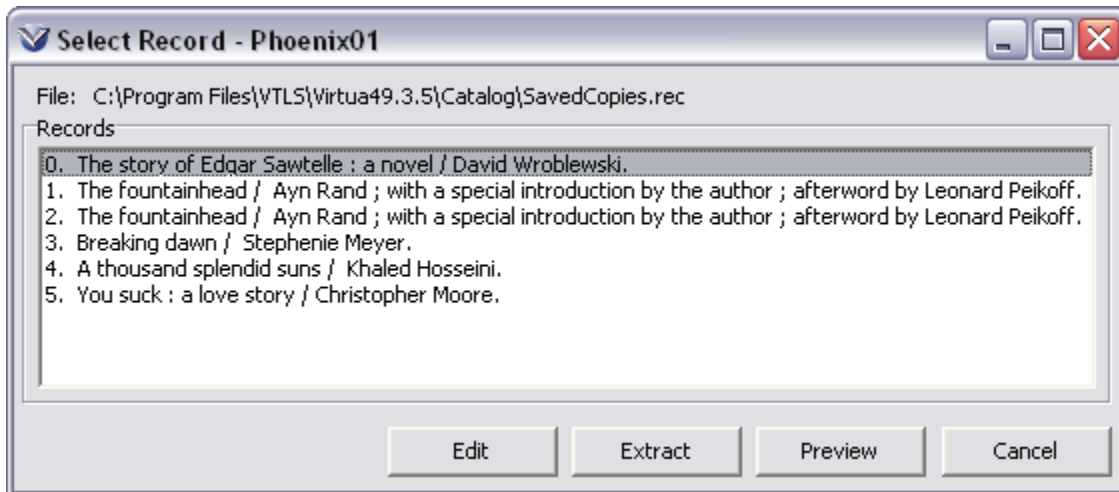
The **Edit Local Record** window appears.



Select a file from the list of files with \*.rec extensions. Click the **Open** button.

- **If** the file contains only one record, the MARC Editor appears.
- **If** the file contains more than one record, the Select Record window appears with a list of MARC records from the selected file.

**Note:** Virtua reads any file regardless of its name and extension as long as the file is composed of MARC communication records. However, Virtua defaults to displaying files with a .rec extension.



Select record(s) using one of the following methods:

- An individual record by clicking the record
- Multiple adjacent records by highlighting the first one, then holding down the Shift key and clicking on the last one.
- Multiple individual records by holding down the Control key and clicking on each record.

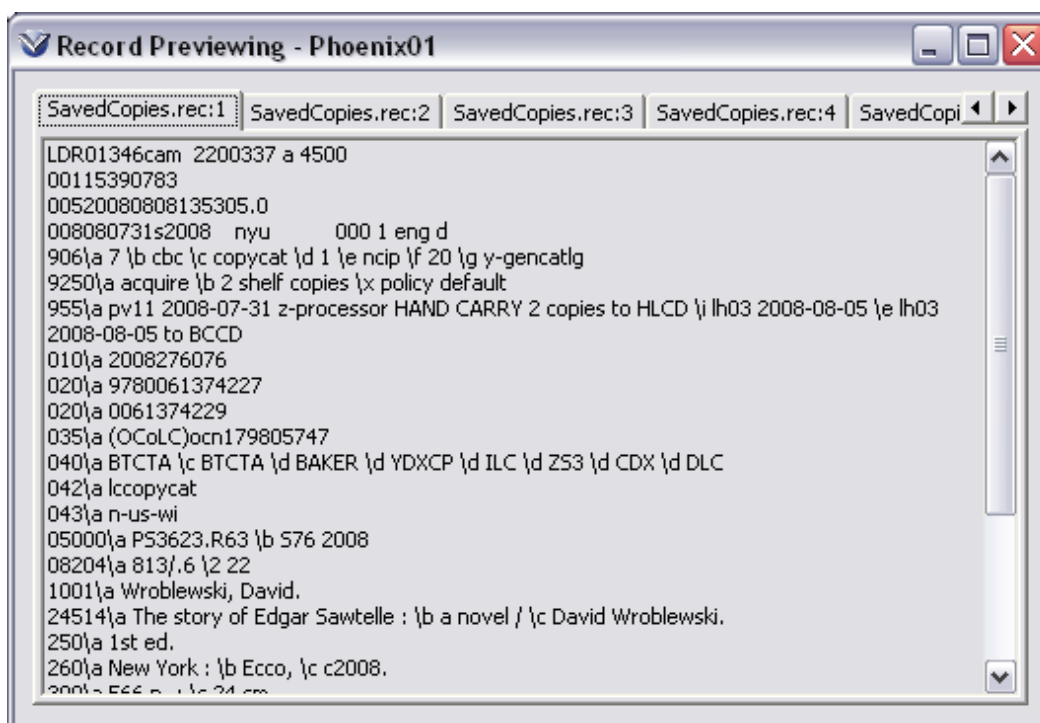
## Preview, Edit, Extract Local Records

After selecting the local records with which you want to work, you may want to preview them before editing or extracting them.

### Preview Local Records

On the **Select Record** window, click the **Preview** button.

The **Record Previewing** window appears, displaying your record selections in order and in a format that allows you to preview them before editing them.



To preview a specific record click the appropriate tab across the top of the **Record Previewing** window

### Edit or Extract Local Records

On the Select Record window click the **Edit** or **Extract** button.

- **Edit:** The selected records are placed in the MARC Editor and the original records *remain* in the file.
- **Extract:** The selected records are placed in the MARC Editor and the original records are *deleted* (extracted) from the file.

Click the desired tab along the bottom of the editor window. If the tab you want is not visible, click the directional arrows in the bottom right corner.

All editing functions are available to you.

### Validate Record

See [Record Validation](#).

### Save Record

- Save it to the database (F11)
- Append it to an existing local file
- Replace a record in a local file
- Save the record to a new local file

See [Record States](#).

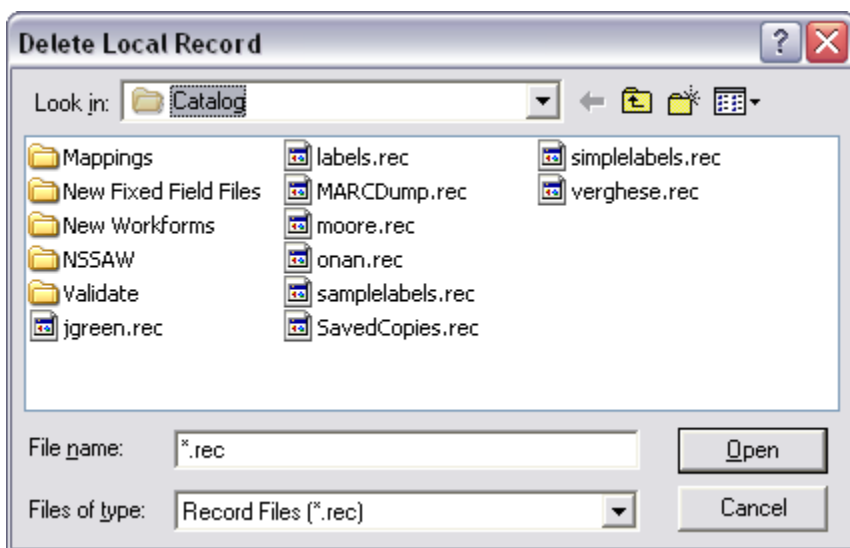
## Delete Local Records

Once records are saved to the Virtua database you might want to delete the local records if you did not extract them, to avoid duplication of records.

Records may be deleted individually or an entire file of records may be deleted.

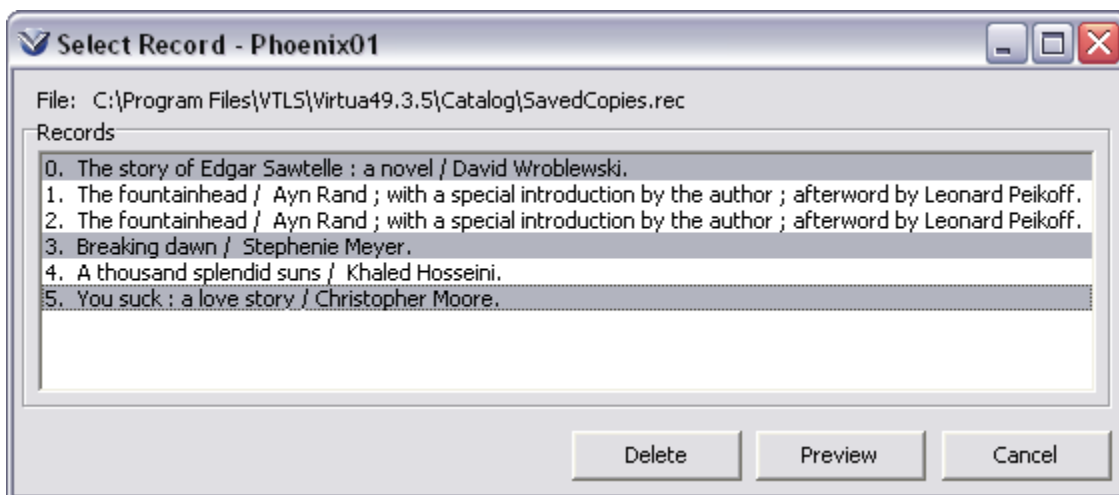
### Delete Individual Records

On the Virtua menu bar, click **File → Records → Delete Local Record**. The **Delete Local Record** window appears, displaying a list of local record (\*.rec) files.



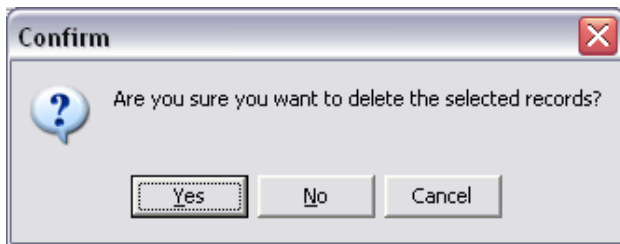
Select the file from which you want to delete the desired record(s).

Click the **Open** button. The **Select Record** window appears, displaying all the records in the local file you selected.



Select the record(s) you want to delete.

Click the **Delete** button. The system asks you to confirm the deletion.



Click the **Yes** button. A dialog box appears telling you how many records were deleted.

Click the **OK** button.

### Delete a File of Local Records

You can delete an entire file of local records in two ways. You can use Windows Explorer to delete the file, or you can delete the file using Virtua's Delete Local Record function. When you delete a file using the Delete Local Record function, you must first delete ALL the records in the file.

On the Virtua menu bar, click **File → Records → Delete Local Record**. The **Delete Local Record** window appears displaying a list of files.

Select the file to delete.

Click the **Open** button. The **Select Record** window appears, displaying all the records in the local file you selected.

Select **ALL** the records in the window.

Click the **Delete** button.

Click the **OK** button.

# Cataloging Reports

Authorities List

Bibliographic Record List

Broad Cataloging Statistics

Cataloger Productivity

Cataloging Errors

Change Item Location by Call Number Range

Indexed Words

Item Barcode List

Items Created List

Items Received List

Legal Deposit Statistics

Number of Records in Database

Production of Records by User

Record Extraction Utility

Record Modification Utility

Records By State

Subject Bibliography

URL Checker



# Appendix A - Changes in this Guide

## Changes for Version 16.1

No changes were made.