

**Workflow-Based
Reference
Guide**



Online Public Access Catalog

WORKFLOW-BASED REFERENCE GUIDE

OPAC

2017



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Introduction to OPAC	3
Understanding Menu & Toolbars.....	4
OPAC Menu Options	4
OPAC Menu & Toolbar	4
OPAC Options.....	5
Connect to Virtua	9
Start Virtua	10
Configure a Connection	10
Optional Settings.....	11
Select a Database	12
Login.....	12
Open Multiple Connections	13
Close Connections.....	14
Browse Search	15
Search the OPAC	16
Navigate Search Results	20
Refine a Search	22
View a Record	25
Full Tab.....	26
Items Tab	27
Item Information Window	31
MARC Tab.....	38
Statuses Tab	40
Holdings Tab	41
Output Records	46
Keyword & Full Text Searching	50
Search Commands	51
Keywords.....	51
Truncation	51
Phrase Searching.....	52
Boolean Operators & Search Operators	52
Parentheses	52
Proximity Searching	53
Search Categories	53
Enter Search Criteria	54
Sort Records.....	55
Refine a Search	56
Set Filters	56
View a Record	58
Output Records.....	58
Full Text Searching	58
View Records	58
Holdings Keyword Searching.....	60
Authority Heading Searches	63
Keyword in Heading Search	64
Browse Multiple Subject Headings	66
Cross-References	68
Display Options	72

Control Number Search	74
Control Numbers and Search Results in Virtua	75
Search the OPAC	76
Masked Records.....	78
Create Masked Records	79
Masking Statuses	83
Display Masked Records	84
Patron Records	86
Access Patron Record.....	87
Browse Search.....	87
Patron Keyword Search.....	88
View Patron Information	90
Appendix A: Definition of Key Terms.....	91
Appendix B: InfoStation Reports for OPAC	98
Appendix C: OPAC in a Consortium Environment	99
Users	99
Views.....	99
Filtering Out Holdings Records	99
Appendix D: Commonly Used Search Categories	100
Appendix E: Multiple Subject Thesauri	101
Appendix F - Changes in this Guide	103
Changes for Version 16.1.....	103

Introduction to OPAC

The purpose of this workflow-based reference guide is to provide information on the Online Public Access Catalog subsystem of the Virtua ILS – Integrated Library System highlighting the diverse searching methods supported in the module and providing instructions for locating records.

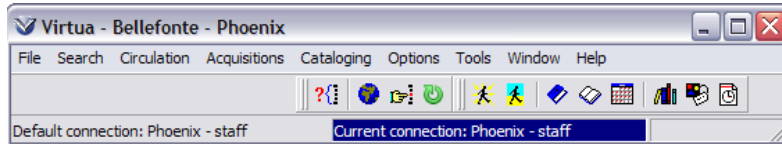
The Virtua client OPAC provides various types of searches, such as Browse, Heading and Keyword for library staff. In addition, staff may choose to search by common indexes, such as title, subject and author, while also allowing for staff restricted searches not allowed in the OPAC available to the patrons.

The client OPAC may be used as the starting point for many of the tasks that you will perform in Virtua, including circulation control and cataloging.





Please contact VTLS Customer Support for more information or if you would like to see an OPAC training video.

Understanding Menu & Toolbars

OPAC Menu Options



OPAC Menu & Toolbar

Menu Bar	Icon	Function Keys	Function
<u>S</u> earch			Opens Search window
<u>S</u> earch by State			Search by record state
<u>A</u> uthor			Author Search
<u>T</u> itle		F9	Title Search
<u>S</u> ubject			Subject Search
<u>C</u> all Number			Call Number Search
<u>P</u> atron Name		F8	Patron Name search (last name first)
<u>K</u> eyword		F12	Keyword Search
<u>I</u> SSN			Opens record in View Record window
<u>L</u> CCN			LC Control Number Search
Patron <u>B</u> arcode		F2	Patron Barcode Number Search
Item <u>B</u> arcode		F3	Item/Barcode number search
ISSN <u>S</u> erials		F10	Opens Serial Checkin window
Serial <u>A</u> bbreviation			
<u>I</u> nstructor			Reserve search by instructor name
Course <u>I</u> D			Reserve search by course number
<u>O</u> ptions			
<u>C</u> hange Location			Change Login Location
OPAC <u>D</u> isplay			Displays or hides Blind References, Authority Source, and Heading Type
			Displays a list of connections for the client
			Refreshes the connection

Note: When used with the Alt key, underlined letters denote keyboard shortcuts. For example: **Alt + s + a** performs an author search.

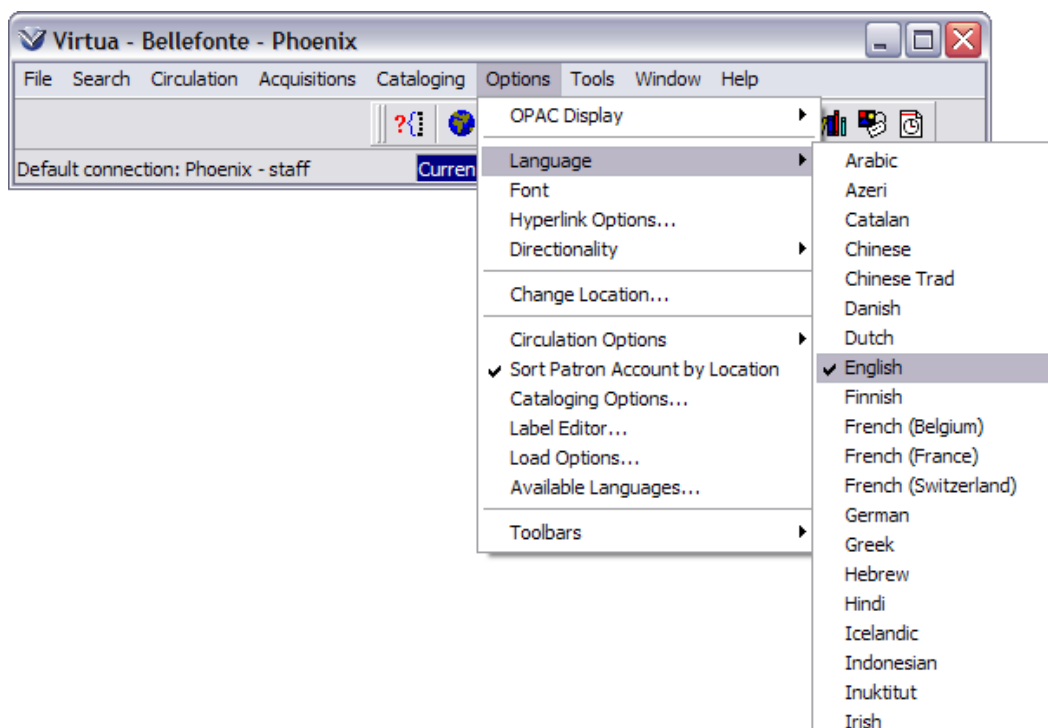
OPAC Options

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

Language

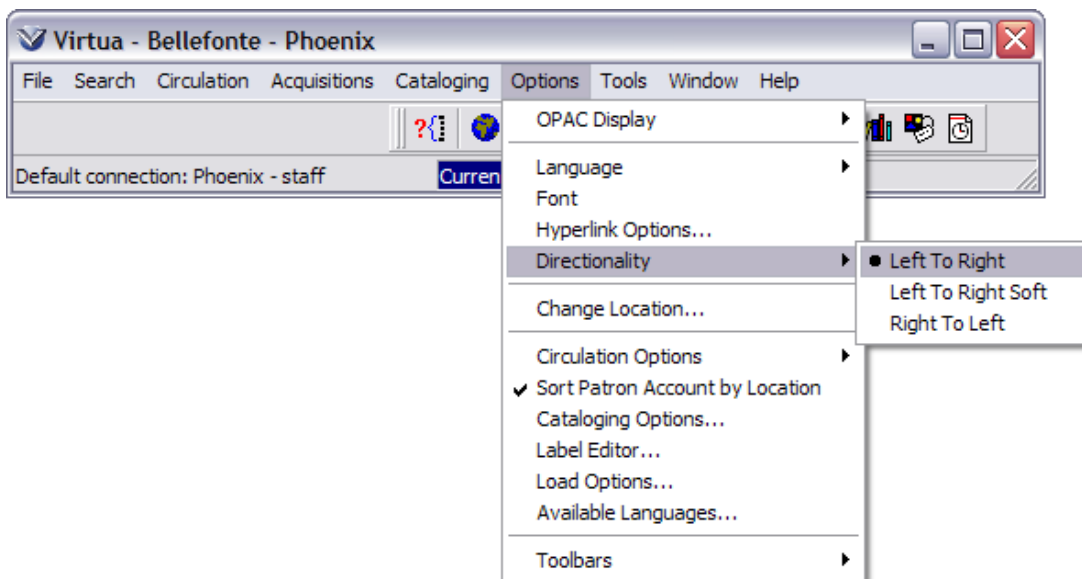
Select a language from the menu list; click on the **Options** menu, select the **Language** option, and choose the appropriate language.

Any translated strings for that language will appear in the Client interface. There are currently twelve complete translations for Virtua.



Directionality

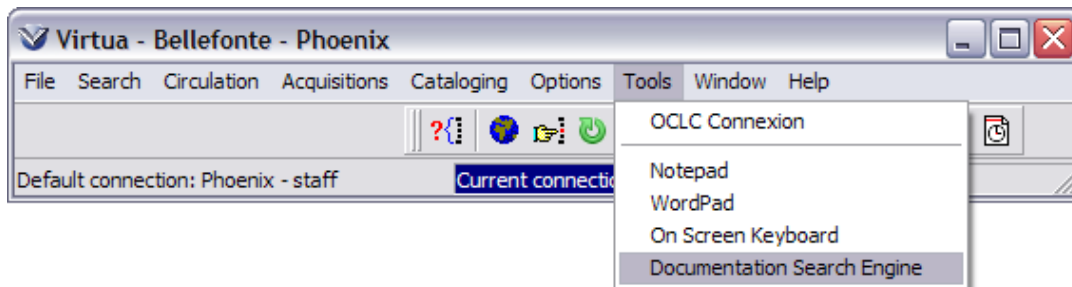
Select directionality from the menu list; click on the **Options** menu, select the **Directionality** option, and choose the appropriate directionality.



Directionality	Meaning
Left to Right	All text, regardless of directionality, will left justify.
Left to Right Soft	Text that is left-justified text will display left justified and right-justified text will display to the right.
Right to Left	All text, regardless of directionality, will right justify.

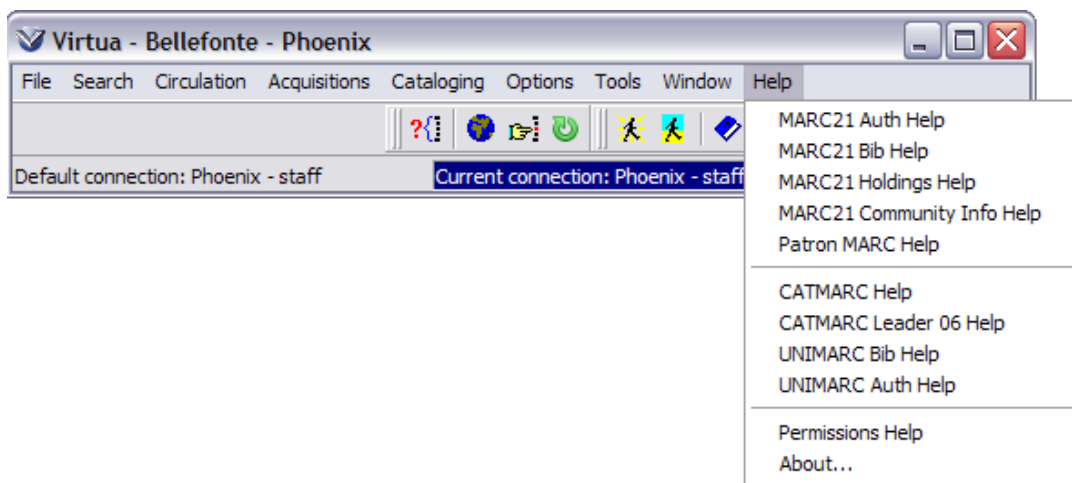
Documentation and Help

Virtua Users Guides are available in searchable .pdf format from the **Tools** menu; click on the **Tools** menu, then select **Documentation Search Engine**.

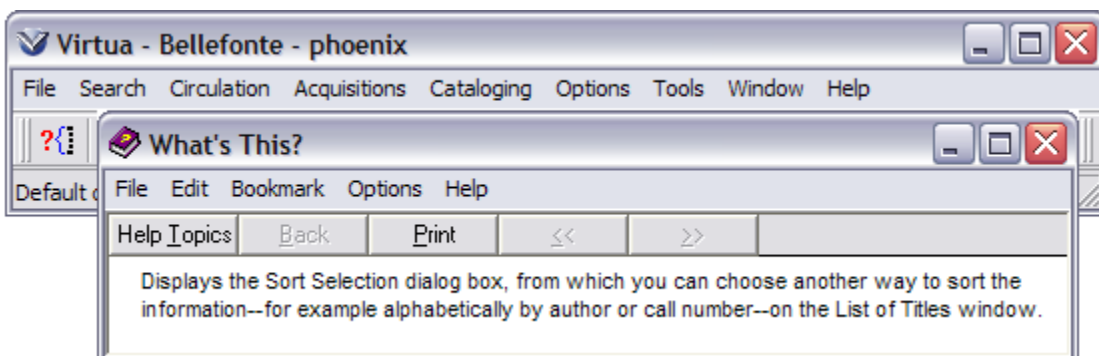


Note: While the Documentation Search Engine appears on your Tools menu by default, it is functional *only if* the Virtua documentation has been installed via the Documentation Installer. For details on the Documentation Search Engine, see the section *Viewing and Searching the Virtua Documentation* in the *Virtua Client Getting Started Primer*.

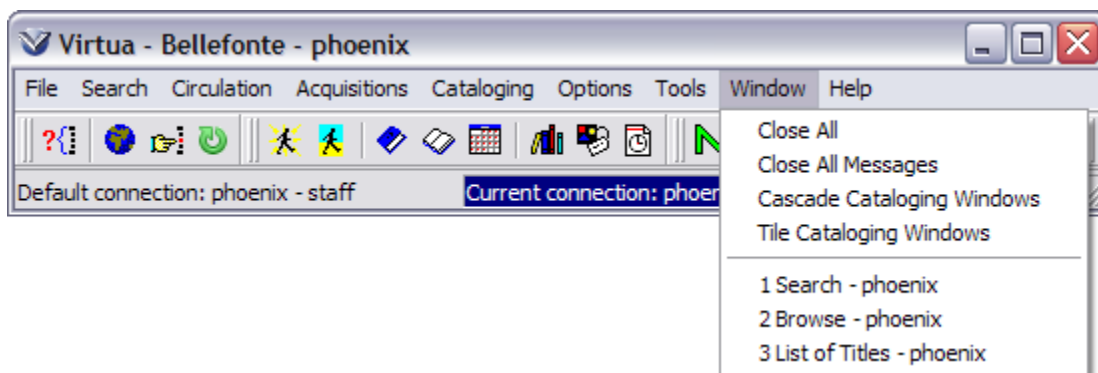
MARC 21, CATMARC, SWEMARC, and UNIMARC Format help is available from the **Help** Menu; click on the **Help** menu and select the appropriate help category.



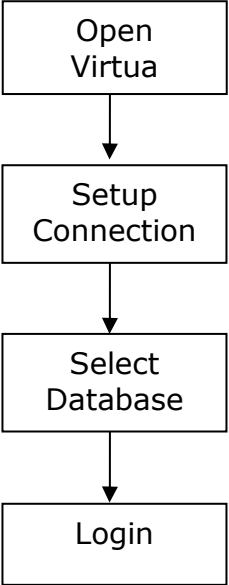
Context sensitive help is available; from the window for which help is needed, using the **F1** key or right mouse click will bring forward more information regarding that portion of the window.




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

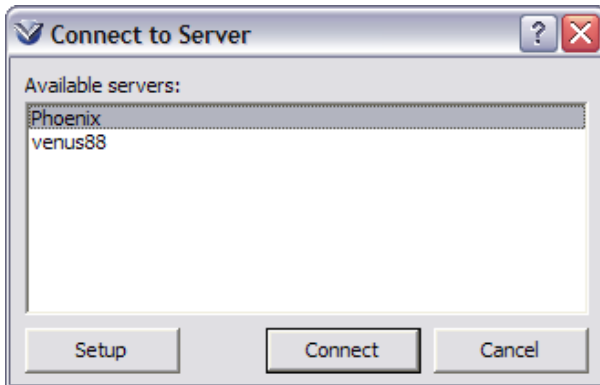


Connect to Virtua

Recommended Workflow	Explanation
 <pre> graph TD A[Open Virtua] --> B[Setup Connection] B --> C[Select Database] C --> D[Login] </pre>	<p>The first step in using Virtua is configuring a connection to your library; you may also configure connections to other Z39.50 library databases.</p> <p>Summary</p> <ul style="list-style-type: none"> Start Virtua Configure a Connection Connect to Virtua <p>Key Terms</p> <ul style="list-style-type: none"> Attribute Configuration Default Load Character Set Host Name Port Profile Name Z39.50 Database Z39.50 Protocol <p>Related Topics</p> <ul style="list-style-type: none"> Users Permissions Guest

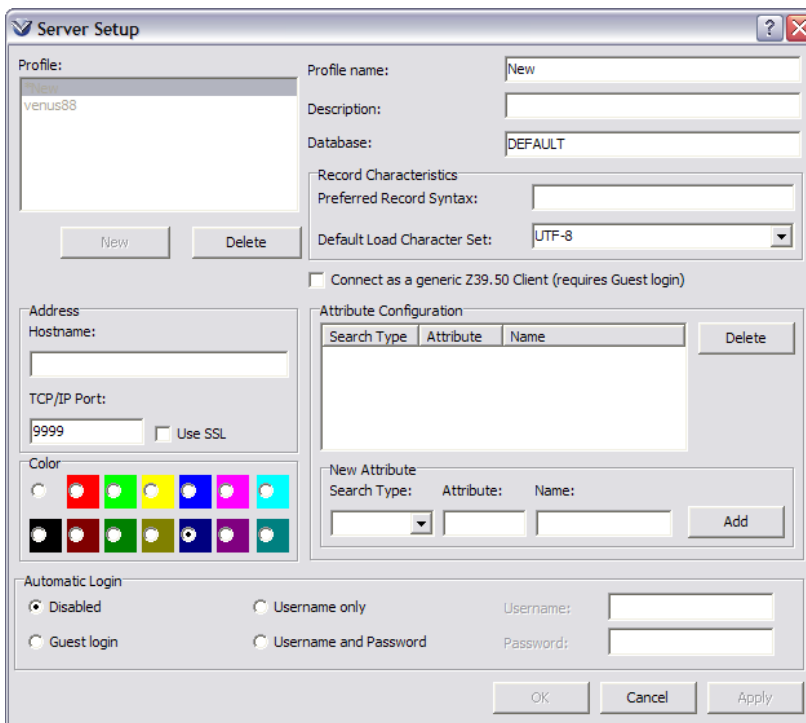
Start Virtua

To open the Virtua Client; either click the Virtua Client icon  or select **Start → Programs → VTLS → Virtua**. The **Connect to Server** window appears displaying the databases available for connection.



Configure a Connection

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



Click the **New** button to create a new connection. The word ***New** will appear in the Profile box to the left.

Select ***New** from the **Profile** list, then enter the Profile Name (New will be put in by default, but you will want to change that to a more appropriate name).

Enter the following information:

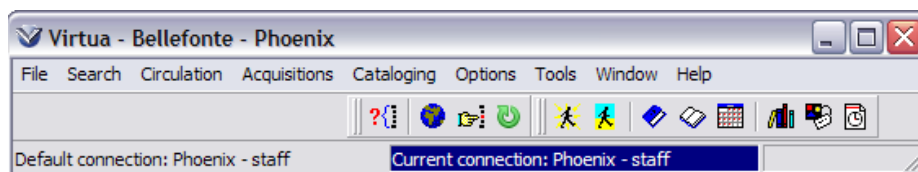
Description (the name that will appear in the Connection List box),
Host name or IP address of the database, and
Port number of the database.

Note: The **Database** textbox should either contain the word *DEFAULT* or should be left blank to connect to Virtua databases.

The screenshot shows the 'Server Setup' dialog box. The 'Profile' list contains 'Phoenix' and 'venus88'. The 'Profile name' field is set to 'Phoenix', 'Description' is 'Phoenix', and 'Database' is 'DEFAULT'. The 'Default Load Character Set' is 'UTF-8'. The 'Address' section shows 'Hostname: phoenix.vtls.com' and 'TCP/IP Port: 9999'. The 'Color' section has a grid of colored circles. The 'Attribute Configuration' section has a table with columns 'Search Type', 'Attribute', 'Name', and a 'Delete' button. The 'New Attribute' section has fields for 'Search Type', 'Attribute', and 'Name', and an 'Add' button. The 'Automatic Login' section has radio buttons for 'Disabled', 'Username only', 'Guest login', and 'Username and Password', with 'Username' and 'Password' fields.

Optional Settings

You may select a color for the section of the menu bar in Virtua that displays the database connection information.



If a server returns records in a syntax other than MARC 21, Virtua uses the syntax specified here. Currently, the Virtua client accepts records from a server in MARC 21, CATMARC, and UNIMARC formats. In the Preferred Record Syntax text box, type the Object Identifier (OID) for your preferred record syntax.

This setting specifies the character set the server to which you are connecting. If MARC21 is selected, records will be converted to UTF8 when you download records from that server to your Virtua server.

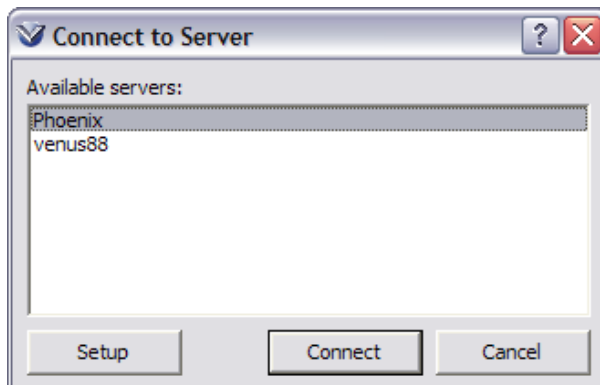
In order for Virtua to search non-standard Z39.50 databases, you will need to specify search types and use attributes in the **Attribute Configuration** area. Configure a use attribute in the **New Attribute** boxes and click the **Add** button. The attribute will appear in the Attribute Configuration area.

Click **OK** to return to the **Connect to Server** window.

Note: If you click **Apply**, you will then need to click the **Cancel** button to exit the **Setup** window. You should not lose the connection information if you follow this workflow.

Select a Database

From the **Connect to Server** window click on the desired database (there may only be one). It will be highlighted indicating that it is selected.



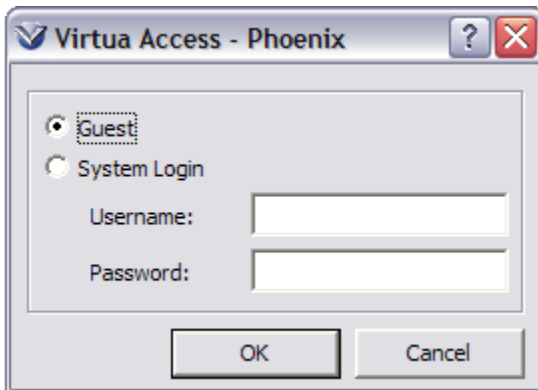
Click on the **Connect** button to open a connection, the **Virtua Access** window will appear.

Login

Guest Login

The **Virtua Access** window defaults to **Guest**. This profile allows users to log in to the Virtua Client without authentication.

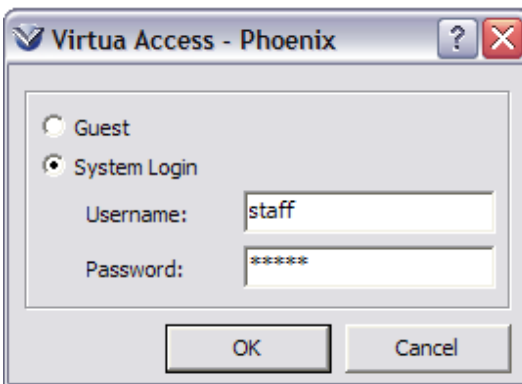
Click **OK** to login as Guest.



System Login

To login with a user ID and password, click in the **User ID** text box. System Login will be enabled.

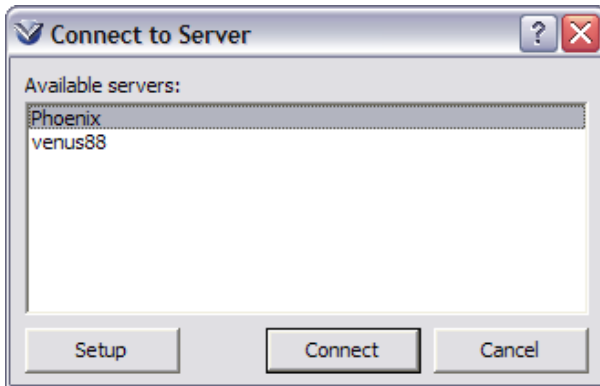
Type your Username and Password. Click **OK** to login.



Open Multiple Connections

Virtua supports connections to multiple databases.

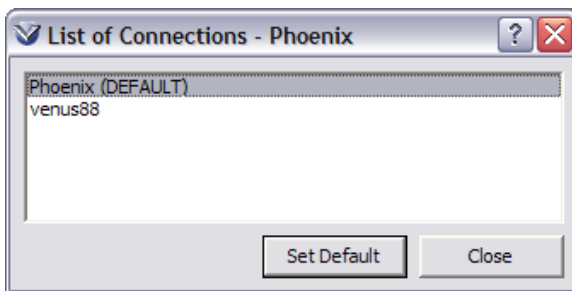
To open multiple connections, select **File** → **New Connection** from the Virtua Menu bar. A list of all configured connections will appear.



Select the connection you wish to open and click the **Connect** button. The new connection will become the **default** connection.

Note: The default database is the one that will be active, (e.g. You will be able to search that database, retrieve MARC records, and if you have permission, update the database).

To change the default connection, select **File** → **Connection List**; the **List of Connections** window will appear.

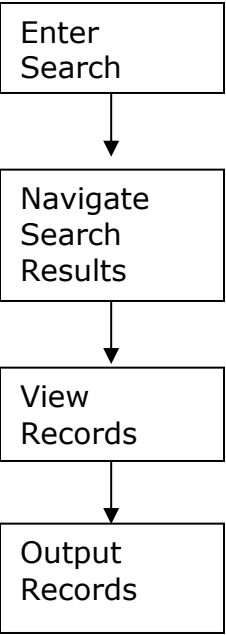


Highlight the connection you wish to be active, and click the **Set Default** button.


Close Connections

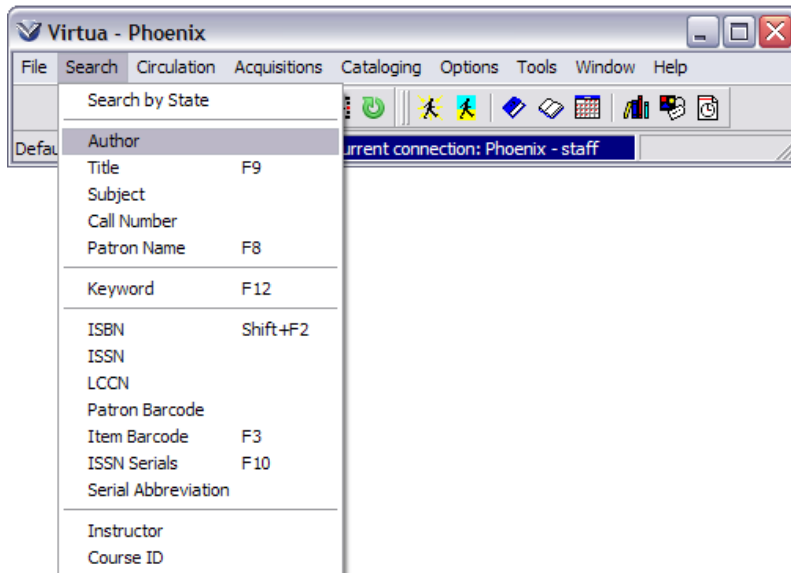
To close a connection, select **File** → **Close Connection** from the Virtua menu; the active (default) connection will close.

Browse Search

Recommended Workflow	Explanations																								
 <pre> graph TD A[Enter Search] --> B[Navigate Search Results] B --> C[View Records] C --> D[Output Records] </pre>	<p>Virtua’s Browse Search takes advantage of a library’s controlled vocabulary and cross-reference structure. The browse search feature is useful for searching the OPAC when the user wants to narrow a search from a broad topic to a specific topic or does not know an exact term.</p> <p>Summary</p> <ul style="list-style-type: none"> Open the Browse Search window Select an index Enter search terms Navigate the search results Navigate View Record window Navigate item Information window <p>Key Terms</p> <table border="0"> <tr> <td>Authority Headings</td> <td>Item Information window</td> </tr> <tr> <td>Bibliographic MARC Record</td> <td>Item-Level Call Number</td> </tr> <tr> <td>Bib-level Call Number</td> <td>Items Elements tab</td> </tr> <tr> <td>Browse Search</td> <td>Items tab</td> </tr> <tr> <td>Browse window</td> <td>List of Titles window</td> </tr> <tr> <td>Call number</td> <td>MARC tab</td> </tr> <tr> <td>Course ID</td> <td>MARC 856 tag</td> </tr> <tr> <td>Full tab</td> <td>Search window</td> </tr> <tr> <td>Holdings tab</td> <td>Sort Order</td> </tr> <tr> <td>Holdings-level Call Number</td> <td>Statistics tab</td> </tr> <tr> <td>Item</td> <td>Statuses tab</td> </tr> <tr> <td></td> <td>View Record window</td> </tr> </table> <p>Search Strings</p> <p>Author, Instructor, Patron: Last name first Title: Do <i>not</i> include A, An, The as the first word Subject: Type the category as it appears in the Library of Congress Subject Headings Course ID searches: Use the official name and number</p>	Authority Headings	Item Information window	Bibliographic MARC Record	Item-Level Call Number	Bib-level Call Number	Items Elements tab	Browse Search	Items tab	Browse window	List of Titles window	Call number	MARC tab	Course ID	MARC 856 tag	Full tab	Search window	Holdings tab	Sort Order	Holdings-level Call Number	Statistics tab	Item	Statuses tab		View Record window
Authority Headings	Item Information window																								
Bibliographic MARC Record	Item-Level Call Number																								
Bib-level Call Number	Items Elements tab																								
Browse Search	Items tab																								
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Holdings-level Call Number	Statistics tab																								
Item	Statuses tab																								
	View Record window																								

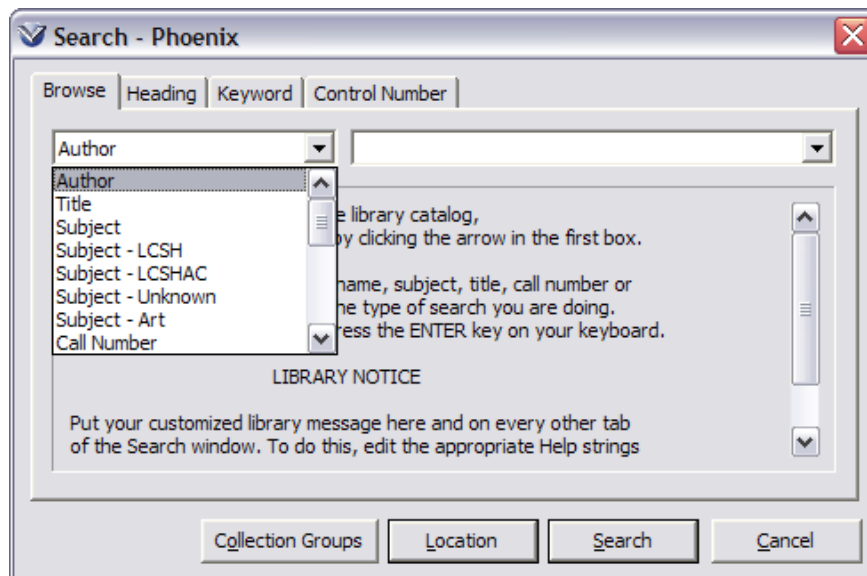
Search the OPAC

Click the **Search**  icon on the OPAC toolbar or the **Search** drop-down menu to select one of the search options, or use the assigned function key (i.e. to perform a **Title** search hit the **F9** key) to open the OPAC **Search** window.



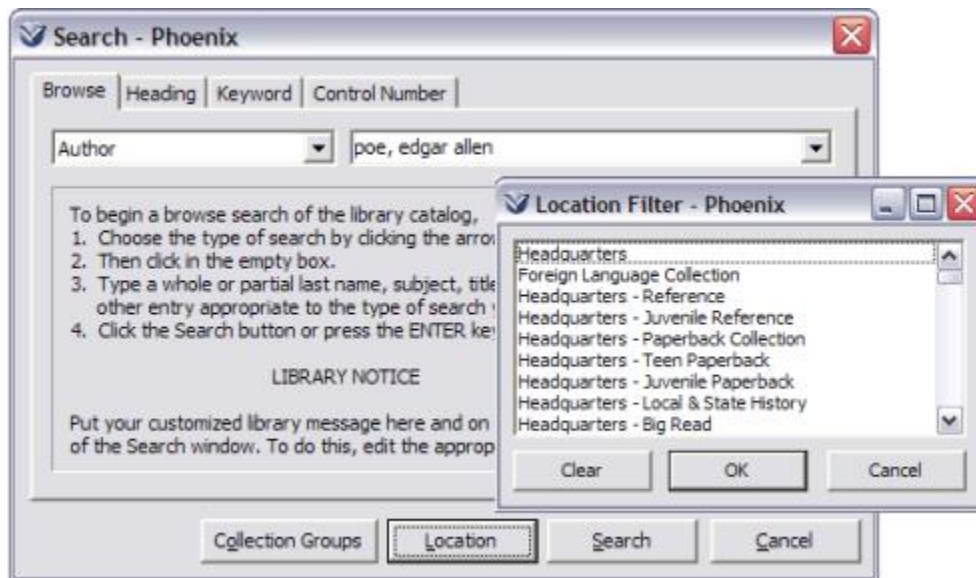
If you clicked on the OPAC Search icon, the **Search** window appears with **Browse** as the active tab.

Select an index from the dropdown menu of the index selection box.



Enter search terms in the text box to the right of the index selection box.

(Optional) Click the **Location** button to filter search types by Location. Highlight a single location or select several locations by using the **Ctrl** key, then click **OK** to accept your location(s) selection.



Note: Location filter applies to all search types. Using the browse location filter for call number searches, you can search by call number and display only those items that belong to your library in call number order; creating a shelf list. The location filter is inclusive, meaning that your search results will *include* only the items and holdings records that are shelved at the location(s) that you select on the **Location Filter** window.

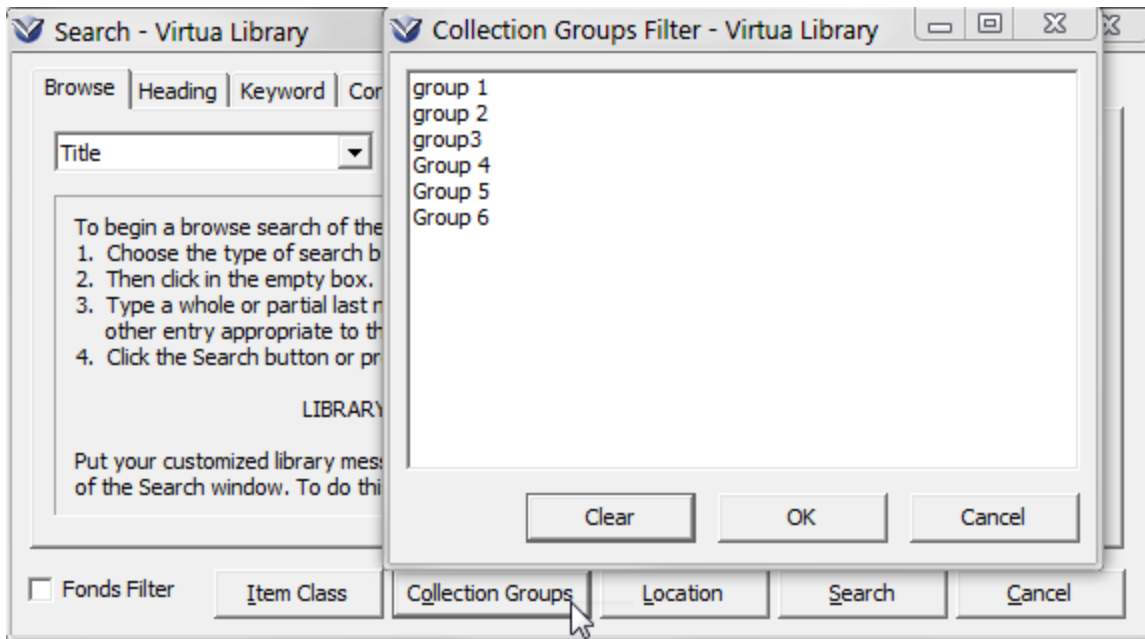
Click the **Search** button to perform a search of the database.

To turn off location filtering, click on the **Location** button from the **Search** window.

Click **Clear** from the **Location Filter** window.

Profiler Tip: Library-defined browse and heading keyword search definitions are set in the Tags Indexed for User Defined Search parameter in the *Virtua Profiler*. A library-defined search is a type of custom heading search for which your library can determine indexing rules. You can determine which tag/subfield/indicator combinations are indexed for your library-defined search. See *Defining Tags Indexed for User Defined Searches* in the *Virtua Profiler/Cataloging Parameters User's Guide* for more information.

(Optional) Click the **Collection Groups** button to filter search types by collection group. Highlight a single collection group or select several collection groups by using the **Ctrl** key, then click **OK** to accept your selection.



Note: The Collection Groups filter is available for the Browse and Heading search types. The Collection Groups filter is inclusive, meaning that your search results will *include* only the records that belong to the collection group(s) that you select on the **Collection Groups Filter** window.

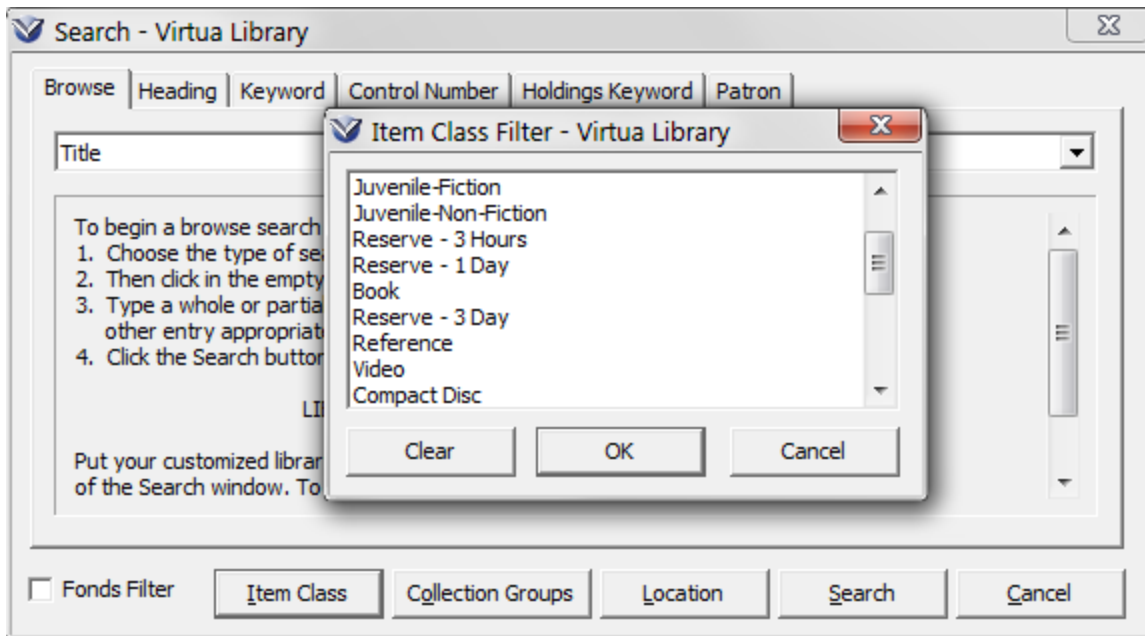
Click the **Search** button to perform a search of the database.

To turn off collection group filtering, click on the **Collection Groups** button from the **Search** window.

Click **Clear** on the **Collection Groups Filter** window.

Profiler Tip: The Collection Groups filter button is enabled by the "Allow collection group filters for browse/heading" setting on the OPAC Basic Options window. See the *Virtua Profiler/OPAC Parameters User's Guide* for information on this setting. After enabling this setting, you must run the script `PopulateCollectionGroupFilters.sh`. This will populate the Collection Groups Filter window with the collection groups defined in the Collection Code Group parameter; see the *Virtua Profiler/Cataloging Parameters User's Guide* for information.

(Optional) Click the **Item Class** button to filter search types by item class. Highlight a single item class or select several item classes by using the **Ctrl** key, then click **OK** to accept your selection.



Note: The Item Class filter is available for the Browse and Heading search types. The Item Class Groups filter is inclusive, meaning that your search results will *include* only the records that belong to the item class(es) that you select on the **Item Class Filter** window.

Click the **Search** button to perform a search of the database.

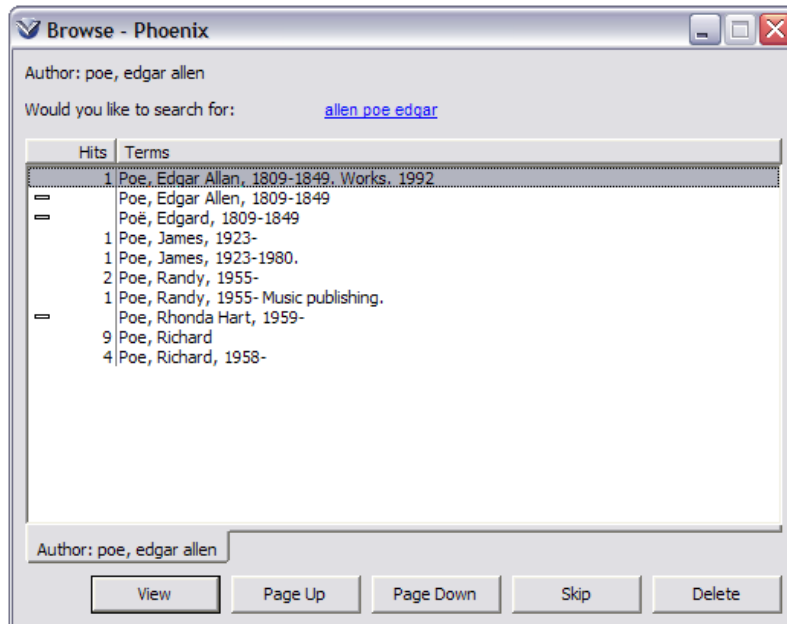
To turn off item class filtering, click on the **Item Class** button from the **Search** window.

Click **Clear** on the **Item Class Filter** window.

Profiler Tip: The **Item Class Filter** button is enabled by the “Allow item class filters for browse/heading” setting on the OPAC Basic Options window. See the *Virtua Profiler/OPAC Parameters User’s Guide* for information on this setting. After enabling this setting, you must run the script **PopulateItemClassFilters.sh**. This will populate the **Item Class Filter** window with the item classes defined in the Item Class Definitions parameter; see the *Virtua Profiler/Circulation Parameters User’s Guide* for information.

Navigate Search Results

The results of a **Browse** search are displayed as an alphabetical list of *hits* from the catalog. In the case of an author, title, or subject search, the list consists of authority headings.



Note: For **Author** searches, a normalized version of the name appears as a hyperlink above the list of hits.

If an **exact match** for the search term **is** found, the search term will be highlighted.

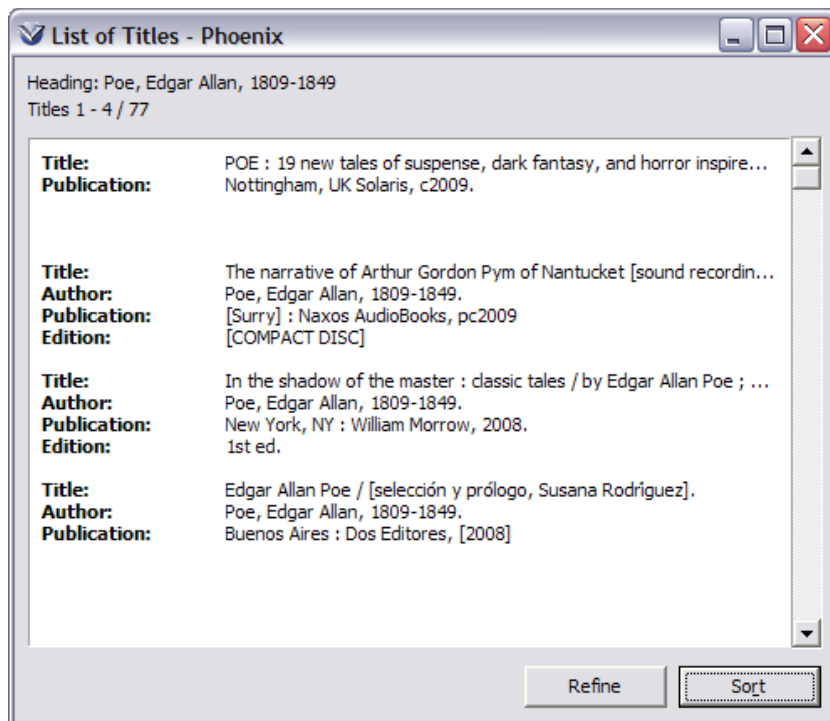
If an **exact match** for the search term **is not** found, the term above where the searched term would be is highlighted.

Term	Definition
Hits	Number of titles associated with each line item
Cross-Reference	If the line item is associated with a cross-reference, the Hits column displays a sign (see also reference) or sign (see reference)
Search Result Tabs	Displays previous search results provided the Browse window is not closed
View	Displays additional information about the selected item
PageUp/PageDown	Displays the previous <i>page</i> in the browse list
Skip	Skips to the top, bottom, or skips x number of entries in the browse list

Delete | Deletes the active search tab
 To navigate search results:

Select an item with more than one hit.

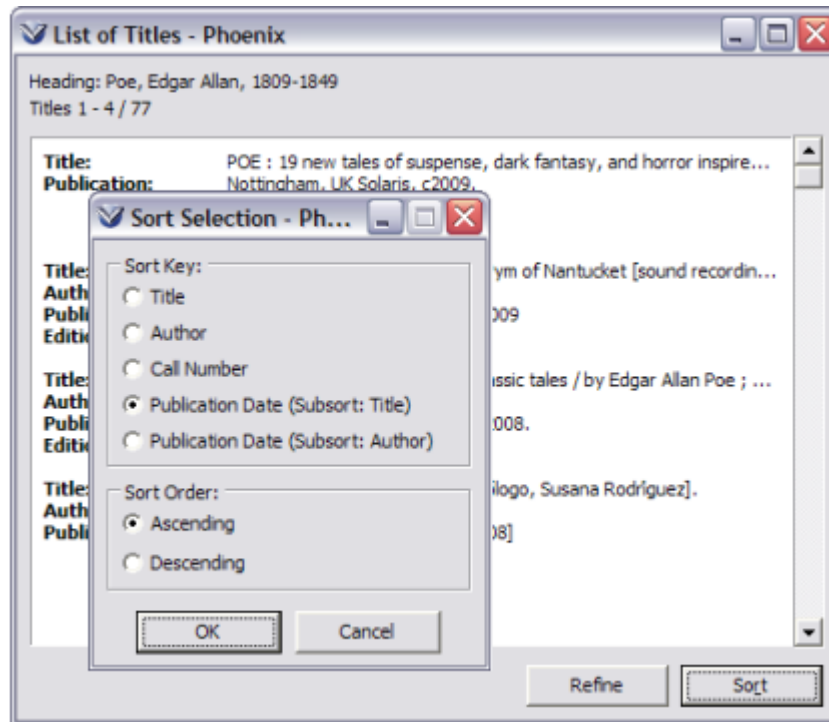
Click the **View** button or double click on the item to retrieve the **List of Titles** window.



The **List of Titles** window displays the brief record information for each title associated with the line item you selected from the **Browse** window. The bibliographic information that appears is defined in the List of Titles View record in the MARC View Editor in the *Virtua Profiler*.

Note: *If* there is **only** one **hit**, this screen is bypassed and the record will open in the **View Bibliographic Record** window.

To sort the titles, click on the **Sort** button. The **Sort Selection** dialog box appears.



Publication Date (Subsort: Title) and Ascending order are selected by default.

In the **Sort Key** field, select the radio button for the type of sort you want to use.

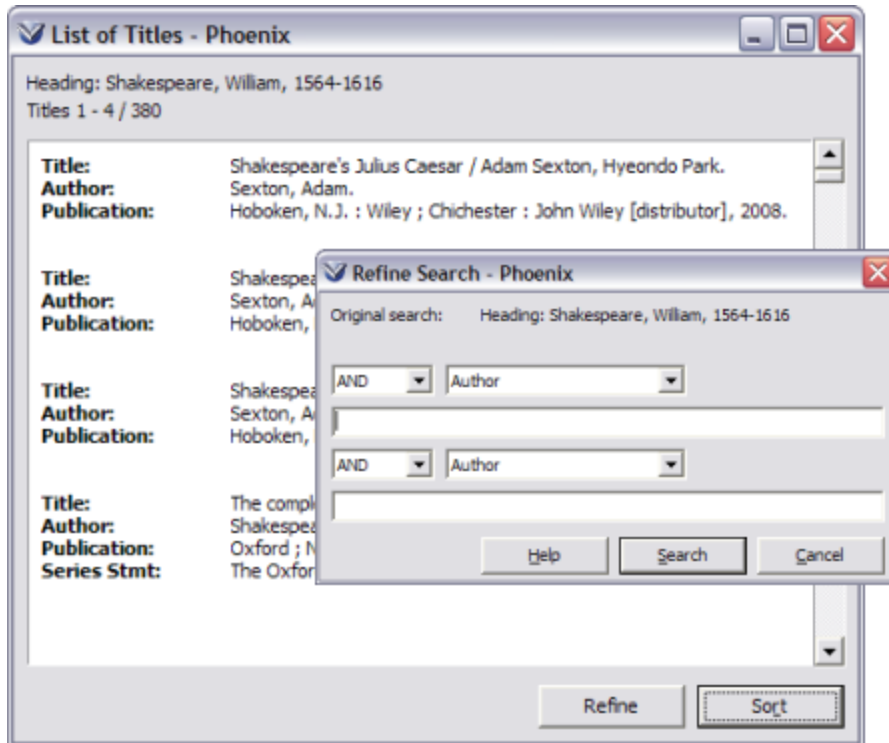
In the **Sort Order** field, select the radio button for the order in which you want the results to be sorted: **Ascending** or **Descending**.

Click **OK**. Virtua re-sorts the list of titles according to the specified criteria.

Refine a Search

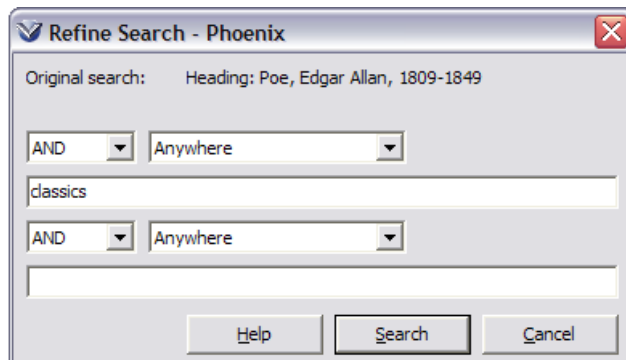
When you search for a topic, which has a long list of titles, you may wish to refine your search by adding additional criteria.

From the **List of Titles** window, click on the **Refine** button; the **Refine Search** window will appear.



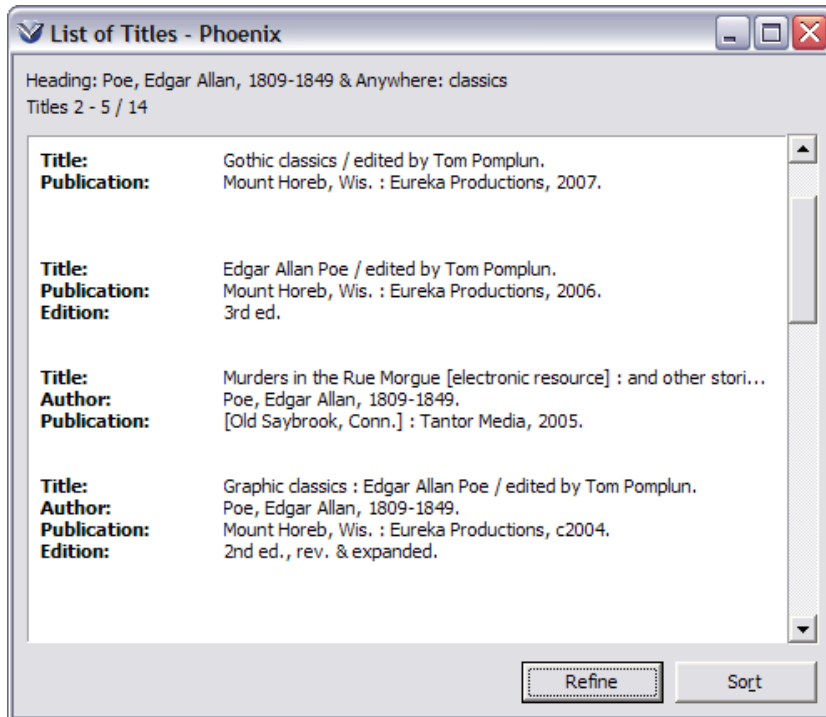
Note: Your original search appears at the top of the screen.

Select a category for the first term, then type the first term in the text box.

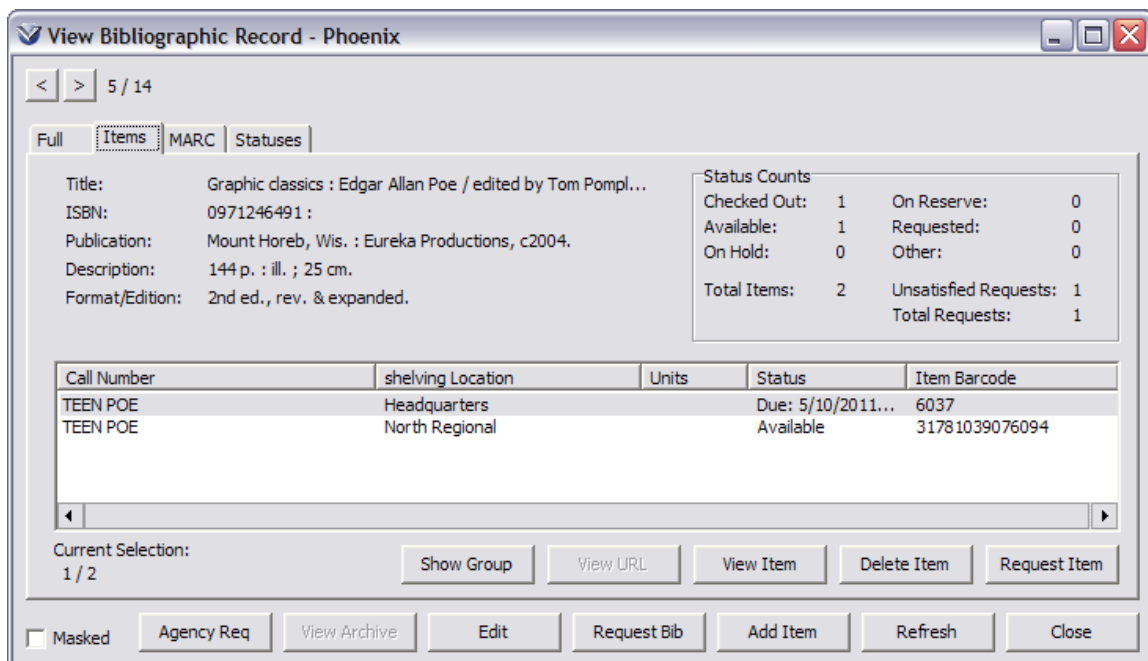


If a second refinement term is to be used, select a Boolean Operator (AND, OR, AND NOT) and category for the second term, then type the second term in the middle text box.

Click the **Search** button to execute the refined search; the **List of Titles** window will appear.



Once you have selected a title to view, click on the title. The full view of the bibliographic record will appear in the **View Bibliographic Record** window.



View a Record

The **View Bibliographic Record** window provides information about the title/item that was selected from the **List of Titles**. Information concerning the record is displayed on tabs. Different tabs are available for each record type in each different window:

View Bibliographic Record Window

Full tab
 Items tab – Access to Item Information window
 MARC tab
 Statuses tab – Acquisitions information
 Holdings tab – Serials records only

Item Information Window

Item Elements tab
 Notes tab
 Statistics tab
 Status tab

View Bibliographic Record - Phoenix

5 / 14

Full | **Items** | MARC | Statuses

Title: Graphic class
 ISBN: 0971246491 :
 Publication: Mount Horeb,
 Description: 144 p. : ill. ; 2
 Format/Edition: 2nd ed., rev.

Call Number
 TEEN POE
 TEEN POE

Current Selection:
 1 / 2

Masked Agency Req

Item Information - Phoenix

Item Elements | Notes | Statistics | Status | Barcode History

Bibliographic Information
 Author: Poe, Edgar Allan, 1809-1849.
 Title: Graphic classics : Edgar Allan Poe / edited by Tom Pomplun.
 Edition: 2nd ed., rev. & expanded.

Item Information
 Item ID: 729553
 Barcode: 6037
 Barcode Type: Regular
 Item Class: Paperback
 Reserves Item Class:
 Item URL:
 Location: Headquarters
 Shelving Location: Headquarters

Number of Pieces: 1 Circulate Pieces:
 Price: \$ 14.95
 EPN Number:
 Accession Number:
 AV Accession Number:
 Collection Code:

Call Number
 Copy:
 Call #: TEEN POE
 2nd Call #:

Units
 Free Text
 Enumeration and Chronology
 None
 Edit

Preservation and Conservation
 Code:

Non-Parameterized Shelf Location
 Location:

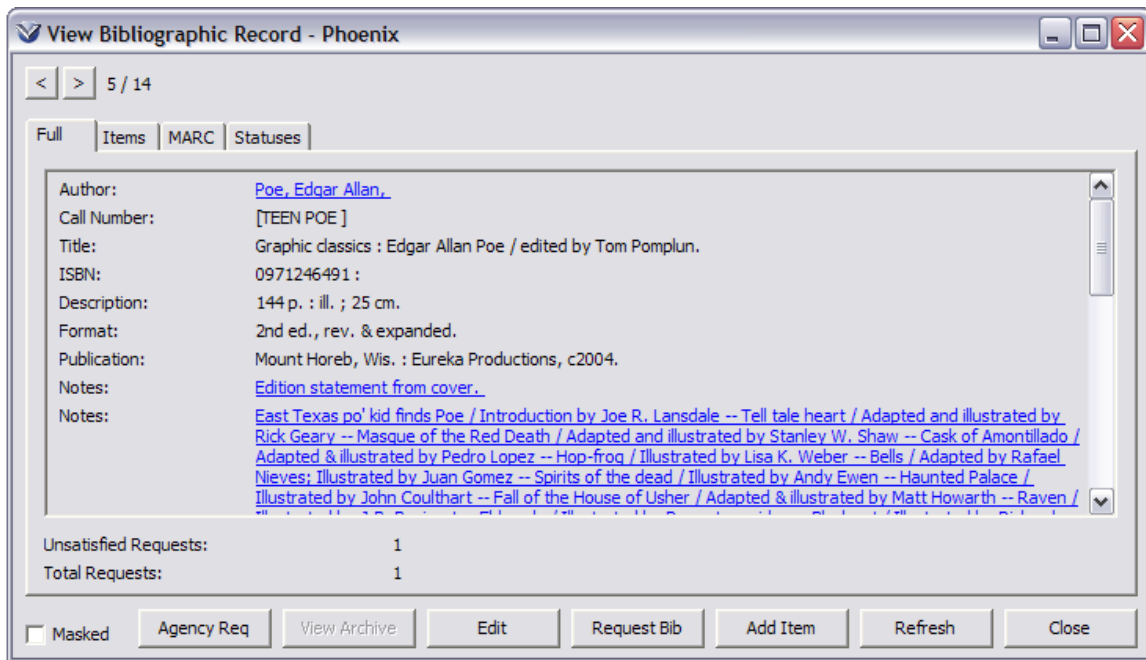
Circulation Rules
 Use Matrix
 Use Loan Period: 0
 Allow Request:

Masked

Full Tab

The **Full** tab view is the non-MARC, public view of the bibliographic record. You can configure the bibliographic information that is displayed by editing the View Bibliographic Record: Full Display View record in the MARC View Editor in the *Virtua Profiler*.

Click the **Full** tab. The **Full** tab of the **View Bibliographic Record** window displays bibliographic information such as author, title, call number, subjects, etc.



Label	Description
Agency Request	Places a request for multiple copies of a bibliographic record
Edit	Opens MARC Editor window to edit record
Request Bib	Opens Request window to place a bibliographic level request
Add Item	Opens the Add Item window to add an item to the bib record
Refresh	Refreshes to screen
Close	Closes the window

The **Full** tab of the **View Bibliographic Record** window contains the following areas:

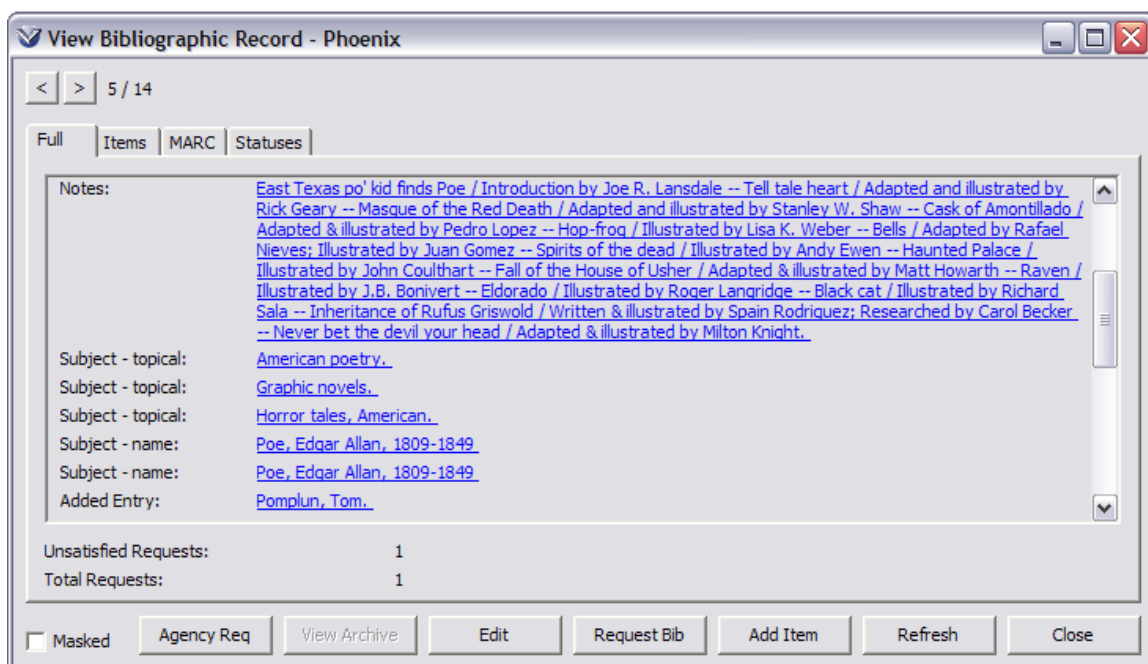
Library Defined Information: Using the *Virtua Profiler*, your library can determine which tabs appear to which user, the names of the tabs, and the bibliographic information that appears on the **Full** tab.

Requests: In the lower left corner of the window the number of requests (if any) for this title is displayed.

The **Full** tab of the **View Bibliographic Record** window may also contain hyperlinked text.

Multimedia Links: If a bibliographic record is associated with multimedia files (856 tag), the URL of each multimedia file is displayed as a hyperlink.

Search Hyperlinks: The **Full** tab view may be configured in the *Virtua Profiler* to display the contents of any bibliographic tag as a search hyperlink. When you click the hyperlinked field, Virtua launches the type of search you configured.



Example: Click on the hyperlinked subject of **Poe, Edgar Allen, 1809-1849**. The **Browse Search** opens, launching a search for subject, Poe, Edgar Allen, 1809-1849.

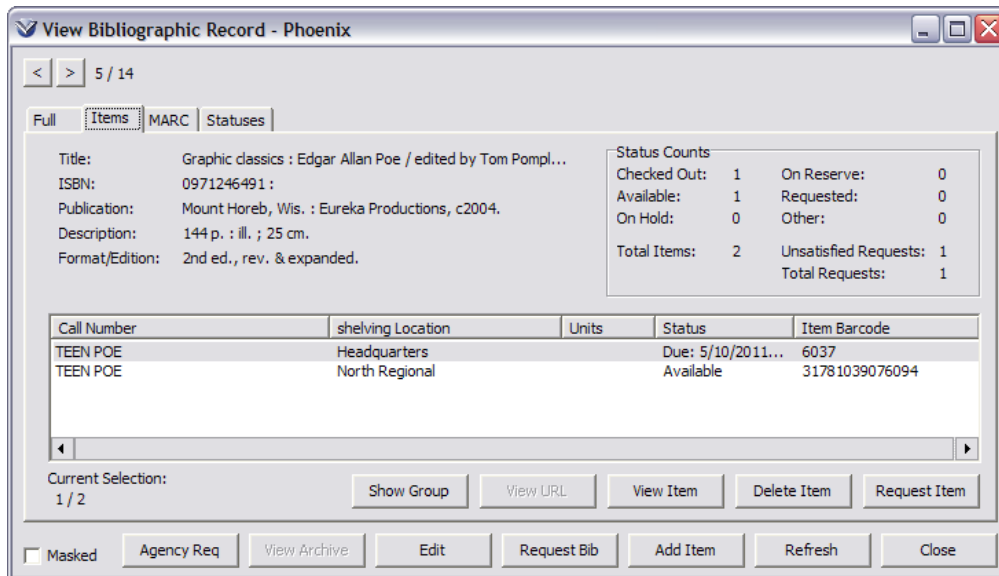
Click the **Items** tab. The **Items** tab of the **View Bibliographic Record** window displays the copies and volumes attached to the bibliographic record.

Items Tab

The **Items** tab consists of two configurable areas: header and list box.

Header: contains information from the bibliographic record and associated library-defined labels.

List box: contains columns of information about the various physical copies of the item.



Depending on how you configure the View Bibliographic Record/View Holdings Record: Items Tab View record in the *Virtua Profiler*, the information displayed may include:

Label	Description
List of Items	Physical and/or virtual items attached to bibliographic record
Item Level URL	If the item record has a URL an icon displays to the left of the call number.
Call number(s)	Shelving location number
Location	Where items are located
Status	Items available, on reserve, or which have outstanding requests
Item number	Barcode of the item
Units	Number of discrete pieces associated with the item
Circulation Data	Tallies, or counts, of items with specific statuses
Requests	Number of outstanding requests for an item
Masked	If checked, the record will not display to users without permission

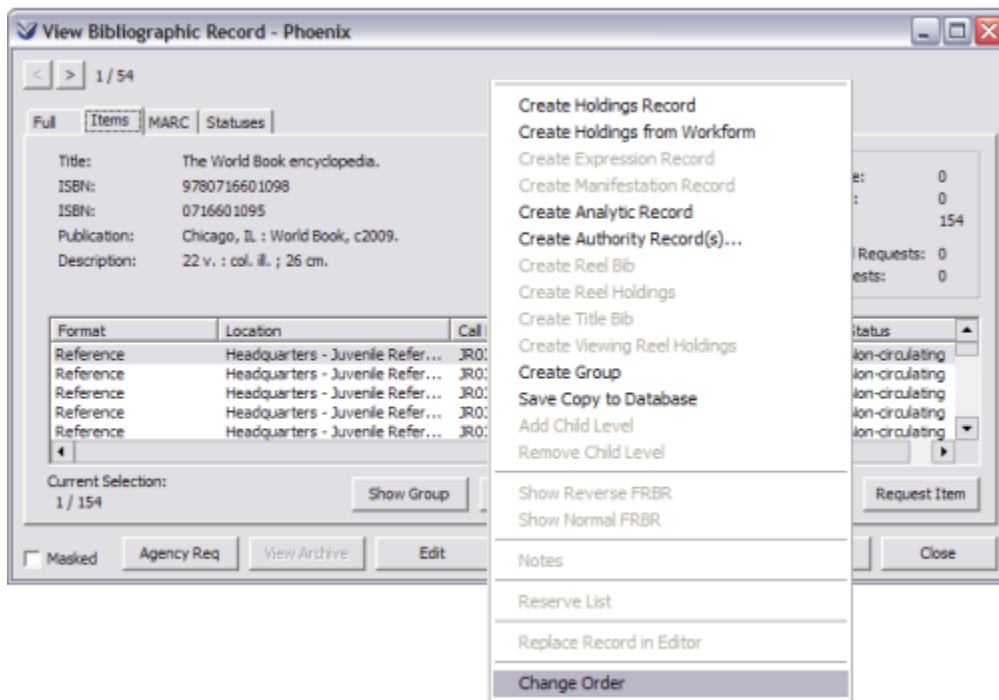
Sorting on the Items Tab

Click the **column headings** to sort the information in that column. Each category sorts the items alphabetically in ascending order.

When new items are added, the default sort placement is the last item in the list. If a user clicks on the **Units** column heading to *change* the sort order, the system will only reverse the order of the items. That is, the items going down the list would, after clicking the **Units** column, now be at the bottom of the list and will go up. If that new item is not in the desired sort order, then the user will use the **Change Order** feature to place the new item into the correct sorted order.

The **Change Order** feature allows the staff user to define a sort order for the display of items on the **View Bibliographic Record** window or the **View Holdings Record** window in the Virtua client.

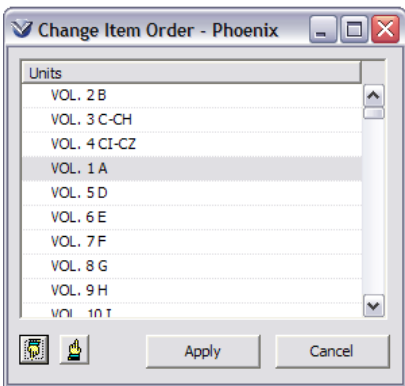
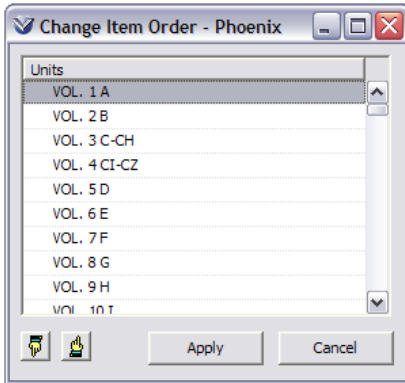
To change the order in which items display on the **View Bibliographic Record** window:



Select an item in the list.

Right click and select the **Change Order** option.

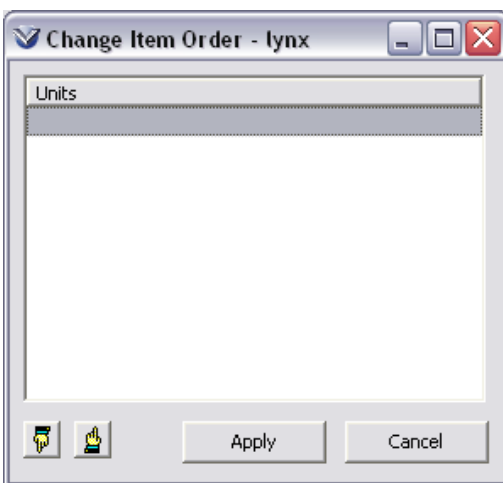
Change the order of the items (Units field values are in the list) by selecting the item and using the up and/or down arrows to change the position.



Click the **Apply** button.

Re-sorting Items By Units

Re-sort the list of items on the **Items** tab of the **View Bibliographic Record** window or the **View Holdings Record** window by the items' Units values. Re-sorting is especially useful when the item list contains items of different volumes and the volumes are identified with non-traditional Units values (such as Roman numerals).



To resort the items, select a line item, right click, and select the Change Order option, which displays the **Change Sort Order** window. The **Change Sort Order** window displays Units field data from all the associated item records.

Select the item you want to re-sort, and then use the **Up** and **Down** "hand" icons to move each item as desired.

Apply the changes and the items in the **View Bibliographic Record** or **View Holdings Record** window appear in the sort order specified.

Item Information Window

The **Item Information** window displays information about a physical or virtual piece in the library collection. While all copies of one title may have identical bibliographic information, other types of information, such as barcode, are unique and differ from copy to copy.

Each tab contains the same Bibliographic Information at the top of the display. You can determine what information appears in the bibliographic header and how it is displayed by configuring the Item Information View record (20004) in the MARC View Editor in the *Virtua Profiler*. For details, see the *Virtua Profiler/OPAC Parameters User's Guide*.

From the **View Bibliographic Record** window, select an item and click on the **View Item** button. The **Item Information** window will appear.

The screenshot shows a software window titled "Item Information - Phoenix". It has several tabs: "Item Elements", "Notes", "Statistics", "Status", "Acquisitions", and "Barcode History". The "Item Elements" tab is active, displaying the following information:

- Bibliographic Information:**
 - Author: Poe, Edgar Allan, 1809-1849.
 - Title: Graphic classics : Edgar Allan Poe / edited by Tom Pomplun.
 - Edition: 2nd ed., rev. & expanded.
- Item Information:**
 - Item ID: 729553
 - Barcode: 6037
 - Barcode Type: Regular
 - Item Class: Paperback
 - Reserves Item Class: (empty)
 - Item URL: (empty)
 - Location: Headquarters
 - Shelving Location: Headquarters
 - Number of Pieces: 1
 - Circulate Pieces: (checkbox, unchecked)
 - Price: \$ 14.95
 - EPN Number: (empty)
 - Accession Number: (empty)
 - AV Accession Number: (empty)
 - Collection Code: (empty)
- Call Number:**
 - Copy: (empty)
 - Call #: TEEN POE
 - 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.

Tab	Description
Item Elements	Bibliographic, item, and call number information, preservation and conservation codes, and circulation rules
Notes	Public and staff notes and check-in and check-out alerts
Statistics	Information grouped by bibliographic information, record information, and circulation statistics
Status	Special or system-defined circulation statuses
Acquisitions	Displays acquisitions information for the item.
Barcode History	Displays old barcodes for the item, along with the first and last dates the barcode was used.
Button	Description
Delete	Deletes the item record
Edit/Save	Displays as Save when in Edit mode to save changes
Refresh	Refreshes the item record display
Close	Closes the item record

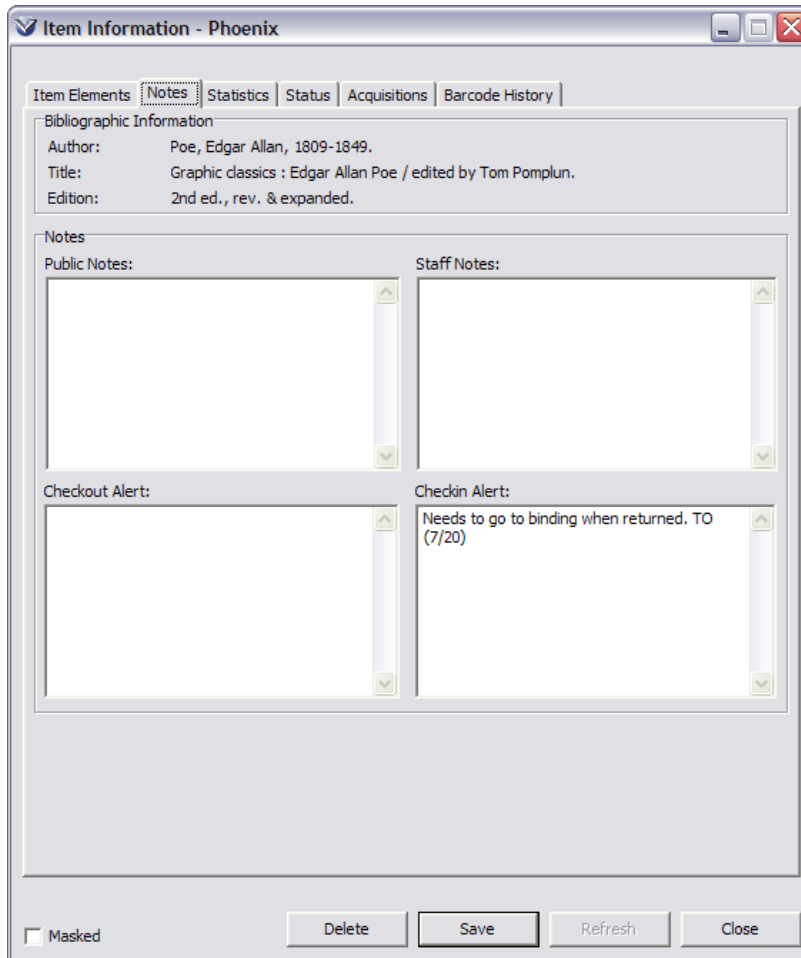
Item Elements Tab

The **Item Elements** tab *always* appears on the **Item Information** window, and it always appears first. On the **Item Elements** tab, item information is organized into four groups:

Label	Description
Bibliographic Information	You can determine what information appears in the bibliographic header and how it looks by configuring the Item Information View record in the Virtua Profiler.
Item Information	Item Barcode: alphanumeric, up to 50 characters long Item Class Reserve Item Class Location: Owning, or permanent, location of the item Shelving Location At Shelving Location Until: This field appears only if the owning and shelving locations are different. Number of Pieces Circulate Pieces: If checked, users may specify at check-out and check-in how many of the pieces are to be checked out or in. Price Lamination: Provides a drop-down list of values to describe the state/type of lamination.
Call Number	Copy: Copy number of the item Call #: Primary call number Second Call # Units area: Free Text: text box at the bottom of the Units area will be enabled only if you select the Free Text radio button Enumeration and Chronology: Available only if the item is attached to a holdings record with at least one 853 tag. None
Circulation Rules	Use Matrix Use Loan Period Allow Requests Note: You can make an item non-circulating by selecting the Use Loan Period radio button and setting the period to 0 (zero).

Notes Tab

The **Notes** tab displays Public and Staff notes and Check-in and Check-out alerts regarding the associated item. If notes are **not** associated with the item, the **Notes** tab appears **only** in edit mode.



There are four types of notes:

Note	Description
Public Notes	Displays to patrons from the OPAC
Staff Notes	Displays only to staff logins
Checkout Alert	Alert box pops up during check-out
Checkin Alert	Alert box pops up during check-in

To Add/Edit a note:

Click in a note field to add a note.

Type in the note text, or perform the note edit.

Click the **Save** button to save the note and exit.

Note: Public notes in the Client may be displayed on the **View Bibliographic Record** window by configuring the View Record view in the *Virtua Profiler*. Public notes may also display in the *iPortal* by configuring the *iPortal* View Record view in the *Virtua Profiler*.

Statistics Tab

The **Statistics** tab displays read-only statistical data about the item. The **Statistics** tab always appears when the **Item Information** window is in view mode.

The screenshot shows the 'Item Information - Phoenix' window with the 'Statistics' tab selected. The window is divided into three main sections: Bibliographic Information, Record Information, and Circulation Statistics. At the bottom, there are buttons for 'Delete', 'Save', 'Refresh', and 'Close', along with a 'Masked' checkbox.

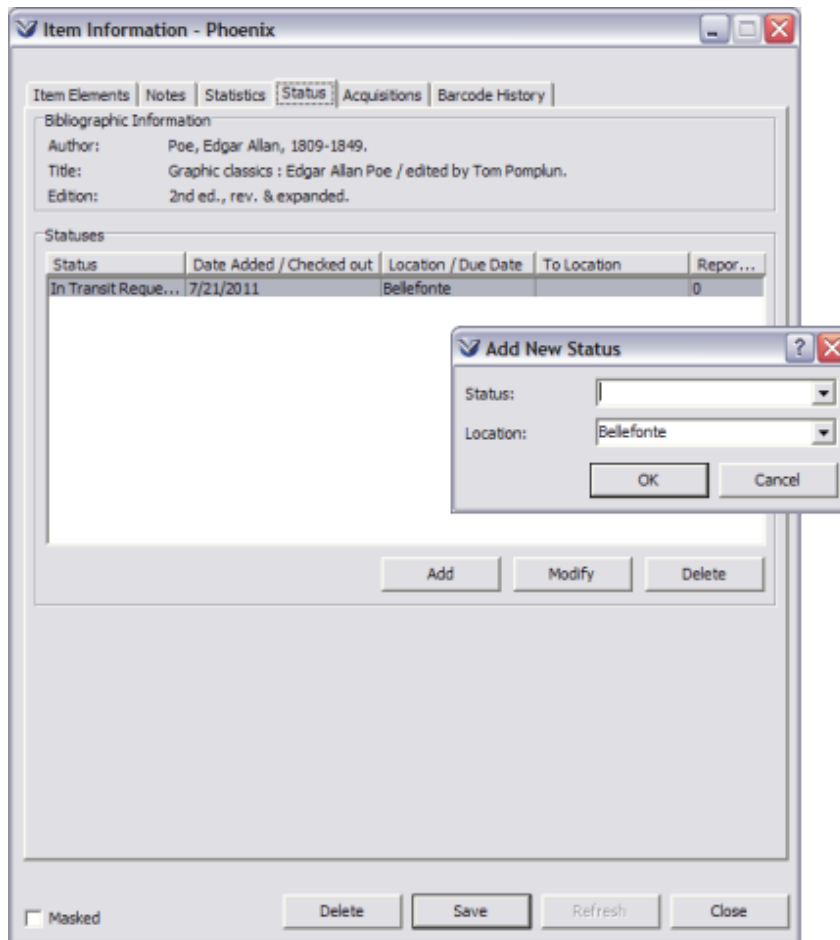
Bibliographic Information			
Author:	Poe, Edgar Allan, 1809-1849.		
Title:	Graphic classics : Edgar Allan Poe / edited by Tom Pomplun.		
Edition:	2nd ed., rev. & expanded.		

Record Information			
Item ID:	729553	Last Modified:	7/20/2011
Barcode Date:	11/30/2010	by Operator ID:	9
Date Created:	6/30/2005		

Circulation Statistics			
Circ Count:	6	In House Circ Count:	0
Temp Circ Count:	6	Temp In House Circ Count:	0
Since:	6/30/2005	Since:	6/30/2005
Reserve Count:	0	Last Inventory Date:	
Temp Reserve Count:	0	Last Inventoried By:	
Since:	6/30/2005	Last Circulation Date:	5/10/2011

Status Tab

The **Status** tab displays the library or system defined circulation status attached to an item. When more than one status exists, each line contains a different status.



Column Heading	Description
Status	The type of status that applies to the item. Status types are defined in the Virtua Profiler
Date Added	Date when the status was created. The software adds this date, which is read-only
Location/Due date	Location where the status was created. This field can also indicate the location for an item that you have manually put in-transit
To Location	The location to which the item is being sent if the status is <i>In-transit</i> . This field displays data only when In-Transit is the selected status
Report #	The number of times this status has appeared on a report. The system increments the Report number automatically

To Add/Edit a Status:

Double click an item to edit a status. The **Edit Item Status** window appears.

Click the **Add** button to add a new status. The **Add New Status** window appears.

Select a status from the dropdown menu.

Acquisitions Tab

The **Acquisitions** tab of the **Item Information** window includes the following information: date, cost, purchase order number, order line number, vendor name, and receipt date.

Item Information - Phoenix

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

Bibliographic Information
 Author: Poe, Edgar Allan, 1809-1849.
 Title: Graphic classics : Edgar Allan Poe / edited by Tom Pomplun.
 Edition: 2nd ed., rev. & expanded.

Acquisitions Information
 Purchase Order Id:
 Purchase Order Line Number:
 Receipt Date: Use Date: 7/20/2011
 Invoice Number:
 Vendor:
 Invoice Unit Price:
 Invoice Currency:
 Invoice Unit Discount:
 Invoice Unit Fee:
 Acquisition Date: 6/30/2005
 Original Purchase Price: \$.00
 Invoice Line Fee(s):

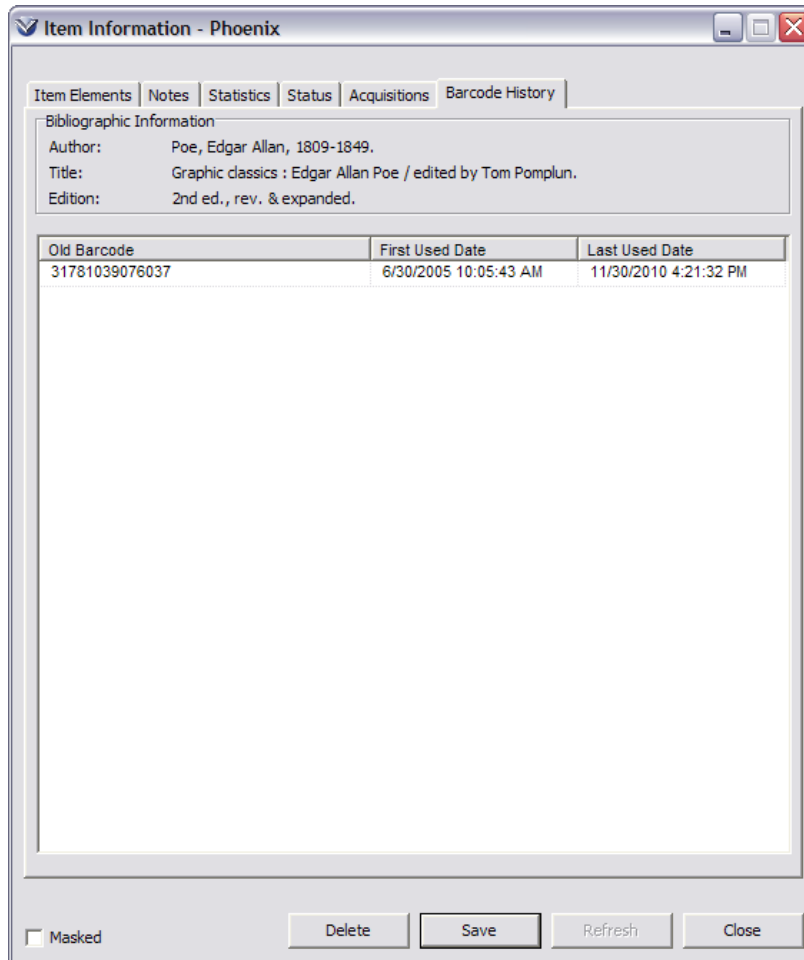
Fee	Amount

Binding Cost: Depreciation Rate (Per Year) : 0%
 Lamination Cost: Maximum Depreciation: 100%
 Surcharge:

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.

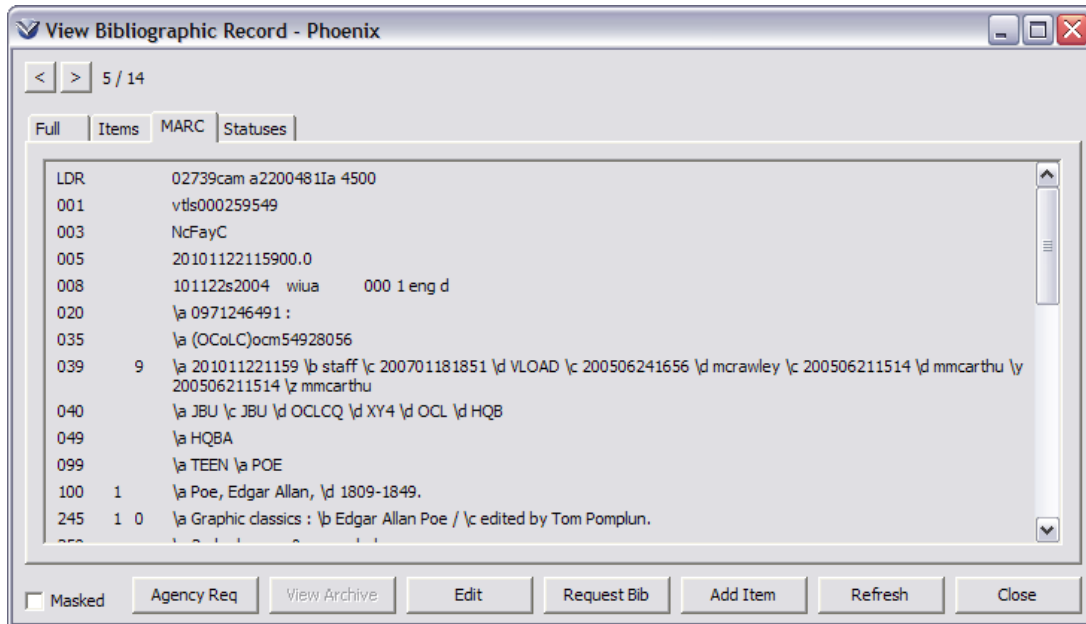


Profiler Tip: The Maintain Item Barcode History setting controls whether Virtua maintains a history of the item barcodes that have been assigned to any given item. See *Details about the Cataloging Basic Options: About the Maintain Item Barcode History Setting* in the *Virtua Profiler/Cataloging Parameters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

MARC Tab

The **MARC** tab displays the MARC format for the bibliographic record. Your library can choose whether or not this tab will display to OPAC users.

Click the **MARC** tab. The MARC record will appear.



Click the **Edit** button to open the MARC Record in the **MARC Editor** window.

MARC Editor - phoenix			
<input type="checkbox"/>	008		080514s2006 wiua 000 0 eng d
<input type="checkbox"/>	010	<input type="checkbox"/>	\a bl2006-020195
<input type="checkbox"/>	020	<input type="checkbox"/>	\a 0974664871 (pbk.) : \c \$16.95
<input type="checkbox"/>	020	<input type="checkbox"/>	\a 9780974664873
<input type="checkbox"/>	035	<input type="checkbox"/>	\a bl2006020195
<input type="checkbox"/>	040	<input type="checkbox"/>	\a NjBwBT \c NjBwBT
<input type="checkbox"/>	082	0 4	\a 741.5/973 \2 22
<input type="checkbox"/>	099	<input type="checkbox"/>	\a TEEN \a POE
<input type="checkbox"/>	245	0 0	\a Edgar Allan Poe / \c edited by Tom Pomplun.
<input type="checkbox"/>	246	3	\a Graphic classics, Edgar Allan Poe
<input type="checkbox"/>	250	<input type="checkbox"/>	\a 3rd ed.
<input type="checkbox"/>	260	<input type="checkbox"/>	\a Mount Horeb, Wis. : \b Eureka Productions, \c 2006.
<input type="checkbox"/>	300	<input type="checkbox"/>	\a 144 p. : \b ill. ; \c 25 cm.
<input type="checkbox"/>	440	0	\a Graphic classics ; \v v. 1
<input type="checkbox"/>	500	<input type="checkbox"/>	\a At head of title: Graphic classics.
<input type="checkbox"/>	500	<input type="checkbox"/>	\a "The Raven, The Masque of the Red Death, The Tell-Tale Heart & more!"--Cover.
<input type="checkbox"/>	501	<input type="checkbox"/>	\a MARCIVE 12/19/07
<input type="checkbox"/>	600	1 0	\a Poe, Edgar Allan, \d 1809-1849 \v Adaptations.
<input type="checkbox"/>	700	1	\a Poe, Edgar Allan, \d 1809-1849.
<input type="checkbox"/>	700	1	\a Pomplun, Tom.

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

< > MARC 21 Bib: Book OPAC

OPAC1

Statuses Tab

If an item has an acquisitions status, the **Statuses** tab will appear on the **View Bibliographic Record** window.

Click the **Statuses** tab to view the acquisitions status for the item.

The screenshot shows a web application window titled "View Bibliographic Record - Phoenix". At the top, there are navigation buttons for "<" and ">" and a page indicator "5 / 14". Below this are tabs for "Full", "Items", "MARC", and "Statuses". The main content area is divided into several sections:

- Order ID/Line Pairs:** A dropdown menu showing "3369 - 27".
- Order Status Information:**
 - Order ID: 3369
 - Order Type: Monograph
 - Payment Type: Standard
 - Line Number: 27
 - Order Status: Ordered
 - Quantity: 3
 - Location: Headquarters Library/Technic
 - Vendor: B&T Processed Acc# L40618C
 - Price: \$ 9.02
 - Date: 8/6/2007
- Receipt Status Information:**
 - Status: Received Satisfactory
 - Quantity: 3
 - Condition: Correct Item
 - Date: 7/11/2007
- Payment Status Information:**
 - Voucher ID: 5007966639
 - Status: Paid in Full
 - Amount Paid: \$ 27.06
 - Date: 7/12/2007
- Invoice Status Information:**
 - Invoice ID: 5007966639
 - Status: Valid for Payment
 - Quantity: 3
 - Price: \$ 9.02
 - Date: 7/12/2007
- Credit Status Information:**
 - Credit ID:
 - Status:
 - Amount Used:
 - Total Amount:
 - Expiration Date:

At the bottom of the window, there is a row of buttons: "Masked" (checkbox), "Agency Req", "View Archive", "Edit" (highlighted with a dashed border), "Request Bib", "Add Item", "Refresh", and "Close".

Depending on where the item is in the acquisitions process, some areas of the screen may be grayed out. In the example above, the item has been ordered but not yet received.

Holdings Tab

The **Holdings** tab displays information about the holdings records that are attached to the bibliographic record. From the **Holdings** tab you can view brief information about the holdings records or access additional information about each specific holdings record.

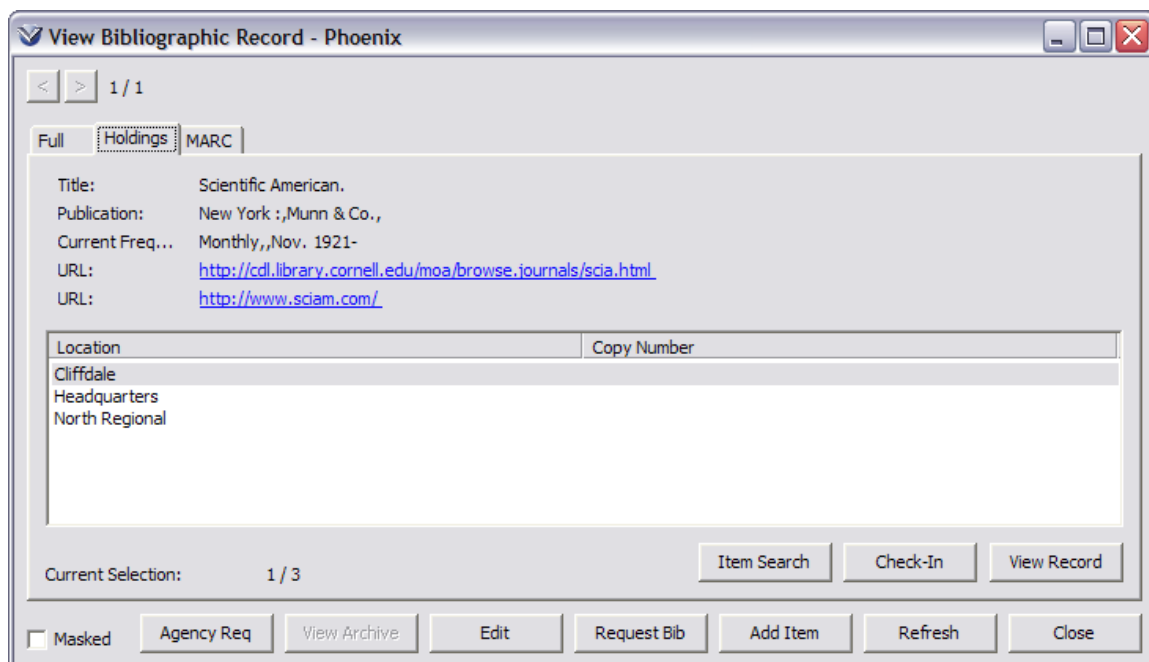
The **Holdings** tab is **only** associated with serials that have holdings records attached.

The **Holdings** tab consists of two configurable areas: header and list box.

Header: contains elements of the serial bibliographic record and associated library-defined labels such as author, title, edition, publisher, and description of material.

List box: contains columns of information taken from each holdings record and other records linked to the holdings record. You can determine which information appears in the list by configuring the View Record: Holdings Header/Item Details View record in the *Virtua Profiler*.

Click the **Holdings** tab to view the holding record information.



Double click on the copy that you wish to view **or** highlight the copy and click the **View Bibliographic Record** button. The **View Holdings Record** window appears.

View Holdings Record

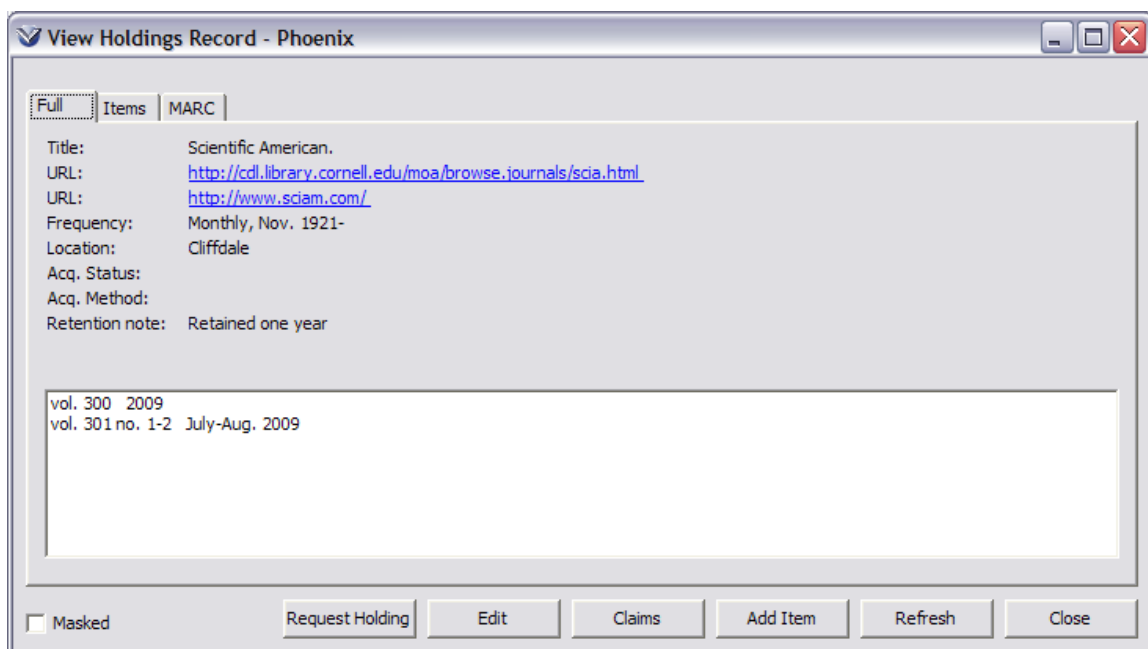
The **Full** tab of the **View Holdings Record** window contains holdings information from the 863 tag of the MARC Holdings record.

The **Full** tab consists of two configurable areas:

Bibliographic Header - Displays information associated with the parent bibliographic record.

Holdings Header - Displays information associated with the holdings record (below the bibliographic header).

You can configure these headers via the View record for the View Holdings Record: Full Display in the MARC View Editor in the *Virtua Profiler*. You can configure the bibliographic header using the Primary Display tab of the MARC View Editor. You can configure the holdings header using the Format feature of the MARC View Editor.



If item records are associated with the holdings record, an **Items** tab will appear on the **View Holdings Record** window. The **Items** tab displays a list of items that are attached to the current holdings record.

Click the **Items** tab to view brief information about each item, access additional information about each item, and perform various functions for specific items.

The **Items** tab of the **View Holdings Record** window looks the same and offers the same functions as the **Items** tab on the **View Bibliographic Record** window, except for items with Enumeration and Chronology Units, a special re-sort is available.

View Holdings Record - Phoenix

Full **Items** MARC

Title: Scientific American.
 ISSN: 0036-8733
 Publication: New York : Munn & Co.,
 Description: v. : ill. (some col.) ; 30-41 cm.
 Format/Edition: [MAGAZINE]

Status Counts
 Checked Out: 0 On Reserve: 0
 Available: 7 Requested: 0
 On Hold: 0 Other: 1
 Total Items: 8 Unsatisfied Requests: 0
 Total Requests: 0

Call Number	shelving Location	Units	Status	Item Barcode
2009/08	Cliffdale	vol. 301 ...	On Display	31781049296773
2009/07	Cliffdale	vol. 301 ...	Available	31781049295213
2009/06	Cliffdale	vol. 300 ...	Available	31781049291832
2009/05	Cliffdale	vol. 300 ...	Available	31781021054083
2009/04	Cliffdale	vol. 300 ...	Available	31781049294257

Current Selection: 1 / 8

Show Group View URL View Item Delete Item Request Item

Masked Request Holding Edit Claims Add Item Refresh Close

The **MARC** tab of the **View Holdings Record** window displays all the fields that exist in the holdings record.

Click the **MARC** tab to view or edit the Holdings Record.

The bibliographic header that is displayed on the **MARC** tab is identical to the bibliographic header on the **Full** tab of the **View Holdings Record** window, and is defined by the same View.

View Holdings Record - Phoenix

Full Items **MARC**

Title: Scientific American.
 URL: http://cdl.library.cornell.edu/moa/browse_journals/scia.html
 URL: <http://www.sciam.com/>
 Frequency: Monthly, Nov. 1921-

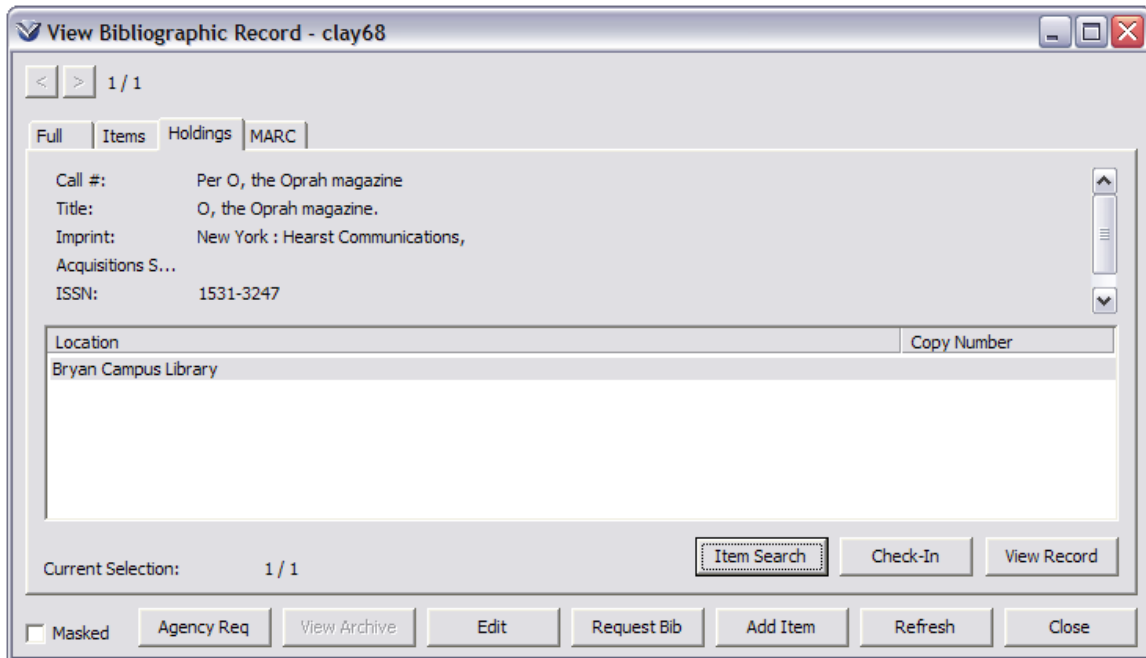
```

LDR      00524nym a2200169 4500
001      vts000000806
003      NcFayC
004      vts0000028745
008      050126 1
039      9   |a 200903060857 |b Iraynor |c 200808151636 |d Iraynor |c 200703230959 |d Iraynor |y 200501261621 |z Iraynor
852      |b 40000
853      2 1  |8 1 |a vol. |b no. |u 12 |v r |j (year) |j (month) |x 01, 07 |w m
863      0   |8 1.11 |a 300 |j 2009
863      |8 1.12 |a 301 |b 1-2 |i 2009 |i 07-08
  
```

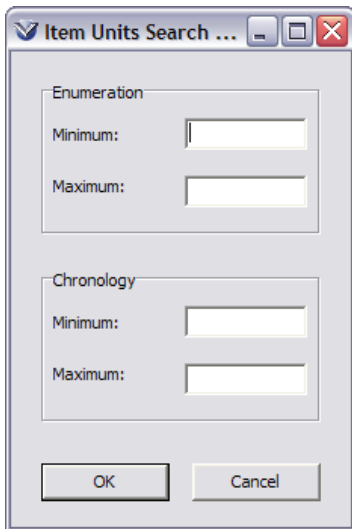
Masked Request Holding Edit Claims Add Item Refresh Close

Filtering Items Attached to Holdings Records

To filter items attached to multiple holdings records on the **Holdings** tab of the **View Bibliographic Record** window click the **Item Search** button to open the **Item Units Search** dialog box.



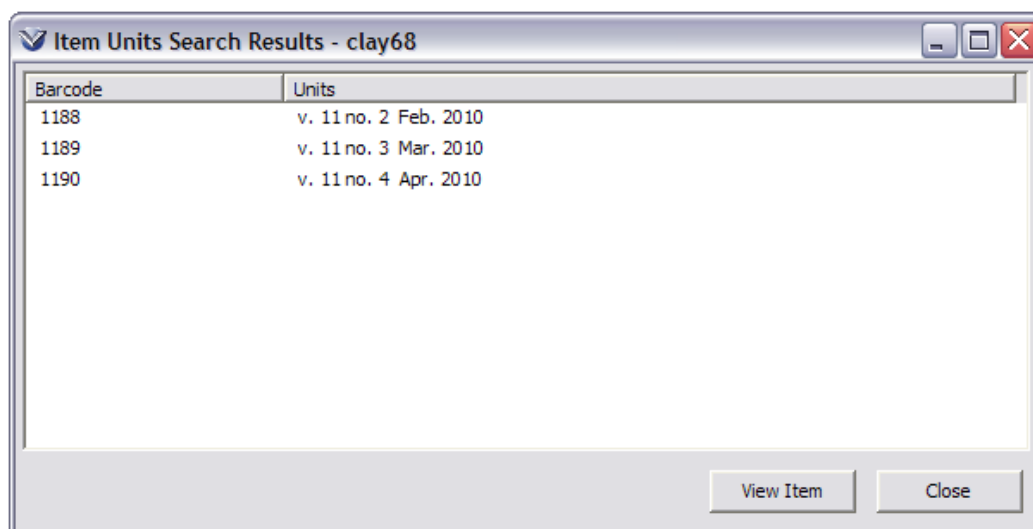
The **Item Units Search** dialog box lets you search the holdings items attached to the bibliographic record according to top-level chronology and enumeration.



In the **Item Units Search** dialog box, you can enter a single value in the Enumeration Minimum field and/or the Chronology Minimum field, OR you can enter a minimum and maximum range for Enumeration and a minimum and maximum range for Chronology. **Note:** Values are numeric only.

To perform a search, type information in one or more of the search fields, and click **OK**.

The results of your search will appear in the **Item Unit Search Results** window.



Output Records

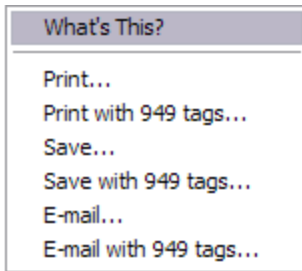
Copies of bibliographic records can be obtained from the **List of Titles**, **View Record**, and **MARC Editor** windows in three ways:

- Print
- Save
- Email

Print Record(s)

Open the record in the **List of Titles**, **View Record**, or **MARC Editor** window.

Highlight the **Print** option from the File pull-down menu or right click the mouse and select **Print**.



The **Print** window will appear.



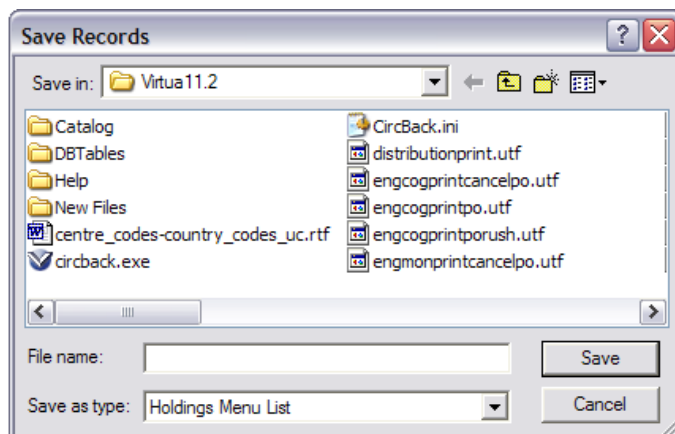
From the drop down menu select the format that you would like to print.

Press the **OK** button.

Save Record(s)

Open the record in the **List of Titles**, **View Record**, or **MARC Editor** window.

Highlight the **Save** option from the **File** pull-down menu or right click the mouse and select **Save**; The **Save Records** window will appear.



Choose the drive or directory to which the record(s) will be saved.

Type the file name in the text box labeled **File Name**.

Choose the format for the record(s) by clicking the arrow in the pull-down list box labeled **Save As Type**.

Note: You will have different “Save as Type” options depending upon which window/tab you chose.

If you right click from all windows/tab **except** the **Items** tab, you will have the following options:

- Full
- MARC
- MARC (Binary)
- List of Titles

If you right click from the **Items** tab, you will have the following options:

- Items Menu List
- Holding Menu List

Click the **Save** button.

Note: From the **List of Titles** screen you also have the option to save records with 949 tags containing item information.

Email Record(s)

Open the record in the **List of Titles**, **View Record**, or **MARC Editor** window.

Highlight the **Email** option from the **File** pull-down menu or right click the mouse and select **Email**; The **Email Records** window will appear.

Choose a format for the record(s) you are saving by clicking the arrow in the pull-down list box labeled **Format**.

If you are using a non-UTF-8 compliant e-mail client, select the **Map to ISO-8859-1** check box for proper display of diacritics.

If you want to send email the record(s) as an attachment, select **Send as Attachment**.

Choose the range of records that you want to Email.

Type the information required in the **Message Information** area.

Click the **OK** button.

Keyword & Full Text Searching

Recommended Workflow	Explanation
<p>Keyword</p> <pre> graph TD A[Enter Keyword] --> B[Refine Search] B --> C[Set Filters] C --> D[View Records] D --> E[Output Records] </pre> <p>Full Text</p> <pre> graph TD A[Enter Phrase] --> B[View Record] B --> C[View Document] </pre>	<p>Virtua Keyword searching has the flexibility to allow the novice user to create simple searches, yet allows the experienced user to build sophisticated searches through Precision Searching and Filtering using the following tools:</p> <ul style="list-style-type: none"> Keywords Wild cards Parentheses Boolean Operators Search Categories (including 008 Fixed Fields) Phrase searching Proximity searching Full Text searching <p>Summary</p> <ul style="list-style-type: none"> Open the Keyword Search window Enter Search Terms and Search Strings Select appropriate operators Select appropriate search categories Refine the Search Set Filters <p>Key Terms</p> <ul style="list-style-type: none"> Boolean Operators Expert Search Filters Keyword Search Refine Search Categories Search Strings Sub-Location Truncation

Search Commands

A search command, or query string, is a line of text that consists of a combination of:

- Keywords
- Search categories
- Wild cards
- Boolean Operators
- Parentheses (for creating groups)
- Phrase searching
- Proximity searching

Keywords

Keyword searches let you search for bibliographic records that contain one or more keywords in an indexed field, fixed field, or Leader position.

In bibliographic keyword search queries, you can use any term that you want in order to find it in the index for a given category. You can use:

- Alphanumeric words: for example, 1900s
- Numbers: for example, 1984
- Letters: for example, MS
- Word list: for example, civil war
- There is an implied AND between terms in the word list
- There is no order to the terms in the word list (it is not a phrase search)

Truncation

Within keywords, you can specify left or right truncation along with wild card searches.

Words truncated with an asterisk (*): Designate one or more characters.

Example Searches	Virtua Retrieves
farm*	farm, farms, farming, or other words starting with farm.
Wa*n	walton, warden, Washington, etc.

Words containing a question mark (?): Use a question mark (?) to designate a single character per question mark. Use two question marks to designate two characters, etc.

Example Searches	Virtua Retrieves
------------------	------------------

Ho?	hop, hog, hot, etc.
Vi?e	vice, vise, vile, etc.

Phrase Searching

Quotation marks are used to denote a phrase. The search returns only those records containing all keywords inside the quotation marks, in that order.

Example Searches	Virtua Retrieves
"way of all"	"The way of all women", "The way of all flesh", etc.

Boolean Operators & Search Operators

Boolean operators (symbols) or **Search Operators** (terms), are used to link two or more keywords. In Virtua, these operators are available on drop-down menus or can be used within the text boxes as part of a search string. If entering them as part of a search string, you must put a space before and after each operator and use a symbol such as & or +.

Symbols	Terms
&	AND
+	OR
-	AND NOT
&x	NEAR (Proximity searching)

Parentheses

You can use **parentheses** anywhere within a query string to group a set of operators and search terms. Search strings within the parentheses will be processed first.

Use the plus (+) and minus (-) signs to include or exclude search terms from your group:

Example Search	Virtua Retrieves
(art history) - art, greek	Records that have <i>art</i> AND <i>history</i> as a subject but do not have <i>art</i> , <i>Greek</i> as a subject are found.

Use the plus (+) and minus (-) signs within groups:

Example Search	Virtua Retrieves
(t:painting + art) & a:mayer	Records that have <i>painting</i> in the title AND <i>art</i> as a subject AND <i>Mayer</i> as an author are found.

Use nested logic that combines two sets of terms using two sets of parentheses:

Example Search	Virtual Retrieves
((art or sculpture) & art collections)	Records that have <i>art</i> OR <i>sculpture</i> as subjects AND <i>art collections</i> are found.

Proximity Searching

Bibliographic keyword searches let you specify the **proximity** between search terms using either the **NEAR** operator that or with the **& xx** operator. The value of the **x** indicates the number of words between the two terms. For example, **&3** indicates that the keywords are within three words of each other.

Example Search	Virtual Retrieves
t:ancient &1 t:rome	Records in which <i>ancient</i> appears within one word of <i>Rome</i> in any indexed title field are found.

Notes concerning proximity searching:

It is possible within ONE category only.

It is possible between TWO terms only.

The search operator OR has no inherent value in a proximity search between two terms. Use OR only in a query string that contains parentheses.

Search Categories

When specifying a search category, type the category code, followed by a colon and the search term. Do **not** put a space between the category code and the colon or between the colon and the search term. See **Appendix D** for a complete list of search categories.

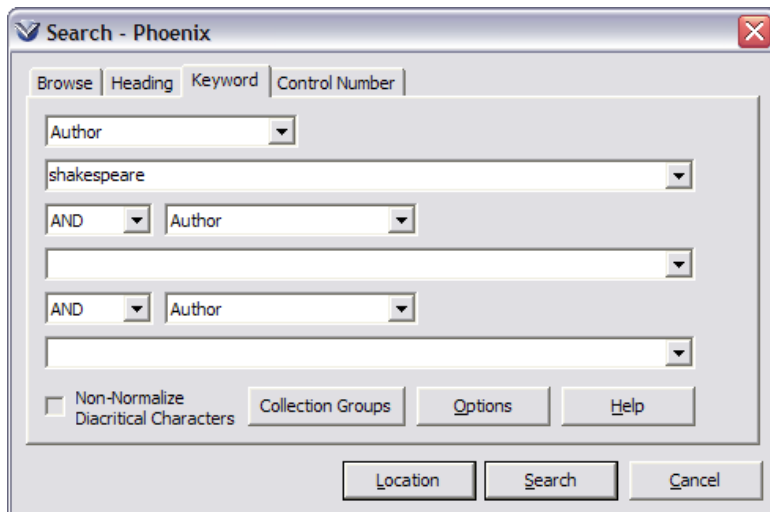
a: author	j: notes
h: personal name	g: general
i: corporate name	u: publisher
t: title	k: place of publication
s: subject	e: everything (ALL indexed fields)
f: series	

Example Search	Virtual Retrieves
a: Bronte	Records authored by Bronte, Charlotte; Bronte, Emily; etc. are found.

Enter Search Criteria

Click the **Search** icon  on the OPAC toolbar or use the **Search** pull down menu from the toolbar. The **Search** window appears.

Click the **Keyword** tab; the **Keyword Search** window appears.

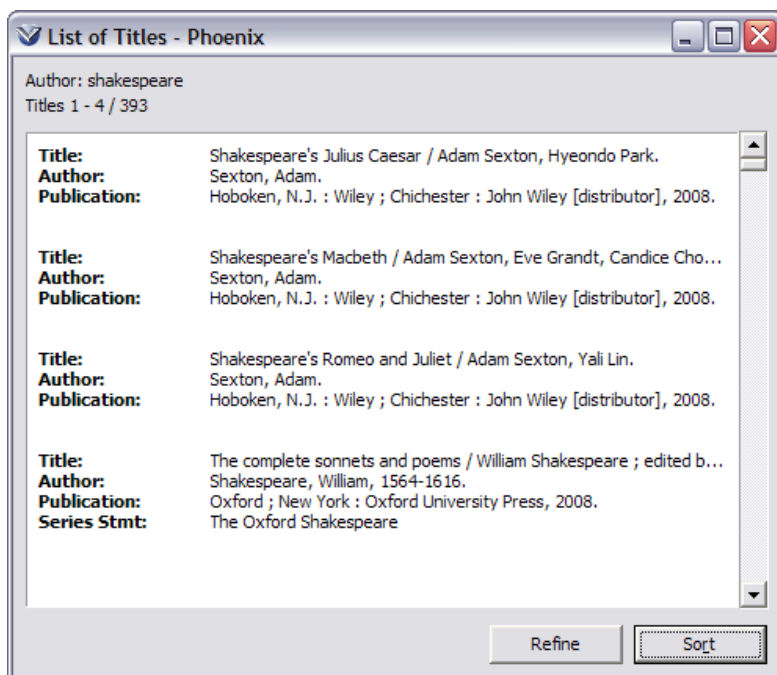


Select a category for the first term, then type the first term in the text box.

If you wish, select a Boolean Operator (AND, OR, AND NOT) and category for the second term, then type the second term in the middle text box. Repeat for the third row if necessary.

Tip: Use the **Help** button to display the **Keyword Search Help** window, which offers you information and examples to help you construct precision search queries.

Click the **Search** button to execute your search; the **List of Titles** window will appear.



Sort Records

On the **List of Titles** window, your search results are displayed using the sort order specified in the Default Result Set Sorting parameter in the *Virtua Profiler*. The default Result Set Sorting parameter also allows you to:

Specify whether the selected sort is displayed in ascending or descending order.

Specify a maximum number of hits to sort. Result sets that contain more than the specified number of hits will not be sorted.

To sort your search results on the **List of Titles** window see *Browse Search: [Navigate Search Results](#)*.

Profiler Tip: The Max Bib Keyword Search Result Set Size area has two options for specifying the size of bibliographic keyword result sets. If you specify a value in the Maximum Number of Hits field, the Virtua server will truncate any results returned from a bibliographic keyword search that exceed the value. See *Working with the OPAC Basic Options Parameter: Setting the Maximum Size of Result Sets for Bibliographic Keyword Searches* in the *Virtua Profiler/OPAC Parameters User's Guide* for more information.

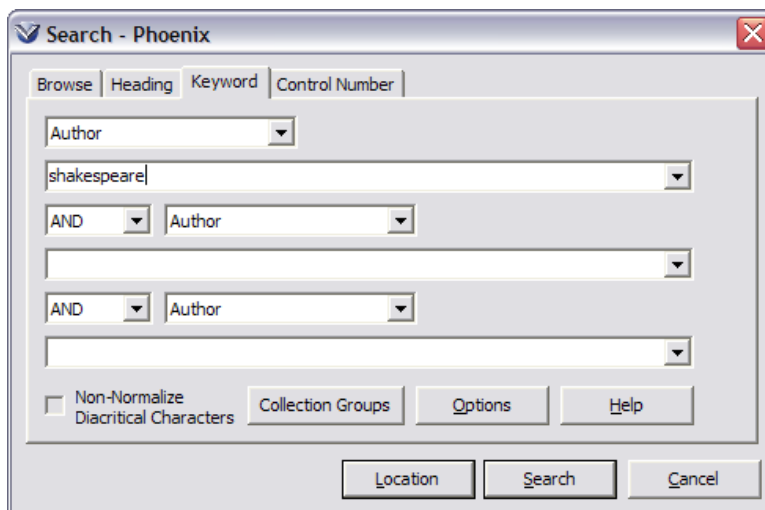
Refine a Search

To refine a search from the **List of Titles** window see *Browse Search: [Refine a Search](#)*.

Set Filters

Filtering options are available for Keyword and Expert searches. The filter option returns information from the fixed fields in the MARC record, set in the *Virtua Profiler*.

On the **Search** window, click the **Options** button; the **Search Filters** window appears.



In the list boxes select one or more filters by clicking each list item in turn; use the Control key to select multiple terms.

Filter Category	Description
Publication Year	Date range, currently can only be used to filter on 1 year.
Format	Format of the work (e.g. map, video, serial).
Language	Language of the publication.
Context Year	Established in tag 945 \$a and \$b (\$a designates common era start date and \$b common era end date for AD dates).
Nature of Contents	Category of the work (e.g. handbook, dictionary).
Place of Publication	(e.g. state or country)

Note: The Context Year filter is used to find bibliographic records whose topic covers a specified date range.

Example	How to Filter
The Civil War has a date range of 1861-1865.	To search on a bibliographic record within the context of the Civil War, for a battle that occurred in 1864, you would enter a Context Year range of 1864-1864.

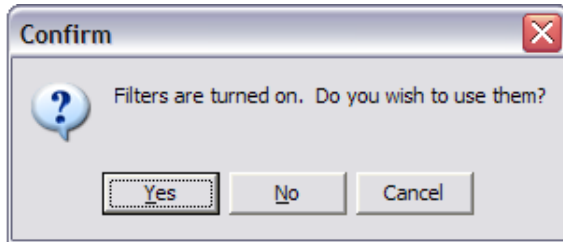
To clear the filters, click the **Clear** button on the **Search Filters** window.

When finished, click the **OK** or **Enter** button.

Note: The software remembers the filters you set. Once set, the software will warn you as you begin each new Keyword or Expert search that filters are ON and ask if you want to use them.

Once you have chosen your search categories, Boolean terms, and typed in your search terms, click on the **Search** button.

When you click on the **Search** button, a confirmation window will appear. Choose to include or exclude the selected filter(s).



If your search term(s) finds **one record**, the **View Record** window will be displayed.

If your search term(s) finds **multiple records**, the **List of Titles** window will be displayed.

View a Record

See *Browse Search*: [View a Record](#).

Output Records

See *Browse Search*: [Output Records](#).

Full Text Searching

In order to allow full text searching, a full text document loader program and associated scripts are needed to index full text documents. Please contact VTLS Customer Support.

To enable full text searching:

- A bibliographic record is created for the full text document. The user can specify a multimedia link in the 856 tag of the bib record or in the item record.

- A text file of the document is put on the server.

- The bib id for the associated bibliographic record is specified in the load program to link the index of the text file to the bib record.

View Records

Select **Full Text** from the **Keyword** search menu.

Enter a phrase of the text from the desired record.

Search - Phoenix

Browse | **Keyword** | Control Number

Full Text

when in the course

AND Author

AND Author

Non-Normalize Diacritical Characters

Collection Groups Options Help

Location Search Cancel

Click the **Search** button.

If there is **only** one matching bib record it will display in the **View Record** window.

If there are multiple matching bib records, the **List of Titles** window will be displayed.

In the example shown below, the *open book* icons indicate that there are item level URLs. These URLs are links to the full text documents.

View Bibliographic Record - Porterfield Library System

1 / 37

Full **Items** MARC

Author: Jefferson, Thomas, 1743-1826.
 Title: Declaration of Independence.
 Imprint: Washington : National Archives.
 Description: 3 ill.(scanned images)

Status Counts
 Checked Out: 0 On Reserve: 0
 Available: 2 Requested: 0
 On Hold: 0 Other: 0
 Total Items: 2 Unsatisfied Requests: 0
 Total Requests: 0

Location	Call Number	Units	C...	Barcode	Status	PAC Co
Wilson Public Library	Electronic Reserves			30445	Available	
Wilson Public Library	Electronic Reserves			33451	Available	

Current Selection: 1 / 2

View URL View Item Delete Item Request Item

Masked Edit Request Bib Add Item Refresh Close

Click an item in the list to select the item you wish to view.

Click the **View URL** button; the document will open in the associated program.

For example: The text version of this record is a Word document, so the document will display in Word.

Note: You can associate more than one document with a full text index. For example, you might want the full text document as both a text document and as an image for handwritten historical documents.

Holdings Keyword Searching

Holdings keyword search functionality is a special Virtua feature that must be configured by VTLIS personnel. To enable holdings keyword search functionality for your library, contact your local VTLIS office.

Holdings keyword searches let you search for holdings records that contain one or more keywords in an indexed variable field or fixed field. You can construct a holdings keyword search query by combining search categories, search operators, and keywords on the **Holdings Keyword** tab of the **Search** window.

To perform a holdings keyword search:

Click the **Search** icon  on the OPAC toolbar.

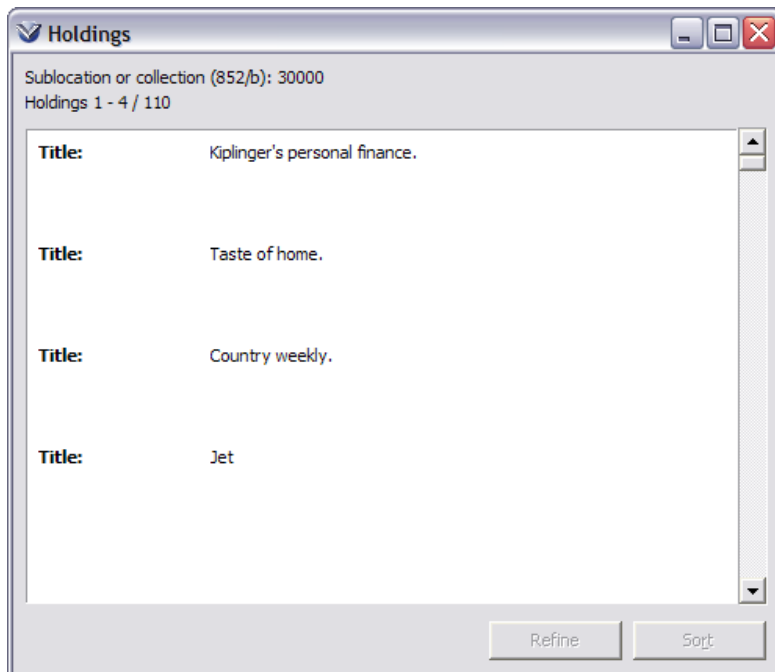
The **Search** window appears, displaying the **Browse** tab.

Click the **Holdings Keyword** tab.

Using a combination of keywords, search categories, and search operators, construct a holdings keyword search query.

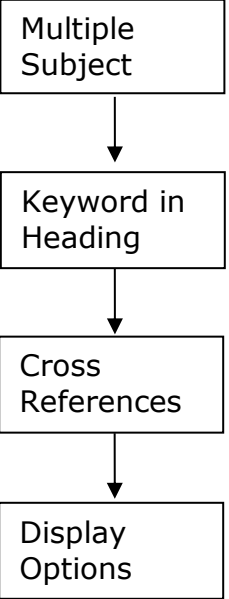
Click the **Search** button. Your search results appear on either the **Holdings** window or the **View Holdings Record** window.

If Virtua finds more than one holdings record that meets your holdings keyword search criteria, the records appear on the **Holdings** window, which displays brief information about each of the records.



If Virtua finds only ONE holdings record that meets your holdings keyword search criteria, it appears on the **View Holdings Record** window.

Authority Heading Searches

Recommended Workflow	Explanation
 <pre> graph TD A[Multiple Subject] --> B[Keyword in Heading] B --> C[Cross References] C --> D[Display Options] </pre>	<p>Virtua provides two types of authority heading searches beyond the ability to browse subject headings, titles, or authors.</p> <p>Multiple Subject Heading Searches: Virtua can be configured to allow the searching of either MARC21 defined subject thesauri such as LCSH or MeSH as well as library-defined thesauri</p> <p>Keyword in Heading Searches: Virtua provides the functionality to perform keyword searches of authority headings.</p> <p>This lesson will also cover: Cross-References Display Options</p> <p>Summary</p> <ul style="list-style-type: none"> Perform a search using a specific subject thesaurus Perform a keyword in heading search Distinguish between See and See Also references Navigate the Cross Reference screens View Authority Records <p>Key Terms</p> <ul style="list-style-type: none"> Blind Reference Cross Reference Display Options Subject Thesaurus Subject Headings MARC Authority Record See Also Reference See Reference

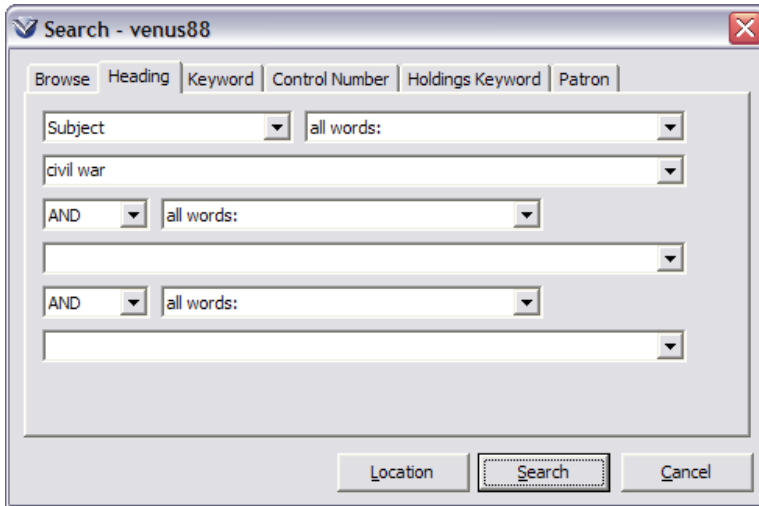
Keyword in Heading Search

The **Heading** tab on the **Search** window gives users the ability to do keyword searching of **authority** headings in bibliographic and authority records. Users can limit the search by: all words, phrase, or exact match.

From the **Search** menu click the **Search** icon  on the OPAC toolbar.

Select the **Heading** tab.

From the drop-down menus, select a search category and search criteria.



Enter your search terms in the corresponding textbox.

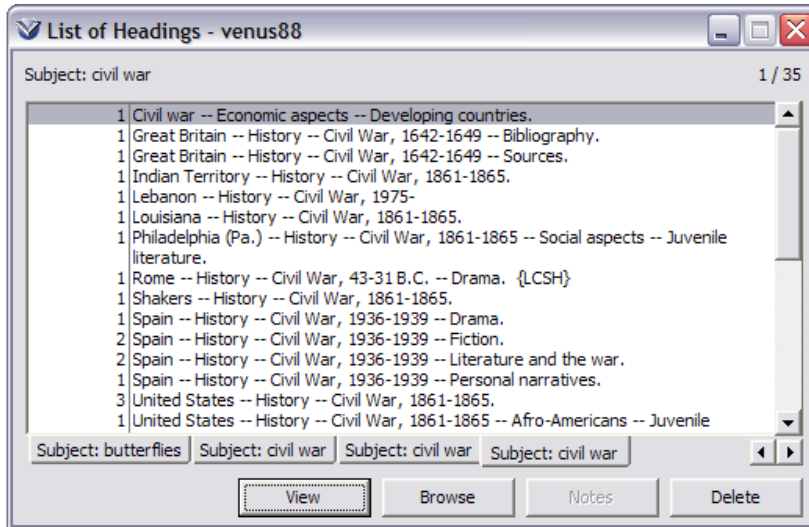
Click the **Location** button to filter search types by Location. Highlight a single location or select several locations by using the **Ctrl** key, then click **OK** to accept your location(s) selection.

Click the **Search** button.

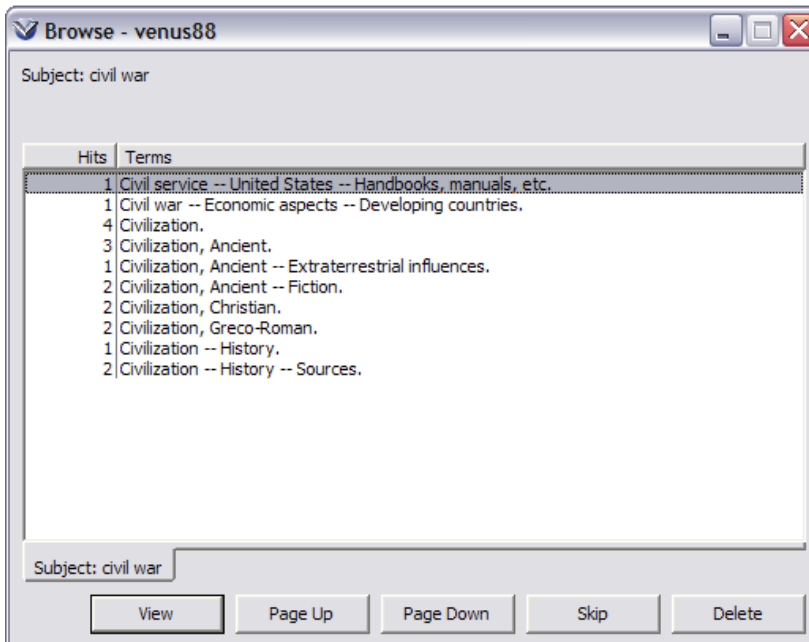
An alphabetical list of subject headings containing your search term(s) will appear.

Note: Unlike a **Browse** subject search, where only terms found at the beginning of subfield \a of the 6xx tag are retrieved, the **Keyword in Heading** search will retrieve keywords found *anywhere* in the 6xx tag.

Example: Search results for **Keyword in Heading** subject search: Civil War




Example: Search results for **Browse** subject search: Civil War

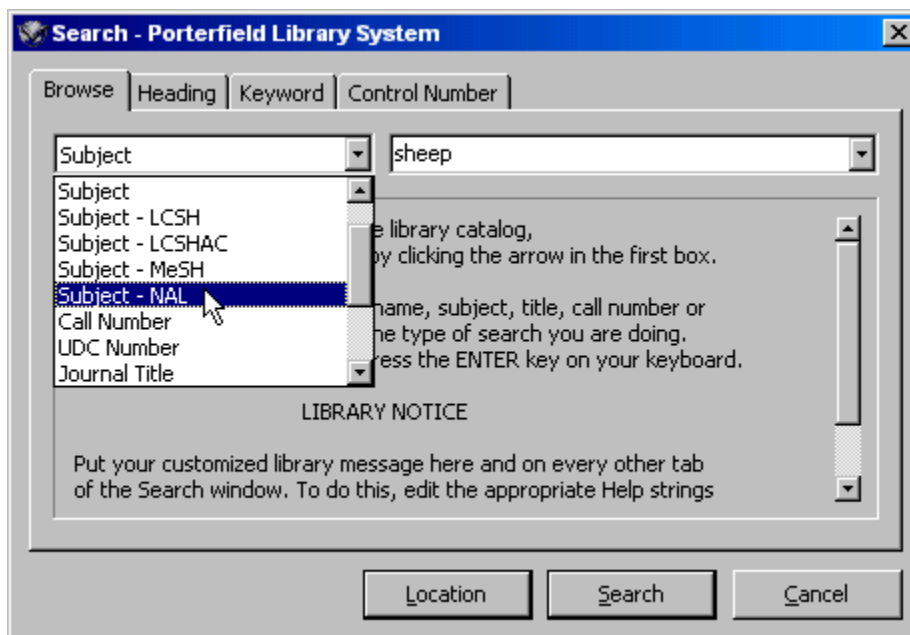


Browse Multiple Subject Headings

Virtua gives libraries the ability to add menu thesauri searches to the **Browse** search dropdown menu. The authoritative-agency thesauri defined by MARC21 are set using the Multiple Subject Headings Parameter in the Profiler. (See **Appendix E** for additional information.)

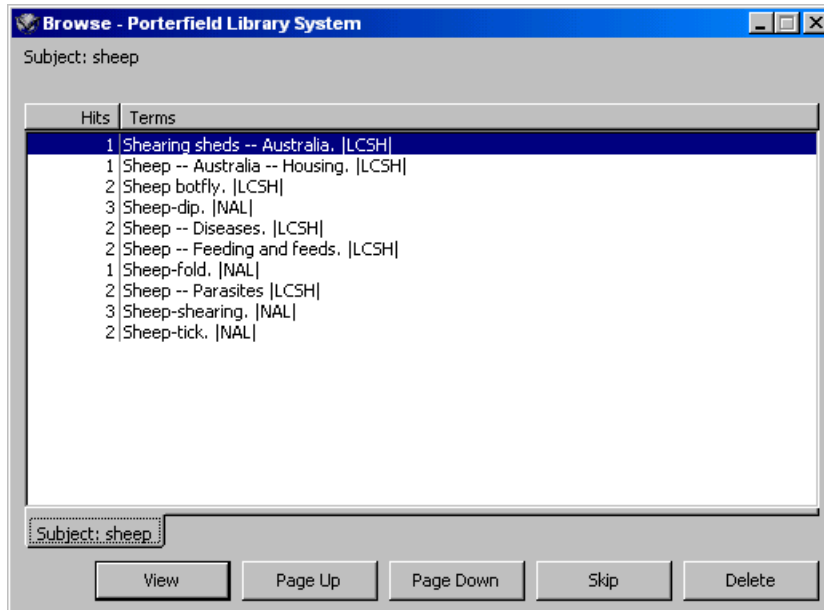
From the **Search** menu select the **Subject** search option or click the **Search**  icon on the OPAC toolbar to open the OPAC in browse mode.

Click the **Find** dropdown menu. The subject heading searches enabled will appear at the bottom of the menu.



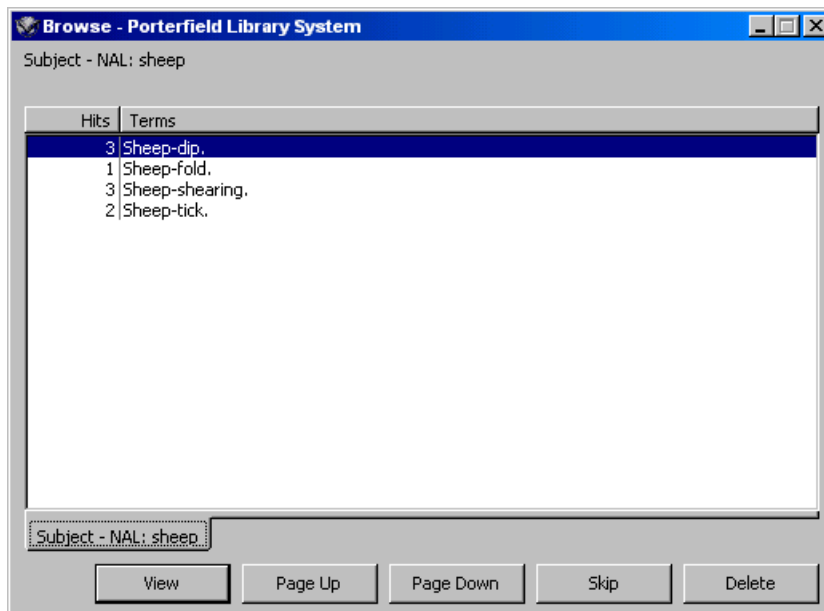
Your search results will be slightly different from the search results of a **general subject search**. The example below shows the results of a general subject search of *Sheep*.

Note: Each subject heading has a thesaurus name after it.



The example below shows the results of a **Subject - NAL** search of *Sheep*.

Note: Only the subject headings that have the subject thesaurus name NAL (National Agriculture Library) in the **general subject search** display in the **Browse** window.



Cross-References

Perform a subject search from the **Browse** tab; the **Browse** window will appear with a list of terms. In the column labeled *Hits*, the + (plus sign) and - (minus sign) indicate cross-reference information.

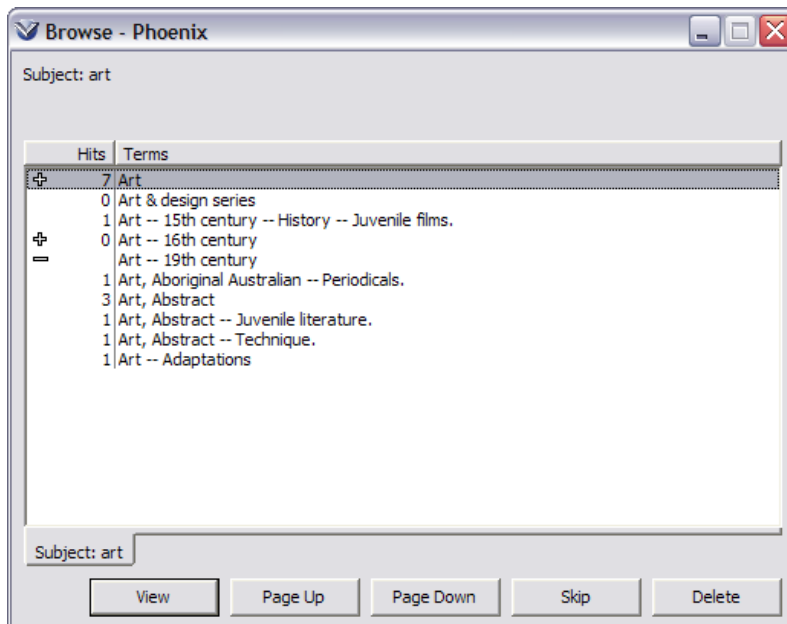
Symbol	Indication
+ (plus sign)	Indicates a see also cross-reference
- (minus sign)	Indicates a see cross-reference.

Notes:

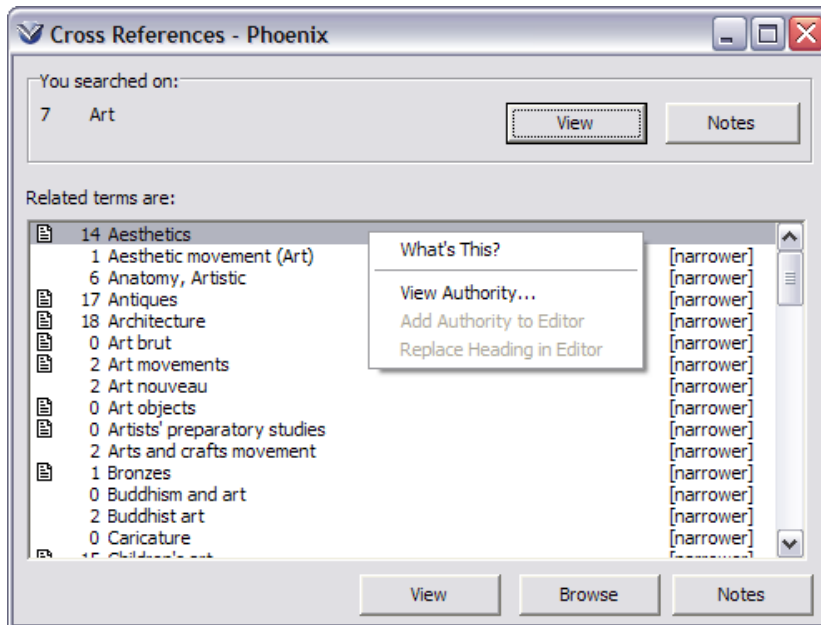
A plus sign (+) and a zero (0) in the **Hits** column indicates a valid authority heading that infers a see also reference.

A zero (0) without a plus or a minus in the **Hits** column indicates a valid authority heading that is not associated a heading in the database.

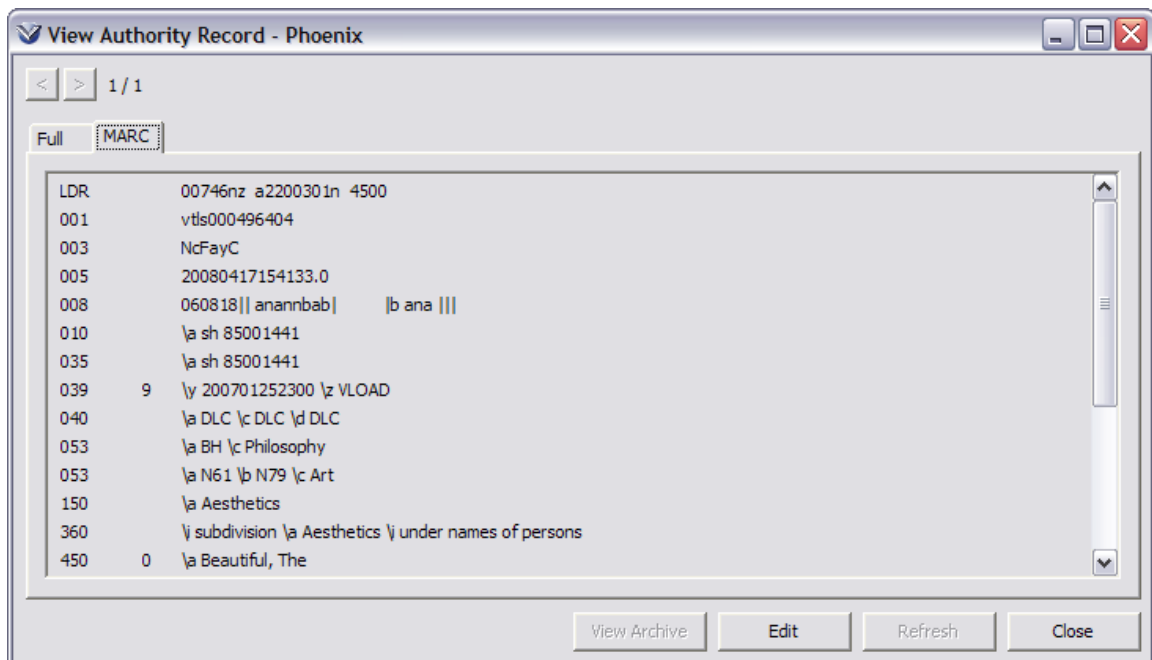
A minus sign (-) with a blank in the **Hits** column indicates an invalid authority heading.



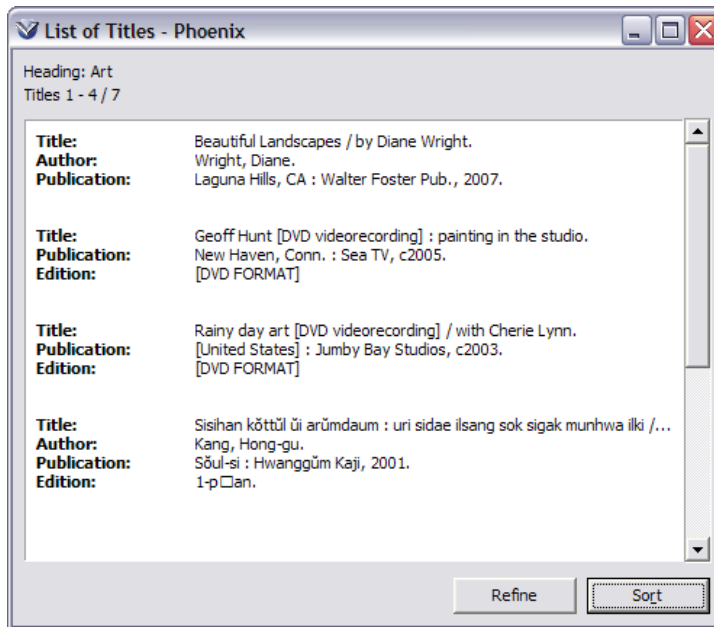
Click a term with a plus sign. The **Cross References** window appears displaying a list of related terms.



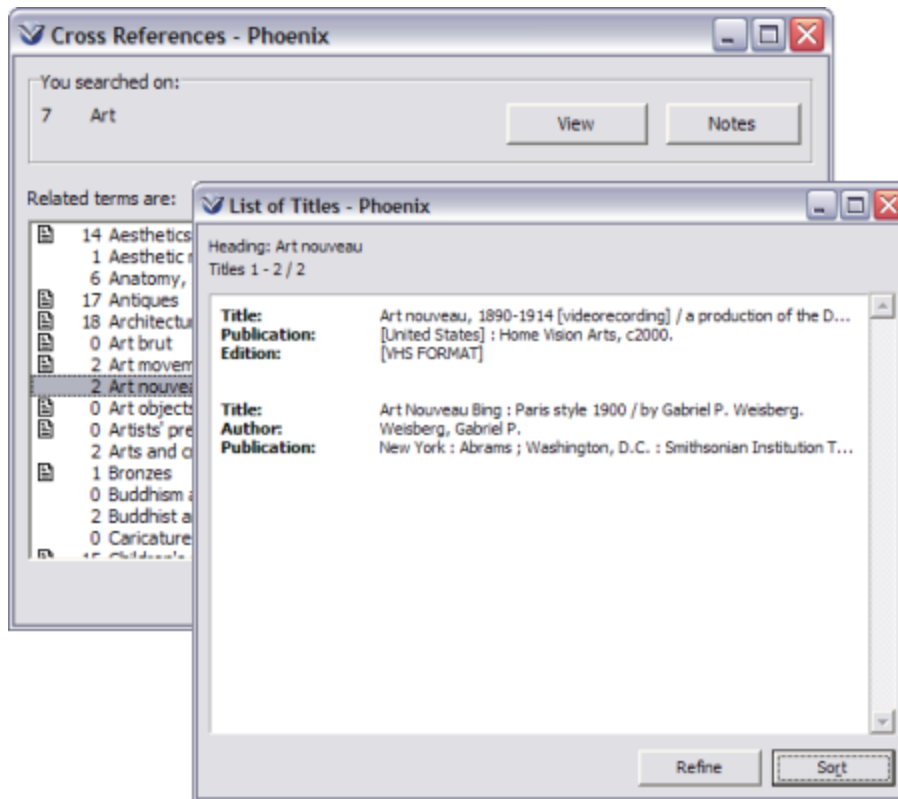
Select an entry, right mouse click to view authority record.



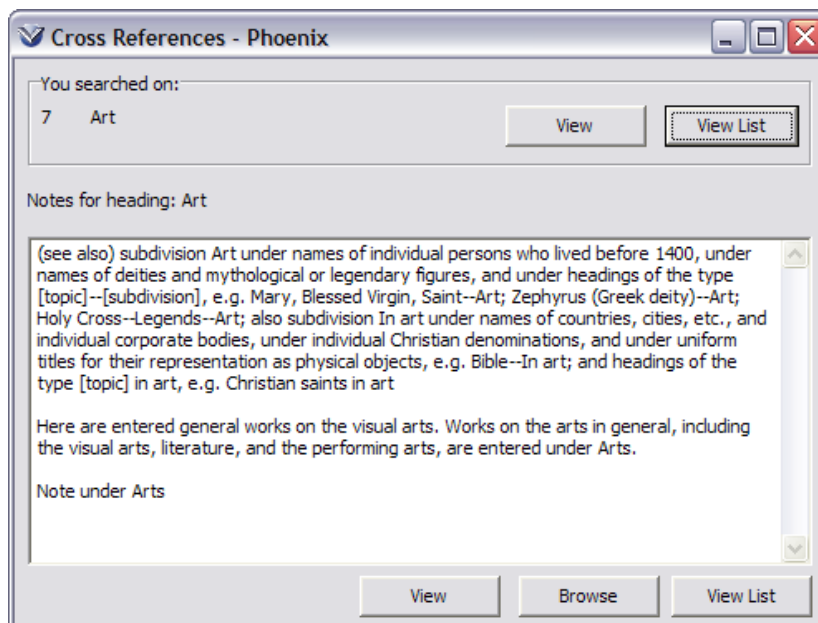
Close the **View Authority Record** window and click on the **View Button** in the top right of the window. A list of title associated with the heading will appear.



Select a related term from the **Cross References** window and click on the **View** button in the lower part of the window; a list of title related to that term appears.



You may view notes associated with related terms by selecting a term and clicking the **Notes** button.

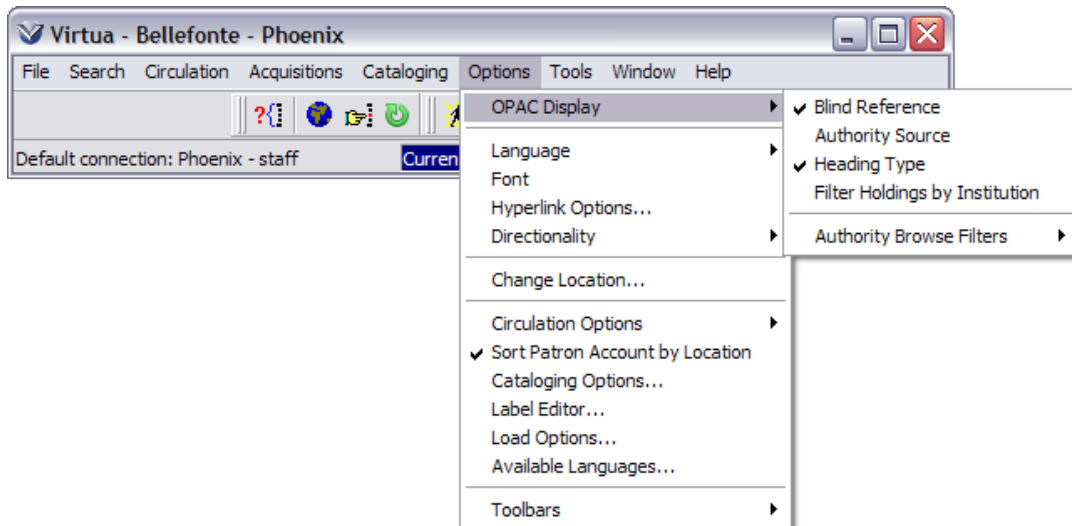


To return to the list of related terms, click the **View List** button.

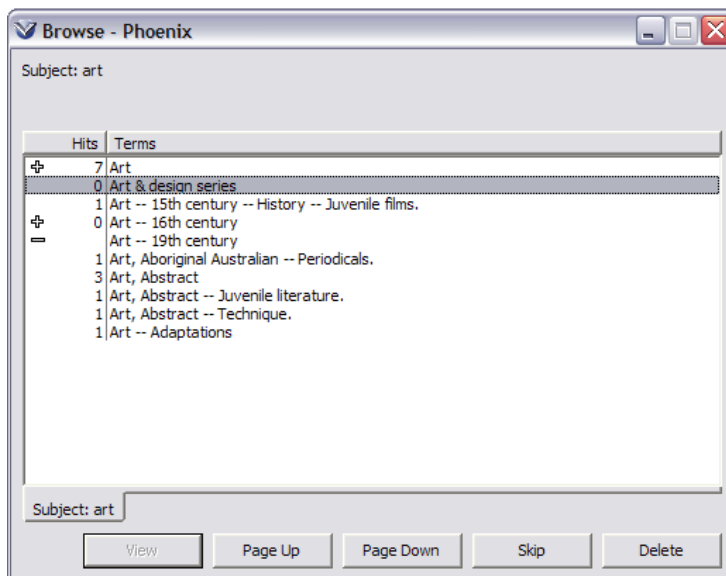
Display Options

The OPAC display can be set to display **Blind References**, **Authority Source**, and **Heading Type** if the user so chooses.

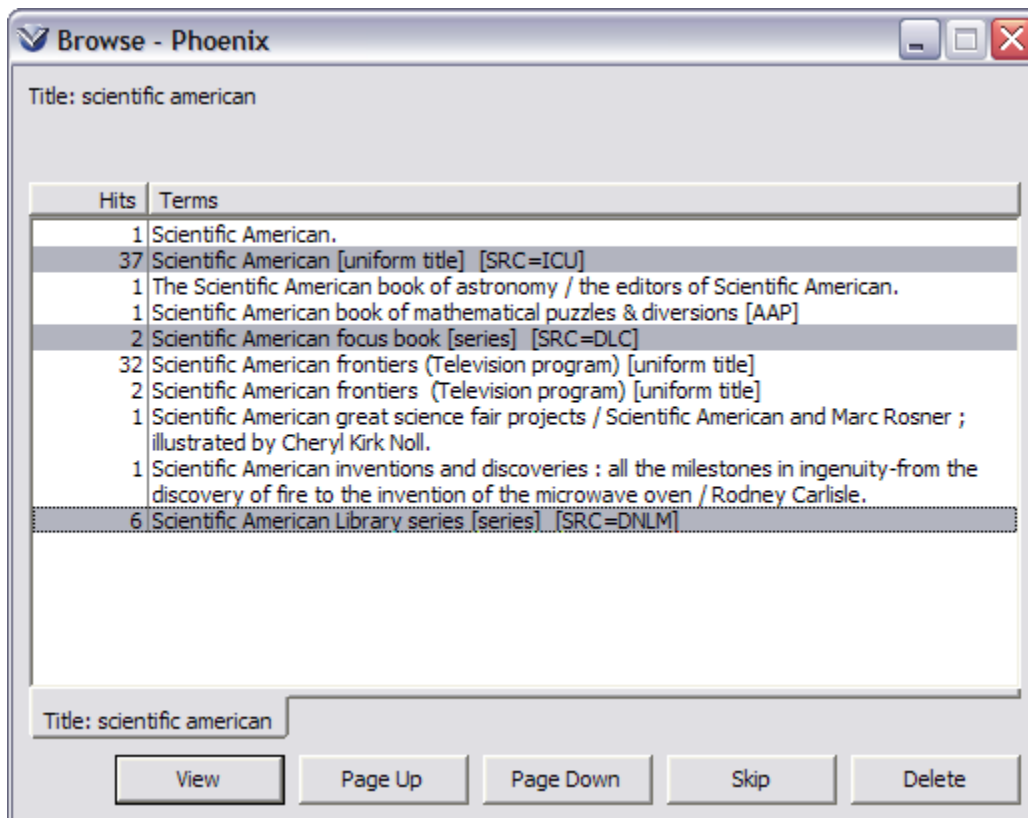
From the **Options** menu, click on **OPAC Display**, and then place a check next to the options that you wish to display.



Blind Reference: The term is a valid heading but there are no hits/records in the database associated with the term. If **Blind References** are set to display, Virtua displays the term with 0 hits next to it.



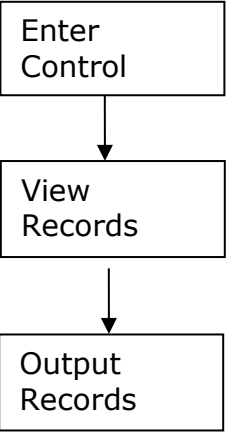
Heading Type: The words *series* or *uniform title* will display in brackets next to appropriate terms. These are derived from the Bib Lvl values specified in the 008 tag of the 999 Virtua tag of the authority record.



Authority Source: A cataloging code that indicates who created the authority record, for example Library of Congress. This is derived from the subfield \a of the 040 tag of the authority record.

Authority Browse Filters: All Authority Headings, Permanent Authorities Only or Provisional Authorities Only.

Control Number Search


Recommended Workflow	Explanation
 <pre> graph TD A[Enter Control] --> B[View Records] B --> C[Output Records] </pre>	<p>Control numbers are unique numbers assigned to library items or attached to catalog records and subsequently are used to identify those items or records. Virtua indexes these numbers so you can use them in a search. Searching on a control number will produce a direct hit, immediately accessing the items and records.</p> <p>Summary</p> <p>Open the Control Number tab of the Search window Identify search results relating to control numbers</p> <p>Key Terms</p> <ul style="list-style-type: none"> Authority MARC Record Control Number Control Number Search Holdings MARC Record Item Record Patron Record Vendor Record

Control Numbers and Search Results in Virtua

Index	Searches	Retrieves
Auth Ctrl #	010 tag of the Authority Record	View (Authority) Record window
Auth ID	001 tag of the MARC Authority Record	View (Authority) Record window
Authority LCCN	035 tag of the Authority Record	View (Authority) Record window
Bib ID	001 tag of the MARC Bibliographic Record	View (Bibliographic) Record window
Birth Certificate #	025 tag subfield \$a of patron records	Patron Information window
Control Number Link	773 tag subfield \$w to find all child (i.e., component part) records associated with a particular parent analytic record.	This search is available for databases that have MARC 21 and/or CATMARC records <i>only</i> .
Holdings ID	001 tag of the Holdings Record	View Holdings window
ISBN	020 tag of the MARC Bibliographic Record	List of Titles window or View Bibliographic Record window
ISSN	022 tag of the MARC Bibliographic Record	List of Titles window or View Bibliographic Record window
ISSN-L	022 tag subfield \$l of the MARC Bibliographic Record	List of Titles window or View Bibliographic Record window
ISSN Serials	022 tag of the MARC Bibliographic Record	Serials Check-in window or the Holdings tab of the View Bibliographic Record window
Item Accession Number	All item records. The Accession Number on the Item Elements tab of the Item Information window is distinct from the acquisitions accession number.	Item Information window
Item Barcode	Item barcode number	Item Information window
Item ID	System ID number of the Item Record	Item Information window
LCCN	010 tag of the MARC Bibliographic Record	View (Bibliographic) Record window
Local Number	Searches the <i>exact content</i> of the 035 of the MARC Bibliographic Record tag	View (Bibliographic) Record window
OCLC Number	035 tag of the MARC Bibliographic Record and automatically adds	View (Bibliographic) Record window

Other Standard Identifier	the (OCoLC) ocm prefix. 024 tag subfield \$a of the MARC Bibliographic Record	List of Titles window or View Bibliographic Record window
Passport #	022 tag subfield \$a of the Patron Record	Patron Information window
Patron Barcode	015 tag of the Patron Record	Patron Information window
Patron ID	001 tag of the Patron Record	Patron Information window
Publisher Number	028 tag subfield \$a the MARC Bibliographic Record	List of Titles window or View Bibliographic Record window
Vendor #	System-generated Vendor ID number	View Vendor window

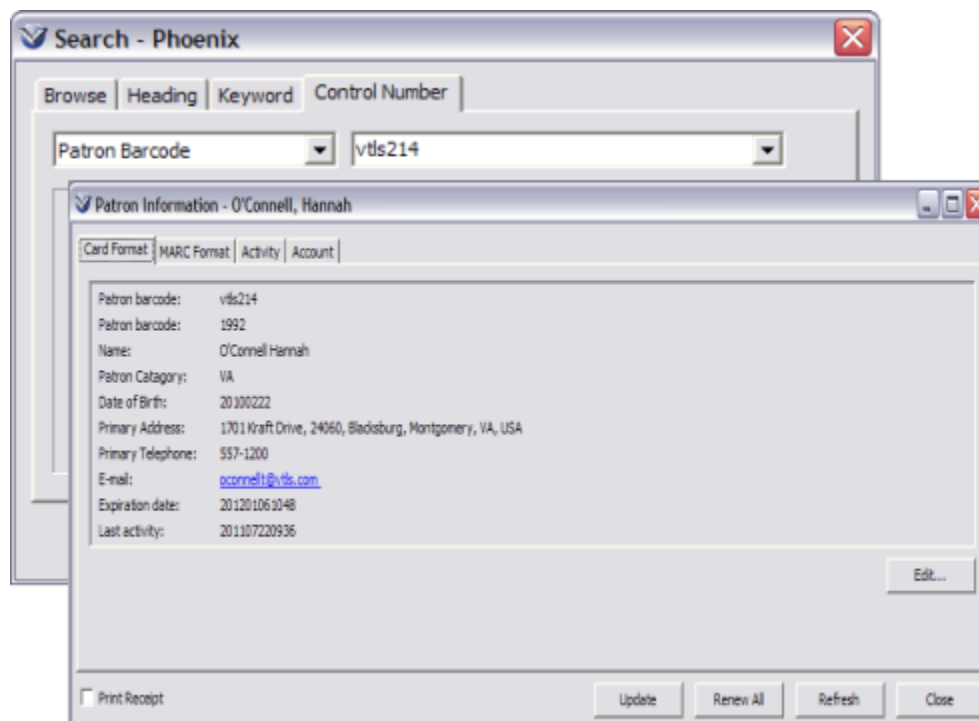
Search the OPAC

Click the **Search**  icon on the OPAC toolbar or use the **Search** pull down menu from the toolbar.

Choose one of the control number types listed.

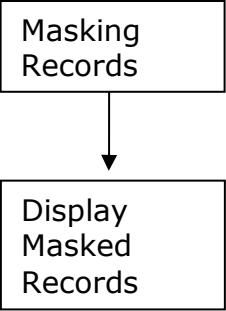
Type the number in the box adjacent to the box containing the search term categories.

Press the **Search** button or **Enter** on your keyboard.



Note: Depending on the type of control number search performed, different windows may appear. Since control numbers are unique, you should only retrieve one record.

Masked Records

Recommended Workflow	Explanation
 <pre> graph TD A[Masking Records] --> B[Display Masked Records] </pre>	<p>Masked Records</p> <p>Comprehensive record masking is available in Virtua. This feature can be used to hide records that have been added to selection lists or are on order. Bibliographic records, item records, and holdings records can be masked.</p> <p>Masked records are not visible in the public OPAC. The ability to view and/or create masked records can be in the Profiler.</p> <p>Optional setting in profiler: Masking is removed when items are received.</p> <p>Summary</p> <p>Mask a Record</p> <p>Key Terms</p> <p>Masked Record</p> <p>Related Topics</p> <p>Users Permissions Guest</p> <p>Masked Record Parameters</p> <p>Acquisitions Basic Options: Automatically unmask records on receipt.</p> <p>Operational Security: Permissions can be set to allow users to View, and/or Edit masked records.</p>

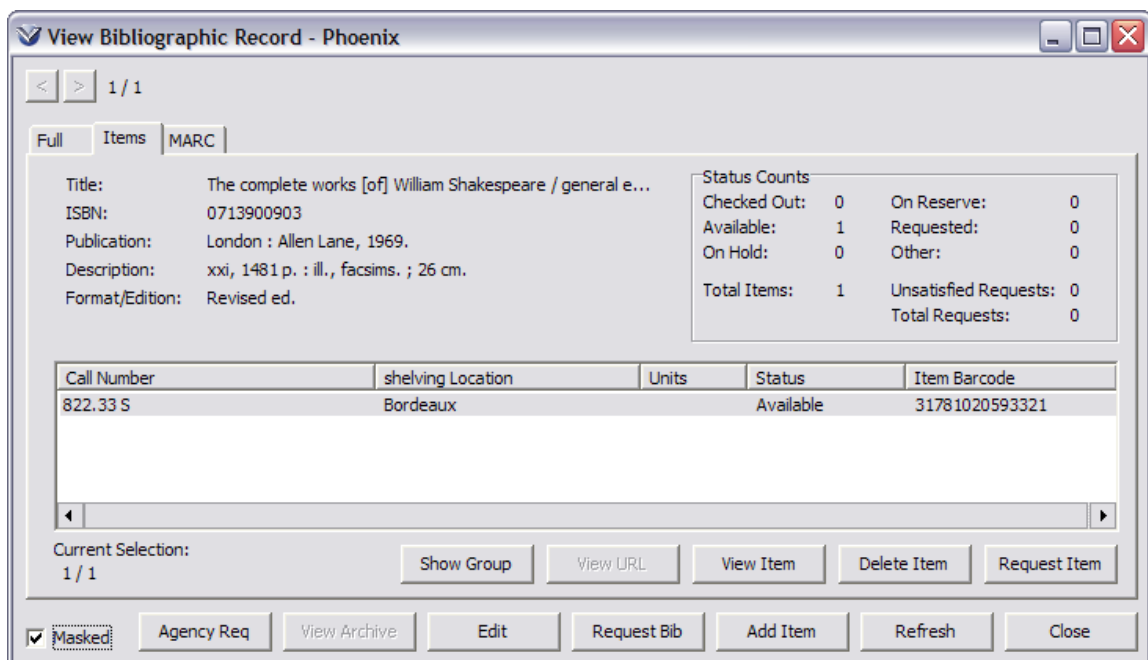
Create Masked Records

Bibliographic records may be masked so that they are not visible in the public OPAC, or to staff members without permission to see masked records.

Bibliographic Records can be masked from several places in the Virtua Client:

- View Bibliographic Record Window
- Item Information Window
- View Holdings Record Window
- MARC Editor Window
- Add Purchase Request Window
- Import to Purchase Request Window

From the **View Bibliographic Record** window by placing a check in the **Masked** checkbox:



From the **MARC Editor** window by placing a check in the **Masked** checkbox:

The screenshot shows the MARC Editor - Phoenix window with the following fields and values:

<input type="checkbox"/>	008			691008r19691969enka	000 0 eng d
<input type="checkbox"/>	020	<input type="checkbox"/>	<input type="checkbox"/>	\a 0713900903 \c \$60.00	
<input type="checkbox"/>	035	<input type="checkbox"/>	<input type="checkbox"/>	\a (OCoLC)ocm30289687	
<input type="checkbox"/>	040	<input type="checkbox"/>	<input type="checkbox"/>	\a UKM \c UKM \d HQB	
<input type="checkbox"/>	049	<input type="checkbox"/>	<input type="checkbox"/>	\a HQBA	
<input type="checkbox"/>	082	0	4	\a 822/.33 \2 18	
<input type="checkbox"/>	092	<input type="checkbox"/>	<input type="checkbox"/>	\a 822.33 \b S	
<input type="checkbox"/>	100	1	<input type="checkbox"/>	\a Shakespeare, William, \d 1564-1616.	
<input type="checkbox"/>	240	1	0	\a Works	
<input type="checkbox"/>	245	1	4	\a The complete works [of] William Shakespeare / \c general editor Alfred Harbage.	
<input type="checkbox"/>	250	<input type="checkbox"/>	<input type="checkbox"/>	\a Revised ed.	
<input type="checkbox"/>	260	<input type="checkbox"/>	<input type="checkbox"/>	\a London : \b Allen Lane, \c 1969.	
<input type="checkbox"/>	300	<input type="checkbox"/>	<input type="checkbox"/>	\a xxi, 1481 p. : \b ill., facsims. ; \c 26 cm.	
<input type="checkbox"/>	500	<input type="checkbox"/>	<input type="checkbox"/>	\a Illus. on lining papers. In slip case.	
<input type="checkbox"/>	500	<input type="checkbox"/>	<input type="checkbox"/>	\a Revised ed. originally published, Baltimore: Penguin Books Inc., 1969. Previous ed. originally published in 38 vols, Harmondsworth: Penguin, 1956-1967.	
<input type="checkbox"/>	501	<input type="checkbox"/>	<input type="checkbox"/>	\a MARCIVE 03/01/06	
<input type="checkbox"/>	700	1	<input type="checkbox"/>	\a Harbage, Alfred, \d 1901-	
<input type="checkbox"/>	913	0	0	\a SHACWWS99000	
<input type="checkbox"/>	994	<input type="checkbox"/>	<input type="checkbox"/>	\a E0 \b HQB	

At the bottom of the window, the following options are visible:

- (a) Language material
- (m) Monograph/Item
- Masked
- MARC 21 Bib: Book
- OPAC
- OPAC1

From the **Add Purchase Request** window by placing a check in the **Masked** checkbox:

The screenshot shows the 'Add Purchase Request' dialog box. The 'Masked' checkbox at the bottom left is checked. The form includes fields for Requestor Barcode, Category, Title, Author, Publisher Name, Publication Date, Publication Place, Notes, Vendor, Source of Selection, Material, Quantity, Group Name, Location, Fiscal Year, Fund Account, Music Pub. Num., ISBN, ISSN, Price, Price Currency, and a Rush Order checkbox. A Rejection Reason text area is also present.

From the **Import to Purchase Requests** window by placing a check in the **Masked** checkbox:

The screenshot shows the 'Import To Purchase Requests' dialog box. The 'Mask Records' checkbox is checked. The form includes fields for File Name, Character Set, Vendor, and Category (set to Fiction). It also has checkboxes for 'Is New', 'Overwrites Existing Record', 'Is Discarded', and 'Is Placed in Error State'. A status summary at the bottom shows 0 records in various states.

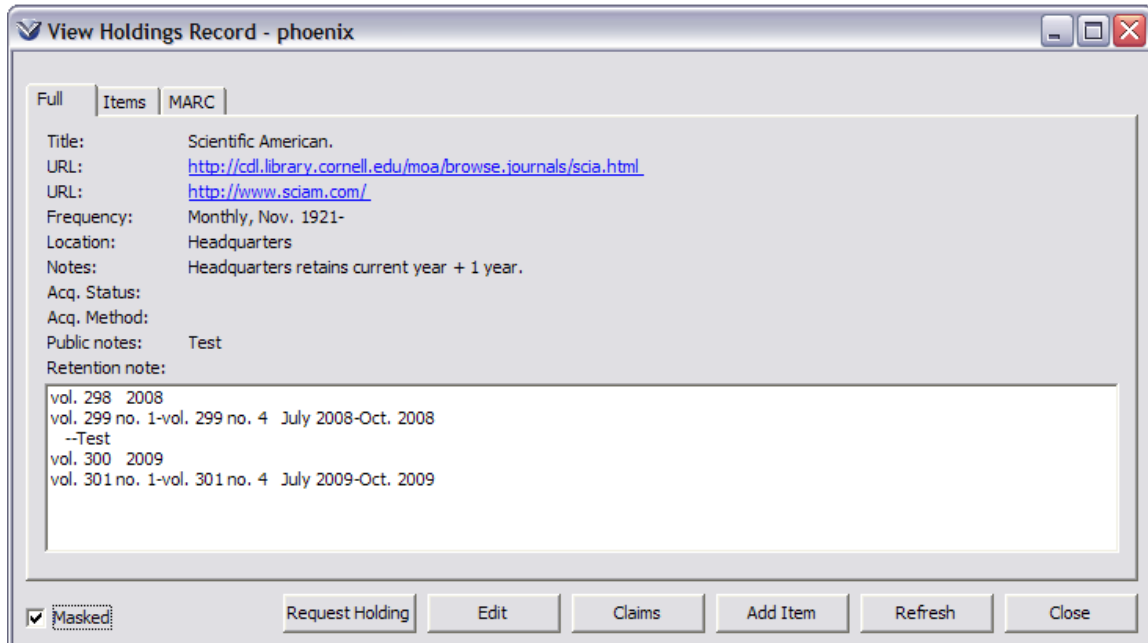
From the **Item Information** window by placing a check in the **Masked** checkbox:

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

- Bibliographic Information:**
 - Author: Shakespeare, William, 1564-1616.
 - Title: Works
 - Edition: Revised ed.
- Item Information:**
 - Item ID: 533794
 - Barcode: 31781020593321
 - Barcode Type: Regular
 - Item Class: Book
 - Reserves Item Class: (empty)
 - Item URL: (empty)
 - Location: Bordeaux
 - Shelving Location: Bordeaux
 - Number of Pieces: 1
 - Circulate Pieces: (unchecked)
 - Price: \$ 60.00
 - EPN Number: (empty)
 - Accession Number: (empty)
 - AV Accession Number: (empty)
 - Collection Code: (empty)
- Call Number:**
 - Copy: (empty)
 - Call #: 822.33 S
 - 2nd Call #: (empty)
- Units:**
 - Free Text: (unchecked)
 - Enumeration and Chronology: (unchecked)
 - None: (checked)
 - Units field: (empty)
 - Edit: (button)
- Preservation and Conservation:**
 - Code: (empty)
- Non-Parameterized Shelf Location:**
 - Location: (empty)
- Circulation Rules:**
 - Use Matrix: (checked)
 - Use Loan Period: 0
 - Allow Request: (checked)

At the bottom left, the **Masked** checkbox is checked. At the bottom right, there are buttons for **Delete**, **Edit**, **Refresh**, and **Close**.

From the **View Holdings Record** window by placing a check in the **Masked** checkbox:



Masking Statuses

Under certain circumstances, you may wish to set record masking so that item record statuses do not display in the OPAC. For example, item records with the status *missing*.

To configure a status to be masked go to the **Global Settings** tab, **Status Displays** option in the *Virtua Profiler*. On the **General** tab of the **Statuses** window enter a status descriptor, click the **Mask Status** checkbox, and click **Save**.

Statuses

General Requests/Renewals Reports

Status Descriptor: Missing

First Digit Descriptor: 4 Display warning and clear status

Second Digit Descriptor: 7 Check-out, check-in, and renew

Last Two Digits Code: 00

Status Code: 4700

Suppress Warning

Mask Status

Unserviceable

Save Cancel

Last modified at 5/25/2011 5:03:13 PM by Root User

Display Masked Records

If the bibliographic record for War and Peace is masked:

A user **with** permission to view masked records will see the following results of a title browse search for War and Peace.

Browse - Phoenix

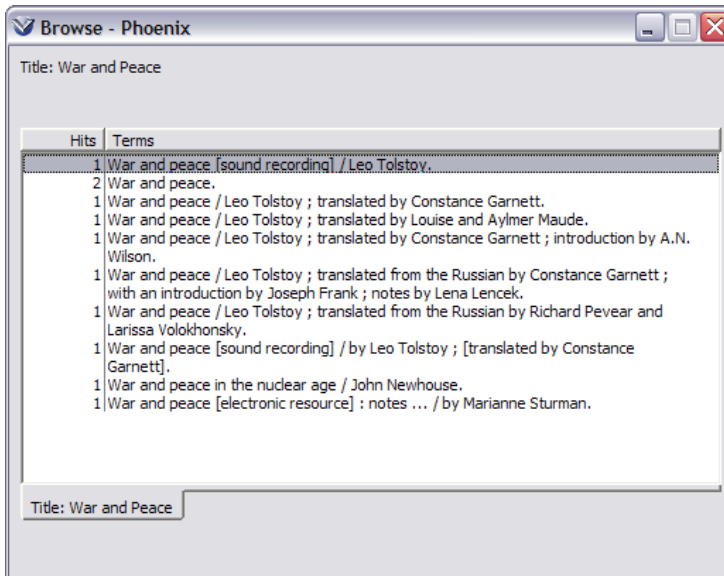
Title: War and Peace

Hits	Terms
1	War and peace [sound recording] / Leo Tolstoy.
1	War and peace [videorecording] / produced by Dino de Laurentis ; directed by King Vidor.
2	War and peace.
1	War and peace / Leo Tolstoy ; translated by Constance Garnett.
1	War and peace / Leo Tolstoy ; translated by Louise and Aylmer Maude.
1	War and peace / Leo Tolstoy ; translated by Constance Garnett ; introduction by A.N. Wilson.
1	War and peace / Leo Tolstoy ; translated from the Russian by Constance Garnett ; with an introduction by Joseph Frank ; notes by Lena Lencek.
1	War and peace / Leo Tolstoy ; translated from the Russian by Richard Pevear and Larissa Volokhonsky.
1	War and peace [sound recording] / by Leo Tolstoy ; [translated by Constance Garnett].
1	War and peace [electronic resource] / Leo Tolstoy ; Frederick Davidson.

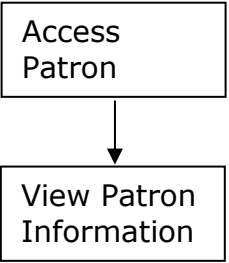
Title: War and Peace

View Page Up Page Down Skip Delete

A user **without** permission to view masked records will see the following results of a title browse search for War and Peace.



Patron Records

Recommended Workflow	Explanation
 <pre> graph TD A[Access Patron] --> B[View Patron Information] </pre>	<p>Patron information can also be viewed using the OPAC. Your library decides whether or not patrons will be allowed to view their patron records and check out materials from the OPAC.</p> <p>Summary</p> <ul style="list-style-type: none"> Retrieve a patron record Navigate the search results View patron records <p>Key Terms</p> <ul style="list-style-type: none"> Patron Account tab Patron Activity tab Patron Empowerment Patron Information window Patron Record

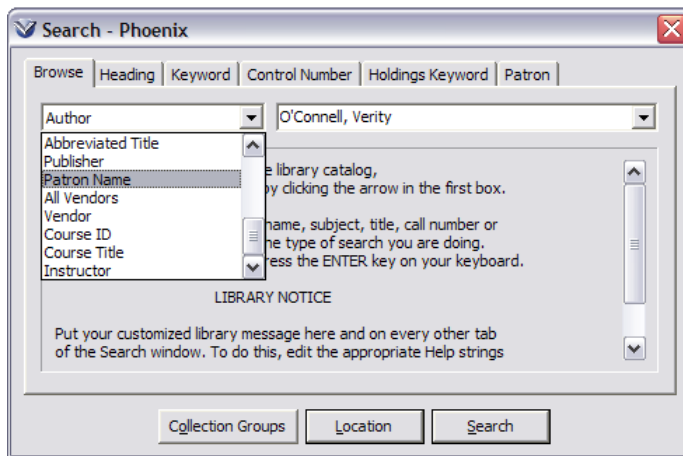
Access Patron Record

Browse Search

On the **Browse** tab you can initiate a patron name search.

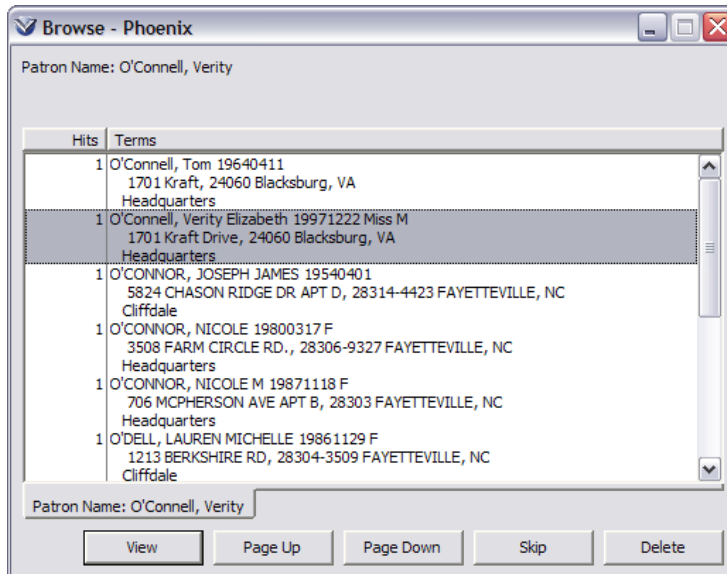
To perform a **Browse** search, click the Search icon . The **Search** window appears, displaying the **Browse** tab.

To access a patron's record, select **Patron Name** from the drop-down list box.



Type the patron's name (Last Name, First Name) in the search box and press the **Search** button or **Enter** key.

The browse screen will display a list of patrons closest to the name searched. Click the desired patron and you will be taken to the **Patron Information** window.



Patron Keyword Search

Patron searches let you search for patron records using keywords found in indexed patron information fields. The **Patron** tab of the **Search** window lets you use multiple search categories and search operators to operators to search for patrons, allowing more flexibility than the standard Patron Name Browse search or Patron ID Control Number search.

Important: Patron keyword search functionality is a special Virtua feature that must be configured by VTLIS personnel. To enable patron search functionality for your library, contact your local VTLIS office.

To perform a patron search:

Click the **Search** icon  on the OPAC toolbar.

The **Search** window appears, displaying the **Browse** tab. Click the **Patron** tab.

Search - phoenix

Browse | Heading | Keyword | Control Number | Holdings Keyword | Patron

E-mail Address from 271 subfield a

oconnelle@vtls.com

AND Additional name from 700 subfields a, h ,m and

AND Additional name from 700 subfields a, h ,m and

Location Search Cancel

Using a combination of search terms, search categories, and search operators, construct a patron search query.

Click the **Search** button.

Your search results appear on either the **Patron Search Results** window or the **Patron Information** window.

Patron Search Results - phoenix

E-mail Address from 271 subfield a: oconnelle@vtls.com

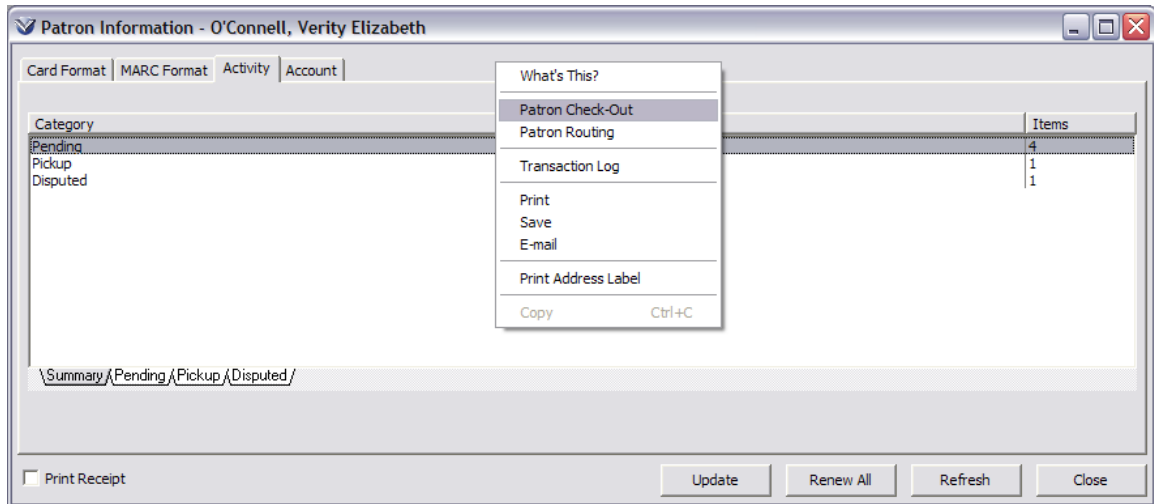
Titles 1 - 3 / 3

Patron Name	Patron Other Name	Address	Patron Barcode
O'Connell, Rosie Riveter		1701 Kraft Drive Blacksburg VA 24060	vtls529
O'Connell, Seafoam		1701 Kraft Drive Blacksburg VA 24060	vtls704
O'Connell, Verity Elizabeth		1701 Kraft Drive Blacksburg VA 24060	vtls1222

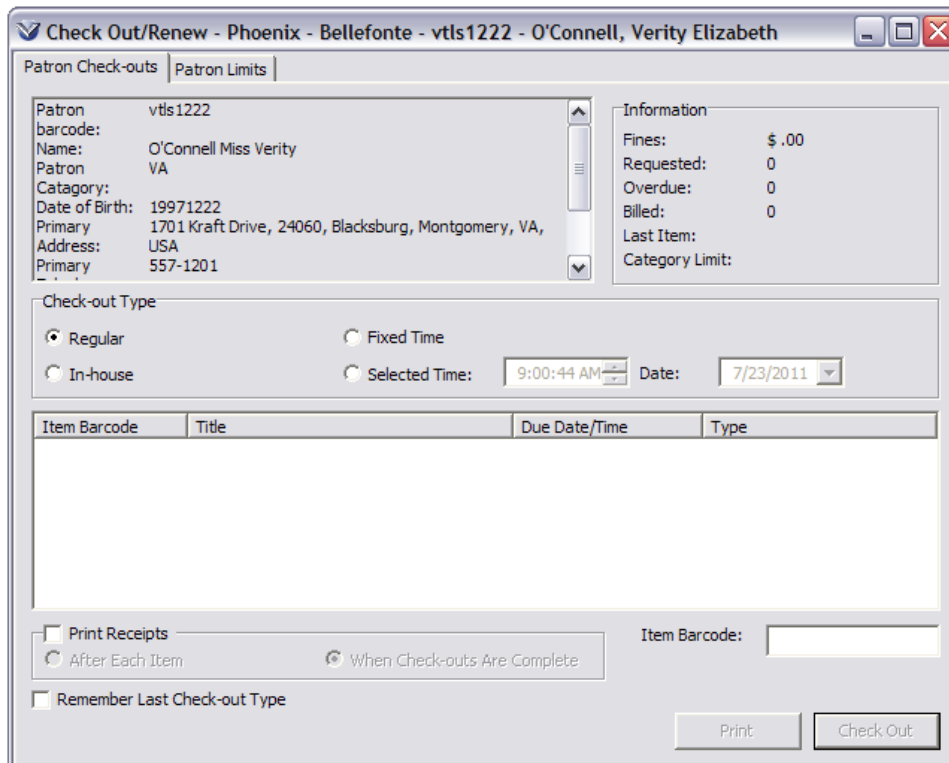
View Cancel

View Patron Information

Click on the **Patron Activity** tab to view current circulation transactions.



Use the right mouse click to access the **Patron Check-out** window.



Appendix A: Definition of Key Terms

Attribute Configuration: In order for Virtua to recognize non-standard Z39.50 use attributes it is necessary to configure them in the Server Setup window. This setting is for use when searching non-Virtua databases and is optional.

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

Bib-Level Call Number: the call number for the bibliographic record; which can be different from the call numbers of items associated with the record.

Blind Reference: valid heading that appears in a browse index, but does not lead to any bibliographic records because there are no associated hits in the database.

Boolean Operators: method of combining terms in a keyword search that allows the searcher to use three logical commands (AND, OR, NOT), sometimes called operators.

Browse Window: window that contains the results of an OPAC Browse Search.

Browse Search: type of OPAC search where the system retrieves all headings in the database that match or come close to matching the terms a user enters for a selected category.

Call Number: identification code used to arrange items in order on the shelf. Call numbers are usually composed of two parts: 1) classification (located in subfield \$a of the MARC tag), and 2) item or book number (located in subfield \$b of the MARC tag). Call numbers are found in the 050 tag (LC) and 080 tag (Dewey), and in 900 tags (locally defined) of the Bibliographic MARC record.

Control Number: unique numbers assigned to library items or attached to catalog records and used to identify those items or records, for example, ISBN, ISSN, and LCCN.

Control Number Search: a Virtua feature that provides direct access to records and items; control numbers are unique to a record so this type of search will retrieve only one record. The window in which the search result

displays is dependent on the type of control number; for example, a patron number search will display in the Patron Information window.

Course ID: character string used to identify an academic course (e.g. HISTORY 101) in the Reserves module. Course ID is one of the Browse search categories in the Virtua OPAC.

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

Default Load Character Set: If a server returns records in a syntax other than MARC 21, Virtua uses the syntax specified here. Currently, the Virtua client accepts records from a server in MARC 21, CATMARC, and UNIMARC formats.

Display Options: settings a user can choose for a session; fonts, language, and supplementary authority information (blind reference, authority source, heading type). You can enable or disable these display options at any point during your session.

Expert Search: allows the experienced user to build sophisticated searches using search categories, keywords, Boolean operators (AND, OR, NOT), precedence, proximity, and truncation.

Filters: criterion a user can set to restrict an OPAC search and thus limit the result set. Possible filters are: Location (library), Format, Language, Publication Year, Nature of Contents, and Place of Publication.

Full Text Searching: using the program DocumentBatchLoader.ksh, your library can load text documents into the database and index them for keyword searching. When you use the Full Text keyword search category, Virtua searches for your keyword in any text document that has been indexed.

Full Tab: (Bibliographic Record): displays the non-MARC public view of bibliographic information for a given record.

Full Tab: (Holdings Record): displays bibliographic/holdings information along with the volumes and issues of a particular serial that the library or location houses.

Holdings-level Call Number: Call number that is specific to a holdings record and is different from the call number on the associated bibliographic record or on other holdings records associated with the same bibliographic record.

Holdings MARC Record: Type of MARC record used in Virtua to describe serials. Holdings records contain the following elements: a link to the bibliographic record, location, prediction pattern, and issue level holdings information.

Holdings Tab: tab on the View Record window that displays holdings record information associated with the bibliographic record. The header of the holdings tab contains elements of the bibliographic record and associated library-defined labels such as author, title, edition, publisher, and description of material; the list box contains columns of information taken from each holdings record and other records linked to the holdings record.

Host Name: the IP address or the host name of the service (i.e. zeus.library.edu).

Item: unique physical or virtual piece or entity, e.g., a book, volume of a journal, a roll of microfilm, etc. that is part of a library's collection.

Item Elements Tab: tab on the Item Information window that displays basic descriptive information for the item, such as Item Information, Call Number Information, and Circulation Rules.

Item Information Window: displays data associated with the item record on up to four tabs, depending on the item class and the user profile: Item Elements, Statistics, Status and Notes. The Status tab appears only if the item has a status associated with it or if the Item Information window is in edit mode. The Notes tab appears only if the item has a public, staff, check-in, or check-out notes associated with it or if the Item Information window is in edit mode.

Item record: A record attached to a bibliographic record or holdings record that describes an individual item belonging to the library. Item records contain information unique to the item such as call number, price, shelving location, etc.

Item Tab: tab on the View Record window that displays the physical and/or virtual items associated with the bibliographic record, including: outstanding requests, location, call number, and barcodes.

Item-Level Call Number: call number that appears on an individual item record (and correspondingly, on an actual physical item). An item-level call number is specific to an item. Libraries use this type of call number to uniquely identify multiple item records that are associated with a bibliographic record, which has a different call number from each of the items (see also Call Number).

Keyword in Heading Search: A type of OPAC keyword search that lets you search for keywords anywhere within an authority heading. The results of a Heading search appear on the List of Headings window, which resembles the Browse window but displays only the authority headings that contain your search term.

Keyword Search: type of OPAC search that allows users to enter search terms with Boolean operators. Filters and left, right and medial truncation may also be applied to a keyword search.

List of Titles: Displays brief bibliographic information about each title that is a qualified hit from a browse search.

Location: (see shelving location)

MARC 856 tag: tag is used to support multimedia files, containing images, video clips, sound recordings, or full text and which may reside on a local hard drive, a remote server, the Internet, or a CD-ROM. The views in the Profiler can be configured so that these files appear as hyperlinks on the Full, Items and Holdings tabs of the View Record window.

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

MARC Bibliographic Record: type of MARC record that describes an item held by the library in MARC bibliographic format, and may contain the following descriptive elements: title and statement of responsibility (author, editor etc.), edition, material type, publisher/distributor, publication date, physical characteristics, series, notes, standard number (ISBN, ISSN, etc.), and terms of availability, including price.

MARC Community Record: type of MARC record that describes a non-bibliographic entity that provides information related to a civic community. Examples include individual people (e.g., storytellers, civic leaders, etc.), organizations, programs (e.g., a driver's education class), event (e.g., a seminar), or some other entity (e.g., a facility such as a planetarium).

MARC Tab: tab on the View Holdings Record window that displays a combination of bibliographic and holdings information. The MARC tab includes all the fields of the MARC holdings preceded by the following fields from the parent bibliographic record: 004, 010, 022, 030, 035, indexed call number, 1xx, 245, 246, 260, 780, 785. Note that when a holdings record opens in the MARC Editor, only the holdings fields appear.

Masked Record: Records that are hidden for some reason, often because they are on order. Records that are masked will not appear in the results of searches performed by users who do not have permission to view masked records (usually library patrons).

Multiple Subject Heading Search: is based on the second indicator of the 6xx tag of the MARC record, which generates a subject code in position 11 of the 008 of the authority record.

OPAC: Online Public Access Catalog: it is one of the subsystems in Virtua.

Patron Account Tab: fees owed by a specific patron are displayed on the Patron Account tab of the Patron Information window.

Patron Activity Tab: a patron's borrowing activity displays on the Patron Activity tab of the Patron Information window, (e.g. checked-out items, overdues, and pending requests).

Patron Empowerment: optional Virtua features that allow patrons to make requests, check-out materials, and edit their own patron records.

Patron Information Window: displays a patron's personal data in Full or MARC Format, borrowing activity, and fees owed.

Patron Record: database record in 2709 MARC Communications format (defined by VTLIS, rather than by USMARC) that houses all of the identifying information about a library patron such as name, address, phone number, date of birth, patron barcode number, borrowing activity, and account activity.

Port: An entrance to, or exit from, a data network. In Virtua it is the number used to access the server housing a Virtua database. Z39.50 servers often use the port number 210; otherwise, four- or five-digit port numbers between 1025 and 32767 are used.

Profile Name: the name of the server or any other descriptive information that will identify the server the database is located on. Once the setup is configured this is the information that appears in the dropdown menu of available servers.

Refine Search: a bibliographic keyword search query that Virtua combines with your original search query to produce a new (usually narrower) set of search results.

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

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

Search Categories: categories or indexes defined in Virtua which are used for searching the OPAC, for example, a: (author), t: (title).

Search Strings: a series of keywords, Boolean operators, and/or parentheses that define a search. For example: (a:Mitchell) + (t:gone & t:wind)

Search Window: window in the Virtua client from which a user can choose to do a Browse, Keyword, Control Number, or Expert search.

Selection List: A list of materials recommended for purchase. In Virtua items for selection lists can be submitted electronically and integrated into the Acquisitions sub-system.

Shelving Location: physical or virtual location of library material; main locations and sub-locations are defined in the Global Settings parameters in the Virtua Profiler. The shelving location is used to tell patrons where to locate the item and also as a filter in keyword and expert searches.

Sort Order: order in which a set of search results appears on a results window. The standard value of the default sort on the List of Titles window is a title sort. A user can customize the default sort by clicking the Sort button. In a future release, a library can set the default sort on the List of Titles via a parameter setting.

Statistics Tab: tab on the Item Information window that displays statistical data about the item: Bibliographic Information, Record Information, and Circulation Statistics.

Statuses Tab: tab on the Item Information window that displays the purchase order number, order line item number, details about the purchase order and line item, receipt, invoice, payment, and credit status information.

Subject headings: a controlled vocabulary used in subject cataloging and indexing by libraries or indexing agencies.

Subject Thesaurus: a controlled vocabulary designated by a specific organization or agency. Examples include National Agriculture Library (NAL), Medical Subject Heading (MeSH), and Art and Architecture.

Sub-location: a department or specific location within a building or organizational unit, and represented by the last four digits of a unique nine-digit library location code. Location filtering in the OPAC is allowed at both main location and sub-location levels.

Truncation: ability to search on part of a word. Virtua uses the symbol * to represent an unknown number of letters and a ? to represent a single letter. For example, Farm* will retrieve records that contain the terms farm, farms, farmer, farming, etc.

Vendor Record: field-based format that contains vendor information to describe an organization from which library materials are ordered.

View Record Window: shows data your library chooses to display for bibliographic records. From the Items tab and the Holdings tab of the View Record window, it is possible to navigate to a specific item record or holdings record.

Virtua Client: refers to the Virtua Windows-based graphical user interface that resides on your PC and lets you access each subsystem in Virtua such as the OPAC subsystem.

Z39.50 Database: A database that allows access through the Z39.50 protocol.

Z39.50 Protocol: national information retrieval standard developed by the National Information Standards Organization (NISO). It defines a protocol that allows one computer (the client) to communicate with another (the server), perform searches, and retrieve records.

Appendix B: InfoStation Reports for OPAC

OPAC Report Group	Notice	Function
OPAC Search Statistics	N	The OPAC Search Statistics report generates counts of various types of OPAC searches performed by the users, at the locations, and during the date range that you specify for the report configuration. Additionally, you can optionally choose for the report to display each count as a percentage of the total for a given category.
Server Response Times	N	Generates a summary of the response times of the Virtua server to all Z39.50 search requests.

Appendix C: OPAC in a Consortium Environment

Users

User Profiles in the Profiler let you define the username, password, description, default log-in location, and group membership for each Virtua user. Additionally, the User Profiles parameter lets you configure user permissions. Permissions determine which functions, actions, and controls each Virtua user or group of users has permission to access or execute.

Views

Windows in the Virtua client display bibliographic, holdings, item, and patron data elements based on the tags, subfields, fixed fields, and other information defined in the Client Views in the Profiler. In the consortium environment, each institution can configure its own set of Client and iPortal Views.

Filtering Out Holdings Records

In the consortium environment, institutions can set their OPAC Display Options in the Virtua client to filter out those holdings records in the **View Bibliographic Record** window that belong to locations outside their institution. This allows users in the Virtua client to toggle between showing "all" holdings and showing just the holdings for their institution.

Appendix D: Commonly Used Search Categories

a	Author	i	Index1
t	Title	il	Illustrations
s	Subject	fst	Festschrift
tse	Series Title	fic	Fiction
p	Publisher	b	Biography
pp	Place of Publication	tc	Type of Computer File
nre	Notes	rf	Relief
lang	Language	pj	Projection
ty	Type	pm	Prime Meridian
ed	Entered Date	ct	Cartographic
cs	Cat Source	sf	Special Format
bl	Bibliographic Level	fc	Form of Composition
tym	Type of Material	fm	Format of Music
nc	Nature of Content	mm	Matter of Music
rs	Rec Status	lt	Literary Text SR
ar	Archive	tm	Time MP VR
el	Enc. Level	mv	Matter Visual
d	Desript	tq	Technique
lr	Link Rec	ic	ISSN Center
f	Format	ts	Type of Serial
td	Type of Date	foi	Form of Original Item
sd	Start Date	new	Nature of Entire Work
edt	End Date	oa	Original Alphabet
mr	Mod Rec	aw	Anywhere
fr	Frequency	loc	Location
r	Regularity	temp	User Defined Search 1
ta	Target Audience	ud02	User Defined Search 2
gp	Govt Publication	ud03	User Defined Search 3
cp	Conf Publication		

Appendix E: Multiple Subject Thesauri

Virtua gives libraries the ability to add to the browse search dropdown menu specified thesauri searches in addition to the general subject search. For further information, consult the Multiple Subject Thesauri white paper.

The indexes are set in the Profiler using the **Cataloging Multiple Subject Headings Parameter**.

1. A script is run against the database to identify existing library-defined thesauri codes and to identify improperly cataloged records: those with a conflict between the 2nd indicator in the bib record and position 11 of the 008 tag in the authority record.
2. After a second script fixes any reported records, the Multiple Subject Headings Parameter is set in the Profiler.
3. A third script is run against the database to create the indexes.

Thesauri searches are based on the second indicator of the 6xx tag of the MARC record, which generates a subject code in position 11 of the 008 tag of the authority record.

Browse Dropdown	Subject Thesaurus	2nd ind. of bib record	Bib 6xx \$2 or Auth 040 \$f	008/11 of Auth Record
Subject-blank	Blank	'blank'		'blank'
Subject-lcsh	Library of Congress Subject Headings (LCSH)	0		a
Subject-lcshac	LC subject headings for children's literature	1		b
Subject-MeSH	Medical Subject Headings (MeSH)	2		c
Subject-NAL	National Agricultural Library subject authority file (NAL)	3		d
Subject-Unknown	Source not specified	4		4
Subject-Canadian	Canadian Subject Headings	5		k
Subject-Répertoire	Répertoire de vedettesmatière	6		v
Subject-Art	Art and Architecture Thesaurus	7	aat	r
Subject-Sears	Sears List of Subject Headings	7	sears	s
Subject-Value	Source specified in bib \$2 or auth 040 \$f	7	'value'	z
Subject-Local1	Locally defined	8		8
Subject-Local2	Local	9		9

NOTE: When saving a bib record, the 008/position 11 of the authority record is automatically populated based on the 2nd indicator on the 6xx tag.

Appendix F - Changes in this Guide

Changes for Version 16.1

No changes were made.