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Materials

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Materials overview

You manage your library's material collection by editing, importing, and exporting material records. Editing your material records database includes adding, changing, and deleting individual records. You can also batch process material records, set up custom indexes, and perform a global subject edit.

Setting up

You add records either by importing a file of records or by entering individual records. However, before you add materials, you must set up your material types. While setting up these types, you can also set up how call number patterns map to material types. This process relates call numbers to material types, so that the program can determine material types by analyzing the call number. This can save you data entry time. For more information, see "Setting up material types" in the *Setup* chapter of this manual.

Backing up

Back up your database files before and after you make major changes or additions to your records. For more on backups, see "Backing up Spectrum data" in the *Backup* chapter of this manual.

About materials and holdings

Spectrum CIRC/CAT uses both *material* records and *holding* records.

Material versus holding

It can be easy to confuse the terms "material" and "holding"—as well as the related terms "material data," "holding data," "material record," and "holding record."

"Material" refers to a library item in general, such as a book, periodical, filmstrip, and so on. The material record contains information such as author and title that applies to every copy of that item. "Holding" refers to a particular *copy* of a material. The holding record contains information such as material number, material type, and price, that applies specifically to a single copy of the material.

Term	Definition
Material	A literary, audiovisual, art, or other work as a whole (such as <i>Moby Dick</i> by Hermann Melville). <i>Note:</i> For cataloging purposes, you may consider works in different mediums (such as a film and a book of the same title and author) as different materials.
Holding	One copy of a material in your collection (such as your library's paperback copy of <i>Moby Dick</i> with material number 19034—or your hardcover copy with number 13458).
Material data	The MARC 21 data of a material. This data is common to all copies of the material (for example, title, author, subject, and so on).
Holding data	The MARC 21 and Spectrum-specific data relating to an individual holding. Holding data includes material number, inventory status, and so on.
Material record	All the bibliographic data describing a material.
Holding record	All the data specific to one holding. The holding record does not include title or author information, but is associated with a material record, which does include that information.

Choosing a task

The Material tasks include Edit, Quick Add, Import, Export, Batch Process, Custom Indexes, and Global Subject edit. You choose tasks by clicking the Materials button on the Navigator toolbar.

How to choose a task

Example scenario: You want to start the Material Import feature.

To choose a task

From the Navigator toolbar, click the **Materials** button and choose **Import**.



Adding records with Quick Add

The Quick Add feature provides a fast and simple way to enter new materials into your Spectrum CIRC/CAT database. It is designed for entering only basic catalog information and one holding. More detailed information must be added using the Material Edit feature.

When should I use Quick Add?

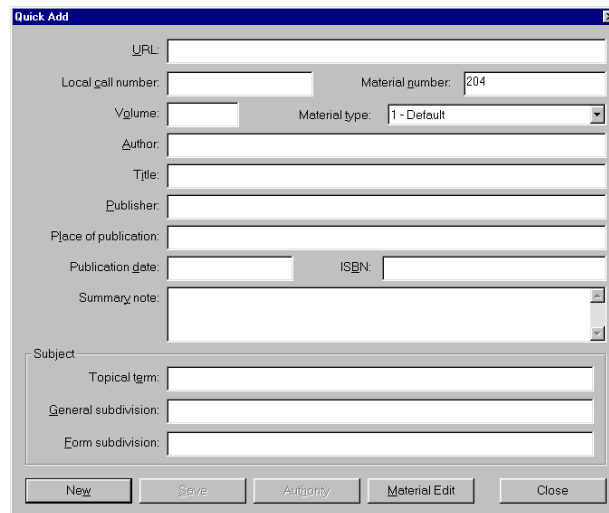
Use Quick Add to enter basic catalog information for a new material. If you want to enter additional material information or information for more than one holding, you must use the Material Edit feature. You can easily switch from Quick Add to Material Edit.

Note: You cannot use Quick Add to edit existing records. To edit records use the Easy Entry or Edit MARC features. For more information, see "Editing existing material records" later in this chapter.

How to add a record with Quick Add

To add a record with Quick Add

- 1 In the Navigator toolbar, click the **Materials** button and choose **Quick Add**. The Quick Add window opens.



The screenshot shows a window titled "Quick Add" with a standard Windows-style title bar. The window contains several input fields and a dropdown menu. The fields are arranged in a vertical stack. At the bottom, there are five buttons: "New", "Save", "Authority", "Material Edit", and "Close".

URL:	<input type="text"/>		
Local call number:	<input type="text"/>	Material number:	<input type="text" value="204"/>
Volume:	<input type="text"/>	Material type:	<input type="text" value="1 - Default"/>
Author:	<input type="text"/>		
Title:	<input type="text"/>		
Publisher:	<input type="text"/>		
Place of publication:	<input type="text"/>		
Publication date:	<input type="text"/>	ISBN:	<input type="text"/>
Summary note:	<input type="text"/>		
Subject:	<input type="text"/>		
Topical term:	<input type="text"/>		
General subdivision:	<input type="text"/>		
Form subdivision:	<input type="text"/>		

- 2 Enter the material and holding information into the appropriate boxes in the Quick Add window.
- 3 When you have finished, click **Save**.
- 4 To catalog another material, click **New**. Otherwise, click **Close** to close the Quick Add window.



If you need to enter more detailed information or more than one holding, save the record and then click the Material Edit button. The information in the Quick Add window is transferred to the Easy Entry window so that you can enter additional information.

Using authority control with Quick Add

Quick Add provides optional authority control for author, title, and subject information. You can enter information into any of these fields by choosing the desired value from a list of data already in the database. This helps you keep your entries consistent between records.

How to use authority control with Quick Add

Example scenario: You want to enter the author Martin, Louise.

To use authority control with Quick Add

- 1 From the Quick Add window, in the **Author** box, type the first few letters of the author's name, in this case *Mar*.
- 2 Click **Authority**. The Select Authority Author window opens.
- 3 Scroll through the list in the **Authorities** box until you find the name of the author you want to enter, in this case, *Martin, Louise*.
- 4 Select the author name. Then click **Select**. The Select Authority Author window closes and the author name you selected is entered into the Quick Add window.

Note: If the item you want to enter, in this case an author's name, is not already in the database, it will not appear in the Select Authority window. If you cannot find the item you want to enter, exit the Select Authority window by clicking **Cancel**. Then manually type the item.

Managing material records

You can add, edit and delete material records using the Material Edit feature.

Opening Material Edit

To open the Material Edit feature

From the Navigator toolbar, click the **Materials** button and choose **Edit**. The Easy Entry window opens.

Opening the Material Edit windows

There are two different windows that you can use for adding and editing material records: the Easy Entry window and the Edit MARC window. The Easy Entry window is useful for people who do not want to deal with the MARC format during data entry and editing. The Edit MARC window is useful for people who are familiar with the MARC standard. It also provides options for adding fields and subfields not found in the Easy Entry window.

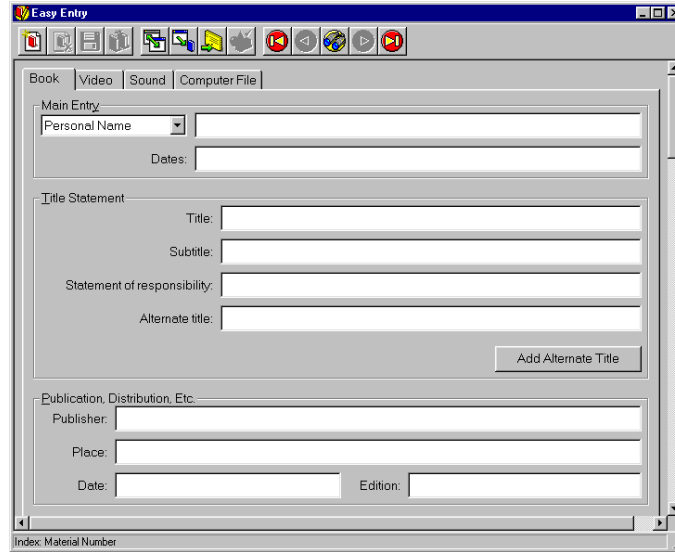
Note: When adding or editing records, you can switch between the Easy Entry and Edit MARC windows.

Opening the Easy Entry window

In the Easy Entry window, you add, edit, and delete material records in an easy-to-use format using a template for different material categories. In this window, you don't need to be familiar with the MARC standard.

To open the Easy Entry window

From the Navigator toolbar, click the **Materials** button and choose **Edit**. The Easy Entry window opens.



Note: Press the Tab key to move to the next box, or press both the Shift and Tab keys together to move to the previous box.



Show Easy
Entry button

To open the Easy Entry window from Edit MARC

From the Edit MARC window, click the **Show Easy Entry** button.

For information about the Easy Entry window, see "About the Easy Entry window" in the *Materials* chapter of the *Spectrum CIRC/CAT Reference Manual*.

Opening the Edit MARC window

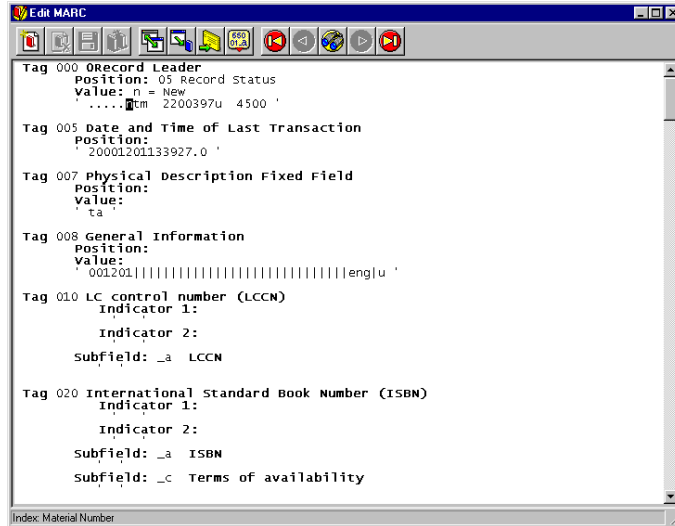
The Edit MARC window lets you edit material information in the MARC 21 with 852 holdings format (formerly known as USMARC/852 Holdings Data format). You can add, edit, or delete information located in any tag, indicator, or subfield of a material record. Essentially, the window contains the structure for a MARC record. You simply provide the record's content.

To open the Edit MARC window

- 1 From the Navigator toolbar, click the **Materials** button and choose **Edit**. The Easy Entry window opens.
- 2 Choose **Edit MARC** from the **View** menu, or click the **Show Edit MARC** button.



Show Edit
MARC



Note: If you don't have a mouse, you navigate through the record data by using the Tab and Shift keys (Tab to move to the next box, Shift + Tab to move to the previous box).

Inserting an underscore

To insert an underscore (_) anywhere in a MARC 21 record, you need to press Control + Shift + the underscore key, except when you're adding subfields. The underscore is displayed with a space following it to distinguish it from a subfield mark.

For information about the Edit MARC window, see "About the Edit MARC window" in the *Materials* chapter of the *Spectrum CIRC/CAT Reference Manual*.





Loading material records

Before you view, edit, or delete an existing record, you must load it into a Material Edit window (Easy Entry or Edit MARC window). You can load a record by specifying its position in the database or by searching for it.

Note: Before you load a record, you may want to check the index by which your records are arranged. This is especially true if you are planning to load a record by specifying its position. This is because the order that records are arranged will depend on the active index. The active index is displayed at the bottom of the window. You can select a different index from the Index menu.

How to load a record by specifying its position

You can use any of these buttons when specifying a record's position.

Button name	Button	Description
First Record		Displays the first material record in the database (according to your current index).
Previous Record		Displays the material record that immediately precedes the current record.
Next Record		Displays the material record that immediately follows the current record.
Last Record		Displays the last material record in the database (according to your current index).

Example scenario: You want to load the last record in the database when the database is ordered by title.

To load a record by specifying its position

- 1 From the Navigator toolbar, click the **Materials** button and choose **Edit**. The Easy Entry window opens.
- 2 From the **Index** menu, choose **Title**.
- 3 From the **Record** menu, choose **Last** or click the **Last Record** button. The appropriate record is loaded.

How to load a record using the Look Up button

Example scenario: You want to load the record with an ISBN of *0590849131*

To load a record by searching

- 1 From the Navigator toolbar, click the **Materials** button and choose **Edit**. The Easy Entry window opens.
- 2 From the **Index** menu, choose **ISBN**.
- 3 From the **Record** menu, choose **Look Up**, or click the **Look Up Record** button. The Look Up window opens.
- 4 In the **Find ISBN** box, type *0590849131*.
- 5 Click **OK**. The record is loaded. If an exact match is not found, you are informed and the next record is loaded (except when you select Material Number as the index, you are informed that a match cannot be found).



**Look Up Record
button**

Note: You can use the same procedures to load records from the Edit MARC window.

Viewing card images

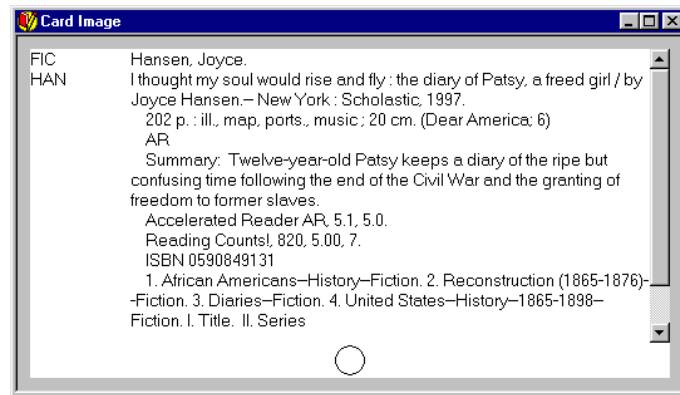
You can view material record data as it would appear on a traditional catalog card.

To display a card image

- 1 From the Navigator toolbar, click the **Materials** button and choose **Edit**. The Easy Entry window opens.
- 2 Load the material record that you want to view. For instructions, see "Loading material records" earlier in this chapter.
- 3 Choose **Card Image** from the **View** menu, or click the **Show Card Image** button. The Card Image window opens.



Show Card
Image button



Note: You can also view card images from the Edit MARC window.

Adding new material records

You can add new material records to your database by:

- Adding the records manually (ideal for adding a small number of records).
- Importing a file of records (ideal for adding many records). For more information about importing, see "Importing material records" later in this chapter.

Adding material records is a two-step process. First you add universal information, such as title and author, in the Easy Entry or Edit MARC window. Then you add local information, such as material number, material type, and shelving information, in the Holdings window.

How to add a new material record manually

To add a new material record

- 1 From the Navigator toolbar, click the **Materials** button and choose **Edit**. The Easy Entry window opens.
- 2 Choose **New** from the **Record** menu, or click the **New Record** button. The default material record appears. (If you haven't saved a default record, the window contains no data. For help creating a default record, see "Managing default records" later in this chapter.)
- 3 Enter the data for the new record in the Easy Entry window or, if you prefer, open the Edit MARC window and enter data there.
- 4 Click the **Show Holdings** button and enter the holdings data. You must add at least one holding. For instructions, see "Adding holding records" later in this chapter.
- 5 Choose **Save** from the **Record** menu, or click the **Save Record** button.



New Record button



Show Holdings button



Save Record button



For a full description of Easy Entry and Edit MARC fields, see "Material and holding fields" in the *Material/Holding Fields* appendix of the *Spectrum CIRC/CAT Reference Manual*.

To add diacritics in Windows, hold down the Alt key while using the numeric keypad to type the decimal value of the character you want. To add diacritics on a Macintosh, use the Key Caps control panel.

Editing existing material records

You can modify the information for an existing material record at any time. From either the Easy Entry or Edit MARC window, simply load the record and make your changes.

How to edit an existing material record

Example scenario: You have previously cataloged and saved a material record. Now you discover that some of the information you entered was incorrect. You decide to edit the record to fix these inaccuracies.

To edit a material record

- 1 From the Navigator toolbar, click the **Materials** button and choose **Edit**. The Easy Entry window opens.
- 2 Load the material record that you want to edit. For instructions, see "Loading material records" earlier in this chapter.
- 3 Make your changes in the Easy Entry window or, if you prefer, open the Edit MARC window and make your changes there.
- 4 When you have finished, click the **Save Record** button.



Save Record
button

Duplicating existing material records

You can create a new material record based on the currently loaded material record. When you duplicate an existing material record, the information from the current record is copied to the new record and a new material number is assigned. The program also creates a new holding for the new material record based on the selected holding in the current record.

Note: This command is available only when you load an existing material record or create and save a material record.

How to duplicate an existing material record

Example scenario: You are cataloging two items in a series. Only the publication date, physical description, title, and notes are different between the two materials. To save time, you have decided to create a record for the first material and duplicate it. Once you've done this, you can edit the date, physical description, title and summary data to reflect the second material.

To duplicate a material record

- 1 From the Navigator toolbar, click the **Materials** button and choose **Edit**. The Easy Entry window opens.
- 2 Create and save a material record for the first material.
- 3 From the **Record menu**, choose **Duplicate**, or click the **Duplicate Record** button. The program creates a new record.
- 4 Edit the information so that it reflects the second material. *Note:* You can do this from either the Easy Edit or the Edit MARC window.
- 5 Click the **Show Holdings** button and add or edit material holdings for the record. For instructions, see "Adding holding records" later in this chapter.
- 6 From the **Record menu**, choose **Save**, or click the **Save Record** button.



Duplicate Record button



Show Holdings button



Save Record button

Deleting material records

As you remove materials from your collection, you can remove the corresponding material record from your database. The program will not allow you to delete a record that currently has holdings circulating or holdings for which advanced reserves have been placed. If you are in the process of editing a material record, you must first save it or revert to the last saved version before deleting.

Note: When you delete a material record, all corresponding holdings records are also deleted.



For records with multiple holdings you can delete individual holdings, rather than the entire material record. For more information, see "Deleting holding records" later in this chapter.

How to delete a material record

Example scenario: You have weeded all copies of a particular material from your collection. Now you want to delete its material record.

To delete a material record

- 1 From the Navigator toolbar, click the **Materials** button and choose **Edit**. The Easy Entry window opens.
- 2 Load the material record you want to delete. For instructions, see "Loading material records" earlier in this chapter.
- 3 Click the **Delete Record** button. If the record has only one holding, you are asked if you're sure you want to delete the record. If the record has multiple holdings, you are asked if you want to delete all copies of the record. If the material has circulation activity, the program warns that you cannot delete the material record.
- 4 Click **Delete** or **Delete All** to confirm. The record data remains on screen, but the record's holding(s) are deleted. After you load another record, you cannot reload the deleted record's data.



Delete Record
button



Important! If you delete a record by mistake, you can recover it *as long as it's still displayed*. If you haven't done anything else, the record you deleted is still visible in the window. To recover the record, make a minor change to the data (for example, place your cursor in any text field in the Easy Edit or Edit MARC window, delete one character, and replace it with the same character). Then choose File > Save from the menu to put the record back in the database.

Managing default records

A default record is a material or holding record containing data that the program uses as a template when creating new material and holding records. When you create a new material or holding record in Easy Entry or Edit MARC, the program automatically fills in information for you based on the default record. This saves you data-entry time since you do not need to enter this information yourself. The program allows you to have both a default material record and a default holding record.

You can change this default information as necessary to meet the needs of your library. For example, if all of your holdings have the same four-digit location code, you may want to save the location code in the default holding record. When a default record is no longer useful, you can delete it.

Note: When using the Edit MARC window, you can enter holding information directly into tag 852 of the default material record. However, if there is also a default holding record, the information from the default holding record takes precedence over the holding information in the default material record.

How to save a default material record

Example scenario: You are entering a number of books written by Louise Martin. You want to create a default material record so that the correct author information is automatically entered for you each time you create a new record.

To save a material record as default

- 1 From the Navigator toolbar, click the **Materials** button and choose **Edit**. The Easy Entry window opens.
- 2 Choose **Edit MARC** from the **View** menu, or click the **Show Edit MARC** button.
- 3 Edit the record to contain the data you want to use as default. In this case, type *Martin, Louise* in subfield *_a* of tag 100 (Main entry – personal name).
- 4 From the **Record** menu, choose **Save as Default**. You're asked if you want to save the record as a default material record.
- 5 Click **Yes**.

How to save a default holding record

Example scenario: You are entering a number of holdings purchased from the Friends fund. You want to create a default holding record so that the correct fund information is automatically entered for you each time you create a new holding record.

To save a holding record as default

- 1 From the Navigator toolbar, click the **Materials** button and choose **Edit**. The Easy Entry window opens.
- 2 Choose **Holdings** from the **View** menu, or click the **Show Holdings** button.
- 3 Edit the record to contain the data you want to use as the default. In this case, type *Friends* in the **Fund** box.
- 4 From the **Record** menu, choose **Save as Default**.



**Show Holdings
button**

How to delete the default material record

Example scenario: You want to delete the default material record, so that the program does not enter default information for you when you create a new material record.

To delete the default material record

- 1 From the Navigator toolbar, click the **Materials** button and choose **Edit**. The Easy Entry window opens.
- 2 Choose **Edit MARC** from the **View** menu, or click the **Show Edit MARC** button.
- 3 Choose **Delete Default** from the **Record** menu.
- 4 Click **Yes** when asked if you want to delete the default material record.

How to delete the default holding record

Example scenario: You want to delete the default holding record so that the program does not enter default information for you when you create a new holding record.

To delete the default holding record

- 1 From the Navigator toolbar, click the **Materials** button and choose **Edit**. The Easy Entry window opens.
- 2 Choose **Holdings** from the **View** menu, or click the **Show Holdings** button.
- 3 From the **Record** menu, choose **Delete Default**.
- 4 Click **Yes** when asked if you want to delete the default holding record.



Show Holdings
button

Using authority control in material records

Local authority control helps you minimize spelling, capitalization, and punctuation inconsistencies in your data by letting you choose values already used in your database. Authority control also saves you time because you can select existing values rather than typing them.

Local authority control is provided in the Easy Entry window for titles, authors (including main entry and added entry authors), and subjects. For example, if you are adding a book to your collection with the subject: **aAlaska_xDescription and Travel.**, as long as this subject already exists in your database, you can use authority control to select it from an existing record.

How to use authority control in a material record

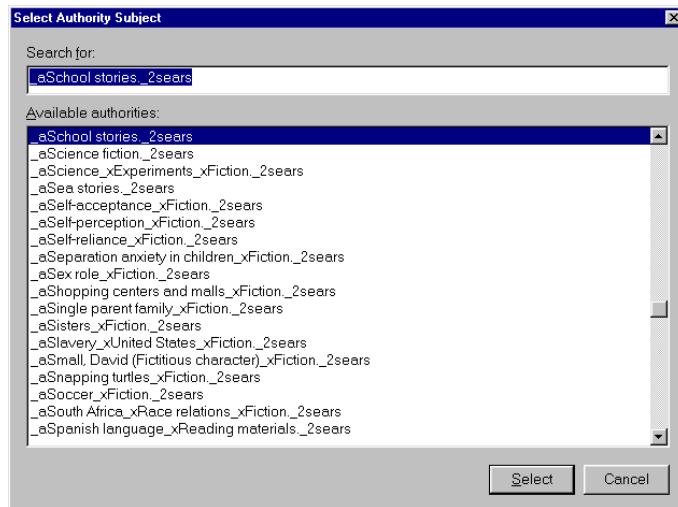
Example scenario: You want to use local authority control to enter the subject "_aLibrary automation".

To use authority control in a material record

- 1 From the Navigator toolbar, click the **Materials** button and choose **Edit**. The Easy Entry window opens.
- 2 Load or create a material record.
- 3 Click the **Subject** box.
- 4 Click the **Authority Control** button. The Select Authority Subject window opens.



**Authority
Control button**



- 5 In the **Search for** box, enter the first few letters of the value you want to search for, in this case *_alib*. Or, use the scroll bar and arrow keys to browse for the value.
- 6 In the **Available authorities** box, click the desired value, in this case, *_aLibrary automation*.
- 7 Click **Select**. The words "Library automation" appear in the **Subject** box.

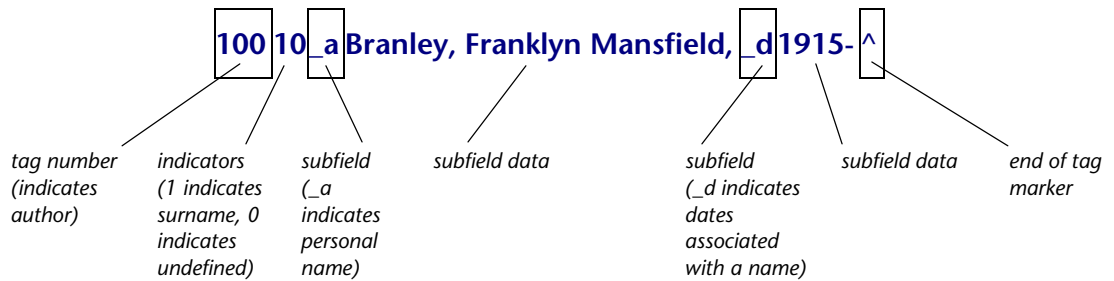
Note: The Select Authority window displays the data as it currently exists in the database—with no changes to the punctuation and capitalization and including all subfields. However, the Select Authority window does not display titles, authors, subjects, or call numbers over 150 characters in length.

Managing tags, subfields, and indicators in Edit MARC

You can add, edit, and delete the tags, subfields, and indicators of a material record's MARC data.

While you're editing, the program maintains correct structure for the MARC record while you provide the content. Normally, text selections and commands in the Edit menu work on a maximum of one tag at a time. The exception is when copying and pasting MARC records. Then, these commands work on all selected tags.

The following diagram shows the components in a typical MARC field:



About tags

A tag is a number that identifies a field of a material record in MARC 21 format. For example, tag number 100 identifies the author of a material.

About subfields

In a MARC 21 record, a subfield divides the data in a field into more details. For example, Publication, tag number 260, has several subfields:

- a – place of publication
- b – name of publisher
- c – date of publication

The material record may contain more subfields than are displayed in the Easy Entry window. You edit or view subfields in the Edit MARC window.

About indicators

Indicators are one of two characters after the tag number in a MARC 21 record. A MARC 21 record indicator usually impacts material record data in very specific ways. For example, tag number 100 holds author data. The first indicator you choose determines whether the actual author name entered is a forename (indicator value of 1), single surname (indicator value of 2), multiple surname (indicator value of 3), or family name (indicator value of 4). You do not have to choose a second indicator.

Adding tags and subfields

You can insert new tags in a MARC record. You can also add new subfields to existing tags. You do all of this from the Edit MARC window.

How to add a tag

Example scenario: You have already loaded a material record and displayed it in the Edit MARC window. Now you want to add the tag 246 *Varying form of title* to the MARC record.

To add a tag

1 In the Edit MARC tab, place your cursor in one of the following places:

- Before an existing tag number to insert the new tag immediately before the existing tag.

Position the cursor before the existing tag.

```
Tag 050 Library of Congress call number
Indicator 1: Existence in LC collection
0 Item is in LC
Indicator 2: Source of call number
0 Assigned by LC
Subfield: _a Classification number
PZ7.H1933
Subfield: _b Item number
Iaj 1997
```

- At the end of the record to append the new tag to the end of the record.

To append the tag to the end of the record, position the cursor at the end of the record.

```
Tag 852 Location
Indicator 1: Shelving scheme
No information provided
Indicator 2: Shelving order
No information provided
Subfield: _h Classification part
FIC
Subfield: _i Item part
HAN
Subfield: _8 Link and sequence number
19991122
Subfield: _p Barcode number
118
Subfield: _b Sublocation or collection
Media Center
Subfield: _6 Linkage
Book
Subfield: _5
Econo-Clad
```

- Between two existing tag numbers (in Moderate or Full MARC Expansion views only) to insert the new tag between the existing tags.

To insert the tag between two existing tags, position the cursor between the existing tags.

```

Tag 521 Target audience note
      Indicator 1: Display constant controller
      Indicator 2: Interest grade level
      Subfield:  _a Target audience note
                5-9.

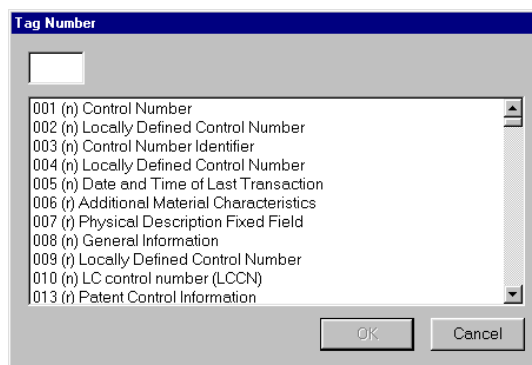
Tag 521 Target audience note
      Indicator 1: Display constant controller
      Indicator 2: Reading grade level
      Subfield:  _a Target audience note
                6.

```



Insert MARC text button

- 2 Click the **Insert MARC text** button. The Tag Number window opens.



- 3 Select tag **246 (r) Varying form of title** from the Tag Number window list.
- 4 Click **OK**. The Tag Number window closes and the tag is inserted in the record.



If you are not using a mouse, you can place the insertion point just before a tag number or between two tags, and then type the new tag number. When you press the Return key, the program adds the new tag.

How to add a subfield

Example scenario: You have already loaded a material record. Now you want to add subfield *e* *place of manufacture* to tag 260.

To add a subfield

- 1 From the Edit MARC window, in tag 260, place the cursor in an existing subfield or after the second indicator (if expansion is set to **None**).

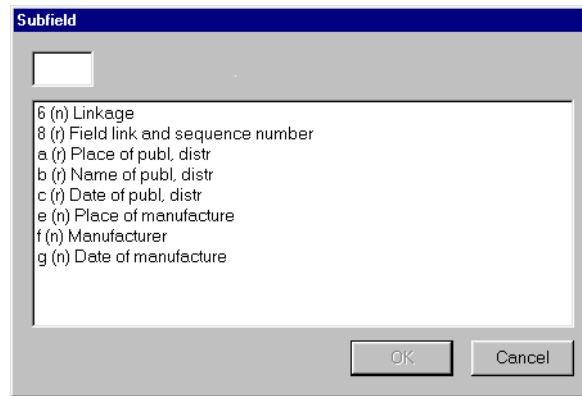
Position the cursor in an existing subfield.

```
Tag 260 Publication, distribution, etc. (Imprint)
Indicator 1:
Indicator 2:
Subfield: _a Place of publication, distribution, etc.
      New York
Subfield: _b Name of publisher, distributor, etc.
      Scholastic
Subfield: _c Date of publication, distribution, etc.
      J1997.
```



Insert MARC text button

- 2 Click the **Insert MARC Text** button. The Subfield window opens and displays a list of valid subfields for that tag.



- 3 Select a subfield value, in this case *e* (*n*) *Place of manufacture*.
- 4 Click **OK**. The Subfield window closes and the subfield is inserted in the record.



You can add a subfield using only the keyboard. Position the insertion point where you want the subfield, and then type an underscore character.

Note: You can insert a subfield wherever one is valid: after the second indicator, in the middle of the tag, or at the end. (In moderate or full MARC expansion, to insert a subfield between the second indicator and an existing subfield you need to temporarily switch MARC Expansion to None.)

Editing indicator values, subfield codes, and tag numbers

From the Edit MARC window, you can change the value of subfield codes and indicators.

How to edit an indicator or subfield

Example scenario: You have already loaded a material record. Now you want to change the Indicator 1 value of tag 082 to 1.

To edit an indicator

- 1 In the Edit MARC window, select the current indicator 1 value for tag 082.

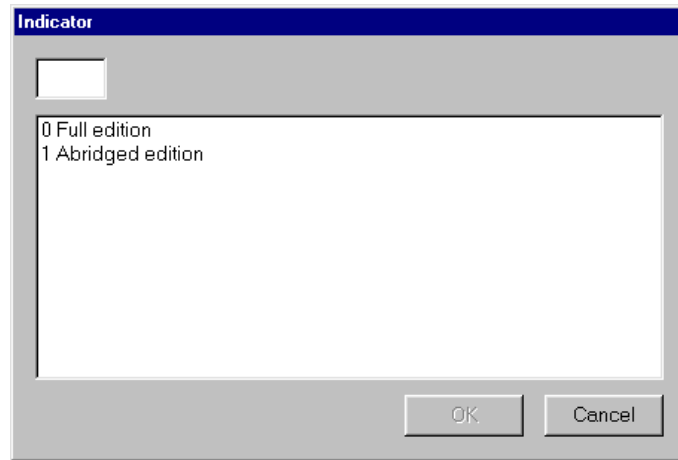
Select the
current indicator
value.

```
Tag 082 Dewey Decimal call number
Indicator 1: Type of edition
          0 Full edition
Indicator 2: Source of call number
          0 Assigned by LC
Subfield: _a Classification number
          Fic
Subfield: _2 Edition number
          21
```



Insert MARC text button

- 2 Click the **Insert MARC Text** button, or press **Enter**. The Indicator window opens and displays a list of valid values for that indicator or subfield.



- 3 Select **1 Abridged edition**.
- 4 Click **OK**. The Indicator window closes and the value is inserted in the record.

You can follow the same procedure to edit a subfield code. Just select the existing code, click the Insert MARC Text button, and then choose the new subfield code from a list.



If you know the indicator value you want, you can type it rather than selecting it from a list.

Note: All tags numbered 10 or higher have two indicator positions—you can't insert or remove individual indicator positions.

How to edit a tag number

Example scenario: You have already loaded a material record. Now you want to change tag number 100 to 110.

To edit a tag number

- 1 In the Edit MARC window, select the tag number you want to change, in this case, **100**.

Select the tag number.

```
Tag 100 Main entry - personal name
Indicator 1:  Type of personal name entry element
             1  Surname
Indicator 2:
Subfield:  _a  Personal name
           Hansen, Joyce.
```



Insert MARC text button

- 2 Click the **Insert MARC Text** button, or press **Enter**. The Tag Number window opens.
- 3 Select the new tag number, in this case, **110 (n) Main entry – corporate name**.
- 4 Click **OK**.



If you know the tag number you want, you do not need to use the Insert MARC Text button. You can select the existing tag number in the Edit MARC window and then type the new number.

Deleting indicators

All tags numbered 10 or higher have two indicator positions. Although you can't insert or remove individual indicator positions, you can remove their values.

How to delete an indicator

Example scenario: You have already loaded a material record. Now you want to remove the value from the first indicator in tag 100.

To delete an indicator value

- 1 In the Edit MARC window, select the value for the first indicator in tag 100. *Note:* If you are using Moderate or Full Expansion, select just the value shown between the single quotation marks. Although there may be descriptive text associated with this value, this text does not need to be selected.
- 2 Press the **Delete** key on your keyboard

Deleting tags (and accompanying indicators and subfields)

When you delete a tag, all accompanying indicators and subfields are also deleted.

How to delete a tag

Example scenario: You have already loaded a material record. Now you want to delete tag 740.

To delete a tag (and all accompanying indicators and subfields)

- 1 In the Edit MARC window, use your mouse to select the entire tag, including all indicators and subfields.
- 2 Press the **Delete** key, or choose **Clear** from the **Edit** menu.



To select an entire tag when MARC Expansion is set to None, triple-click the line. If MARC Expansion is set to Moderate or Full, select the tag number and both indicators—the rest of the tag is selected automatically.

Exceptions

You can add and edit most fields in Edit MARC. However, because of their unique characteristics, some fields require special consideration.

Leader and control fields

The process for editing data in these fields is different than editing other fields. For more information, see "Managing fixed-length fields" later in this chapter.

Local holding data—in general (tag 852)

You must add and delete holding records in the Holdings window. Although you can edit local holding data through the Edit MARC window, you can't add or delete a holding record in Edit MARC. You can't renumber a non-852 tag to 852 or change the 852 tag to another number.

Local holding data—price (tag 852_9)

Although the price of a material is local holding information, you can add or edit the data in either the Edit MARC window (at 852_9) or the Holdings window (in the Price box).

Local holding data—call number (tag 852_h)

The various parts of the call number can be stored in the following subfields: `_k` (prefix), `_h` (classification part), `_i` (item part), and `_m` (suffix). However, when you enter the call number in the Holdings window, the combined call number is displayed, with spaces inserted between subfields in the `_h` subfield in the Edit MARC window. For example, entering the call number field in Edit MARC preserves the `_k`, `_h`, `_i`, and `_m` subfields. But as soon as you change the call number in the Holdings window, all the text is placed in the `_h` subfield.

Local holding data—material number (tag 852_p)

For the material number, Spectrum CIRC/CAT accepts only characters in the 3 of 9 character set—including numbers, capital (not lowercase) letters, spaces, and select symbols (such as `%` - `.` `+` `/` and `$`). You cannot enter invalid characters. Also, if you insert an unacceptable character (by entering, pasting, or deleting part of a subfield), a window alerts you that the invalid character(s) were deleted.

URLs (tag 856_u)

Uniform Resource Locators (URLs) are the addresses for locations on the Internet (such as <http://www.sagebrushcorp.com>). A material record can store this information in tag 856 (Electronic location and access) subfield _u. However, many URLs contain underscores (_), which don't work well in a MARC record because they conflict with the Pre-1987 MicroLIF format.

To get around this conflict, the characters %5F are stored in place of an underscore (the MicroLIF standard interprets %5F as an underscore). When entering or editing a URL in 856_u, press Control + Shift + Underscore wherever you need to insert an underscore. The window displays an underscore followed by a space to represent a single underscore, and it is converted to and from %5F when the record is saved or loaded.

Note: Enter a URL in the material record if you want to be able to access its web site from the Catalog part of the program using WebConnect. To enable WebConnect, you must activate it in Catalog Setup.

Managing fixed-length fields

If you are familiar with the MARC format, you know that some fields, those with tag numbers starting with 00, such as the leader (tag LDR) and control fields (tags 006, 007, and 008) are special. This is because:

- The data stored in each of these fields is composed of several elements. For example, the leader contains information about the record length, the record status, the type of record, and so on.
- Each element has its own specific position within the field. For example, the first five characters of the leader refer to the logical record length, the sixth character refers to the record status, the seventh character refers to the type of record, etc. These positions are numbered starting from 0. For example, the second character is in position 1, the third character is in position 2, and so on.
- Record length is fixed.
- Information in these fields is encoded. This means that although the information is valid and important, it cannot easily be deciphered by someone who is not familiar with the MARC standard.

These fields are called fixed-length fields.

Identifying components within a fixed-length field

When MARC Expansion is set to Moderate or Full, the program provides you with detailed information about the fixed-length fields. For each field, this includes:

- Description of the field. This tells you about the type of information stored in a particular field.
- Position. This tells you the position in the field that is selected for editing. It also tells you what type of information that position refers to.
- Value. This tells you the current value stored in that position and what that value signifies.

If MARC Expansion is set to Moderate or Full, to identify a component within a fixed-length field, all you need do is select the component. The program will then display the position and value information for that component. If MARC Expansion is set to None, you can simply position the mouse pointer over the component to have the program display both the name of the component and its value.

How to identify the components within a fixed-length field

Example scenario: You want to identify the component in position 1 of the 007 tag.

To identify a component in a fixed-length field when MARC Expansion is set to Moderate or Full

- 1 Display the Edit MARC window for the desired record.
- 2 Click the first position in the field labeled **007 Physical Description Fixed field**. Notice that the position indicator changes to show that you are at position 1 and that this position represents the **Specific material designation**.

2. The selected position in the field.

1. Select a component in a fixed-length field's data and the program displays information about that component.

Tag 007 Physical Description Fixed Field
Position: 00 Category of material
Value: t = Text
1a

4. The current value and what it stands for.

3. A description of the type of data contained at the position.



When MARC Expansion is set to None, you can identify a component in a fixed-length field by positioning the mouse pointer over it. A box appears telling you both the name of the component and its value.

Editing fixed-length fields

Because each element in a control field must be encoded and entered into a specific location within the field itself, entering data into these fields could be time-consuming. Fortunately, the program makes this process easier by, wherever possible, providing you with a list of values for a particular component within the field. You simply choose the desired value from the list. The program encodes it and inserts it into the correct position within the field.

How to edit a fixed-length field

Example scenario: You want to change the *Specific mat designat* component (position 1) of the 007 tag to indicate *Large Print*.

To edit a fixed-length field

- 1 Display the Edit MARC window for the desired record.
- 2 In the **007** field, click the single character in position 1.

```
Tag 007 Physical Description Fixed Field
Position: 01 Specific material designation
Value: a = Regular print
      'a'
```

Click on the character in position one. Note that positions are numbered starting at 0 (zero).



Insert MARC text button

- 3 Click the **Insert MARC Text** button. A window opens showing all the possible values for this component.
- 4 Click **b Large print**.
- 5 Click **OK**.

Note: In some cases, providing a list of values is not possible. In these situations, the program provides a description of the component and gives you as much information as possible to help you enter data.

Copying and pasting MARC records

You can copy MARC records from outside sources. Not only does this save data entry time, it also saves cataloging resources. Instead of cataloging a record yourself, you can find an existing record on the Internet or from some other source and copy it into your Spectrum CIRC/CAT database. Possible sources of MARC records include the Library of Congress, other Spectrum CIRC/CAT systems, MARConnect, and Athena library automation systems.

Before you can copy a MARC record, it must adhere to either the 1987 MicroLIF format or the MARC 21/852 Holdings format. If the leader, tag 005, or tag 008 is missing, the program creates it for you. If the incoming MARC record contains holding data in the 852 tag, this information is not copied into Spectrum CIRC/CAT.

How to copy and paste a MARC record

Example scenario: You want to copy a record from the Library of Congress web site into Spectrum CIRC/CAT.

To copy a record from an outside source

- 1 Using your browser go to the Library of Congress web site (<http://lcweb.loc.gov/z3950/>) and search for the record that you want to copy.
- 2 Display the record in MARC format (the Library of Congress calls this tagged display).
- 3 Using your mouse, select the entire record. Make sure that you do not select information, such as a button, that is not part of the MARC record.
- 4 Copy the selected information to the clipboard. (For help, refer to the documentation that came with your operating system.) If you like, you can exit your browser.
- 5 In the Spectrum CIRC/CAT Edit MARC window, display a blank record by clicking the **New Record** button.
- 6 From the **Edit** menu, choose **Select All**.
- 7 From the **Edit** menu, choose **Paste**. The program copies the new record into the Edit MARC window.
- 8 Edit the record as necessary and add holdings information. When you have finished, save the record.



**New Record
button**

Note: This feature is intended to save time by copying the bulk of the MARC record data. However, since it has to be flexible enough to handle a variety of formats, depending on the MARC record source, the program may not always make a perfect copy of the data. Always do at least a quick check to make sure the data copied correctly, especially control tags and indicator values.

Some sources of MARC records do not display subfield codes. This can cause problems when the program copies the record into the Spectrum CIRC/CAT database. Problems range from not being able to paste the record into the Spectrum CIRC/CAT database to incorrect display of subfield data. After copying a record from a source that does not display subfield codes, pay special attention to subfield data. You may need to edit it before saving the record.



For optimum results when copying leader and control tags, the source record should be in the communications format. Some sites offer this format.

Problems?

Here is a list of common problems and suggestions for solving them.

Tag 008 from Athena records does not copy properly. Before selecting the record in Athena, make sure that the Athena window is wide enough that the tag can display on one line.

Tag 001, leading spaces removed. After pasting the record into Edit MARC, edit the tag to re-insert the leading spaces.

Problem copying records that contain URLs with underscore characters. If the record adheres to a 1987 MicroLIF type format, copy the record to a word processor, such as WordPad or SimpleText, and replace each underscore with "%5". This will not work with formats other than 1987 MicroLIF.

Customizing the Edit MARC window

You can customize the Edit MARC window by specifying the amount of supporting information displayed as well as the way this information is displayed.

Customizing the amount of information shown

The MARC Expansion command in the View menu lets you display the material record's MARC data with varying amounts of supporting information: None, Moderate, and Full. The following table provides examples of all three MARC expansion settings.

Setting	Description	Example
None	Displays all of a field's data on one line (fields with a lot of data may wrap onto additional lines).	10010_aKepler, Harry Leonard,_d1893-1957.
Moderate	Displays all of a field's data on separate lines—including the descriptions of tag numbers and subfield codes.	100 Main entry - personal name ' 1 ' Surname ' 0 ' _a Personal name ' Kepler, Harry Leonard, ' _d Dates associated with a name ' 1893-1957. '
Full	Displays all of a field's data on separate lines—including the descriptions of tag numbers, subfield codes, and the identifiers Tag, Indicator, and Subfield in front of each element.	Tag 100 Main entry - personal name Indicator 1: Type of personal name entry element ' 1 ' Surname Indicator 2: ' 0 ' Subfield: _a Personal name ' Kepler, Harry Leonard, ' Subfield: _d Dates associated with a name ' 1893-1957. '

How to specify the amount of information shown

Example scenario: When viewing a MARC record, you want to view the maximum amount of supporting information.

To specify the amount of information shown

With the Edit MARC window open, choose **MARC Expansion** from the **View** menu. Then select the type of expansion desired, in this case, **Full**.

Choosing a font

The Font command lets you set the characteristics of the text that appears in the Edit MARC window. When you choose Font, a window opens where you specify the font and point size of the window text.

Note: This feature is not available in this version of Spectrum CIRC/CAT.

How to choose a font

Example scenario: You want to change the font to Courier 16 point.

To customize the font

- 1 With the Edit MARC window open, choose **Font** from the **View** menu. The font window appears.
- 2 From the **Font** list, select the appropriate font, in this case **Courier**.
- 3 In the **Sizes** list, select the desired size, in this case **16**.
- 4 Preview the font in the **Sample** box.
- 5 Click **OK**.

Note: Changing the value in the Font style list of the Font window, affects only the supporting information such as field names. It does not affect the display of information entered into the various fields.

Displaying supporting information

The **Bold/Italic** command lets you determine how a record's supporting information is displayed. Supporting information includes the descriptions (names) of fields, subfields, and indicators that help identify the different elements of the record. You can either bold or italicize this text, thus distinguishing it from the record's MARC data. *Note:* This command is available only when MARC Expansion is set to Moderate or Full.

How to change the supporting information display

To change the appearance of supporting information

With the Edit MARC window open, choose **Bold/Italic** from the **View** menu.

Managing holdings

Managing holdings consists of adding, editing, and delete holding data.

About materials and holdings in Spectrum

In Spectrum CIRC/CAT, the term "material" refers to a library item in general, such as a book, periodical, filmstrip, and so on. The term "holding" refers to a particular *copy* of a material. In Spectrum CIRC/CAT, a material record must have at least one holding associated with it. When you delete a material record's only holding, you also delete the material record from the database.

Accessing holding records

Because each holding record is connected to a material record, you must first display the material record before you display its holding record(s). After you display a record (in either the Easy Entry or Edit MARC window), you can then access its holding data.

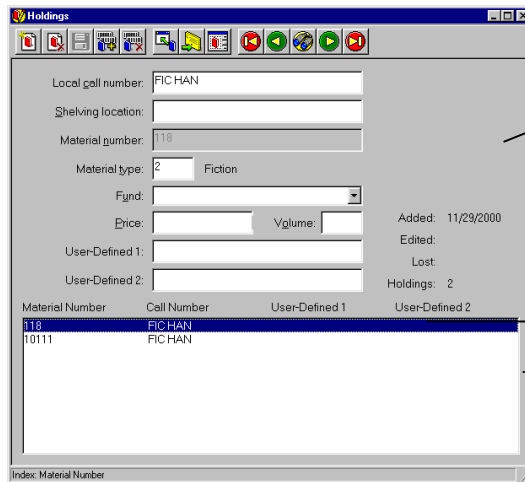
How to access a holding record

To access a holding record

- 1 From the Navigator toolbar, click the **Materials** button and choose **Edit**. The Easy Entry window opens.
- 2 Load the material record for the holding that you want to access. For instructions, see "Loading material records" earlier in this chapter.
- 3 Click the **Show Holdings** button. The Holdings window opens. Notice that all holdings are listed in the box at the bottom of the window. To view information for a particular holding, click it.



Show Holdings
button



This part of the window shows detailed information about the holding selected below

Select a holding. The program displays detailed information about the selected holding in the top portion of the window.

Note: When the Holdings window is active, all "record" functions apply only to the holdings for the currently loaded material record. You cannot load another MARC record from the Holdings window.

Adding holding records

You can add holding records one at a time or in groups.

Note: When adding large numbers of holdings on a Macintosh, no more than 200 holdings should be added to a single material record. Holdings in excess of this number may result in display errors and/or an unstable system.

How to add a single holding record

Follow these instructions to add a single holding record to a material record.

To add a single holding record

- 1 From the Navigator toolbar, click the **Materials** button and choose **Edit**. The Easy Entry window opens.
- 2 Create or load a material record. For help, see "Loading material records" or "Adding new material records" earlier in this chapter.
- 3 Click the **Show Holdings** button. The Holdings window opens.
- 4 To add a holdings record, choose **New** from the **Record** menu, or click the **New Record** button.
- 5 Enter the information for the new holding.
- 6 Click the **Save Record** button.



**Show Holdings
button**



**New Record
button**



**Save Record
button**



After you enter and save the first holding record, you can add multiple holdings to the same material by clicking the Add Holdings button. For more information, see "How to add multiple holding records".

How to add multiple holding records

Use this method when you want to enter several holding records with similar information.

Example scenario: You want to create two additional holdings for an existing material record. At present the record contains only one holding. Most of the information for the two new holdings is identical to that of the existing holding. You do not want the program to increment volume numbers when creating the new holding records.

To add a group of holding records

- 1 From the Navigator toolbar, click the **Materials** button and choose **Edit**. The Easy Entry window opens.
- 2 Load the material record for which you want to add new holdings. For help, see "Loading material records" earlier in this chapter.
- 3 Click the **Show Holdings** button.
- 4 In the Holdings window, select the holding you want to base the new holdings on.



**Show Holdings
button**



Add Holdings button

5 Click the **Add Holdings** button. The Add Holdings window opens.

Add Holdings

Number of holdings to add:

Increment volume number

Starting with volume number:

Status

Processing material number:
Total holdings added:
From material number: 204
To material number:

6 Enter the number of holdings to add, in this case 2.

7 Do not select the **Increment the volume number** option.

8 Click **Add**. The window displays the number of holdings added.

9 When processing is complete, click **Close**.

If new holdings differ slightly from the original holding, or from each other, you will need to edit the records slightly. You can do this in the Holdings window. Remember to save the records after editing them. For information about the Add Holdings window, see "About the Add Holdings window" in the *Materials* chapter of the *Spectrum CIRC/CAT Reference Manual*.

Editing holding records

You can make changes to a holding record at any time, even if the holding is currently circulating.

Note: If a holding is on Special Reserve, you can't change the material type.

How to edit a holding record

Example scenario: You have relocated a particular holding from the staff library to the main library. Now you want to edit its holding record to reflect this change.

To edit a holding

- 1 From the Navigator toolbar, click the **Materials** button and choose **Edit**. The Easy Entry window opens.
- 2 Load the material record for the holding that you want to edit. For instructions, see "Loading material records" earlier in this chapter.
- 3 Click the **Show Holdings** button. the Holdings window opens.
- 4 If there are multiple holding records in the box at the bottom of the window, click the holding that you want to edit.
- 5 In the **Shelving location** box, replace the existing text with *main library*.
- 6 Click the **Save Record** button.



Show Holdings
button



Save Record
button

Deleting holding records

For a given material record, you can delete a single holding or multiple holdings.

Note: Since every material record must have at least one holding, when you delete the only holding of a material record, the program also deletes the material record. Also, if a holding is checked out or has fines, messages, advance reserves, or is on special reserve, you can't delete it.

For information about the Delete Holdings window, see "About the Delete Holdings window" in the *Materials* chapter of the *Spectrum CIRC/CAT Reference Manual*.

How to delete a holding record

Use this method when you want to delete only one holding record for a given material.

Example scenario: A particular material has four holdings. The material numbers are 500, 501, 502, and 503 respectively. You want to delete only holding 501.

To delete a single material holding record

- 1 From the Navigator toolbar, click the **Materials** button and choose **Edit**. The Easy Entry window opens.
- 2 Load the material record for the holding that you want to delete. For instructions, see "Loading material records" earlier in this chapter.
- 3 Click the **Show Holdings** button. The Holdings window opens.
- 4 In the box at the bottom of the window, click holding 501.
- 5 From the **Record** menu, click **Delete**, or click the **Delete Record** button. An alert window opens asking you to confirm the deletion.
- 6 Click **Delete**, or if you are deleting the only holding, **Delete MARC**.



Show Holdings button



Delete Record button

How to delete multiple holding records

Use this method when you want to delete more than one holding record for a given material.

Example scenario: A particular material has four holdings. The material numbers are 500, 501, 502, and 503 respectively. You want to delete only holdings 501–503.

To delete multiple material holding records

- 1 From the Navigator toolbar, click the **Materials** button and choose **Edit**. The Easy Entry window opens.
- 2 Load the material record for the holdings that you want to delete. For instructions, see "Loading material records" earlier in this chapter.
- 3 Click the **Show Holdings** button.



Show Holdings button



Delete Holdings button

- 4 From the **Material** menu, choose **Delete Holdings**, or click the **Delete Holdings** button. The Delete Holdings window opens.

Delete Holdings

Delete holdings in the material number range:

from material number:

to material number:

Status

Processing material number:

Total holdings deleted:

Holdings not deleted

Currently in circulation:

Delete Stop Close

- 5 In the **from material number** box, type *501*. In the **to material number** box, type *503*.
- 6 Click **Delete**. The window displays the number of holdings deleted and the number *not* deleted because they don't have the circulation status of "in".
- 7 Click **Close**.

Assigning material numbers to holdings

You can select and assign numbers to new holding records in several ways:

- **Using the number already entered by the program.** When you first open the Holdings window, you see a material number in the material number field. You can keep this number and start entering data for the new record.
- **Entering another number.** You can assign any number to the new record by typing the number in the Material number field. (If you set up partitions, the number you enter must be within the material range. See "Setting your location's number options" in the *Setup* chapter of this manual. If the number you enter has already been assigned to a material record, you're prompted to enter an available number.
- **Setting an automatic number.** You can set the material number with the Set Next Number menu item. This feature helps you find the lowest available material number within a particular range.

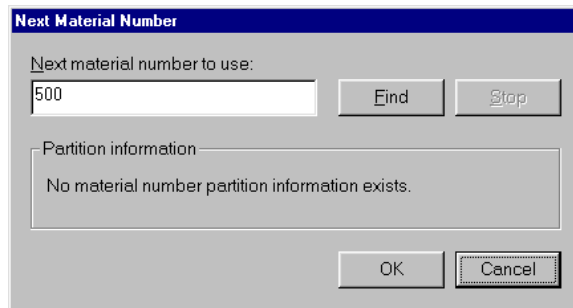
For information about the Next Material Number window, see "About the Next Material Number window" in the *Materials* chapter of the *Spectrum CIRC/CAT Reference Manual*.

How to find the lowest available material number

Example scenario: You want to find the lowest available number that is greater than 500.

To find the lowest available material number within a range

- 1 In the Holdings window, choose **Set Next Number** from the **Material** menu. The Next Material Number window opens.



- 2 In the **Next material number to use** box, type 500.
- 3 Click **Find**. The next lowest available material number is displayed in the **Next number to use** box.
- 4 Click **OK**. The number is loaded in the **Use Number:** menu option of the **Material** menu. The next time you add a holding, the program will assign it this material number.

Assigning material types to holdings

When adding holding information, you can:

- Enter a material type number in the Material type box of the Holdings window.
- Click the "Set Material Type" button and choose a material type from in the Type Number window.
- Enter a call number in the Local call number box and then press the Tab key. If the Material type box is empty and this is the first time that you have entered a call number for this record, the appropriate type number appears in the type box according to the call number patterns you set in the Material Types Setup window. For help setting up call number patterns, see "Managing call number patterns" in the *Setup* chapter of this manual. *Note:* This method works only if the "Material type" box is empty. Also, if the call number you enter doesn't match any call number patterns, the program will assign the default material type to the holding.

How to assign a material type by choosing it from a list

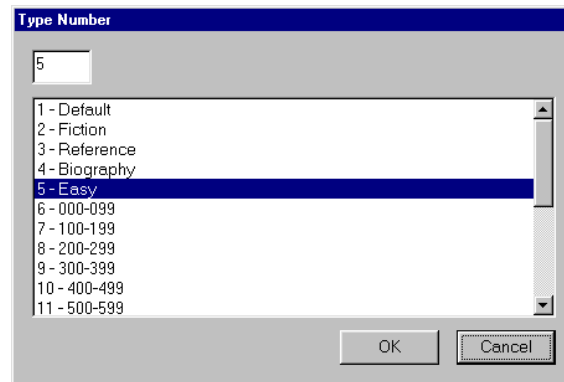
Example scenario: You want to assign type number *5-Easy* to a holding.

To assign a material type

- 1 In the Holdings window, place your cursor in the **Material type** box.
- 2 Choose **Set Material Type** from the **Material** menu, or click the **Set Material Type** button. The Type Number window opens.



Set Material Type button



- 3 Choose a type, in this case *5-Easy*, and click **OK**. The Holdings window opens and the type number you chose is placed in the **Material type** box.

Entering price information

You add or edit a holding's price information in either the Edit MARC window (in tag 852 subfield *_9*) or the Holdings window (in the Price box). However, these two places accept and display price data differently.

What you can enter

In the Edit MARC window, you can enter digits, plus letters or a symbol to indicate the currency (such as \$ or "usd" for U.S. dollars). In the Holdings window, you can enter only digits (0–9) in the price field, but no letters or symbols. The maximum practical value is 9999999.99—or a number up to 10 characters long—including the decimal point. (The actual maximum is slightly higher, but does *not* include all 11-character numbers.)

Adding/deleting the price

When you enter price data in the Holdings window, the tag 852 *_9* is created with the price value in it, but with no other text. If you remove all numbers from the Holding window's price field, the *_9* subfield is deleted if no other data (text or a second value) exists.

Decimal point

Digits after the hundredth place are ignored, so 1.23456 is displayed as 1.23. Also, only the first decimal place is recognized, so the value 2.9 is read as 2.00.

Multiple values

Your MARC data can contain multiple values in the *_9* subfield (for example, "p13.45 usd, 15.65 Canadian"). However, the Holdings window displays only the first value ("13.45"—up to seven numbers before, and two numbers after, the first decimal point). To display the second value, switch the first and second values in Edit MARC ("15.65 Canadian, p13.45 usd"). Likewise, if you edit the value shown in the Holdings window, only the first value in the *_9* subfield is edited.

Importing material records

Rather than adding each new material and holding to Spectrum CIRC/CAT individually, you can add material records to your collection by importing them from a file. For example, if you receive a file of material records from a book vendor, you can import the records to make them part of your Spectrum CIRC/CAT collection. *Note:* Be sure to set up your material types and call number patterns before importing records.

Importing material records can take a lot of time. As an estimate, your records should import at a rate of three to seven records per minute, depending on the size of the records, the size of your existing material collection, the speed of your computer, and the options you select for importing. Building key words and replacing records takes even more time.

Note: When adding large numbers of holdings on a Macintosh, no more than 200 holdings should be added to a single material record. Holdings in excess of this number may result in display errors and/or an unstable system.

Note: Make sure that Power Management is not turned on while you import from a client computer to the server. Otherwise, if Power Management shuts down your client computer during the import process, your database might become corrupt. You can access Power Management through the Control Panel. While you import, you should also turn off any other program that shuts down or suspends activity on your computer.

Backing up

Back up your database files before and after you import records. For more on backups, see "Backing up Spectrum data" in the *Backup* chapter of this manual.

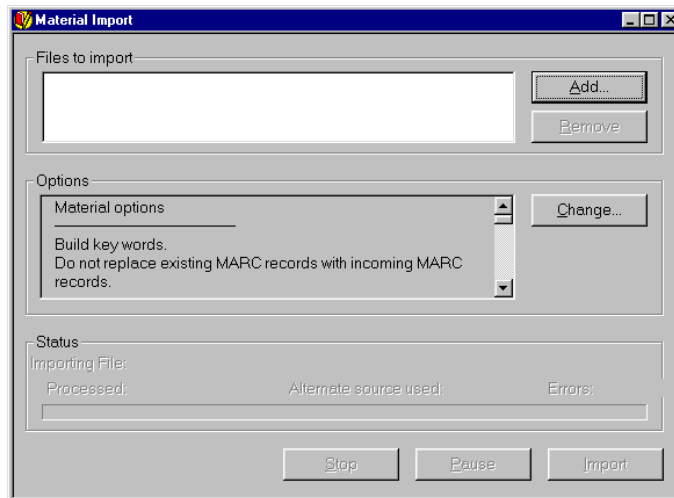
Opening Material Import

To open Material Import

From the Navigator toolbar, click the **Materials** button and choose **Import**.



The Material Import window opens.



For information about the Material Import window, see "About the Material Import window" in the *Materials* chapter of the *Spectrum CIRC/CAT Reference Manual*.

The import process

Importing consists of three steps: selecting files, specifying import options, and starting the import.

If the records you are importing contain diacritics, you should also refer to the topic "Importing records with diacritics".

Step 1: Selecting files to import

Before importing, you need to specify which file(s) contain the records that you want to import. You do this from the Material Import window.

Note: Files from book vendors are typically named MicroLIF.001. (Vendors may also provide a *.vol* or *.fil* file, but you do not have to select these.) If you are importing records from several files with the same name, rename the files so that they have different names. For example, you might want to use *Microlif.001*, *Microlif.002*, *Microlif.003*, and so on.

How to select the file(s) for importing

Example scenario: You want to import the records contained in a file called microlif.001.

To select the file(s) for import

- 1 In the Material Import window, click the **Add** button. A system window opens where you can locate the file you want.
- 2 Select the file to add, in this case *microlif.001*, and click **Open**. The system window closes and the file is added to the **Files to import** list in the Material Import window.

Importing more than one file at a time

You can import records from multiple files into Spectrum CIRC/CAT's material database.

Note: If you have added multiple files to the Material Import window, the program imports all files, not just the selected (highlighted) file.

If you're running Spectrum CIRC/CAT in Mac OS, you can add only one file at a time to the list of files to be imported. That is because the dialog box of this operating system allows only one file to be selected. So, to import more than one file, you need to repeat the above steps for each file.

Step 2: Specifying import options

Import options ensure that records are brought into your Spectrum CIRC/CAT database properly. Among other things, import options tell the program how to determine if an incoming record matches a record already in your database and what action should be taken if a match does occur. You can also use import options to specify whether key words should be built from the incoming records.

There are two types of import options: material import options and holdings import options. For a full description of material import options, refer to "About the Materials tab" in the *Spectrum CIRC/CAT Reference Manual*. For a full description of holdings import options, refer to "About the Holdings tab" in the *Spectrum CIRC/CAT Reference Manual*.

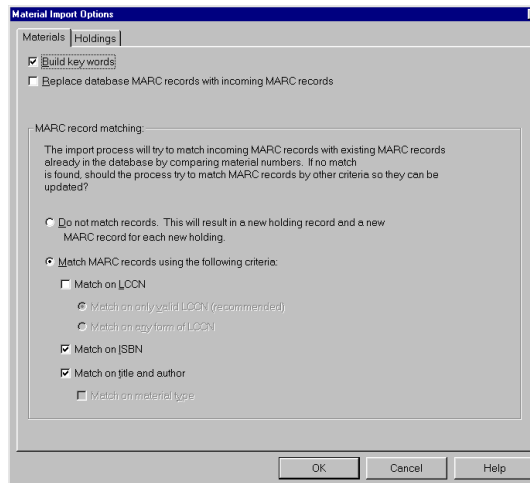
Note: After you set import options, the program retains your settings. You need to re-specify import options only if you want to change them between imports.

How to set import options

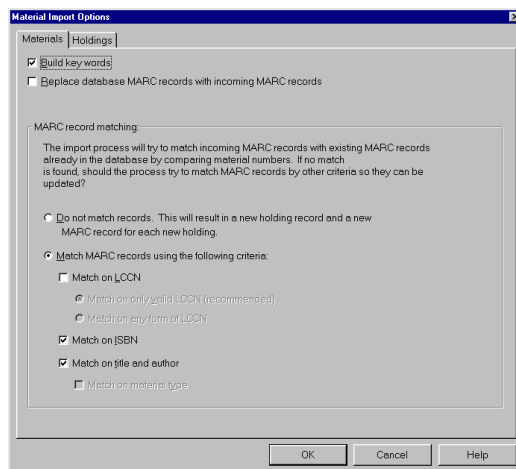
Here are general instructions for setting import options. For specific examples, refer to "Examples".

To set import options

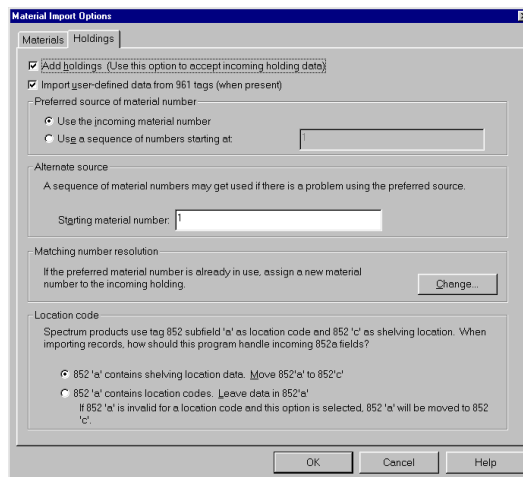
- 1 In the Material Import window, click the **Change** button. The **Material Import Options** window opens.



- 2 In the **Materials** tab, set the respective material options. For a detailed description of the various options, see "About the Materials tab" in the *Materials* chapter of the *Spectrum CIRC/CAT Reference Manual*.



- 3 Click the **Holdings** tab and set the respective options. For a detailed description of the various options, see "About the Holdings tab" in the *Materials* chapter of the *Spectrum CIRC/CAT Reference Manual*.



- 4 Click **OK**. The program returns you to the Material Import window.

Examples

The import options you choose depend on how you want to import your records. Here are three examples showing how various setups can produce different outcomes.

Example 1: How to import new records without matching records

Example scenario: You are importing records and want to add each incoming record to your database as a new record without checking to see if it matches an existing record. (Follow this scenario if you're importing records from a Winnebago CIRC/CAT for MS-DOS program and want your records to appear the same in Spectrum CIRC/CAT as they did in your old program.)

To import new records without matching any records

- 1 In the Material Import window, click **Change**. The **Materials** tab of the Material Import Options window opens.
- 2 In the **Materials** tab, make sure the **Replace database MARC records with incoming MARC records** option is *not* selected.
- 3 In the **MARC record matching** group, make sure that **Do not match MARC records** is selected.
- 4 Click the **Holdings** tab.
- 5 Make sure the **Add holdings** option is selected.
- 6 Make sure the **Import user-defined data from 961 tags** option is selected (when present)
- 7 Select **Use the incoming material number**.
- 8 In the **Starting material number** box, enter a number you know is unused (for example, if your highest material number is 10000, use 20000).
- 9 Click the **Change** button and select **Use the alternate source settings**. Then click **OK** to exit the Matching Number Resolution window.
- 10 Click **OK** and continue importing.

Example 2: How to add new holdings to existing records

Example scenario: You are importing records. If an incoming record already exists in your database, you do not want to create a new material record. Instead, you want to add new holdings to the existing record.

To add new holdings and merge with existing records

- 1 In the Material Import window, click **Change**. The **Materials** tab of the Material Import Options window opens.
- 2 In the **Materials** tab, make sure the **Replace database MARC records with incoming MARC records** option is *not* selected.
- 3 In the **MARC record matching** group, select **Match MARC records using the following criteria**. Select at least one matching option.
- 4 Click the **Holdings** tab and make sure the **Add holdings** option is selected.
- 5 Select **Use the incoming material number**.
- 6 In the **Starting material number** box, enter a number you know is unused (for example, if your highest material number is 10000, use 20000).
- 7 Click **Change** and select **Use alternate source settings**. Then click **OK** to exit the Matching Number Resolution window.
- 8 Click **OK** and continue importing.

Example 3: How to replace minimal records with cataloged records

Example scenario: Some of the records in your current database contain only minimal catalog information. You want to update these brief records with the more complete MARC records that you have obtained from an outside source. In other words, you want to import the new records and use them to replace your minimal records in your database.

To replace minimal records with catalogued records

- 1 In the Material Import window, click **Change**. The **Materials** tab of the Material Import Options window opens.
- 2 In the **Materials** tab, make sure the **Replace database MARC records with incoming MARC records** option *is* selected.
- 3 In the **MARC record matching** group, select **Match MARC records using the following criteria**. Select at least one matching option. (Select a field that has the same data in both records.)
- 4 Click the **Holdings** tab and make sure the **Add holdings** option is *not* selected.
- 5 Click **Change** and select **Replace the existing holding data with the incoming data**. Then click **OK** to exit the Matching Number Resolution window.
- 6 Click **OK** and continue importing.

Step 3: Starting the import

After you have identified the file(s) that you want to import and specified your import options, you can start the import process.

To start importing

From the Materials Import window, click **Import**. The program scans incoming files for diacritics. If any are found, the Diacritics window opens so that you can identify the correct code page. For help identifying the code page, see "Importing records with diacritics" later in this chapter.

A window opens and informs you when the import is complete.

Pausing and stopping the import

While the program is importing, you can temporarily pause or permanently stop the process.

Note: After you stop the process, you can't begin importing records from the last record imported. When you restart the import, the program processes the entire file. To avoid duplicate records when re-importing a file that you have "stopped", select the "Replace database MARC records with incoming MARC records" import option. You may also want to delete records imported between the time you started the import and the time you stopped it. One option is to delete records based on date added, assuming you haven't added any other records that day. You can do this using the Batch Processing feature (set a condition that Date added is equal to your import date). For more information, refer to "Batch processing material records" later in this chapter.

How to pause and stop the import

To pause the import

In the Material Import window, click **Pause**. The program temporarily halts the import. (Click **Import** to resume importing. The program starts at the record it was at when you clicked **Pause**.)

To stop the import (and remain in Material Import)

- 1 In the Material Import window, click **Pause**.
- 2 Click **Stop**. The program stops importing records but keeps the Material Import window open. *Note:* Records processed by the program prior to stopping, are imported.

Importing records with diacritics

Some records may contain non-standard characters. Often these are accented characters such as ñ, à, and ç. These accents, called *diacritics*, are common in non-English words.

Computers use something called *code pages* to display diacritics and other characters. When importing records that contain diacritics, you need to make certain that the program is using the code page that corresponds to the diacritics within the records.

During an import, the program scans the import file for diacritics. If any are found, the Diacritics window opens. You can use this window to identify the correct code page. This is a fairly simple process; it involves previewing diacritics using a series of different code pages until you find the code page for which the diacritics are displayed properly.

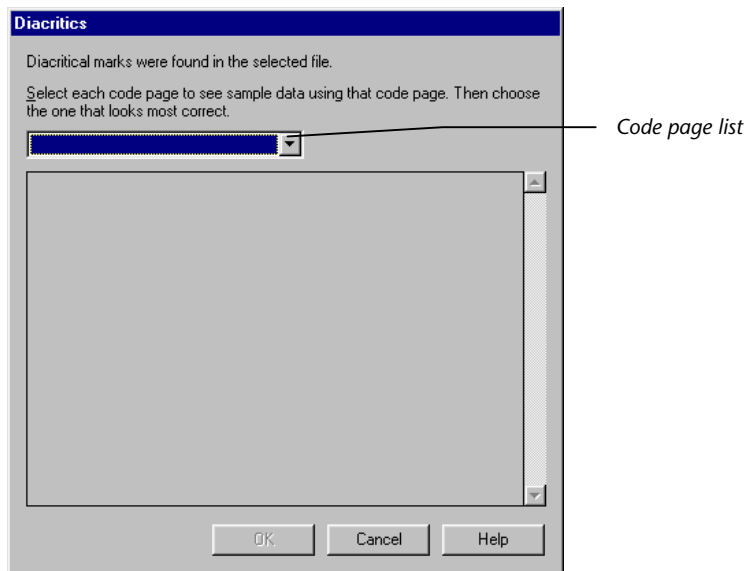


If you know the incoming records use either a Windows code page or the MARC 21 code page, use a Windows machine for the import. If you know the incoming records use a Macintosh code page, use a Macintosh machine for the import.

For additional information about diacritics, see “About diacritics” in the *Diacritics* appendix of your *Spectrum CIRC/CAT Reference Manual*.

How to identify the correct code page

Example scenario: You are importing records that contain diacritics. After starting the import, the Diacritics window opens telling you that diacritics were detected in the incoming records. Now you must identify the correct code page.



To select the correct code page

- 1 In the Diacritics window, open the code page list, and choose a code page.
- 2 In the Diacritics window, look at the sample text in the box at the bottom of the screen. If the diacritics are displayed correctly, the program has identified the correct code page.
- 3 If the diacritics are not displayed correctly, open the code page list, and choose a different code page. Continue trying different code pages until the diacritics are displayed correctly.
- 4 Click **OK**.



If multiple code pages are used in the same import file, you cannot identify a single code page. In this situation, select Auto-detect from the code page list. This instructs the program to try and find the correct code page on a record-by-record basis.

Note: Depending on your operating system, it may not be possible to display certain characters. Characters that cannot be displayed by your operating system are shown as vertical bars.

After importing

When the import process is complete, an information window opens and shows the number of records that were added to the database and the number of records that weren't added. To view errors that occurred when importing materials, click the View File button in the information window. This opens the m_import.log file.

If you encounter errors while importing, refer to the topic "Addressing import errors".

Addressing import errors

The program reports problems with records being imported both during and after the import process. You should address all errors either while importing or after importing, as appropriate. Errors that can't be automatically corrected by the program or addressed by you during importing are recorded in a log, or error, file. After you finish importing, you can check the contents of this log. You should also check the records listed in the file thoroughly. If data in any of the imported material records is missing or incorrect, add or edit the material record.

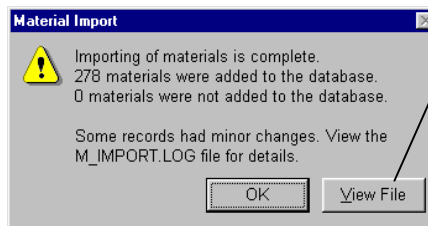
For information about specific error messages, refer to "Material Import troubleshooting" in the *Troubleshooting* appendix of the *Spectrum CIRC/CAT Reference Manual*.

How to open the m_import.log file immediately after the import process

After importing, the program displays information about the number of records that were imported, the number of records that were not imported, and so on. Any errors are listed in the m_import.log file.

To open the m_import.log file immediately after the import process

When the import is finished, the program displays a Material Import status window providing information about the import. If the import process generates errors, this window contains a **View File** button. To open the log, click the View File button.



To view the log, click the View File button.

How to open the m_import.log file after closing the Material Import status window

You can view import errors even after closing the Material Import status window.

To open the m_import.log file (Windows)

- 1 Click the **Start** menu in the Windows desktop.
- 2 Click **Find**.
- 3 Click **Files or Folders**. A "Find: All Files" window opens.
- 4 Enter *m_import.log* in the **Named** box.
- 5 Choose the drive to search by clicking the arrow beside the **Look in** box.
- 6 Click **Find Now**.
- 7 Double-click the **m_import.log** file listed at the bottom of the Find window.
- 8 If computer prompts with an option to open the file, choose Notepad. The **m_import.log** file opens.

To open the **m_import.log** file (Macintosh)

- 1 Double-click the **Hard Disk** icon.
- 2 Open the folder containing your Spectrum system files. (By default this is either "Winnebago Spectrum Client" or "Winnebago Spectrum").
- 3 Locate the **m_import.log** file.
- 4 Double-click the file to open it.
- 5 The log file opens in a word processing program such as SimpleText so you can view the errors.

Exporting material records

You can copy material records from your database by exporting them to a file. You may want to export material records to another program. You may even want to export material records that you are about to delete. This way, you'll have a copy that you can easily re-import should it be necessary.

Note: If you have Windows 98 on your client computer, make sure that Power Management is not turned on while you export from a client computer to the server. Otherwise, if Power Management shuts down your client computer during the export process, your database could become corrupt. You can access Power Management through the Control Panel. While you export, you should also turn off any other program, such as a screen saver, that shuts down or suspends activity on your computer.

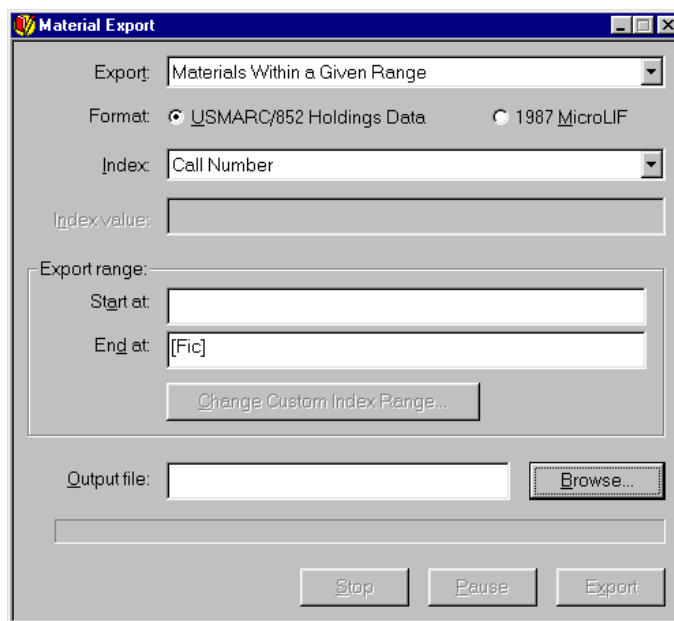
Opening Material Export

To open Material Export

From the Navigator toolbar, click the **Materials** button and choose **Export**.



The Material Export window opens.



For information about the Material Export window, see "About the Material Export window" in the *Materials* chapter of the *Spectrum CIRC/CAT Reference Manual*.

Exporting materials individually

You can export materials individually by specifying their material numbers.

How to export materials individually

Example scenario: You want to export the material with material number 505. Furthermore, you want the exported record to be in the 1987 MicroLIF format and in a file called export.001.

To export materials individually

- 1 From the Navigator toolbar, click the **Materials** button and choose **Export**. The Material Export window opens.
- 2 In the **Export** box, choose **Materials Individually**.
- 3 For **Format**, select **1987 MicroLIF**.
- 4 In the **Index** box, enter the material number of the record that you want to export. In this case, enter *505*.
- 5 In the **Output file** box, type the name of the file that you want to export to. In this case, type *export.001*. If you do not specify a folder, the program places the export file in the same folder as your Spectrum client (or single-user) system files.

Or, click **Browse** to select an existing file from a list.
- 6 Click **Export**.

Note: During an export the program logs error messages in a file called *m_export.log*. After starting the export, you may see a message stating that the log file already exists. You can append to the existing log by selecting **Append**. Or, you can overwrite existing log entries by selecting **Overwrite**.



You can add additional records to this same file. Just repeat steps 4 and 6 for each record that you want to export.

Exporting a range of materials

You can specify a range of materials and have the program export all materials that fall within that range. The arrangement of records within the export file depends on the type of range you select. For example, if you select a range of material type, items are ordered by material type.

How to export a range of materials

Example scenario: You want to export all materials with a material type of 1, 2, or 3. Furthermore, you want the exported records to be in the 1987 MicroLIF format, and you want to place the exported records into a file called *export.002*.

To export materials in a range

- 1 From the Navigator toolbar, click the **Materials** button and choose **Export**. The Material Export window opens.
- 2 From the **Export** box, select **Materials Within a Given Range**.
- 3 Select the format of the materials to be exported. In this case, select **1987 MicroLIF**.
- 4 In the **Index** box, choose the index that you want to use to specify the range. In this case, choose **Material Type**.
- 5 In the **Start at** box, type the starting value of the export range. In this case, type *1*.

Note: If you selected a custom index, click **Change Custom Index Range** to change the range. For more information, see "Using a material custom index range" later in this chapter.

- 6 In the **End at** box, type the ending value of the export range. In this case, type *3*.
- 7 In the **Output file** box, type the name of the file that you want to export to. In this case, type *export.002*. If you do not specify a folder, the program places the export file in the same folder as your Spectrum client (or single-user) system files.
Or, click **Browse** to select an existing the file from a list.

- 8 Click **Export**.

Note: During an export the program logs error messages in a file called *m_export.log*. After starting the export, you may see a message stating that the log file already exists. You can append to the existing log by selecting **Append**. Or, you can overwrite existing log entries by selecting **Overwrite**.

For information about the Material Export window, see "About the Material Export window" in the *Materials* chapter of the *Spectrum CIRC/CAT Reference Manual*.

Exporting all materials

You can export all materials in MARC file order. MARC file order means that the exported records appear in the export file in the same order that they appear in the Spectrum database.

How to export all materials

Example scenario: You want to export all materials and have records in the export file sorted in the same order that they are in the Spectrum database. Furthermore, you want the exported records to be in the 1987 MicroLIF format, and you want to place the exported records into a file called `export.003`.

To export all materials

- 1 From the Navigator toolbar, click the **Materials** button and choose **Export**. The Material Export window opens.
- 2 From the **Export** box, choose **All Materials (in MARC File Order)**.
- 3 For **Format**, select the format of the materials to be exported. In this case, select **1987 MicroLIF**.
- 4 In the **Output file** box, type the name of the file that you want to export to. In this case, type `export.003`. If you do not specify a folder, the program places the export file in the same folder as your Spectrum client (or single-user) system files.
Or, click **Browse** and select an existing file from a list.
- 5 Click **Export**.



If you want to export all records, but need them arranged in an order other than MARC file order, choose "Export Materials Within a Given Range" option in the Export box.

Using a material custom index range

When you select "Materials Within a Given Range" from the Export box, you can use a custom index to set the export range. Before you select a custom index, you must create it in the Material Custom Indexes part of the program. For more information about creating a material custom index, see "Creating material custom indexes" later in this chapter.

Because you can have up to three data fields in one custom index, you set a range for custom indexes using the Custom Index Range Selection window instead of using the Start at and End at boxes in the Material Export window. The Custom Index Range Selection window is only available after you select a custom index in the Index box. The custom index(es) display the index name you assigned in Material Custom Indexes.

For information about the Custom Index Range Selection window, see "About the Custom Index Range Selection window" in the *Materials* chapter of the *Spectrum CIRC/CAT Reference Manual*.

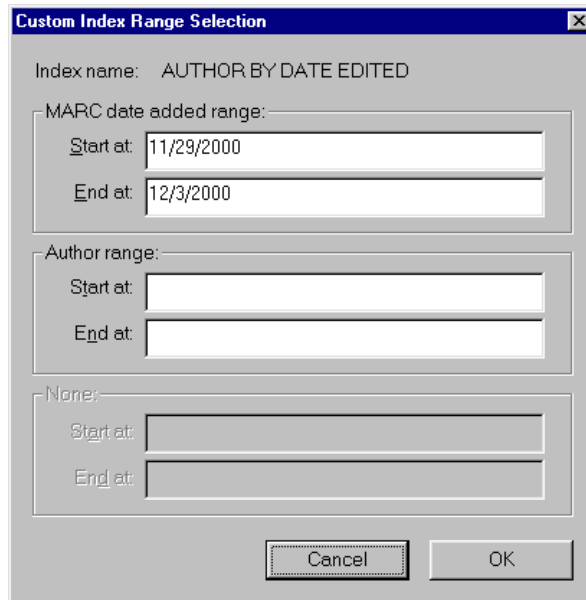
How to specify a range using a custom index

Example scenario: You have already created a custom index called *AUTHOR BY DATE EDITED* which is based first on MARC Date Edited, and secondly on Author. Now you want to export a range of records from your database using this index. You want to export all records edited between 7/11/2000 and 9/25/2000 that have author names starting with a letter from *A* to *D*.

To open the Custom Index Range Selection window and set a range

- 1 From the Material Export window, in the **Export** box, choose **Materials Within a Given Range**.
- 2 In the **Index** box, choose the desired custom index. In this case, *AUTHOR BY DATE EDITED*. *Note:* Before you can do this, the *AUTHOR BY DATE EDITED* custom index must already be set up.

- 3 Click the **Change Custom Index Range** button. The Custom Index Range Selection window opens.



The screenshot shows a dialog box titled "Custom Index Range Selection" with a close button (X) in the top right corner. The dialog box contains three sections for defining index ranges:

- Index name:** AUTHOR BY DATE EDITED
- MARC date added range:** This section contains two input fields: "Start at:" with the value "11/29/2000" and "End at:" with the value "12/3/2000".
- Author range:** This section contains two empty input fields: "Start at:" and "End at:".
- None:** This section contains two empty input fields: "Start at:" and "End at:".

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

- 4 The window contains a box for each field in the custom index. For the first field, in this case MARC Date Edited, enter the starting and ending values for the range. In this example, enter *7/11/2000* in the **Start at** box and *9/25/2000* in the **End at** box.
- 5 For the second field, in this case Author, enter the starting and ending values for the range. In this example, enter *A* in the **Start at** box and *D* in the **End at** box.
- 6 Click **OK** to save the range and close the window.

Selecting an output file

You have to specify the destination of the exported files. You can enter the path and file name of the destination file in the "Output file" of the Material Export window, or you can select the output file by clicking the Browse button and locating it yourself.

How to select an output file

Example scenario: You want to save the exported records in a file called *export.004*.

To select the file to export

- 1 In the Material Export window, click **Browse**. A window opens for you to locate and select the file you're exporting to. If you're exporting to a floppy disk, make sure the disk is inserted.
- 2 In the **File name** box, enter the name of the file, in this case *export.004*.
- 3 Click **Save**. The window closes, and the file name you selected is automatically entered into the **Output file** box.



If the folder in which you want to save the export file does not exist, you can create it from the window that opens after you click the Browse button.

Starting the export

Once you have specified the records that you want exported, the export format, and the output file, you can start the export.

How to start the export

Example scenario: You have already started the Material Export feature and specified the records you want exported, the export format and the output file. Now you are ready to start the export.

To start the export

In the Material Export window, click **Export**.

Stopping or pausing the export

After you begin exporting, you can temporarily pause or permanently stop the process.

How to pause and stop the export

To pause the export

In the Material Export window, click **Pause**. The program temporarily halts the export. (Click **Export** to resume importing.)

To resume the export after pausing

Click **Export**.

To stop the export (and stay in Material Export)

- 1 In the Material Export window, click **Pause**.
- 2 Click **Stop**. The program stops exporting records but leaves the Material Export window open.

Batch processing material records

You can use the batch process feature to change information in your material records. The phrase "batch process" refers to the action of modifying groups of records in your database. You can use this feature to make the following modifications to groups of material records:

- Add, edit, or clear data such as material user-defined data or call number data.
- Clear regular usage and in-library usage.
- Reassign material types (by matching call number patterns). *Note:* When the program reassigns material types, it checks for materials that are on special reserve. If a material is on special reserve, the original type of that material changes.
- Change inventory (lost) status, which essentially decreases the number of periods that a material has been marked lost. If the number becomes zero, the material's status changes from "lost" to "in."
- Delete entire material records. *Note:* Materials that are checked out, reserved, or have fines or messages are not deleted.

You can batch process all of your records, records in a selected range, records that meet certain conditions, or records in a selected range that meet certain conditions. You can even create a text file listing the records that you want to process. If you do, the program will process only the records listed in the file.

Note: If you have Windows 98 or Windows 2000 on your client computer, make sure that Power Management is not turned on while you batch process on the computer. If Power Management shuts down your computer during the batch process, your database could become corrupt. You can access Power Management through the Control Panel. While you batch process, you should also turn off any other program, such as a screen saver, that shuts down or suspends activity on your computer.

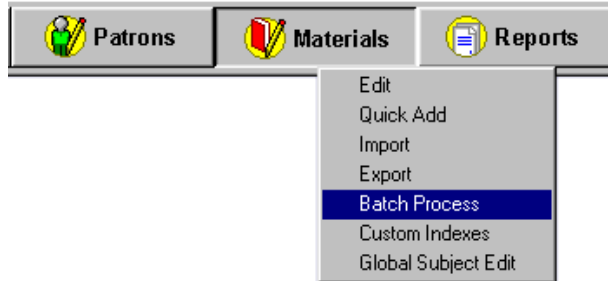
Backing up

Back up your database files before and after you make major changes to your records. For more on backups, see "Backing up Spectrum data" in the *Backup* chapter of this manual.

How to start Material Batch Processing

To start batch processing

- 1 From the Navigator toolbar, click the **Materials** button and choose **Batch Process**.



The Material Batch Processing window opens, which provides an overview of the material batch process.



- 2 View the basic steps of the batch process.

3 Click **Next** to continue. The Range window opens.

Range

Enter the range to limit the searching of records. If you can limit the search to a smaller range, the speed of the batch operation will be quicker. If you are not sure, use the default values that are displayed and all records will be processed.

For title and author ranges, if you would like to change which tags will be searched, select the "Set Tags" button.

Field: Material number

Start at 1

End at 10201

Set Tags << Back Next >> Exit

The batch process feature has a "wizard" look—which guides you through each step of a multi-step process. It offers helpful information and explains options along the way. Follow the instructions in the windows, and use the Back and Next buttons to navigate through the windows. Click Exit in any window to cancel the batch process.

Understanding batch process steps

When you first start the Batch Process feature, an introductory window opens that explains the four basic steps involved in batch processing your material records.

Here is a description of the various windows you encounter when batch processing. Each window corresponds to a step in the batch process.

Window	Description
Range	Lets you set the range of records to process. The batch process won't necessarily modify all of these records. However, while processing, the program only inspects these records.
Conditions	(This step is optional.) Lets you set the conditions, if any, for the records to process. By specifying one or more conditions, you identify the particular characteristic(s) of the records to be modified. Only those material records in the range that meet the condition(s) set in this step are modified.
Actions	Lets you set the modification(s) to be made. Here you specify how you want to change the records in the range that meet the condition(s).
Finalize	Lets you verify the settings of your batch process before you start processing.

Step 1: Specifying the records to process

The first step in batch processing is to specify the records that you want processed. You can do this by specifying a range of records. You can also create a file containing a list of material numbers. Once the list is complete, you can have the program batch process only those records listed in the file.

You specify records in the Range window. For more information about the Range window, see "About the Range window" in the *Materials* chapter of the *Spectrum CIRC/CAT Reference Manual*.

Specifying a range of records

If you have a lot of records in your database and don't need to change them all, specifying a range of only the records you need to process can substantially reduce batch processing time. All the materials in this range may not be modified; however, all these records are inspected to find those that do require processing, according to the criteria you set up.

Initially, the range is set to include all of your material records. However, you can narrow the range to best meet your needs.

How to specify a range

Example scenario: You want to batch process only those records with material types 1, 2, and 3.

To specify a range of records

- 1 In the Range window, in the **Field** box, select the field on which you want to base your range. In this case, choose **Material Type**.
- 2 Enter the starting and ending values of the range. In this case, type *1* in the **Start at** box and type *3* in the **End at** box.
- 3 Click **Next** to continue.



You can specify a single material type by entering the same material type value in both the Start at and End at boxes. Similarly, if you are specifying a range based on a field such as material number, you can have the program process a single record by entering the record's material number in both boxes.

Note: If you base your range on either Title or Author, you can click the Set Tags button to select the title or author tag numbers to process. For more information, see "Specifying MARC tags to process" later in this chapter.

Selecting materials from a file

You can create a text file of material numbers and have the program batch process only records listed in this file. You can use NotePad, SimpleText, or similar program to create the file.

The file must be structured so that there is only one material number per line with no additional characters. All numbers listed in this file are assumed to be from the location chosen in the Range window.

How to select materials from a file

Example scenario: You have already created a file called *batch.001* that contains a list of material numbers for the records you want to process. Now you want to tell the program to use this file to determine which records should be processed.

To select material records from a file

- 1 In the Range window, select **Material number (from a file)** from the **Field** box.
- 2 Click **Select File**.
- 3 In the Open window, locate and select the file that contains the material records, in this case *batch.001*.
- 4 Click **Open**. The name of the selected file is displayed in the Range window next to **File name**.
- 5 Click **Next** to continue.

Specifying MARC tags to process

When you select some fields (such as the Title and Author fields) for your range, condition, or action, you can click the Set Tags button to select the tag numbers containing the field information you want to process.

You should select the specific tags to process because MARC cataloging stores some data (like title and author information) in a variety of subfields. For example, besides having a tag that holds the main title information (tag 245), a book may also have series title information (tag 440).

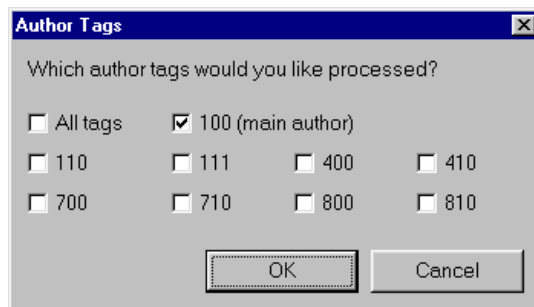
The Set Tags button is available in the Range, Add Condition, Edit Condition, Add Action, and Edit Action windows, when appropriate.

How to select tags

Example scenario: You want to process the items for records that have an author name that falls within a specific range. You want the program to consider all author tags when determining if a record should be processed.

To select a tag to batch process

- 1 In the Range window, in the **Field** box, choose **Author**.
- 2 Click **Set Tags**. A window opens in which you can choose the tag fields to process (the tag window displayed depends on the field you select).



- 3 Select or deselect the appropriate tag fields. In this case, select **All tags**.
- 4 Click **OK**. The selected tags are displayed in the window.

For more information about the Tags windows, see "About the Title Tags window" and "About the Author tags window" in the *Materials* chapter of the *Spectrum CIRC/CAT Reference Manual*.



Although this example uses the Range window, you can use the same process to select tags in the Add Condition, Edit Condition, Add Action, and Edit Action windows.

Step 2: Setting batch process conditions

When you set batch process conditions, only those records that have certain characteristics, such as a certain price or location, are processed. The program won't modify any records in your range that don't meet your condition(s). For example, you may want to change only the records you added to the database after January 1, 1998. In this situation, you could use a condition to process only the records added after that date. These conditions work in conjunction with the range you set in the Range window.

You don't need to set conditions to batch process your records. If you don't want to set conditions, click the Next button in the Conditions window to continue.

You can set up to five conditions for the batch process.

Adding, editing, and removing batch conditions

When you click Add or Edit in the Conditions window, the Add Condition window or Edit Condition window opens. You use these windows to enter the details of a condition. Remember, the batch process modifies only those materials that meet the condition(s) specified, if any.

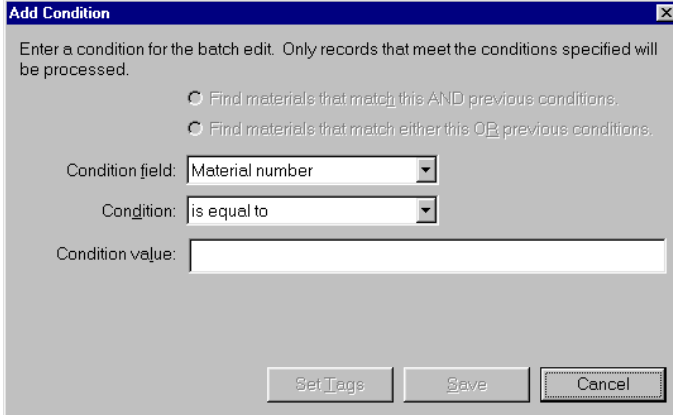
You can add, edit and delete conditions.

How to add a condition

Example scenario: You want the program to batch process only those records that have the author "Martan, Louise". This is the only condition that you want to specify.

To add a batch process condition

- 1 In the Conditions window, click **Add**. The Add Condition window opens.



- 2 Select a field from the **Condition field** box. In this case, choose **Author**.
- 3 Select a condition from the **Condition** box. In this case, choose **is equal to**.
- 4 Enter the condition value in the **Condition value** box. In this case, enter *Martan, Louise*.
- 5 Click **Next**.

You can now set the options for this condition. For more information, see "Setting options for batch process conditions". For more information about the Add Condition window, see "About the Add and Edit Condition windows" in the *Materials* chapter of the *Spectrum CIRC/CAT Reference Manual*.

Note: With some fields, you cannot set condition options. If so, instead of a Next button, you will see a Save button.

Also, when you choose either Title or Author as the Condition field, you can click the Set Tags button to select the title or author tag numbers to process. For more information, see "Specifying MARC tags to process" earlier in this chapter.

You may notice that two fields in the Condition field list have similar names “location” and “location code”. “Location” refers to the shelving location within a library. “Location code” refers to a library within your district.

Setting options for batch process conditions

Sometimes when you set batch process conditions, you need to set options for those conditions. When you click Next in the Add Condition or Edit Condition windows, the Condition Options window is displayed. *Note:* This window opens only if you can further define the value(s) entered for the condition.

The condition options compare the condition value(s) you enter with the values in the selected field for all the material records in the specified range. For example, you may add a condition that processes material records with call numbers that begin with numbers greater than 233. You need to click the Next button in the Add Condition or Edit Condition window to set options for that condition. You would then select Numeric as your condition option, because the condition value—233—is a number.

You don’t need to specify options for every condition you set. Depending on what you select from the Condition box of the Add Condition window or the Edit Condition window, you see either a Next or a Save button. The Next button takes you to the Condition Options window. The options displayed depend on what condition you select in the Condition box.

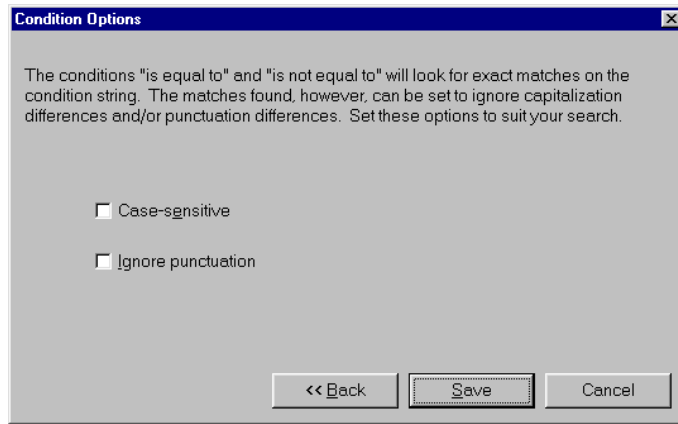
For information about the Condition options window, see "About the Condition Options window" in the *Materials* chapter of the *Spectrum CIRC/CAT Reference Manual*.

How to set condition options

Example scenario: You have set up a condition that specifies that Author values must be equal to "Martan, Louise". The program allows you to specify two options for this condition: "Case-sensitive" and "Ignore punctuation". You want to specify that the condition be case-sensitive, and that the program ignore punctuation.

To set options for a condition

- 1 If you have not already done so, click **Add** in the Conditions window and specify the condition. Then click **Next**. The Condition Options window opens.




- 2 Choose the desired options. In this case, select both **Case-sensitive** and **Ignore punctuation**.
- 3 Click **Save**. The program returns you to the Conditions window.

How to edit a condition

Example scenario: You have already set a condition specifying that Author values should be equal to "Martan, Louise". Now you realize that you misspelled the author's name. You want to change this condition to specify that values be equal to "Marten, Louise".

To edit a batch process condition

- 1 In the Conditions window, select the condition you want to edit from the list of existing conditions.
- 2 Click **Edit**. The Edit Condition window opens.



- 3 Make the necessary changes. In this case, in the **Condition value** box, type *Marten, Louise*.
- 4 Click **Next**.

You can now set the options for this condition. For more information, see "Setting options for batch process conditions" later in this chapter. For more information about the Edit Condition window, see "About the Add and Edit Condition windows" in the *Materials* chapter of the *Spectrum CIRC/CAT Reference Manual*.

Note: With some fields, you cannot set condition options. If so, instead of a Next button, you will see a Save button.

Also, when you choose either Title or Author as the Condition field, you can click the Set Tags button to select the title or author tag numbers to process. For more information, see "Specifying tags to process" earlier in this chapter.

How to remove a condition

Example scenario: You have specified a condition and now realize that it is not needed.

To remove a condition

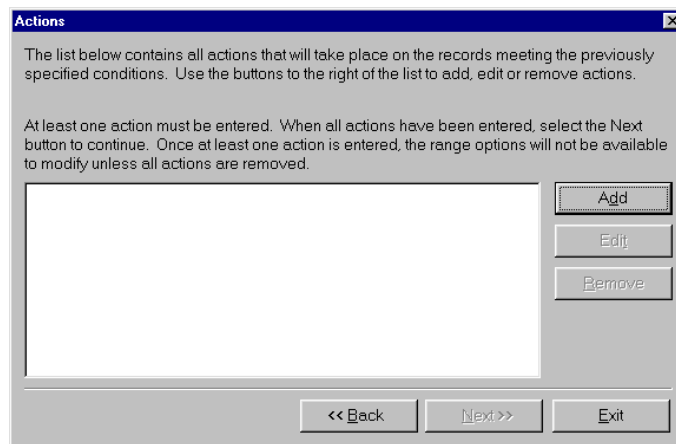
- 1 In the Conditions window, select the condition you want to remove
- 2 Click **Remove**.

Using multiple conditions and Boolean operators

When creating a batch process, you can set more than one condition. When adding a second or subsequent condition, you must include a Boolean operator (AND or OR) so that the program knows how to apply the multiple conditions. These options are both available in the Add Condition window whenever you add multiple conditions.

Step 3: Setting batch process actions

When you click Next in the Conditions window, the Actions window opens.



For information about the Actions window, see "About the Actions window" in the *Materials* chapter of the *Spectrum CIRC/CAT Reference Manual*.

In the Actions window, you can open the Add Action and Edit Action windows. In the Add Action or Edit Action window, you select the action to be done, the field to apply the action to, and how the field is to be changed. You can define up to five modifications—depending on the actions that you select (if you choose to delete, no additional modifications are allowed). When you have finished, you should be able to read your settings like a sentence. For example, an action might read "Replace the field Author with King, Stephen."

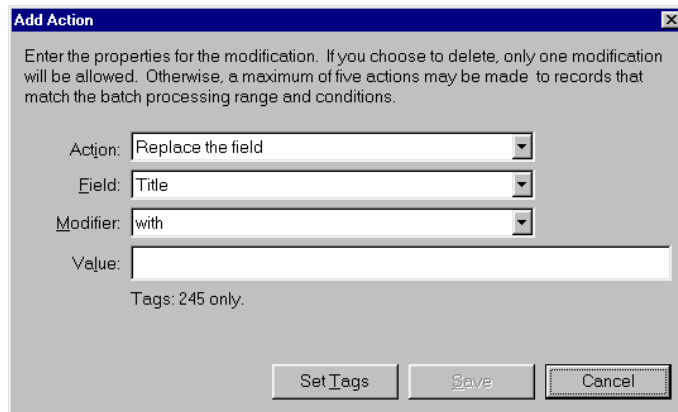
After at least one action is entered, the range options are not available to modify in the Range window until you remove all actions.

How to add an action

Example scenario: Some records in your library have the author listed as "Marten, Louise" instead of "Martin, Louise". You have already specified the range and condition necessary to process these records. Now you want to specify an action that changes the contents of the author fields to "Martin, Louise".

To add a batch process action

- 1 Click **Add** in the Actions window. The Add Action window opens.



- 2 Select an action to perform from the **Action** box. In this case, choose **Replace the field**.
- 3 Select a field from the **Field** box. In this case, choose **Author**.
- 4 Select a modifier from the **Modifier** box. In this case, choose **with**.

5 Enter the appropriate information in the **Value** box. In this case, type *Martin, Louise*.

6 Click **Save**.

Note: If you choose either the Title or Author field, you can click Set Tags to select the title or author tag numbers to process. For more information, see "Specifying tags to process" earlier in this chapter.

How to edit an action

Example scenario: You have already entered an action and now realize that you need to change it.

To edit a batch process action

- 1 Select the action you want to edit from the list of actions in the Actions window.
- 2 Click **Edit**. The Edit Action window opens.

Enter the properties for the modification. If you choose to delete, only one modification will be allowed. Otherwise, a maximum of five actions may be made to records that match the batch processing range and conditions.

Action: Replace the field

Field: Author

Modifier: with

Value: Martin, Louise

Tags: 100 only.

Set Tags Save Cancel

3 Make the necessary changes.

4 Click **Save**.

How to remove an action

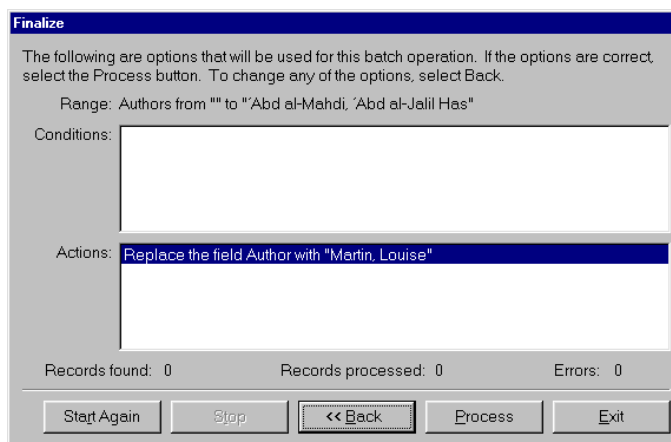
Example scenario: You have already entered an action and now realize that it is no longer needed.

To remove a batch process action

- 1 In the Actions window, select the action that you want to remove.
- 2 Click **Remove**.

Step 4: Verifying batch process settings

When you click Next in the Actions window, the Finalize window opens.



All of the batch process settings appear in the Finalize window. For more information about the Finalize window, see "About the Finalize window" in the *Materials* chapter of the *Spectrum CIRC/CAT Reference Manual*.

Before you click the Process button to begin the batch process, carefully look over your options to make sure that you chose the correct range, conditions, and actions. If the options aren't correct, you can return to the previous windows to change them. Remember, if actions exist, the range options are unavailable for modification until you remove the actions.

Step 5: Starting the batch process

Once you have verified that all your settings are correct, you can start the batch process.

To start the batch process

- 1 Review the options in the Finalize window. (If the current batch process options aren't correct, you can change them by clicking **Back** or cancel the entire process by clicking **Exit**.)
- 2 Click **Process** to start the batch process (click **Stop** to cancel the process). When the batch process is done, an information window informs you that the process is complete. (If an action cannot be performed on one or more records, you are informed of the reason.)
- 3 Click **OK**.



To start another batch process, click Start Again. To exit the batch process function, click Exit.

Creating material custom indexes

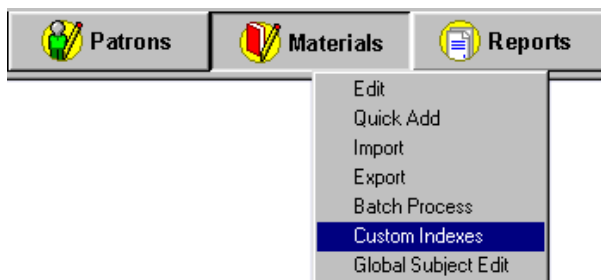
In Spectrum CIRC/CAT, your material database is automatically indexed by some material fields, so that you can sort your records by these fields. You can also create and save your own indexes. These custom indexes can be based on a single field or on multiple fields. You can even combine fields from both MARC and holding data. When new material records are added to the database, all existing custom indexes are automatically updated to include the new records.

Once you have created an index, you can use it when exporting materials and printing reports, just as you would a standard index. For example, if you are ordering books, you might create an index sorted by call number, publisher, and title, and then print a report based on this index. Or, to create a report of new books, you could create an index based on the date added, call number, and title fields. Later when generating the report, you could sort and limit it based on this index.

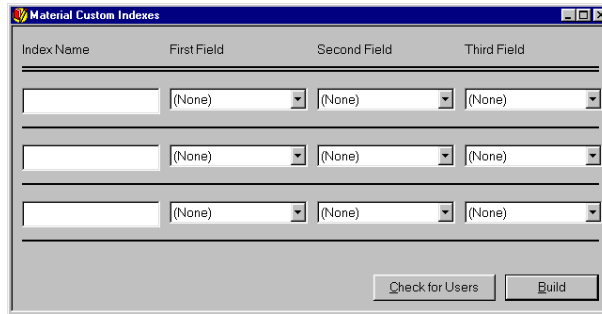
Opening Material Custom Indexes

To open Material Custom Index

From the Navigator toolbar, click the **Materials** button and choose **Custom Indexes**.



The Material Custom Indexes window opens.



Material Custom Indexes window

If there are no existing custom indexes, the Index Name fields are blank and all First, Second and Third Field values are set to None.

For information about the Material Custom Indexes window, see "About the Material Custom Indexes window" in the *Materials* chapter of the *Spectrum CIRC/CAT Reference Manual*.

Creating and editing material custom indexes

To create or edit a material custom index, you enter an index name, select the appropriate fields and have the program build the index. If the index already exists, the program informs you and confirms that you want to rebuild the index.

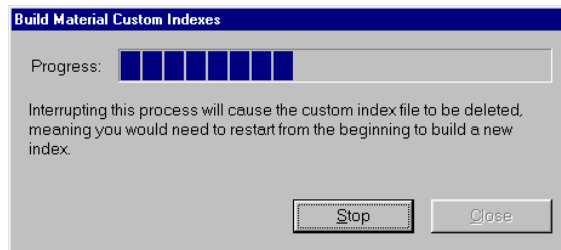
How to create or edit a material custom index

Example scenario: You want to create an index called "AUTHOR DATE" that first sorts by author name and then sorts by date added. In other words, you want records arranged by author. However, if several records have the same author name, you want that group of records further sorted by date added.

To create or edit a material custom index

- 1 From the Navigator toolbar, click the **Materials** button and choose **Custom Indexes**. The Material Custom Indexes window opens.
- 2 Enter the name of the material custom index in the **Index Name** box. In this case, type *AUTHOR DATE*. Notice that the characters are displayed in capital letters.

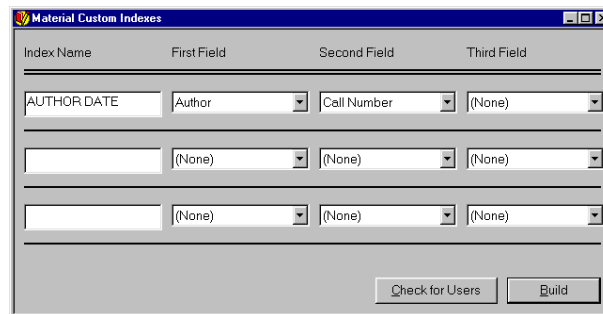
- 3 Select the fields to be indexed by in the **First Field**, **Second Field**, and **Third Field** boxes. (If you don't use a field, select **(None)** in its box.) In this case, choose **Author** for the **First Field**; choose **MARC Date Added** for the **Second Field**; choose **(None)** for the **Third Field**.
- 4 To check whether the material files are in use, click **Check for Users**. The Check for Users window opens, informing you whether other users are using the material files. You cannot build a custom index while the material files are in use.
- 5 Click **Build**. The Build Material Custom Indexes window opens and shows the progress of the build process.



- 6 When the window indicates that the custom index is complete, click **Close**.

Note: If you stop the build process, the index is not built. To build it, you must restart the process. (If you don't explicitly build a custom index, the index files are created the next time a program opens them, so they show up on your hard disk, but they won't have useful information in them.)

After building the index, it is displayed in the Material Custom Indexes window.



Material Custom Indexes window

After you build a custom index, the index name and fields are displayed in the boxes.

Renaming material custom indexes

You can rename a material custom index without having to rebuild the index.

How to rename a material custom index

Example scenario: You have already built a material custom index called "AUTHOR DATE". Now you want to change the index name to "AUTHOR BY DATE ADDED".

To rename a material custom index

- 1 From the Navigator toolbar, click the **Materials** button and choose **Custom Indexes**. The Material Custom Indexes window opens showing all existing custom indexes.
- 2 For the index you want to change, enter the new name in the **Index Name** box. In this case, enter *AUTHOR BY DATE ADDED*.
- 3 Click **Build**. The program informs you that only the name changes.
- 4 Click **OK**.

Removing material custom indexes

If you no longer need a particular material custom index, you can remove it from the system.

How to remove a material custom index

Example scenario: You have previously created a material custom index called "AUTHOR BY DATE ADDED". You no longer need this index and now want to remove it.

To remove a material custom index

- 1 From the Navigator toolbar, click the **Materials** button and choose **Custom Indexes**. The Material Custom Indexes window opens showing all existing custom indexes.
- 2 For the index that you want to remove, in this case *AUTHOR BY DATE ADDED*, delete the name of the material custom index from the **Index Name** box.
- 3 In the **First**, **Second**, and **Third Field** boxes, select **(None)**.
- 4 Click **Build**. The Build Material Custom Indexes window opens.
- 5 When the custom index is removed, click **Close**.

Using material custom indexes

You can use material custom indexes when exporting material records and when printing reports. When performing these activities, your custom indexes can be selected from the Index box. You will notice that custom index names are always displayed in capital letters.

When exporting records or printing a report, if you select a material custom index, the default custom index range is displayed. The Change Custom Index Range button is also enabled. When you click this button, the Custom Index Range Selection window opens, so that you can use the index to specify a range. To help you do this, the Custom Index Range Selection window lists the field(s) the index is built on, and lets you specify a range for each. The first index field defaults to the lowest and highest values in the database so all records are initially included in the range. The second and third index fields, if available, are blank by default.

For example, you might want to create a list of new books that were added to your database within the past year. You could create a custom index to sort your material records by date added, call number, and title. Later, when you print the report, you could choose this index and specify the appropriate range of dates.

For more information on using material custom indexes, see "Exporting material records" earlier in this chapter and "Selecting a custom index range" in the *Reports* chapter of this manual.

Editing subjects globally

Because of data entry errors, there may be several variations of the same subject in your database. The Global Subject Edit feature allows you to find and fix subject variations, so that only the correct subject is used.

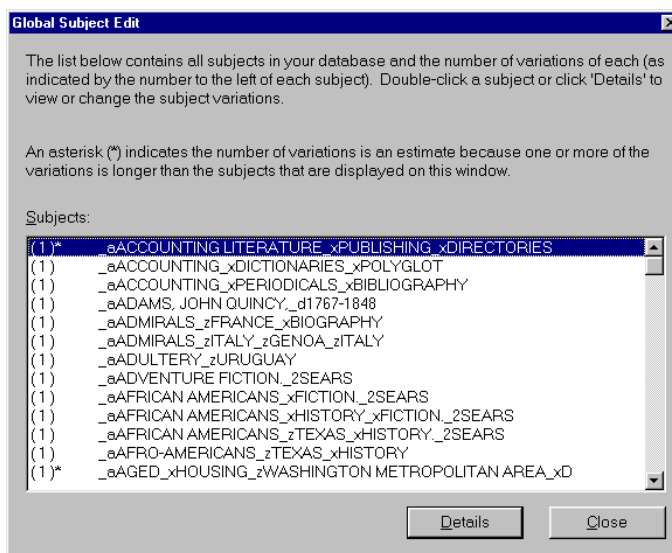
Opening Global Subject Edit

To open Global Subject Edit

From the Navigator toolbar, click the **Materials** button and choose **Global Subject Edit**.



The Global Subject Edit window opens and displays a list of all subjects in your database. You can use the scroll bar and the up and down arrow keys to view more of the list.



For information about the Global Subject Edit window, see "About the Global Subject Edit window" in the *Materials* chapter of the *Spectrum CIRC/CAT Reference Manual*.

What are subject variations?

Subject variations are subjects that are alike except for punctuation or capitalization. For example, the following are subjects of three different materials:

_aAustralian Inventors_xBiography_xJuvenile Literature

_aAustralian Inventors_xBiography_xJuvenile Literature

_aAustralian Inventors_xBiography_xJuvenile Literature.

As you can see, the first two subjects are identical. The last subject ends with a period, so it is a variation of the first two. However, when determining variations, the program checks only the first 48 characters. If one or more of the subjects are longer than the 48 character limit, the program assumes that they are variations. In this example, the subjects are longer than 48 characters. Therefore, the program assumes that all three are variations of the same subject. Since this may not actually be the case, the program indicates that the number of variations is an estimate.

In the Global Subject Edit window, the subject is displayed as:

(3) * _aAUSTRALIAN INVENTORS_xBIOGRAPHY_xJUVENILE LITE

Note: The "3" refers to the number of subject variations. The asterisk indicates that the number of variations is an estimate. In the case of an estimate, you can check to see if there really are variations by viewing the subject details. For more information, see "Viewing subject details".

Viewing subject details

You can view subject details when you want to see the different variations of a particular subject and determine how many times the variation occurs in your database. When displaying subject details, the program shows the subjects as they currently exist in the database—with no changes to the punctuation and capitalization. The program also includes all subfields.

Note: You can select various subject variations and globally change them to make them all the same. For more information, see "Changing subjects" later in this chapter. If a subject exceeds 150 characters, you cannot change it in Global Subject Edit. However, you can change it in the Material Edit part of the program. For instructions, see "Editing existing material records" earlier in this chapter.

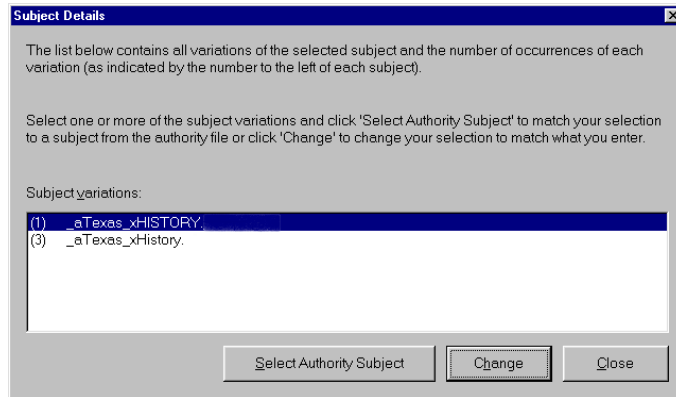
How to view a subject's details

Example scenario: The Global Subject Edit window shows that there are two variations of the subject a_TEXAS_x_HISTORY. You want to see each variation and learn how many times it occurs in your database.

To view subject details

- 1 From the Navigator toolbar, click the **Materials** button and choose **Global Subject Edit**. The Global Subject Edit window opens.
- 2 In the **Subjects** list, select the subject, in this case a_TEXAS_x_HISTORY.

- 3 Click **Details**. The Subject Details window opens and shows the subject variations for the selected subject. The number to the left of the variation indicates how many times it occurs in the database.



For information about the Subject Details window, see "About the Subject Details window" in the *Materials* chapter of the *Spectrum CIRC/CAT Reference Manual*.

Changing subjects

There are two methods of globally changing subjects:

- Browsing through a list of existing subjects and selecting one as an authority subject. The program then replaces all other selected variations with the one you specify as the authority subject. For instructions, see "Using authority subjects".
- Manually entering a subject (or editing a "master subject"). The program then replaces all selected subject variations with the subject you entered. For instructions, see "Using a manually entered subject for global changes" later in this chapter.

Note: If a subject exceeds 150 characters, you cannot change it in Global Subject Edit. Instead, you should use Material Edit. For instructions, see "Editing existing material records" earlier in this chapter.

The Global Subject Edit process also searches for and removes duplicate tags, indicators, and subfields within the same MARC record.

Using authority subjects

An authority subject is a subject in your database that you use to replace incorrect subject variations. For example, if you have three variations of the same subject, you could choose one as the authority subject and use it to replace the other two variations.

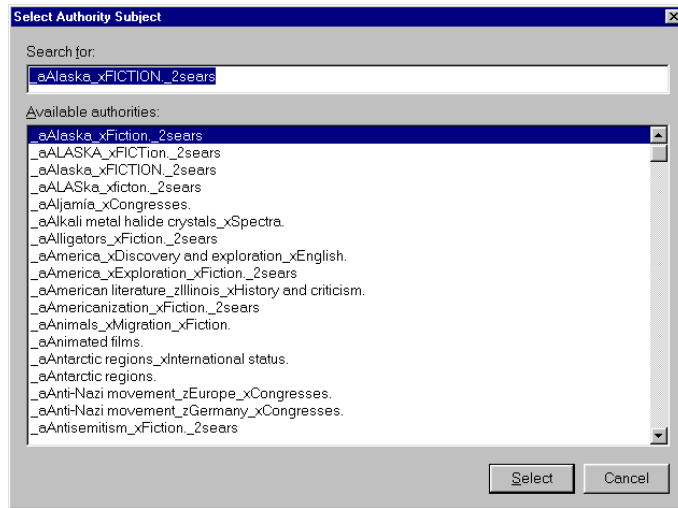
You can browse through the list of existing subjects and select one to use as the authority subject. Or, instead of browsing, you can search for a specific subject. Once you have chosen the authority subject, the program replaces all selected variations with the authority subject.

How to use an authority subject

Example scenario: The Global Subject Edit window shows that there are three variations of the subject *_aALASKA_xFICTION._2SEARS*. You want to use the authority subject method to change all variations to *_aAlaska_xFiction._2sears*. (This variation of the subject does occur in your database.)

To use an authority subject

- 1 In the Global Subject Edit window, select the subject *_aALASKA_xFICTION._2SEARS* and click **Details**. The Subject Details window opens.
- 2 In the **Subject variations** list, select the subject variation(s) that you want to change. In this case, choose all variations except *_aAlaska_xFiction._2sears*. (To select or deselect a variation, click it.)
- 3 Click **Select Authority Subject**. The Select Authority Subject window opens.



4 Locate the subject that you want to use as the authority subject. (You can type the first few characters in the **Search for** box to have the program move to the first subject that matches the characters you enter.)

Or, you can use the scroll bar to browse for the subject.

Note: The Select Authority Subject window displays subjects as they currently exist in the database—with no changes to the punctuation and capitalization—and includes all subfields.

5 In the **Available authorities** list, select the subject that you want to use as the authority subject. In this case, select aAlaska_xFiction_2sears.

6 Click **Select**. The Confirm Subject Change window opens to confirm that you want to change the selected subject(s).

7 Click **Yes**.

For information about the Select Authority Subject window, see "About the Select Authority Subject window" in the *Materials* chapter of the *Spectrum CIRC/CAT Reference Manual*.

Using a manually entered subject for global changes

You can also enter a subject manually, and have the program change all selected variations to the subject you enter. You can enter a subject by typing it or by choosing an existing subject (master subject) and editing it.

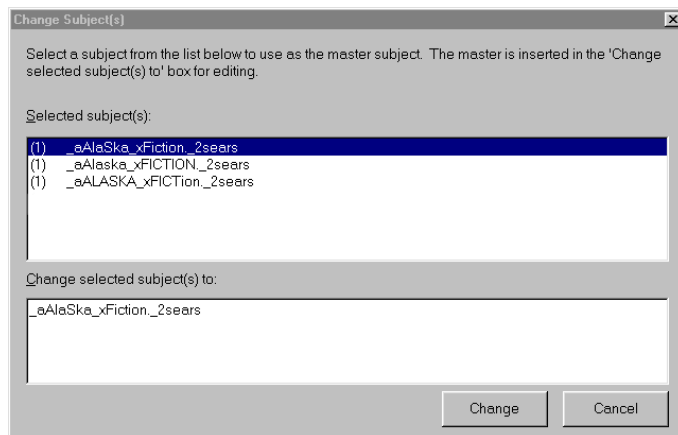
Once you have entered the subject, the program replaces all selected variations with the subject you entered.

How to use a manually entered subject for global changes

Example scenario: The Global Subject Edit window shows that there are three variations of the subject `_aALASKA_xFICTION._2SEARS`. You want to use the manual method to change all variations to `_aAlaska_xFiction._2sears`. (This variation of the subject does not occur in your database.)

To change subject variations

- 1 In the Global Subject Edit window, select the subject `_aALASKA_xFICTION._2SEARS` and click **Details**. The Subject Details window opens.
- 2 In the **Subject variations** list, select the subject variation(s) that you want to change. In this case, select all variations. (To select or deselect a variation, click it.)
- 3 Click **Change**. The Change Subject(s) window opens.



- 4 In the **Selected subject(s)** list, select a master subject that you can easily change to the desired subject. In this case, choose the subject that is closest to `_aAlaska_xFiction._2sears`. The program enters this subject into the **Change selected subject(s) to** box.
- 5 Edit the subject in the **Change selected subject(s) to** box. In this case, change it to `_aAlaska_xFiction._2sears`.
- 6 Click **Change**. The Confirm Subject Change window opens to confirm that you do want to change the selected subject(s).
- 7 Click **Yes**. The Subject Change Progress window opens and displays the progress of the global change.



You can click **Stop** to end the process, **Pause** to pause the process, and **Continue** to start it again.

Note: You cannot enter invalid characters in the Change Subject(s) window. Invalid characters are the caret (^) and the grave accent mark (`). You also must enter subfields correctly; the subfield delimiter (_) must be followed by a lowercase letter or a number.

For information about the Change Subject(s) window, see "About the Change Subject(s) window" in the *Materials* chapter of the *Spectrum CIRC/CAT Reference Manual*.

