

Exporting Materials from Spectrum

Our contract with Auto-Graphics allows libraries to submit their complete database on a monthly basis (or as frequently as they choose) at no additional cost to iCONN. Processing your complete database each time, rather than processing transactions containing only additions and deletions since the time of last contribution, is the preferred (the most accurate and the least complex) method of updating your library's holdings in reQuest. However, instructions for submitting only transactions are presented here as well.

A. Exporting the complete database

You can copy material records from Spectrum by exporting them to a file. The records can then be used by another program, such as Sagebrush's BenchMARC or EnrichMARC. You may also want to export material records to make them available to another library. Any data exported from Spectrum will be in MARC 21 with 852 holdings format (also known as USMARC/852 Holdings Data protocol), which is the industry standard.

The following instructions will assist you with the export process:

1. On the main Spectrum Circ/Cat screen, click the MATERIALS button and select EXPORT. The *Material Export* window will open.
2. In the *Format* field, select *USMARC/852 Holdings Data*.
3. In the *Export* field, choose *Materials Within a Given Range* from the drop-down menu.

Note: If you want to export all materials, select All Materials (in MARC file order) and go to step 6.

4. In the *Index* field, select one of the following indexes for the materials you plan to export: *material number*, *call number*, *material type*, *user-defined fields*, or *fund*.
5. Type in the range of materials that you want to export in the *Start at* and *End at* fields.
6. Type the name **microlif.001**, or another file name of your choice (ex: xyz library 9.16.04), into the *Output file* field, and browse to the location where you wish to save the file.
7. Click the EXPORT button.
8. A window may open stating that *the log file m_Export.log already exists*. Click APPEND.

9. The records will export. When the process is complete, a window will open informing you of the number of records exported and the location of the export file. Click OK.
10. Close the Material Export window by clicking the X in the top right-hand corner (Windows) or the close box in the top left-hand corner (Mac).

B. Using a Custom Index to send Updates

To send updates (adds, deletes, changes), you need to export a file of materials added during a particular time period. For example, you want to send records to reQuest for materials added from September 1-September 15, 2004. The following steps will guide you through the process of creating a Custom Index and then using this Custom Index to export materials from your collection.

Step One: Creating a Custom Index

1. Close all modules (such as Circulation or Material Edit) on your workstation. Close Spectrum on all other client stations, including the Patrons' Catalog. If you are running Spectrum Web Catalog, you must disconnect it from the Spectrum Server.
2. On the main Spectrum Circ/Cat screen, click the MATERIALS button and select *Custom Indexes*. The *Material Custom Indexes* window will open.
3. In the *Index Name* field, enter a descriptive name for the custom index. This can be any unique name that will help you find this Custom Index in the Index list later. For our example, you may wish to name your Custom Index "reQuest Export."

Note: *Your Custom Index name must be distinct from any of the fields available in the Custom Index. For example, you cannot name your Custom Index "Author" or "Material Number" because these field names are used in the Custom Index.*

4. In the *First Field*, select *Holdingdate added*.
5. Leave the *Second Field* blank.
6. Leave the *Third Field* blank.
7. Click the CHECK FOR USERS button to see if any other client stations are still connected.
 - a) If the window reads "*The material files are not currently in use*," click OK and proceed with step 9 below.
 - b) If the window reads "*The material files are in use by another part of this program*," click OK and proceed with step 8.

8. Ensure that you have closed Spectrum on all other client stations and that you have closed all other modules on your workstation. Also ensure that Spectrum Web Catalog is disconnected from the Spectrum Server if you are running it. Click the CHECK FOR USERS button again. The window should now read *The Material Files are not currently in use*. Click OK and continue with step 9.

Note: *Spectrum's Ctadmn utility can help you to monitor client stations that are still open and disconnect these client stations so that you can proceed with building your custom index.*

9. From the *Material Custom Index* window, click BUILD. This process may take some time (5-15 minutes.)
10. When the process is complete, click CLOSE. Close the *Material Custom Index* window by clicking the X in the top right-hand corner (Windows) or the close box in the top left-hand corner (Mac). Continue with Step Two.

Step Two: Using the Custom Index to export materials

1. On the main Spectrum Circ/Cat screen, click the MATERIALS button and select *Export*. The *Material Export* window will open.
2. In the *Export* field, choose *Materials Within a Given Range* from the drop-down menu.
3. In the *Format* field, select *USMARC/852 Holdings Data*.
4. In the *Index* field, select the Custom Index that you created in Step One from the drop-down menu. You will find the Custom Index at the bottom of the drop-down list. (You may need to scroll down to find it.)
5. Click the CHANGE CUSTOM INDEX RANGE button.
 - a. In the *Start at* box enter the first date you wish to include (ex: 9/1/2004).
 - b. In the *End at* box enter the last date you wish to include (ex: 9/15/2004).
 - c. Click OK to close the window.
6. Type the name **microlif.001**, or another file name of your choice (ex: xyz library 9.16.04), into the *Output file* field, and browse to the location where you wish to save the file.
7. Click the EXPORT button.
8. A window may open stating that the log file m_Export.log already exists. Click APPEND.
9. The records will export. When the process is complete, a window will open informing you of the number of records exported and the location of the export file. Click OK.
10. Close the Material Export window by clicking the X in the top right-hand corner (Windows) or the close box in the top left-hand corner (Mac).

For further assistance, contact Technical Support at 1-866-639-7611 or 1-800-661-4109, or via e-mail to support@sagebrushcorp.com.

Once you export your records from your local system into a file or files, you can electronically send these records Auto-Graphics. To FTP the files to A-G, see instructions at: <http://iconn.auto-graphics.com/staff/documents/FTPprocedure.pdf> .

Instructions provided with help and support from Kathleen Nowak, East Haddam Elementary School; documentation provided by Jeffrey P. Roth, Senior Account Manager, Sagebrush Corporation.