The Vger location change program

A tool for changing locations, status codes and item type codes in Vger item and holdings records

by
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The location change program is a tool for making changes to item holdings and bibliographic records in a Vger database. The program can change the permanent and temporary location codes, the permanent and temporary item type codes and the item status codes in item records. When the program changes the permanent location codes in item records, it also changes the location code in subfield $b of the 852 field in the corresponding MARC holdings record.[1] If properly configured, the program is also able to change parts of a holdings record other than the location code. The program can also change the 'OPAC suppression' flag in bibliographic and holdings records.

Changing permanent locations in Vger can be tedious, because when changing the 'permanent location' the same change has to be made in both item and holdings records. When using the Vger cataloging client to do this work, there seems to be no end to the number of mouse clicks required to make this simple change. The Vger location change program was originally designed to make it possible to move items from one location to another with as little fuss—and as little clicking—as possible. With this program, the work on Vger needed to transfer a truckload of items from (for example) reference to the stacks can be reduced to the scanning of relevant barcodes. The program has been expanded beyond the ability to make changes to location codes, because other parts of the item record may also be subject to mass alterations from time to time.

The program helps you do this kind of work in one of two ways:

1. You can change one record at a time. You use the program in this way when you want to change *some* of the items in a particular category, but not all of them. For example, you might have a truckload of materials that you want to move from reference to the stacks, or from the stacks to a remote storage facility. You will set up the program so that it changes records in the way you want, and you then simply scan in the barcode of each item to be moved (or otherwise identify the records that need to be changed). This is the 'record by record' method of working.
2. You can change a set of records all at once. You use the program in this way when you want to change all of the records that have certain features in common. For example:
   - you might decide to eliminate a location altogether, and want to move everything in that location to some other location
   - you might want to move all items in a particular location within a given range of classification numbers to some other location
   - you might want to change the item type code for materials in a given location to some other value

   You define for the program the characteristics of the records you want to change and the characteristics that you want to change (these do not necessarily involve the same pieces of information), and then ask the program to do all of the work. The program will identify all of the records to be changed, and change them one at a time, without any assistance from you. This is the 'batch' method of working.

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[1] After changing the permanent location in one or more item records, the program changes subfield $b of the 852 field in the holdings record to match, *provided that all of the item records attached to the holdings record now have the same permanent location.* Although most of the descriptions of changes in this document are worded as if a Vger installation contained item records for everything, item records are not in fact required; the program will also change the location in the holdings record if there are no item records attached to a holdings record. Obviously enough, if there are no item records attached to a holdings record—or if the item records that are attached have no barcodes in them—it won't be possible to change records by scanning barcodes.

This document tells you how to set up the Vger location change program, and how to use it to change item, holdings and bibliographic records.

This program is created at, and originally distributed by, Northwestern University Library. The program was not developed by, and is not distributed by, the organization that develops and distributes the Vger system. This is in no wise an 'official' Vger program. The organization that develops the Vger system makes available a programming interface into the Vger system that makes possible the capabilities offered by Northwestern University Library's program.

Installation

Point your Web browser to the Northwestern University Library HTTP site:
    http://www.library.northwestern.edu/public/

There is folder at this site for each different version of Vger; click on the label that identifies your version of Vger.[2] You *must* use the version of the location changer program that corresponds precisely to your version of Vger.[3] Within this folder you'll find a folder called 'locationchanger' (or perhaps 'LocationChanger'). When you select this folder, you should see a file with the name 'LocationChanger.ZIP.'

Transfer this ZIP file to your local computer and unzip it. You should now have the following three files:

    setup.exe
    setup.lst
    LocationChanger.cab

Use My Computer or the Windows® Explorer to navigate to the folder on your computer that contains these files. Double-click on 'setup.exe' to start the installation program. This program installs files and adds an entry for the program to your Start menu.[4] Once the installation program has finished, you can create a shortcut for the program on your desktop, if you want; you can also rearrange your Start menu to suit yourself.

You must also run the Vger system installation program on the computer on which you expect to use the program, and you must do some amount of configuration. The location change program does not interact with the clients in any way (so the actual clients don't have to be installed), but it must use the BatchCat DLL[5] file included with the system installation to communicate with your Vger system, and it must use the Vger initialization file (voyager.ini) to locate your Vger system.

Finally, you must also install and configure an ODBC (*o*nline *data*base *c*onnectivity) driver on this computer. Specifically, you must install the ODBC driver for Oracle®, and you must configure the ODBC installation to point to your Vger system. The installation and configuration of the ODBC driver are not

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[2] The word 'version' here refers not just to the general version number (such as 2001.1.1) but also to the specific 'build' of the version. There are, for example, at least three different builds for version 2001.2.1; each build has a separate folder at the HTTP site.

[3] If you install the wrong version of the location changer program, you'll probably see a message something like 'Active X object can't create object' when you try to use the program. This message almost always means that you need to install a different version of the location changer program.

[4] The default location for this program in the Start menu is:
    Programs
        Northwestern University Library
            Location changer

[5] Each build of each version of Vger brings with it a new version of this file. The file for each version of Vger has a different name, incorporating the version number; for example, BatchCat2000-13.DLL for Vger version 2000.1.3, and BatchCat2001-21.DLL for Vger version 2001.2.1. The variations in the BatchCat file for each build of Vger require a corresponding version of the location changer program.

described in this document. (If you're using Microsoft Access® to read Vger tables you've already got an ODBC connection.)

Once you have installed this program, and installed and configured the Vger clients and the ODBC driver, you are ready to use the program.

Options: getting the program ready to use
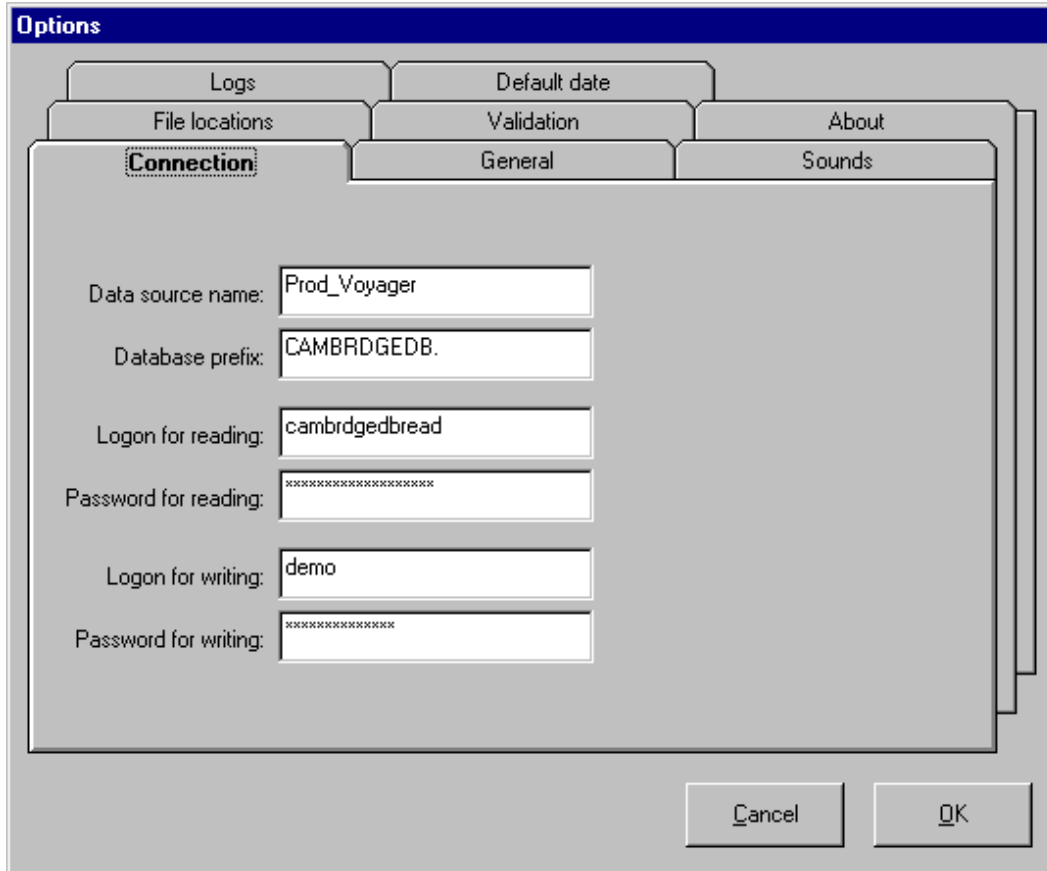
General remarks

The first time you start the program, it will show you its Options panel. You must provide acceptable values for some of the elements in this panel before you can begin to use the program. The very first time you see the Options panel, you need to supply values on the Connections tab, and information (except for the list of owning libraries and the cataloging location) on the other tabs. After you successfully save these changes, the program will show you the Options panel again; you can now complete the list of owning libraries, select a cataloging location, and make any other changes you wish.

At any time except when the program is performing some work, you can return to the Options panel to change your settings. To call up the options panel, select 'Options' from the program's main menu. Normally, after you modify and save options, you can continue to use the program. However, if you change information on the Connection tab, the program will cancel itself after successfully storing your changes. In this case, you must start the program again before the changed Connection information can go into effect.

The various elements in the program's Options panel are displayed on three tabs: elements that tell the program how to connect to your Vger installation, elements that control the program's general behavior, and elements that control the noises the program makes. The following sections describe the elements on each of these tabs.

The Connection tab

The Connection tab on the Options panel tells the program how to connect to your Vger installation. You must provide suitable values for each of the elements in this panel before the program can work with your records.

Data source name: The program uses a technique called ODBC (for *o*nline *data*base *c*onnectivity) to search your Vger system and retrieve records from it. You must install the ODBC driver for Oracle on each computer that uses the program, and you must configure each ODBC driver to point to your Vger system. (The installation and configuration of the ODBC driver are not described in this document.)

As part of the configuration of the ODBC driver, you use the Microsoft ODBC data sources application (available from the Windows 'Control panel') to define a data source that has (among other things) a Data Source Name. This data source name for your Vger system is simply an arbitrary string of characters you assign. (It might simply be 'Voyager', but it could also be 'ProductionFile' or something else; it's entirely up to you.) After completing the ODBC configuration you will put this Data Source Name into the program's *Data source name* box. When the location change program needs to search or retrieve records from your Vger installation, it gives Windows the name of the ODBC connection, and Windows (using the ODBC driver configuration) makes the connection to Vger.

Database prefix: A typical Vger installation contains at least two databases: a production database and a training database. Each Vger database has an Oracle name; this name typically consists of a number of characters, ending in 'DB'. For example, the training database is commonly called 'TRAINDB'; the

production database might be something like 'NWUDB', 'BIGDB' or 'CORNELLDB'.[6] In the *Database prefix* box, give the name of the Vger database in which the program will be doing its searching, and to which it will be writing changed records. Your database prefix name must end with a full stop (example: TRAINDB.); if you forget to include the full stop, the program will add it for you.

The name in this box must identify the same database pointed to by the Cataloging stanza of the *Voyager.INI* file named on the General tab.

Login for reading and *Password for reading:* The program does not use the same method for searching Vger and retrieving records from it as it does for sending changed records back to Vger. Reading and writing have separate operator IDs and passwords. In these two boxes, you need to supply the login (or signon code) and password the program should use when connecting to Vger via ODBC to *read* your Vger database. This is not a signon established via Vger System Administration, but one that your system administrator has to establish with Oracle, outside of Vger. (This signon must have read-only access to your Oracle tables—it need have no higher authorization than that.) This login and password are often both set to 'dbread' but they may be different at your institution. The location change program encrypts the password when it saves it in its configuration file.

Login for writing and *Password for writing:* When the program is ready to write a changed record to Vger, it has to identify itself to Vger in the same way that any cataloger or other operator has to identify her or himself to Vger. This identification consists of two pieces of information: a login (or signon code) and the password associated with it. Put into these boxes the Vger login and password the program should use to change item and holdings records. The location change program encrypts the password when it saves it in its configuration file.

The signon you supply here must already be authorized (in Vger System Administration) for cataloging before you can save it here. In addition, the signon must be authorized to do the work you intend to do: it must be authorized to modify holdings and item records, and to modify them for the locations (and, by implication, owning libraries) with which you wish to work.

Important note about the login and password for writing to Voyager: The program stores the password in encrypted form, so it's protected from casual snoops. However, this doesn't prevent someone from gaining access to a machine on which the program is installed, starting up the program and changing locations. You can enforce an additional level of security by leaving the *Password for writing* box blank. (You'll still need to fill the *Login for writing* box.) If the program doesn't have a password when it comes time to update records, it'll ask for the password.

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[6] If you don't know what this name is, ask your system administrator.

The General tab

The General tab on the Options panel gives the program several miscellaneous pieces of information. You can't complete the information in this tab until you've defined information properly on the Connection tab, and saved that information.
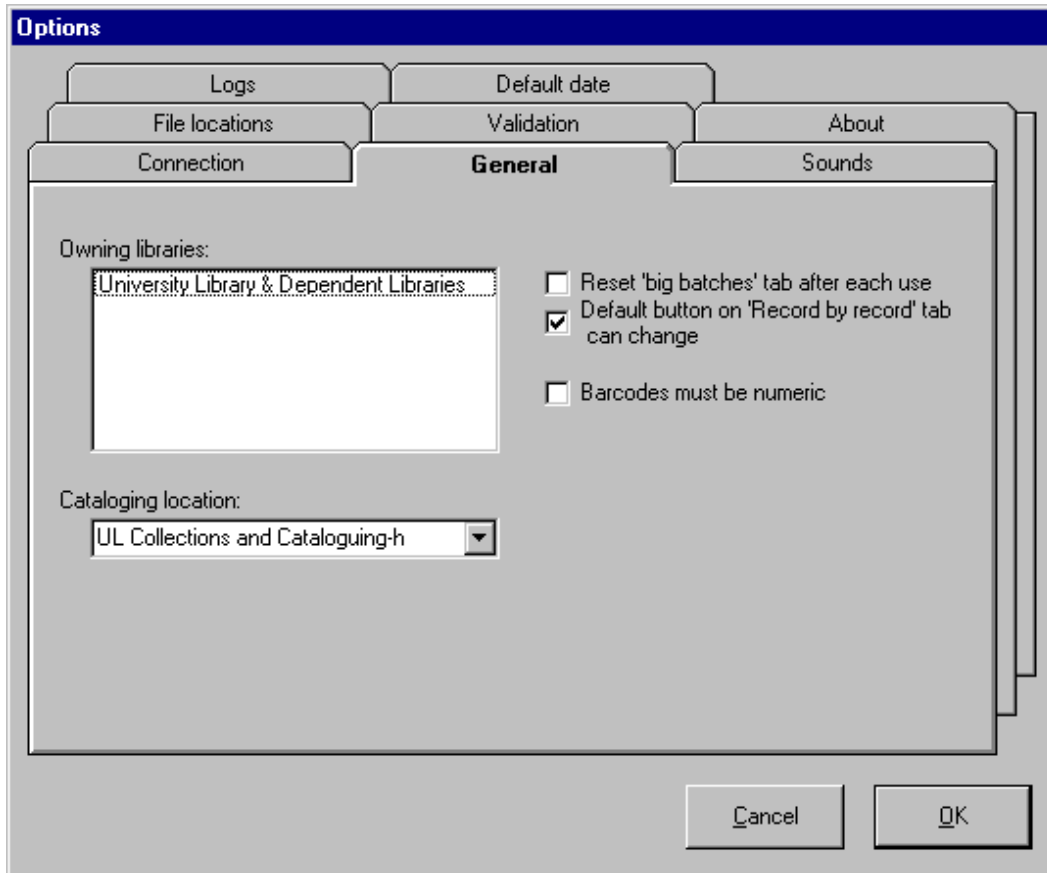
Owning libraries: Identify in this box the Vger owning libraries with whose records you will be working. The list of owning libraries shown here is tied to the 'write' signon identified on the Connection tab: the list the program shows here contains only the owning libraries with which this operator is allowed to work. You can select as many owning libraries as you need.
- If you wish to limit your work only to certain owning libraries (even though you're authorized to work with records for other libraries), select here the libraries with which you wish to work. The program will only change records that belong to those owning libraries.
- If you will be working with records for *all* of the libraries, you can either select all of the names, or you can select none of the names; the program will behave the same way in either case.

Because the list of owning libraries the program gives here contains only those libraries that are legal for the operator defined on the Connection tab, you may decide that in most cases it doesn't matter what choice you make here. If you are selecting records by their location code (which already implies limitation by owning library) you could select *all* of the owning libraries, select *none* of the owning libraries, or select the owning library that corresponds to the location. (If you select only an owning library that doesn't contain the selected locations with which you'll be working, the program won't change anything.) On the other hand, if you are selecting records instead by item type on the 'big batches' tab, you may well want to restrict the work to records in a particular owning library by selecting one or more of the libraries listed here.

Cataloging location: The program must give Vger the name of the 'happening' cataloging location (sorry; that's what the Vger documentation calls it) it should use when sending changed records. The drop-down list given here contains only the 'happening' cataloging locations associated with the operator identified on the Connection tab.

Reset 'big batches' tab after each use: If this box has a checkmark in it, the program will reset all of the input boxes on the 'big batches' tab to their default values when it has finished processing one request. If this box does not have a checkmark in it, the program will not reset the 'big batches' tab; the operator can either ensure each box has the proper value before making the next request, or can click the 'Reset' button to set each input area to its default value.

Default button on 'Record by record' tab can change: The 'default' button is the button that Windows clicks for you automatically when you hit the Enter key. Some forms in Windows programs have default buttons, and some don't. The default button on a form has a darker border around it than other buttons. Having a default button that corresponds to an operator's most likely choice may reduce the number of keystrokes or the amount of clicking required to perform a task.

In this example, the 'Fetch barcode' button is the default button. When the operator presses the Enter key, Windows clicks this button.
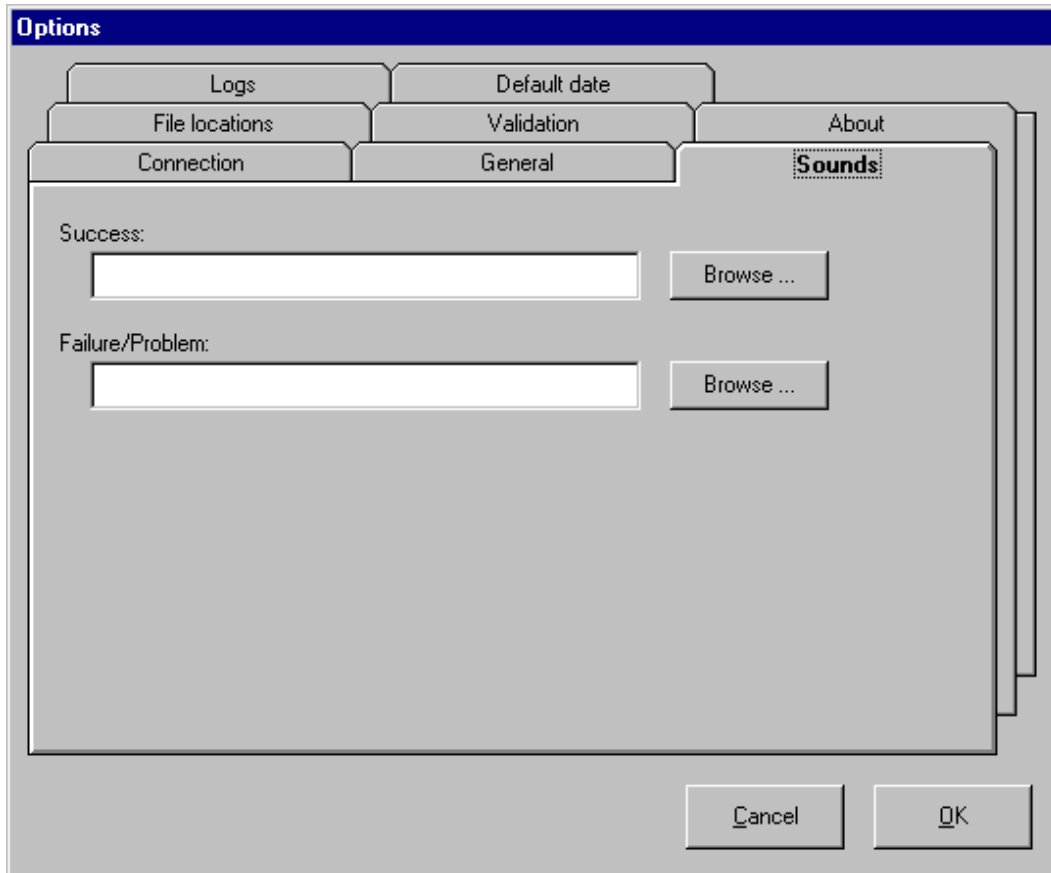
The definition of the 'default' button is especially important on the program's 'Record by record' tab, because you're probably going to be using this tab to do the same thing over and over again, and you're going to want to make things as easy for yourself as you can.

- When the program is first installed, the 'Fetch barcode' button is the default button, and stays the default button. This initial setting is fine if you're scanning in a bunch of barcodes—you will set up your barcode scanner so that it sends the Enter key after sending the barcode, Windows will click the 'Fetch barcode' button, and you will never have to touch the keyboard. If this is the case, you can leave the 'Default button on "Record by record" tab can change' box on the Options panel un-checked.
- If you're going to be typing in item or holdings record numbers, you probably want the default button to become something else after you've done the first one, so you can hit the Enter key for subsequent work instead of clicking a button. If this is the case, you should check the 'Default button …' box on the program's Options panel, so the button you click will be the default button the next time around.

Barcodes must be numeric: If this box is checked, the program will verify that the barcode entered consists only of digits. If this box does not have a checkmark in it, then the program does not analyze the style of a barcode.

The Sounds tab

The Sounds tab tells the program what noises (if any) the program should make after it has completed an action. If the program has successfully done what you ask, it can play a noise; if it has not been able to complete a task, it can make a different noise. Asking the program to make distinct sounds in this manner can be especially useful if you are using the program's record-by-record capability, and are scanning a series of barcodes to make the same change to a number of items. The program will make the appropriate sound after each transaction, allowing the hearing operator to know, without looking at the screen, whether or not there was a problem. This in turn will allow the operator to perform work more quickly. (If the computer on which you'll be using the program doesn't have speakers or headphones, then it doesn't matter whether or not these boxes have anything in them.)


Success: Give the name of the sound file the program should play when it has successfully completed an action. Leave the box blank if you don't want the program to make any noise when it has successfully completed an action.

Failure/Problem: Give the name of the sound file the program should play when it has has not been able successfully to complete an action. Leave the box blank if you don't want the program to make any noise when it has not been able to complete an action successfully.

The Logs tab

The Logs tab tells the program whether log files detailing work carried out by the program should be created, and, if they are required, identify the folder in which they should be placed.
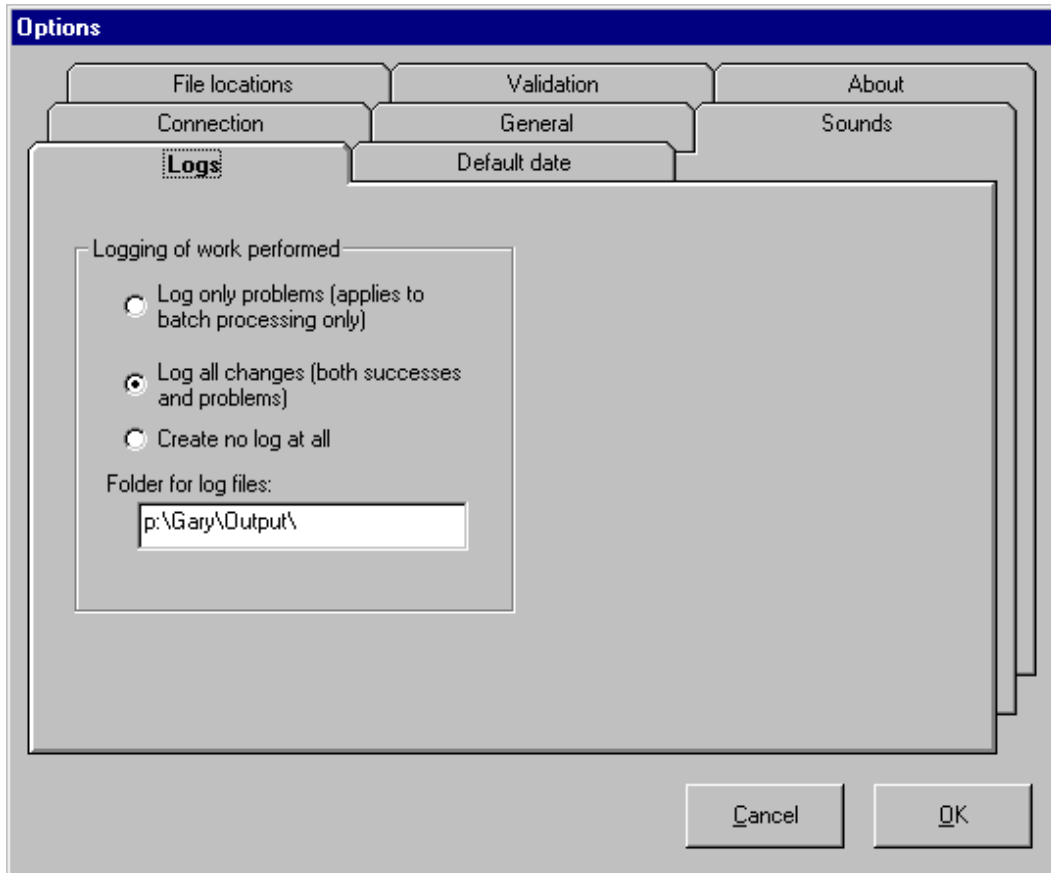
Logging of work performed: The program can prepare detailed logs of its activity. You can ask the program to prepare log entries for every record it changes, to prepare log entries only for those records that present problems, or not to prepare any log entries at all. You indicate your preference by clicking the corresponding radio button.

Place the name of the folder into which the program should write its log files into the *Folder for log files* box. The folder name should end with a backslash; if you leave off the backslash, the program will add it for you.

The names of log files begin with the text 'VgerLoc', continue with the date and time the program started, and end 'Log.txt'. These long names allow you to archive logs of program activity, if you wish. Here are some typical examples of log file names:

```
VgerLoc.20010327.094910.Log.txt
VgerLoc.20010328.171147.Log.txt
```

The program writes its detailed log files one line at a time, as it does its work. However (because Windows accumulates small writes to files until it's got a pile of them) each line doesn't show up on disk immediately after the program releases it. If you view the program's log files while the program is running, you should assume that the log is not complete, even if the program isn't doing anything at the moment; the program may well have released more information to Windows, but Windows may

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not yet have sent it to the file. The only time you can be sure that you are viewing the complete log file is after you've exited from the program.

The Default date tab

In some Voyager initial data loads, holdings and/or item records were added with no creation date. This lack of date may present a problem, to the location change program and also to your institution. The options presented on this tab represent an attempt to overcome this difficulty for the program. You should start out by ignoring this tab. If you encounter date-related problems when using the program, you should probably ask the author of the program for assistance.
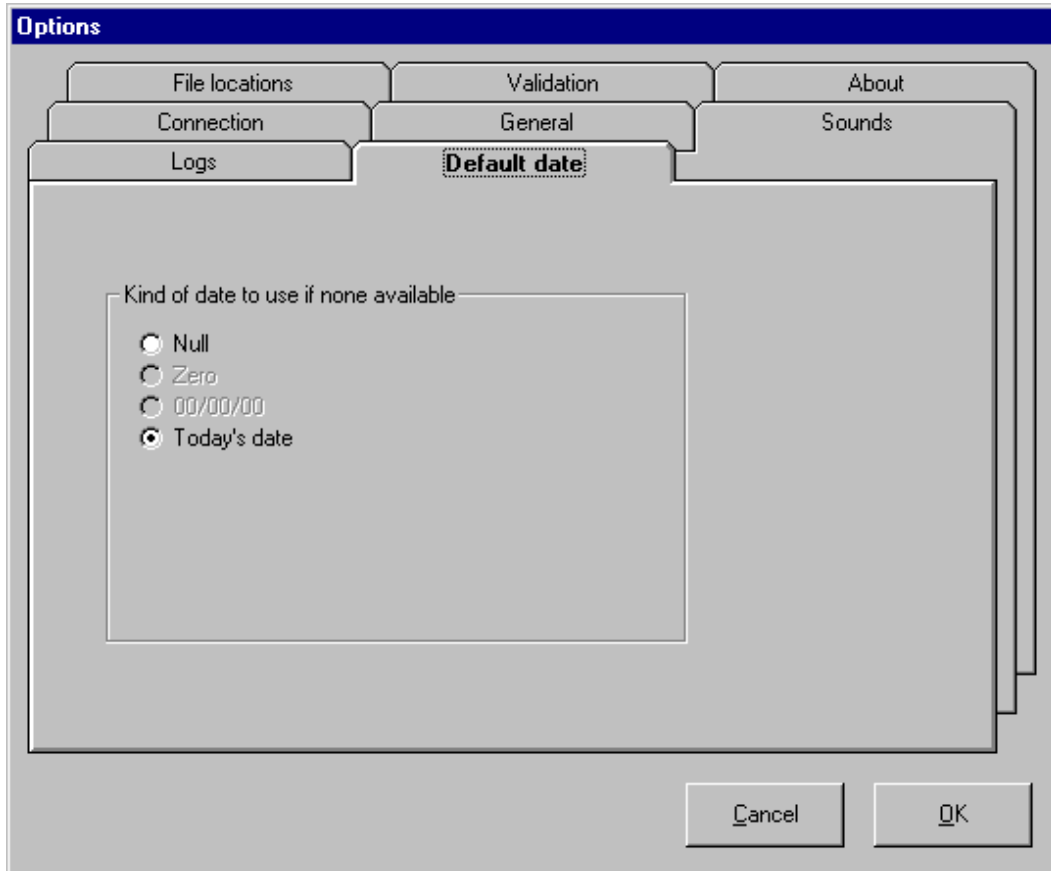
The File locations tab

The File locations tab tells the program where to find miscellaneous pieces of information.
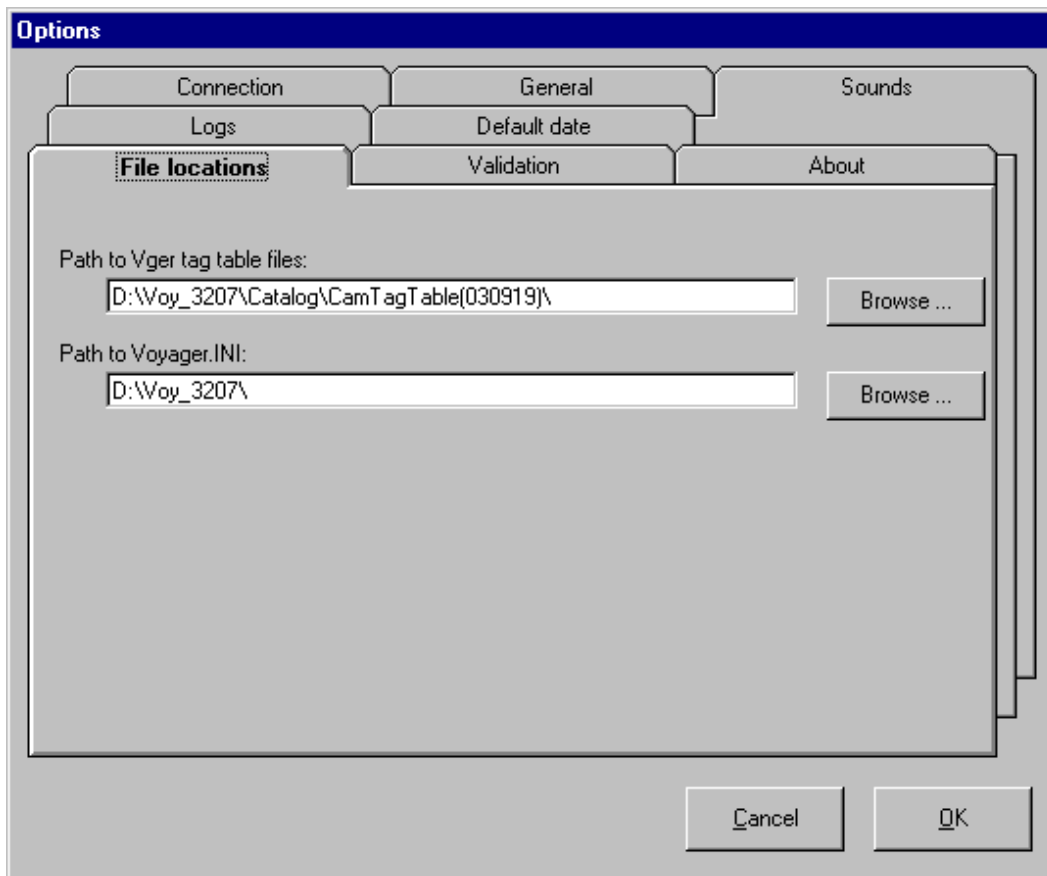
Path to Vger tag table files: This box contains the name of the folder that contains the Vger MARC format definitions. (This is the folder that contains 'amarc1xx.cfg' and similar files.) The program passes this information to the tool that performs validation (see the description of the Validation tab).

Path to Voyager.INI: This box contains the name of the folder that contains the copy of Voyager.INI the program should consult. Most Windows programs keep their initialization files (if they use initialization files at all) in a Windows system folder; but for Vger this file resides in the same folder as the Vger cataloging client.[7] You can use the Browse button to locate Voyager.INI; the program will put only the name of the folder that contains this file into the box.

To provide access to different Vger databases, there may be more than one Voyager.INI file (accompanying separate copies of the cataloging client and other files) present on a given computer, or on the local network. Each copy of Voyager.INI points (via IP address and port numbers) to a different Vger database. The copy of Voyager.INI you identify in this box must identify the same Vger database identified on the Connection tab, in the *Data source name* and *Database prefix* boxes. If you identify different databases, the program will be reading records from one database and writing them to another—probably not the kind of change you had in mind. (There is no way for the program to know that the path for reading records and the path for writing them do not lead to the same place.)

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[7] The location change program doesn't use the Vger cataloging client in any way. For the purposes of this program, Voyager.INI can be in any folder (on any drive) to which the program has direct read access.

The Validation tab

In addition to making changes to the permanent location in subfield $b of the 852 field, the Location changer program is also able to change other parts of holdings records. For example, you might wish the program to add an 856 field to each modified holdings record. You can make modifications to a holdings record other than those build into the program via the 'validation' mechanism. Information on this tab tells the program whether or not you wish to use this mechanism, and how to go about this work.

The validation tool that the location change program uses actually has two functions: it can check the validity of MARC content designation in records (this is how the tool gets its name); and it can modify records according to instructions you provide. It is this second capability—the ability to change records—that may be of use when working with holdings records.

The validation tool takes its instructions from a set of configuration files over which you have complete control. The construction of these files is a complex matter, and is described in a separate document.[8]
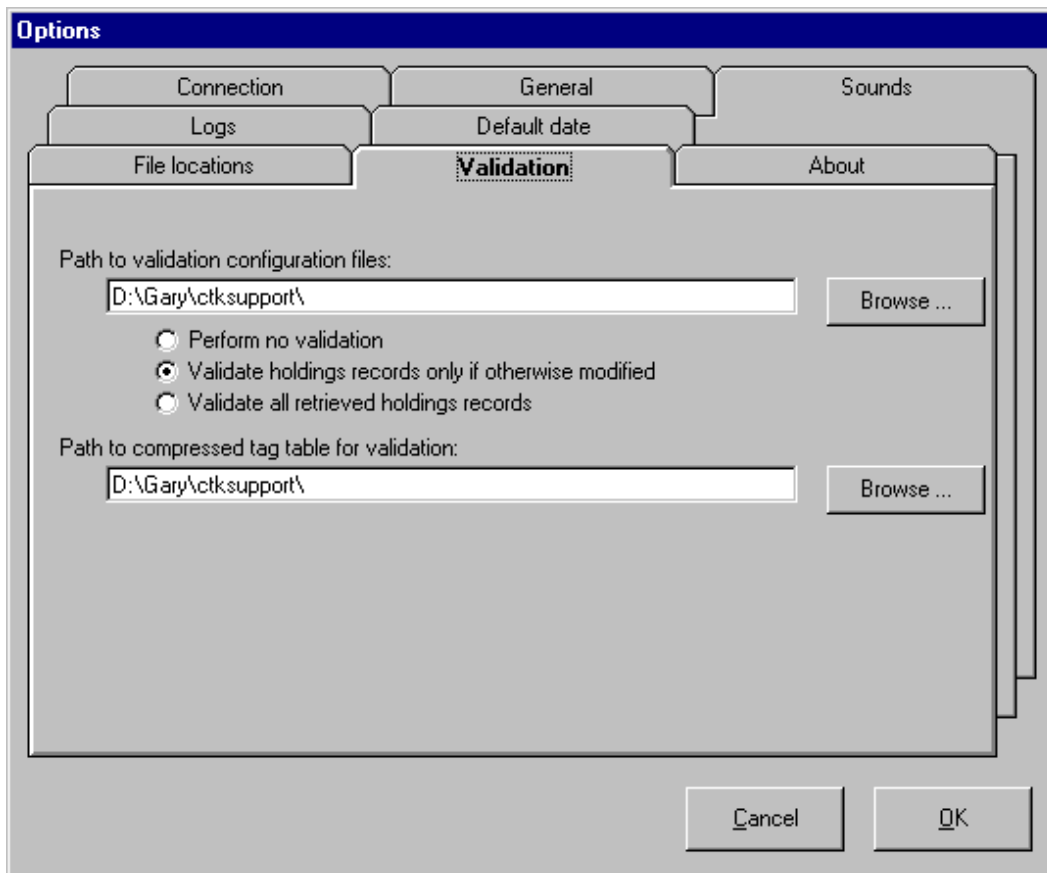
Path to validation configuration files: The name of the folder that contains the validation rules you wish to apply. The file holdvalid.cfg, being the file that contains rules for inspecting and transforming holdings records, is the one that should receive special attention.

Perform no validation, Validate holdings records only if otherwise modified and *Validate all retrieved holdings records:* These control the manner in which the program performs validation of records.

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[8] The document is 'validit.doc', available at Northwestern University Library's HTTP site.

- If the 'Perform no validation' radio button is checked, the program will not pass holdings records to the validation tool; there will be no validation (i.e., modification) of holdings records, even if the other parts of the program's configuration point to the desire to perform validation.
- If the 'Validate holdings records only if otherwise modified' radio button is checked, the program will pass to the validation tool only those holdings records it has modified for another reason.
- If the 'Validate all retrieved holdings records' radio button is checked, the program will pass to the validation tool all of the holdings records it retrieves for any reason. If the validation tool makes any change to these records, the program will send the changed holdings records back to Voyager, and save them.

Path to compressed tag table for validation: The validation tool uses a compressed version of your Vger tag tables when it's checking MARC content designation. In many instances, this compressed tag table is in the same folder as the other configuration files the validation tool uses; in this case, you can leave this box blank. If the compressed tag table is in some folder other than the folder that contains the rest of the configuration files, give here the name of that folder. (If the compressed tag table does not exist, or cannot be found, when the validation tool goes to check the very first record, it will automatically create it.)

If the 'Path to validation configuration files' box is filled in, and if any of the radio buttons other than 'Perform no validation' is selected, the program displays the message 'Validation rules are in effect' at the bottom of its main form:

The About tab

This tab contains some details about the program. (There are no options on this tab for you to change.) The most important things here are the version numbers of the program and its various components. If you have some difficulty with the location change program, you may need to include one or more of these numbers in your message to the appropriate party, as an aid in determining the source of the problem. The panel also includes information about the copyright of the toolkit.
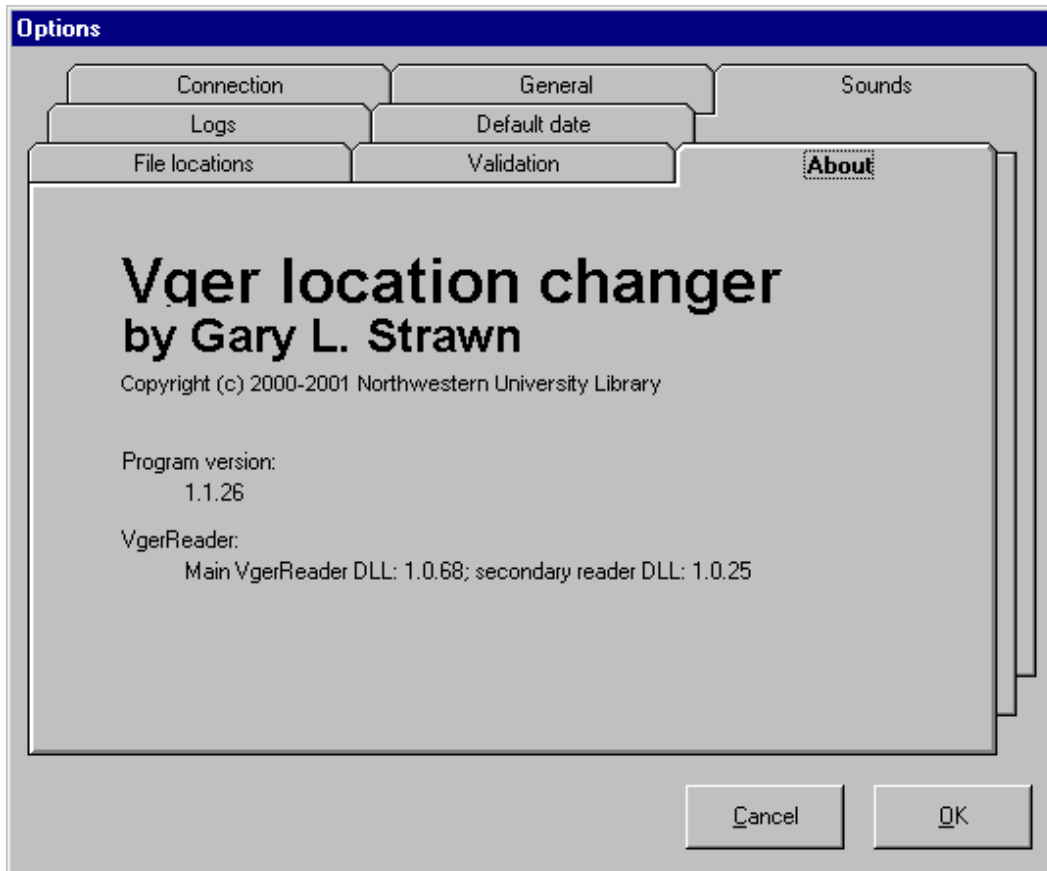
Using the program

Introduction

In general, changing records involves two steps: defining the things you want to change, and defining the change you want to make to them. This is certainly true of this location-changing program: the program needs to know what things to change, and how to change them. The location change program supports two different models for defining the records that should be changed: a record-by-record model, and a batch model. You will use the model that more closely suits the conditions presented by an individual case; not all changes will, of course, employ the same model.

1. With the 'record by record' model, you change one record at a time. You will use the program in this manner when you want to change *some* of the items in a particular category, but not all of them. For example, you might want to transfer a truckload of materials from Reference to open stacks, or from stacks to remote storage. In such cases, you probably want to transfer a limited group of materials, not *everything* in Reference or stacks. Such changes are 'record by record' changes. To use the program in this way, you first define the change you want the program to make (for example 'change the permanent location to remote storage'), and then (one at a time) you identify to the program the records you wish to change. For example, you might set up the program to change the permanent location to 'remote storage', then scan the barcodes of the items being sent to the storage facility.

2. With the 'batch' model, you change all of the records that have a given set of characteristics. For example:
   - you might decide to eliminate a location, and need to transfer everything formerly in that location to some other location (assuming everything in the old location goes to the same new location)
   - you might want to move all items in a particular location within a given range of classification numbers to some other location
   - you might want to change the item type code for materials in a given location to some other code

   To use the program in this way, you define both the characteristics of the records you want to change *and* the change you want to make (these do not necessarily operate on the same parts of records), and then ask the program to do all of the work. The program will identify all of the records to be changed, and change them all, without further assistance from you.

The program's main panel contains two tabs. You will use one of the tabs (the one labeled 'Record by record') when you want to change one record at a time;[9] you will use the other tab (the one labeled 'Big batches') when you want to change a set of records all at once.

The program's main panel also contains a menu. You can use this menu to call up the program's Options panel or to quit the program altogether. (At present, the menu choice labeled 'Undo' is not active; in some future release of the program, the program may allow you to reverse the effect of the most recent change.)

The following text describes the way you use the program to change records, following the two models. This description is intended more for those who will be training others than it is for those who will be using the program for routine work. The preparation of end-user documentation is left to individual institutions.

[9] Despite its name, you can use the 'Record by record' tab to modify more than one thing at a time. The 'record' that gets changed may be one item record, or it may be all item records attached to a single holdings record, or it may be all holdings and item records attached to a single bibliographic record. You have control over the precise definition of 'record' for each change you make on this tab.

Record-by-record changes

If you want to change one record at a time, use the program's 'Record-by-record' panel. On this panel, you first identify the way you want the program to change records. (You may want the program to change the permanent or temporary location, for example, while leaving other parts of records alone.) Once you have defined the change you want to make, you use the bottom part of the panel to identify, one at a time, the records you want to change. (There are several different ways to identify records.) The program makes the same change(s) to each of the records you identify. When you're done with one set of records, you can alter the definition of the change you want to make, and continue with a different set of records.

Change PERM location to: Select the new permanent location. The program will put this permanent location into each item record you identify. If after making this change *all* of the item records attached to a given holdings record now have this location, the program will also change the location in subfield $b of the holdings record's 852 field.[10] If you don't want the program to change the permanent location, make sure the '(no change)' line shows in this box.

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[10] If you set the program up to change the permanent location, it will also change the location in the 852 field if there are no item records at all.
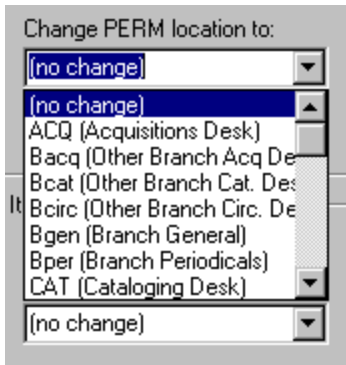
The locations shown in this box are those available to the operator named on the Connection tab of the program's Options panel. Your Vger installation may include other locations, but these are the only ones with which you are allowed to work.
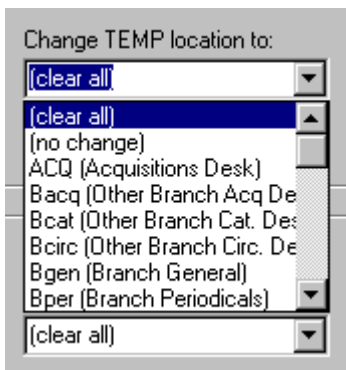
Change TEMP location to: Select the new temporary location. The program will put this temporary location into each item record you identify. If you want the program to remove any temporary location, make sure the '(clear all)' line shows in this box; if you don't want the program to change the temporary location, make sure the '(no change)' line shows in this box.

The locations shown in this box are those available to the operator named on the Connection tab of the program's Options panel. Your Vger installation may include other locations, but these are the only ones with which you are allowed to work.

Change PERM item type to: Select the new permanent item type. The program will put this permanent item type into each item record you identify. If you don't want the program to change the permanent item type, make sure the '(no change)' line shows in this box.

Change TEMP item type to: Select the new temporary item type. The program will put this temporary item type into each item record you identify. If you want the program to remove any temporary item type, make sure the '(clear all)' line shows in this box; if you don't want the program to change the temporary item type, make sure the '(no change)' line shows in this box.
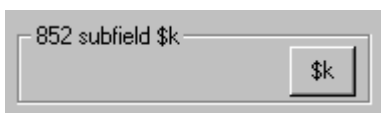
852 subfield $k: The program can change the contents of subfield $k (call number prefix) in the 852 field of holdings records. To request this work, click the '$k' button:
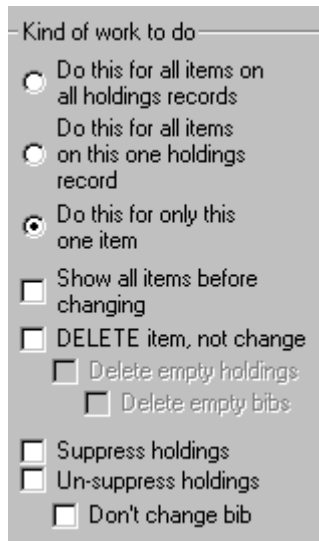
The program shows you a dialog box that looks like this:

Subfield $k

○ Delete $k if present

○ Leave alone

◉ Replace any $k with this:

[   ]

[Cancel]   [OK]

You can ask the program to delete subfield $k if it's present, leave the subfield $k alone, or change subfield $k to something else. After you click the 'OK' button, a piece of text in the '852 subfield $k' box describes the action you have selected. (If there is no text in this box, you've selected 'Leave alone'.)

Kind of work to do: In this box, you indicate how the program is to proceed. The choice you make here is only critical if you are giving the program an item record or a holdings record. If you give the program a bibliographic record, the program will always change all holdings and item records attached to that bibliographic record.

Kind of work to do

○ Do this for all items on all holdings records

○ Do this for all items on this one holdings record

◉ Do this for only this one item

☐ Show all items before changing

☐ DELETE item, not change
   ☐ Delete empty holdings
      ☐ Delete empty bibs

☐ Suppress holdings
☐ Un-suppress holdings
   ☐ Don't change bib

If you are identifying **item** records (by scanning in barcodes or typing in item record numbers), select the radio button that corresponds to the scope of the change you want the program to make.

- If you want the program to make the same change to *all* of the item records attached to *all* of the holdings records attached to a bibliographic record, click the 'Do this for all items on all holdings records' button. When you identify one item record, the program will retrieve the item record and change it, and also change all other item records attached to the same holdings record, and also all item records attached to all other holdings records attached to the same bibliographic record. (Another way to think of this: if you identify an item record, the program finds the associated bibliographic record, and then changes everything attached to that bibliographic record.) If you've

asked the program to change the permanent location, the program will also change the location in subfield $b of the 852 field of the holdings records.

- If you want the program to make the same change to *all* of the item records attached to a single holdings record, click the 'Do this for all items on this one holdings record' radio button. When you identify one item record, the program will retrieve the item record and make changes to it, and also to all other item records attached to the same holdings record. In this manner, you can transfer (as far as Vger is concerned) all of the volumes of an encyclopedia by scanning the barcode for one of the volumes. (You still have to remark the books, of course.) The program will not make changes to item records attached to any other holdings record attached to the same bibliographic record, or to any of the other holdings records attached to the same bibliographic record. If you ask the program to change all of the items attached to one holdings record, and you have asked the program to change the permanent location, it will also change the location in subfield $b of the 852 field of that one holdings record.

- If you want the program to change only the individual item records you identify, click the 'Do this for only this one item' radio button. When you identify one item record, the program will make the indicated change to the one item, but will not change any other item records that may be attached to the same holdings record, or to other holdings records attached to the same bibliographic record. If the item record is the only item attached to its holdings record, and if you have asked the program to change the permanent location, the program will also change the location in subfield $b of the 852 field in the holdings record.

If you are identifying **holdings** records (by typing holdings record numbers), the program will make the same change to all of the item records attached to that holdings record (that is, it will make such changes if there are any item records attached to the holdings record). If you ask the program to change the permanent location, the program will also change the location in subfield $b of the 852 field in the holdings record. The program behaves in this manner if you click either the 'Do this for only this one item' or 'Do this for all items on this one holdings record' button. (Actually, if you supply a holdings record number and you click the 'Do this for only this one item' radio button and the holdings record has more than one item record attached to it, the program will show you an error message instead of doing anything.) If instead you click the 'Do this for all items on all holdings records' button, the program will make the same change to all items attached to all holdings records on the bibliographic record.

If you are identifying **bibliographic** records (by typing in bibliographic record numbers), the program will make the same change to all of the item records attached to all of the holdings records attached to that bibliographic record (that is, it will make such changes if there are any item records attached to the holdings records). If you ask the program to change the permanent location, the program will also change the location in subfield $b of the 852 field in each of the holdings records. If you identify bibliographic records, it doesn't matter which of the radio buttons you click.[11]

Show all items before changing: If you check this box, the program will do all of the preparation required for changing records. But instead of changing records, the program will show you a list containing each item, and the change to be made to each:

---

[11] Actually, if you supply a bibliographic record number and you click the 'Do this for only this one item' radio button and the bibliographic record has more than one item record attached to it, or if you click the 'Do this for all items on this one holdings record' radio button and the bibliographic record has more than one holdings record attached to it, the program will show you an error message instead of doing anything.
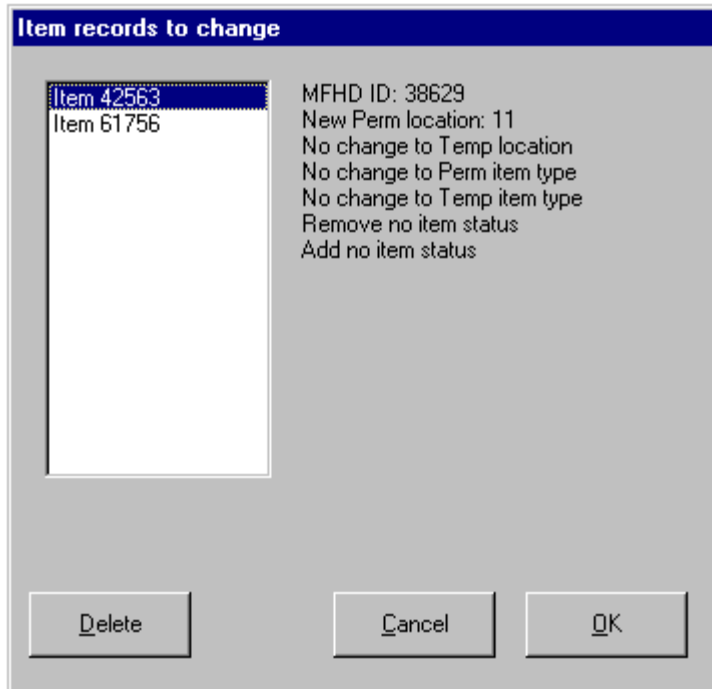
The list on the left side of the panel shows each item record that should be changed. When you highlight an item record, the area to the right of the list shows the change(s) that will be made (or not made) to it.

You can tell the program to go ahead and make all of the changes by clicking the 'OK' button; you can remove certain records from the list of records to be changed by highlighting each unwanted record and clicking the 'Delete' button; or you can cancel the whole operation by clicking the 'Cancel' button.

DELETE item, not change: The program does not simply restrict you to changing certain values – you can also choose to delete the item records identified in your selection. You can tell the program you wish to delete the item records concerned by checking the appropriate box. If you have checked this box, then the program also makes available to you the 'Delete empty holdings' check-box. Checking this means that any holdings record which has no item records attached as a result of the deletion of item records already requested will itself be deleted (this is desirable if your institutional policy does not permit 'orphan' holdings of this sort). If you check the 'Delete empty holdings' box, then another check box, 'Delete empty bibs', is made available to you. Checking this means that any bibliographic record that has no holdings records attached as a result of the previous delete actions will itself be deleted.

The deletion of holdings and bibliographic records is, of course, subject to the usual limitations. If, for example, there is a Purchase Order linked to these, then you will not be able to delete these using the location change program any more than you would be able to if you were using the cataloging client.

Suppress/Un-suppress holdings: If the 'Suppress holdings' box is checked, the program will suppress any holdings record it handles during the processing of a location change request
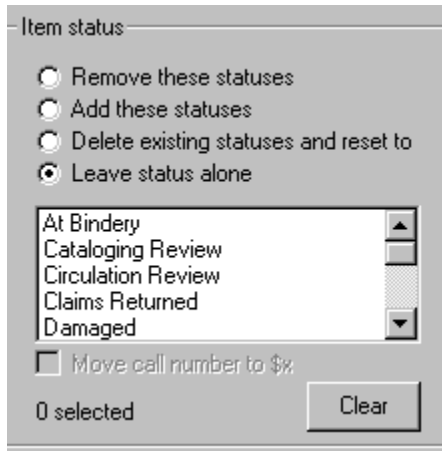
If the 'Un-suppress holdings' box is checked, the program will un-suppress any holdings record that it handles during the processing of a location change request

In normal circumstances, if all of the holdings records attached to a bibliographic record are suppressed, the program will also suppress the bibliographic record. Similarly if any of the holdings

records attached to a bibliographic record is un-suppressed, the program will also un-suppress the bibliographic record. Checking the 'Don't change bib' box causes the program to leave the suppression status of a bibliographic record unchanged, regardless of changes to associated holdings records.

Item status: Use this box to change the status codes in item records. You need to select the appropriate radio button at the top of the box; in most cases, you also need to highlight the names of appropriate item status codes.

```
┌─ Item status ──────────────────────┐
│  ○ Remove these statuses           │
│  ○ Add these statuses              │
│  ○ Delete existing statuses and reset to │
│  ● Leave status alone              │
│ ┌─────────────────────────────┬─┐ │
│ │ At Bindery                  │▲│ │
│ │ Cataloging Review           │ │ │
│ │ Circulation Review          │ │ │
│ │ Claims Returned             │ │ │
│ │ Damaged                     │▼│ │
│ └─────────────────────────────┴─┘ │
│ ☐ Move call number to $x           │
│                                    │
│ 0 selected          [ Clear ]      │
└────────────────────────────────────┘
```

- If you want the program to remove one or more status codes from an item record, highlight the status codes to remove, and click the 'Remove these statuses' radio button. (To remove all status codes from an item record, highlight all of the status codes and click the 'Remove these statuses' button.)
- If you want the program to add one or more status codes to an item record, highlight the status codes to add, and click the 'Add these statuses' radio button.
- If you want the program to remove all existing item status codes and replace them with other codes, highlight the status codes you want the item records to bear and click the 'Delete existing statuses and reset to' radio button.[12]
- If want the program to leave item status codes alone, click the 'Leave status alone' radio button.

The list does not show all item status codes, but only those that a non-Vger program may safely assign or remove. The list does not include any status codes pertaining to circulation, scheduling, or requests.

Northwestern University Libraries users only: If you click either the 'Add these statuses' or the 'Delete existing statuses and reset to' radio button and if you also click the 'Withdrawn' line in this list, the program will make the 'Move call number to $x' check-box available to you. If this box is checked when marking item records withdrawn, and if *all* items on a holdings record are so changed, the program will not only change the location code in the holdings record as appropriate, but will also move the call number (subfields $k, $h, $i and $m of the 852 field) to subfield $x. The 'Move call number to $x' box is only available to NUL users in these limited circumstances; and it is not available at any time to users at other institutions.

Change media type to: This is only of interest to institutions that have set up the media scheduling module. An item record can be assigned a 'media type' code, something that is defined by the local institution. To change the media type, highlight the appropriate entry in the drop-down list. To leave the existing type unchanged, ensure that the default '(no change)' option is showing. To clear an existing media type, highlight the '(clear)' option.

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[12] The program will only remove those status codes listed in this box. It will not remove status codes pertaining to circulation, scheduling, or requests.
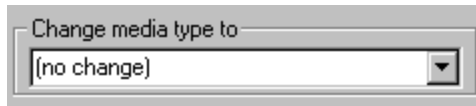
All of the boxes and other things on the 'Record by record' tab described so far constitute the definition of the change the program should make to records. The final part of this tab, the lower portion, is where you tell the program what records it should change. Once you have indicated the change to make, you will work exclusively with the lower portion of the tab, until your definition changes.
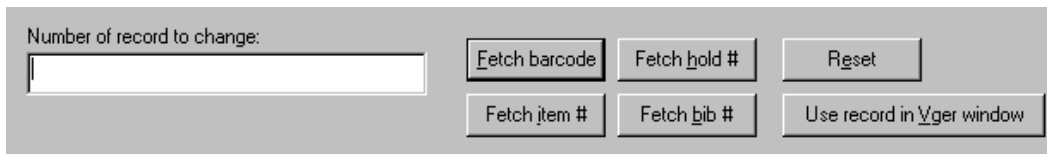
- If you want to scan in a barcode, put the cursor into the *Number of record to change* box and run the barcode under the scanner. If the barcode scanner supplies a 'carriage return' character at the end of the barcode, the program will automatically proceed with its work; otherwise, you will have to click the 'Fetch barcode' button. (If you don't have a scanner, type the barcode into the box and click the 'Fetch barcode' button.) The program will retrieve this item record and will make changes to it as you have defined them.
- If you have the Vger system number of an item, holdings or bibliographic record you want to change, type the number (carefully!) into the box, and click the corresponding 'Fetch' button. The program will retrieve the record and make the changes you requested.
- If you happen to have the Vger cataloging client running (remember, the client isn't required in order to use this program) and you happen to have the record you want to change showing as the active record in the Vger cataloging client, you can just click the 'Use record in Vger window' button. The program will read the active record number from the Vger cataloging client, and then proceed as if you had typed the record number into the box. To see the changed record, close the record in Vger and call it up again.
- When you're all done with one correction definition, the safe thing to do is to click the 'Reset' button before you start with your next task. This sets all of the input areas on this tab to their default values, so you can't accidentally have part of a previous definition affecting the next bit of work you want to do.

Changing groups of records all at once

As is the case with record-by-record changes, when making batch changes the program needs to be told both which records to change, and how to change them. When performing record-by-record changes (as described above), you tell the program how to change records, and then identify to the program each record to change, one at a time. When performing group changes, you prepare in advance a complete definition of the records you want to change and the way you want the program to change them, and then the program changes all of the records in one sweep.

You define the records to be changed, and the way you want the program to change them, on the program's 'Big batches' tab. This tab itself contains two tabs: you use one tab (called 'Records to change') to define the records you wish the program to change; you use the other tab (called 'Change to') to define the manner in which the program should change the records. A complete definition of a change to a set of item or holdings records consists of correct values on both of these tabs. Do not tell the program to make a change to records until you have thoroughly inspected all of the values on both tabs of the 'Big batches' definition.

Naturally enough, you may not want to offer the features on the 'Big batches' tab to just any operator. It is easy enough to use the features on this tab to scramble the records in your database. For this reason, this tab

is by default not available to operators. To make the 'Big batches' tab available to an operator, include the following line in the 'Connection' stanza of the program's initialization file (vgerlocs.ini):

```
ConnectionType=Special
```

To hide the 'Big batches' tab from an operator, either delete the 'ConnectionType' line from the 'Connection' stanza altogether, or change the value on the right side of the equals sign to something other than 'Special'.

You may instead with to offer operators *limited* access to the 'Big batches' tab. Various combinations of capabilities may be offered, as their need is recognized and defined to the program. At present, there is only one kind of limited access to the 'Big batches' tab. This limited access is also defined by placing a special line in the program's initialization file (vgerlocs.ini):

```
ConnectionType=Special2
```

This instruction disables all parts of the 'Records to change' part of the 'Big batches' tab except for the 'Records to be changed are defined in this file' frame. If you assign this level of capability to an operator, that operator will be able to use the 'Big batches' tab *only* when supplied with a list of records to change.

The program only reads this line from the INI file when it first starts up. If you change the INI file in this way while the program is running, exit from the program and start it up again to see the effect of your change.

The *Records to change* tab

On the 'Records to change' tab, you tell the program how to identify the records it should modify. Many of the things on this tab are similar in a superficial way to the things on the 'Record by record' tab; but here, they are used to define the set of records that need attention. There are spaces available on this tab to select records by:
- permanent location (which may be the permanent location in an item record, or the location in subfield $b of the 852 field in a holdings record)
- temporary item location
- permanent or temporary item type
- contents of subfield $k of the 852 field
- the type of record and bibliographic level codes from the Leader in bibliographic records
- item status
- call number type
- call number type and range of call numbers
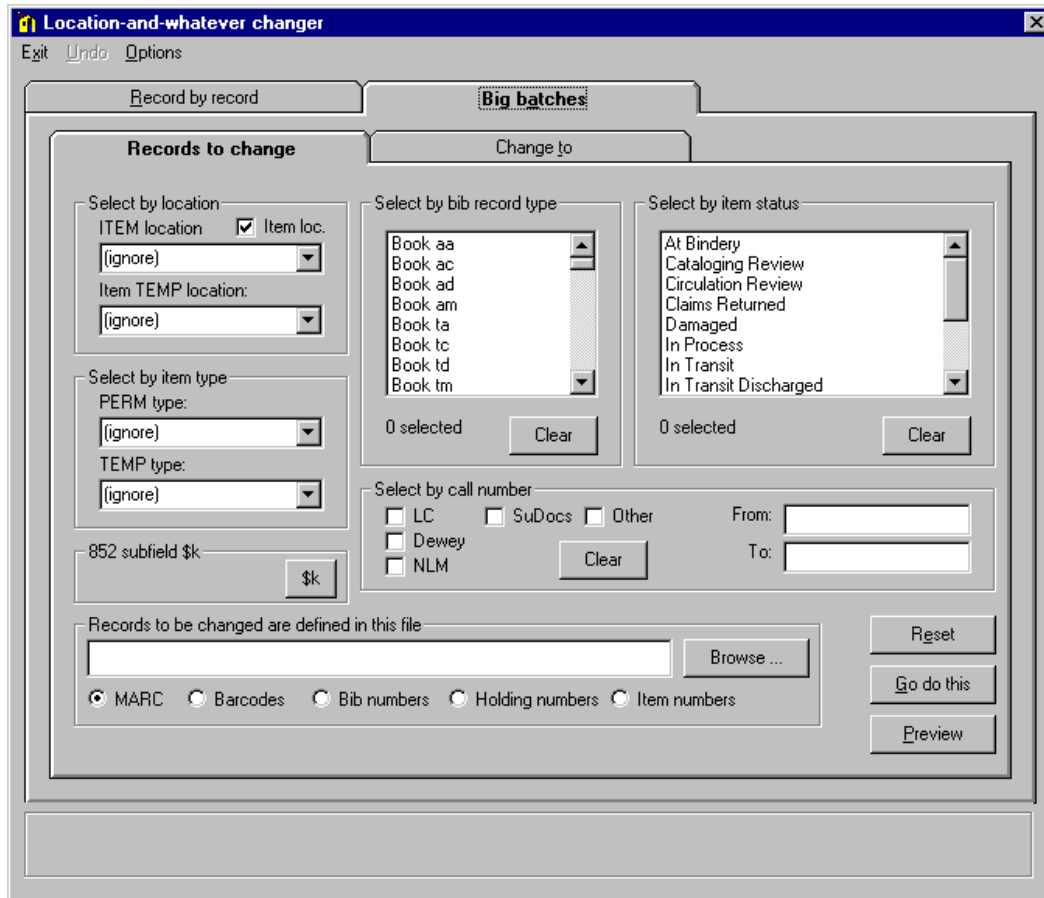
You should consider the different areas on the 'Records to change' tab to be connected with each other with the logical connector 'AND'. If you put information into more than one area, the program will use all parts in a single definition; the effect of including information in more than one area is that of narrowing the scope of records considered for changing.

For example:
- If you select a location in the 'Item location' box and also check the 'LC' call number type box, the program will only consider items with that permanent location AND whose attached holdings records contain LC call numbers
- If you select a location in the 'Item TEMP location' box and two status codes in the 'Select by item status' box and an item type in the 'PERM type' box, the program will only consider items with that temporary location AND with both of those status codes AND which bear that permanent item type code

To identify records to be selected, you can place values into any or all of the work areas on the tab, in any combination; but (except as noted below) you must put some value into at least one of these areas:
- Select by location
- Select by item type
- Select by item status
- Select by call number

The location names in the 'Select by location' box are limited to those with which the operator named on the Connections tab of the Options panel is allowed to work. The status codes in the item status list are only those that a non-Vger program may safely change.

The Vger location change program. Page 26

Both of the location lists also contain, as the first element, the text '(ignore)'. If you select the '(ignore)' line, the program will not use this type of location to select records; if you select a location, the program will include it in its definition of records to change. For the permanent location, you can tell the program to use either the permanent location in item records or the location in subfield $b of the 852 field in holdings records by clicking the 'Item loc.' check box above the list of locations. If you supply an item permanent location (by checking the 'Item loc.' button), the program will change *only* those items that have the permanent location you select; if you select the holdings permanent location (by making sure the 'Item loc.' box is not checked), the program will change all of the item records attached to holdings record that bear that location. (Of course, if all of the items attached to a holdings record have the same permanent location—as they should—the result is the same.)

Both of the lists in the 'Select by item type' box also contain an '(ignore)' line at the top. If you choose this line, the program will not consider item type when selecting records; if you choose any other line in either of these lists, the program will select only records that bear your chosen permanent and/or temporary item type.

You can select records by codes in the associated bibliographic record's leader by clicking on one or more lines in the 'Select by bib record type' box. The box contains all of the combinations of record type and bibliographic level codes defined in one of your Vger configuration files. Selecting by record type and bibliographic level cannot be the *primary* method you use to select records—you must also supply at least one other category of information somewhere on this page.

You can select records by type of call number (the 'call number type' is determined by the first indicator in the 852 field in holdings records), by clicking the appropriate box (or boxes) in the 'Select by call number' box. You can narrow the selection to particular call numbers by selecting a call number type and placing particular numbers into the 'From' and 'To' boxes. (You can supply a call number type without supplying call numbers; but you cannot supply call numbers without giving a call number type.)

- If you put information only into the 'From' call number box, the program will consider item records whose holdings records bear call numbers with the given number or higher numbers.
- If you put information only into the 'To' call number box, the program will consider item records whose holdings records bear call numbers with the given number or a lower number.
- If you put information into both call number boxes, the program will consider only item records whose holdings records bear call numbers are *between* the number in the 'From' box and the number in the 'To' box.[13]

As if this all weren't enough, there is yet one other way to identify the records the program should change. You can use Northwestern University Library's VgerSelect program, or any other program that performs similar work, to create a file of Vger record numbers (or, in the case of bibliographic or holdings records, the Vger records themselves) you want to change.[14] If you create such a file, you can put the name of the

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[13] The program uses the call number type to 'normalize' the call numbers according to the appropriate scheme before using them to match records. This normalization generally produces correct behavior. For example, if you supply the LC classification number 'PR 19' in the 'From' box and 'PR 25' in the 'To' box, the program will consider a record with the classification number 'PR 22' but not one with the classification number 'PR 221' or 'PR 2234'.
If you supply numbers in both boxes, the program generates SQL that requests numbers 'between' those you indicate. In most cases, this means that the number in the 'To' box should be one higher than the highest number of interest. For example, if you put 'PR 19' in the 'From' box and 'PR 25' in the 'To' box, the program will consider call numbers that begin PR19, PR20, PR21, PR22, PR23 and PR24, but *not* call numbers that begin PR25 (unless, that is, the call number is *only* 'PR 25' with nothing following—which isn't likely). If you want to include the call number 'PR 25' in a range of numbers, the 'To' box should, perhaps confusingly, contain 'PR 26'.
[14] In files of record numbers, each record number must be on a separate line in the file; lines must be separated by carriage return and line feed characters. The first character of the record number must be the first character in the line—there must be no spaces, tabs, punctuation, or anything else before the start of

file into the 'Records to be changed are defined in this file' box, indicate the kind of information present in the file by clicking the appropriate radio button, and *make sure that all of the other parts of this tab are empty.* You can either create a file that identifies records of interest, or you can use the other parts of this tab to define the records of interest; but you cannot mix the two techniques. (The program will refuse to proceed if you accidentally mix the two techniques.)

The *Change to* tab

On the 'Change to' tab, you tell the program what changes to make to records. Most of this tab is the same as the 'Record by record' tab, and works in the same way. There are two additional boxes.
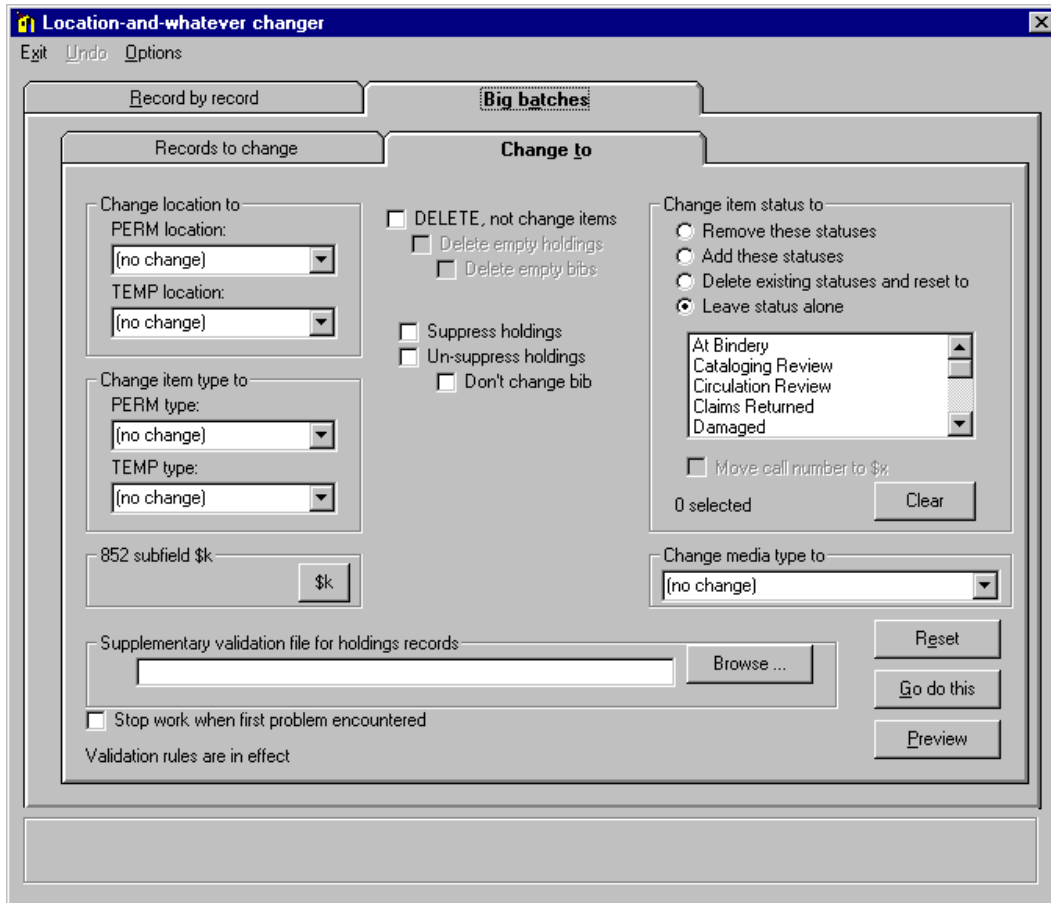
Supplementary validation file for holdings records: The validation tool that the program uses to modify records can pull validation rules not only from a primary set of files, but also from a secondary set. This allows an institution to have a set of rules that applies across the organization, and for selected users to enforce additional rules tailored to their work. Place the name of any file of supplementary validation rules in the box.

each record number. If the line contains any information in addition to the record number, the record number must be followed *by a tab character.*
Records in MARC files must be Vger records, not records from some other system that might match (via ISBN, for example) a Vger record; the program assumes that the number in the 001 field of the record is a Vger record number. All of the records in a file of MARC records must be of the same type (bibliographic or holdings).

Stop work when first problem encountered: When changing a batch of records, the program normally changes each in turn. If the program encounters any difficulty, it writes a message to its log file, and continues with the next record; this is how the program behaves when this box is not checked. If you would prefer that the program instead stop at the first indication of any problem with any record, check this box; when the program encounters a problem, it will stop immediately.

Northwestern University Libraries users only: As is the case on the 'Record by record' tab, there is an extra feature for NUL users on the 'Change to' tab. If you click either the 'Add these statuses' or the 'Delete existing statuses and reset to' radio button and if you also click the 'Withdrawn' line in this list, the program will make the 'Move call number to $x' check-box available to you. If this box is checked when the program is marking item records withdrawn, and if *all* items on a holdings record are so changed, the program will not only change the location code in the holdings record as appropriate, but will also move the call number (subfields $k, $h, $i and $m of the 852 field) to subfield $x. The 'Move call number to $x' box is only available to NUL users in these limited circumstances; and it is not available at any time to users at other institutions.

What to do when everything is defined and ready to go

When you are sure that both parts of the definition—the 'Records to change' and the 'Change to' tabs—are accurate and complete, you need to tell the program that it may proceed with its work. You do this by clicking on the buttons that appear in the lower right-hand corner of either tab.

- If you want to see a list of the records that *would* be changed if the program followed this definition, without having the program actually change the records, click the 'Preview' button. The program assembles the set of records to change, and goes through the motions of making changes to them, without actually sending the changes to Vger. The program prepares a log file showing each change that would otherwise be made. You should review this log file carefully before asking the program to change records.
- If you are certain that the definition is correct and complete, click the 'Go do this' button. The program assembles the set of records to change, makes the indicated changes to them, and writes the changed records back to Vger. If you have told the program to prepare a log file, it creates a detailed log showing the change made to each record.

In doing batch changes, the program applies its own rules to determine how to proceed. (On the 'Record by record' tab, you use buttons in the 'Kind of work to do' box to tell the program what to do; when doing batch changes, the program figures this out for itself.) Specifically:

- If the primary selection is made by item record (selection by permanent or temporary item location, permanent or temporary item type, or item status; or reading from a file that contains a list of Vger item record numbers) the program initially changes *only* the indicated item records.
- If the primary selection is made by holdings record (selection by holdings location, call number type or call number range; or reading from a file that contains either MARC holdings records or Vger holdings record numbers), the program changes all of the item records attached to the holdings record.[15]
- If the primary selection is made by bibliographic record (reading from a file that contains either MARC bibliographic records or Vger bibliographic record numbers), the program changes all of the item records attached to that bibliographic record.

In every case when the program is changing the permanent location in item records, if it changes *all* of the item records attached to any holdings record (or if after the change all of the item records have the same permanent location; or if there are no item records attached to the holdings record at all), it also changes the location in subfield $b of the holdings record's 852 field to match.

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[15] If selecting records by permanent location, the program also considers holdings records that have no item records attached at all. Obviously, it doesn't change any item records for such holdings records, but it still changes subfield $b in the 852 field.

After the program finishes work on one of your change definitions, the safest thing for you to do is to click the 'Reset' button. This tells the program to set all of the input areas on both parts of the 'Big batches' tab to their default values, so no part of a previous definition is lurking around to affect a subsequent task. You can tell the program to clear its work areas automatically after each task if you check the 'Reset 'big batches' tab after each use' box on the program's Options panel.