

Moving To Spectrum

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Moving to 5.0 from Winnebago CIRC/CAT for MS-DOS

Understanding the moving process

This section of the chapter describes the steps necessary for moving your circulation, patron, setup, and cross-reference data from Winnebago CIRC/CAT for MS-DOS to Spectrum CIRC/CAT. These directions assume that your Spectrum CIRC/CAT program is already installed, but no patrons or materials have been added yet. Information on installing Spectrum CIRC/CAT has been covered earlier in this installation guide.

Moving from CIRC/CAT for MS-DOS to Spectrum CIRC/CAT involves a few steps:

- 1 Installing the Winnebago Spectrum CIRC/CAT program including:
 - The Moving To Spectrum program. This is installed at the same time as your Spectrum Server or Spectrum Single-user program.
 - Spectrum CIRC/CAT 5.0
- 2 Running the Finetune program to prepare your material data for exporting. You should receive this floppy disk with your Spectrum 5.0 package.
- 3 Exporting your data from your Winnebago CIRC/CAT for MS-DOS program using the DOS CIRC/CAT Export 5.0 program. You should receive this floppy disk with your Spectrum 5.0 package.
- 4 Importing data into your empty Spectrum CIRC/CAT program database using the Moving To Spectrum program. If you import into a Spectrum CIRC/CAT database that is not empty, any files currently in your Spectrum CIRC/CAT database will be deleted.

Sagebrush suggests that you have a technical specialist help you with these processes.

These instructions go in order from start to finish. Don't skip ahead to a new section of instructions until you've completed the current section. As you go through the instructions, we suggest you check off each step as you complete it. This tracks your progress in case you get interrupted or need to stop for the day.

The following table describes the three programs used to transfer the data.

| Program | Description |
|-------------------------|--|
| Finetune | Prepares the material data for exporting by converting the files to a form that is more easily read by Spectrum CIRC/CAT. You should receive this floppy disk with your Spectrum 5.0 package. |
| DOS CIRC/CAT Export 5.0 | Exports setups, circulation data, materials, patrons, and cross-reference words from your CIRC/CAT for MS-DOS program. <i>Note:</i> You must use the DOS CIRC/CAT Export 5.0 program that you receive with the Spectrum 5.0 program. Using an earlier version of the export program will not work if you have installed Spectrum CIRC/CAT 5.0. You should receive this floppy disk with your Spectrum 5.0 package. |
| Moving To Spectrum | Imports the setups, circulation data, materials, patrons, and cross-reference words into your Spectrum CIRC/CAT database. This program can be installed when you install the Spectrum Server or Single-user program. See the <i>Spectrum Server</i> or <i>Single-user</i> chapter in this guide for instructions on installing the Moving To Spectrum program. |

Understanding holdings

A *holding* is a term used in the Spectrum CIRC/CAT program. In Spectrum CIRC/CAT, a material record contains all the data describing a material, such as the MARC 21 information and commonalties associated with all copies of the material (title, author, subject, and so on). A *holding* is a record of each copy of a material (not to be confused with *copy* in CIRC/CAT for MS-DOS). A holding includes information specific to each copy of a material, including barcode number, local call number, and so on. Every material record must have at least one holding.

Preparing for the moving process

If you've entered records into your Spectrum CIRC/CAT database, you should export them now and then re-import after you're finished with the moving process. The moving to Spectrum process overwrites any data in the Spectrum program. It's important that you make sure your Spectrum CIRC/CAT database is empty before you begin. If you import into a Spectrum CIRC/CAT database that is not empty, any files currently in your Spectrum CIRC/CAT database will be deleted. If you've entered records into your Spectrum CIRC/CAT database, you should export them now and then re-import after you're finished with the moving process.

Before you start the export/import process, you must:

- Print a copy of your Winnebago CIRC/CAT for MS-DOS system information. To do this: From the Main menu, choose Reports
 System information. Press the Print Scrn key on your keyboard or press Shift + Print Scrn. (If printing doesn't work, write down your information on a piece of paper.)
- 2 Back up your current Winnebago CIRC/CAT for MS-DOS program.
- 3 Run the Finetune program that you received on a floppy disk. See the Finetune directions below.
- 4 If you use Winnebago CIRC/CAT for MS-DOS, especially version 6.7, you must set the Convert diacritics on import/export of materials option to N. To access this option, from the Main Menu select Setups/Utilities > System Utilities > Set System Options. Set option 5 to N.
- 5 Exit all Sagebrush programs.

Running the Finetune program

Before you run the Finetune program, you should make a backup of your library's material records. In the event of an error during the Finetune processing, a backup lets you revert to your original records.

To run Finetune

- 1 Insert the **Finetune** floppy disk into the floppy disk drive of your server computer.
- 2 At the DOS prompt, type *a:finetune* (where a: is your floppy drive letter) and press the **Enter** key. The Finetune program opens.
- 3 Type the path to the directory of your Winnebago CIRC/CAT for MS-DOS program and press **Enter**.
- 4 From the **Select an Index** menu, select the index by which you want to arrange your material records for processing. Sagebrush recommends that you use the first selection, **Barcode**. Use the arrow keys on your keyboard to select the index and press **Enter**.
- 5 Type the first and last material barcodes of the range that you want processed and press **Enter** after each number you type. The first and last barcodes of your current material records are listed by default. If you want to export your entire collection, use these defaults.

The window displays the record number and the barcode number of the material processed. When all records are processed, you receive the "Press any key to continue" message.

6 Press any key to exit the Finetune program.

Exporting data using DOS CIRC/CAT Export 5.0

The Winnebago DOS CIRC/CAT Export 5.0 program exports the circulation data, patrons, materials, setups, and cross-reference words from your current CIRC/CAT for MS-DOS program. The following circulation files are exported in a text file format: callpat.imp, mattype.imp, pattype.imp, circ.imp, circlocl.imp, circlog.imp, fine.imp, finelog.imp, lost.imp, matuse.imp, patuse.imp, reserve.imp, dailyuse.imp, matmess.imp, and patmess.imp. Your patron records are exported into a file called patron.win. The material records are exported into a file called microlif.001, and the cross-reference words are exported into a file called words.imp.

Note: You must use the DOS CIRC/CAT Export 5.0 program that you received with Spectrum CIRC/CAT 5.0. Using an earlier version of DOS CIRC/CAT Export will not work after you've installed Spectrum CIRC/CAT 5.0.

To export data from DOS CIRC/CAT

- 1 Insert the **DOS CIRC/CAT Export 5.0** disk into the floppy disk drive of your server computer.
- 2 At the DOS prompt, type *a:process* (where a: is your floppy drive letter) and press the **Enter** key.

The first program window opens.

| Command Prompt - bp insta | | | CIRC/CAT |
|---|--|-----------------------------|--|
| | Winnebago DOS CIRC/CAT Export | | At this window |
| The material, from your CI directory ca | patron and circulation informatic C/CAT directory (C:\CIRC) and put led C:\IMPORT. | n is exported into a new | path of your CIRC/CAT database and |
| CIRC/CAT dire | ctory: C:\CIRC | - | take note of the |
| Export direct | ofy: C:\IMPORT | | directory where your exported data will be |
| Esc Exit | FIO Continue | GIES Move | storeu. |

3 Make sure that the CIRC/CAT directory displayed is the correct path of your DOS CIRC/CAT database. It also displays the directory where your exported data will be stored.

- 4 Write down the location of the **Export directory** (for example, C:\IMPORT). You'll need to locate the directory when you import your files into Spectrum CIRC/CAT.
- 5 Press the F10 key on your keyboard to continue.

The second program window opens.



6 Choose 1) Export Everything from the CIRC/CAT Export Utility Menu.

The export process begins.

| Command Prompt - circ | | | _ 🗆 × | CIRC/CAT |
|--|---|--|--|---|
| Exporting Circulation Exporting Circulation Exporting Fines Exporting Pines of Exporting Reserves . Exporting Material Ty Exporting Material Us Exporting Material We Exporting Material Me Exporting Material Me Exporting Patron Type Exporting Patrons . | CIRC/CAT Log De Usage Usage age als ssages ages s | Export Utility 4725 32435 4022 533 986 86 41869 777 583 1473 14 14 6192 | - EXPORT PROCESS COMPLETE PRESS ANY KEY TO CONTINUE_ | Export Process window This window reports the progress of the Export Utility and informs you when the process is complete. |

The program displays the heading of each file that is exported. The program also informs you when it finishes exporting the records.

- 7 Compare the number of materials, patrons, and materials in circulation from the system information sheet you printed or wrote out with the information on the window. (These are the first three lines of information on your system information report.)
- 8 Press any key on your keyboard to continue.

The last program window opens.



Export Complete window This window informs you the export is complete and was placed in the Import directory.

This window informs you that the data you exported was placed in the Import directory.

- 9 If necessary, display the contents of the **Import** directory by typing *dir* and then the drive letter and import, for example *dir C*:*Import*.
- 10 Eject the **DOS CIRC/CAT Export 5.0** disk from your floppy drive.

After exporting

After you export your CIRC/CAT files (into the Import folder), you must decide on the best way to transfer that data to a location accessible to your Spectrum CIRC/CAT program. This may involve physically moving the Import folder from one computer to another. For quick reference, a standard library collection of 10,000 records usually equals over 12 MB. The following are four standard means for managing this process (listed from the least effort to most effort required):

1 Using the same computer

If your Winnebago CIRC/CAT for MS-DOS and Spectrum CIRC/CAT programs reside on the same computer, you should be able to easily locate the Import folder when you import the files into Spectrum CIRC/CAT. *Note:* You must be able to see both programs on that computer.

2 Using a network

If your Winnebago CIRC/CAT for MS-DOS computer and your Spectrum CIRC/CAT computer reside on the same network, you can transfer the Import folder over the network. *Note:* You must be able to see both computers on the network.

3 Using large removable media

You can move the Import folder using large removable media, such as Zip disks. A Zip disk holds 100 MB of data but requires a Zip drive. You should resort to large removable media if you can't see both programs on the same computer, or you don't have networked computers.

4 Using floppy disks

You can move the Import folder via floppy disks. However, resort to floppy disks only if you can't see both programs on the same computer, don't have networked computers, or don't have access to a higher volume storage medium such as a Zip drive or tape backup. Floppy disks store a smaller amount of information (approx. 1.5 MB). Using floppy disks to move your import information will take longer than the other methods mentioned above. If you need to use floppy disks to transfer data from one computer to another, Sagebrush recommends that you use a compression program. For more on compression programs, see below.

Using a compression program

If you're using floppy disks to transfer your data from one computer to another, Sagebrush recommends that you use a compression program. A compression program reduces the size of files. This technique lets you place more files onto a floppy disk because compressed files minimize the amount of disk storage space required by each file.

There are several compression programs on the market, such as WinZip, Turbo Zip, ZipMagic, and so on. If you currently don't have a compression program, we recommend downloading PKWare's PKZip free from the Internet. PKWare's web address is *www.pkware.com*. For example, you can download PKZip 4.0 for Windows 95/98/NT from their Download Shareware web page at *www.pkware.com/shareware*. PKWare also has a frequently asked questions web page at *www.pkware.com/support/faq.html*.

Important! If you use a compression program to transfer your exported data, you must make sure you extract the data before you try to import it.

Moving to 5.0 from Winnebago CIRC/CAT for Mac OS

Understanding the moving process

The transition from your CIRC/CAT for Mac OS program to Spectrum CIRC/CAT involves the following processes:

- 1 Installing the Winnebago Spectrum CIRC/CAT program including:
 - The Moving To Spectrum program. This is installed at the same time as your Spectrum Server or Spectrum Single-user program.
 - Spectrum CIRC/CAT 5.0
- 2 Export the following data from your CIRC/CAT for Mac OS program:
 - Material records
 - Patron records
 - Circulation data (checkouts, reserves, and so on) and material type and patron type setup data. *Note:* For this step you must use the Mac CIRC Export 2.0.2 program. You should receive this floppy disk with your Spectrum 5.0 package. Using an earlier version of the Mac CIRC Export program will not work if you have installed Spectrum 5.0.
- 3 Import data into your empty Spectrum CIRC/CAT program database using the Moving To Spectrum program. If you import into a Spectrum CIRC/CAT database that is not empty, any files currently in your Spectrum CIRC/CAT database will be deleted.

Sagebrush suggests that you have a technical specialist help you with these processes.

These instructions go in order from start to finish. Don't skip ahead to a new section of instructions until you've completed the current section. As you go through the instructions, we suggest you check off each step as you complete it. This tracks your progress in case you get interrupted or need to stop for the day.

| Program | Description |
|-----------------------|--|
| Mac CIRC Export 2.0.2 | Exports the circulation, material type setup, and patron type setup data from your current CIRC/CAT for Mac OS program. (<i>Note:</i> To export your materials and patrons, you use your Winnebago CIRC/CAT for Mac OS program.) You should receive this floppy disk with your Spectrum 5.0 package. |
| Moving To Spectrum | Imports the exported data into your Spectrum CIRC/CAT database. This program can be installed when you install the Spectrum Server or Single-user program. See the <i>Spectrum Server</i> or <i>Single-user</i> chapter in this guide for instructions on installing the Moving To Spectrum program. |

Exporting your CIRC/CAT for Mac OS data

Before you can start exporting any data, you must:

- Exit all programs (including the server program) on all workstation computers.
- Back up your current CIRC/CAT for Mac OS program.

Exporting circulation, material type setup, and patron type setup data

You must run the Mac CIRC Export 2.0.2 program, which only exports your circulation, material type setup, and patron type setup data. You must use the version of the export program that you receive with Spectrum CIRC/CAT 5.0. Using an earlier version of Mac CIRC Export will not work if you have installed Spectrum 5.0.

To export circulation, material type setup, and patron type setup data

- 1 Quit the Server program.
- 2 Insert the Mac CIRC Export 2.0.2 floppy disk into the computer on which your Winnebago database is located.
- 3 Double-click the Mac CIRC Export 2.0.2 disk icon.

- 4 Locate and drag the **Mac CIRC Export 2.0.2** file into the folder that contains your Winnebago CIRC/CAT program (do not copy it directly into the Winnebago database folder).
- 5 Double-click the Mac CIRC Export 2.0.2 program icon, or select the icon and choose Open from the File menu. The Circulation Export window opens.
- 6 Click **Begin**. If the program successfully exports your setup and circulation data, it displays a summary window. If a file is locked or the disk becomes full, the program displays an error message, and your files are not exported.
- 7 Click OK to close the export summary window.
- 8 Click **Done** to close the program and then eject the **Mac CIRC Export 2.0.2** disk.
- 9 Copy the 15 exported files into one folder (either on your hard disk or on a floppy disk) so you can easily import them into Spectrum CIRC/CAT.

Exporting your material records

You need to export your material records from CIRC/CAT for Mac OS.

To export your material records

- 1 Start your Winnebago CIRC/CAT for Mac OS program.
- 2 Choose Materials > Export from the Winnebago menu.
- 3 Select Export Materials Within a Given Range.
- 4 Select **USMARC/852 Holdings Data** under **Export Format** and specify **material number** as your preference for exporting the material records under Index.
- 5 Select Add 961 tags.
- 6 Click **Select Output File**, specify **MicroLIF.001** as the name (this is the required name), and enter the location where the file will be exported (this must be the same location as the above 15 files that you copied).
- 7 Click Begin Exporting to export the material records.
- 8 When exporting is complete, click **Done**.

Exporting your patron records

When you're done exporting your material records, you can export all or some of your patron records.

To export your patron records

- 1 Choose **Patrons** > **Export** from the **Winnebago** menu.
- 2 Click Set Export Options.
- 3 Choose Text from the Export Format menu.
- 4 Choose **Delimited With <Tab>** from the **Field Format** menu.
- 5 Click OK.
- 6 Click **Select Export File**, specify **patrons.imp** as the name (this is the required name), and enter the location where the file will be exported (this must be the same location as your material records and the 15 files you copied earlier).
- 7 When exporting is complete, click Done.
- 8 Quit your Winnebago CIRC/CAT for Mac OS program.

You have completed exporting data from your CIRC/CAT for Mac OS program.

Importing data using Moving To Spectrum

Before you import your data into Spectrum CIRC/CAT, it's important that your Spectrum CIRC/CAT database is empty. If you import into a Spectrum CIRC/CAT database that is not empty, any files currently in your Spectrum CIRC/CAT database will be deleted.

If you've entered records into your Spectrum CIRC/CAT database, you should export them now and then re-import after you're finished with the moving process.

About the Moving To Spectrum program

The Moving To Spectrum program is a wizard. A wizard program consists of a series of windows that guide you through each step of a multistep operation. These windows offer helpful information and explain options along the way. You're required to specify your import options when using this wizard. After you finish verifying and/or setting your options at each window, click the Next button to continue with the import process. The following pages provide you with detailed instructions for each window of the wizard program.

You should have installed the Moving To Spectrum program on your Spectrum Server or Single-user computer. If you didn't install the Moving To Spectrum program, you must install it before you can go any further by reinstalling Spectrum Server or Spectrum Single-user (for more information on how to install the Moving To Spectrum program, see the *Spectrum Server* or *Single-user* chapter in this manual). The directions that follow assume that you installed the program in the default locations (your path may differ if you installed to a location other than the default).

Important! Before you start the moving to Spectrum process, make sure your Spectrum programs are not running.

To import data into Spectrum CIRC/CAT

1 Start the Moving To Spectrum program.

For the client/server version of Spectrum CIRC/CAT on a Windows-based computer, click the **Start** button and choose **Winnebago Spectrum Server (server name)** > **Moving To Spectrum.**

For the client/server version of Spectrum CIRC/CAT on a Macintosh computer, double-click the **Moving To Spectrum** program icon in the **Winnebago Spectrum Server** folder on your computer's active hard drive.

For the Single-user version of Spectrum CIRC/CAT on a Windows-based computer, click the **Start** button and choose **Winnebago Spectrum Single-user** > **Moving To Spectrum**.

For the Single-user version of Spectrum CIRC/CAT on a Macintosh computer, double-click the **Moving To Spectrum** program icon in the **Winnebago Spectrum** folder on your computer's active hard drive.

The Moving To Spectrum window opens.

| Moving to Spectrum Velcome to the Moving to Spectrum program. This program will allow you to transfer the files previously exported from your Winnebago CIRC/CAT for DDS or CIRC/CAT for Mac program. (For more complete instructions, see the instruction manual.) | Moving To Spectrum window This window introduces you to the import process. Here you must read and |
|---|---|
| Before running this program you must have: 1. Run either the CIRC/CAT DOS or CIRC/CAT Mac export program. 2. Placed the exported files in a directory accessible to this machine. 3. Installed this program in the same directory as your Spectrum CIRC/CAT database. | verify the three items in the window before you can continue with the import process. |
| Please carefully follow the directions in the following windows. The information provided will determine how your data is imported into the Spectrum CIRC/CAT program. | |
| <u>Next>></u> E <u>x</u> it | |

2 Read and verify the information in the window, then click **Next** to continue.

The Import Folder Path window opens.

| Import Folder Path Import Folder Import Folder Path Import Folder Path | Import Folder Path window Here you set the path to the files you want to import |
|---|---|
| Import folder path | inport. |
| << <u>B</u> ack <u>N</u> ext⇒>> E <u>x</u> it | |

You need to specify the path to the circulation, patron, material, and other files that you want to import into the Spectrum CIRC/CAT program's database. To do this you must locate the circ.imp file, which was created when you exported your files from the Winnebago CIRC/CAT for Mac OS or Winnebago CIRC/CAT for MS-DOS database. The Moving To Spectrum program uses the path to circ.imp because all the other files exported from the Winnebago CIRC/CAT program should be in the same folder as circ.imp.

3 Click the Browse button.

The Open window opens. To locate the circ.imp file using the Open window, see the "Locating the circ.imp file" section.

| Shows the available drives and directories | Navigates up one drive or folder com folder you're curre | level to the taining the ntly viewing | eates a new folder | ١ | |
|---|--|--|---|---|---|
| The Look in box shows the folder currently displayed | Cpen Look in: 🔁 Unio | on Server | | ?× | Open window This is one example of an Open |
| Shows the content of the folder listed in the Look in box File currently selected Only files of this type appear in the window | FAIRUTIL C_crotta.dat C_crotta.idx C_crotcl.idx C_crotcl.idx C_crotcl.idx C_fnedta.dat File name: Files of type: All | C_fnedta.idx C_matmss.dat C_matmss.idx C_svdta.dat C_rsvdta.idx C_rsvdta.idx C_rsvdta.idx Thes (*.*) | Ctrdmp.exe Ctsrvr.cfg Ctsrvr.exe CTSTATUS.FCS Cdefktags.cfg Cdefktags.cfg Cdeftypes.cfg | F_tcpip.dl FAIRCOM. Fnetbios.d kywrdoff.c L0000001. m_author.c Dpen Cancel | window. Shows a detailed view of the folder's contents. Shows a list view of the folder's contents Click the Open button to open the file currently selected Click the Cancel button to close the Open window without selecting a file to open |

This box shows the folder currently displayed.

Shows the content of the folder listed .File currently selected



Open window (Macintosh)

This is one example of an Open window on a Macintosh computer.

Click the Cancel button to close the Open window without selecting a file to open

Click the Open button to open the file currently selected

Locating the circ.imp file

You can browse to locate the circ.imp file to import it.

To locate the circ.imp file (Windows)

- 1 In the Open window, search for the **circ.imp** file.
- 2 If the circ.imp file is displayed in the Open window, select it and click **Open**.

If the folder containing the circ.imp file is displayed in the Open window, select the folder and click **Open**. (Its contents become visible.) Then select the circ.imp file and click **Open**.

If neither the circ.imp file nor its folder are in the Open window, you need to locate the drive and then the folder where the circ.imp file is stored (continue with step 3).

- 3 To navigate to the **Import** folder, which contains **circ.imp**, click the down arrow in the drop-down box located in the upper part of the window.
- 4 Find the correct drive or folder, select it and click **Open**. The contents of the item you selected are displayed in the scrollable box.
- 5 When you find the **Import** folder, select it and click **Open**. Then select **circ.imp** and click **Open**.

You're returned to the Import Folder Path window.

To locate the circ.imp file (Macintosh)

- 1 In the Open window, search for the circ.imp file.
- 2 If the file is displayed in the Open window, select it and click **Open**. If the folder is *not* displayed in the Open window, you need to locate the drive or folder where the folder/file is stored (continue with the steps below).
- 3 To navigate to the **Import** folder, which contains **circ.imp**, click the down arrow in the drop-down box located in the upper part of the window.
- 4 Find the correct drive or folder, select it and click **Open**. The contents of the item you selected are displayed in the scrollable box.
- 5 When you find the **Import** folder, select it and click **Open**. Then select **circ.imp** and click **Open**.

You're returned to the Import Folder Path window.

Moving To Spectrum steps continued...

4 Click Next.

The Barcode Information window opens.

| efore running this import program, yo | ou should verify the following: |
|--|--|
| The System Setup Partition The following barcode loc fourteen-digit barcodes. | on for Material and Patron range is currently blank. ation option is set correctly if using |
| fter completion of this import program nported material and patron records. | n, you will be able to view the existing ranges for your |
| Set the barcode location option | |
| Four-character location code if u | using fourteen-digit barcodes: |
| | |
| | |
| | |
| | < <back next="">> Exit</back> |

Barcode Information window

Here you set up your barcode options for Spectrum CIRC/CAT. Make sure your partition information in your Spectrum CIRC/CAT program is currently not set up.

- 5 You must make sure your Spectrum CIRC/CAT Location Setup partition for material and patron range is blank. This lets your imported MARC and patron records use the assigned barcodes from your CIRC/CAT for Mac OS or CIRC/CAT for MS-DOS program.
- 6 Read and verify the information in the top portion of the window.
- 7 Enter your four-character location code, if necessary. You should enter a four-character location code if you were using fourteendigit barcodes with your CIRC/CAT for Mac OS or CIRC/CAT for MS-DOS program.
- 8 Click Next to continue.

The Material Holdings Options window opens.

| 🚼 Material Holdings Options 🛛 🗙 |
|---|
| Material records will be imported using USMARC/852 Holdings Format. Holdings will use imported barcodes and will include the user defined tags(961u). Any existing material records will be deleted during the import process. Keywords will automatically be built during the import process. |
| Before running the import program, you should verify the following: |
| Any material records currently entered into the Spectrum CIRC/CAT database have been exported. The material options on the next window are correctly set. |
| Kext>> Exit |

Your material records are imported using MARC 21/852 Holdings format. During the import process, the program builds key words from CIRC/CAT for Mac OS or CIRC/CAT for MS-DOS for your Spectrum CIRC/CAT program. You must verify the two items in the Material Holding Options window before you can continue.

9 Read and verify the information, then click Next.

The Material Import Options window opens.

| | In Incoming MARC records |
|---|--|
| 1ARC record matching | |
| The import process will try to match in already in the database by comparing process try to match MARC records I | ncoming MARC records with existing MARC records g material numbers. If no match is found, should the by other criteria so they can be updated? |
| C <u>D</u> o not match records. This will re MARC record for each new holding | esult in a new holding record and a new ng. |
| Match MARC records using the feedback A standard statement A standard statement A stateme | ollowing criteria: |
| Match on LCCN | |
| Match on only valid LCC | IN (recommended) |
| O Match on any form of LC | CON |
| Match on <u>I</u> SBN | |
| Match on <u>t</u> itle and author | |
| Match on material type | |

Material Import Options window Here you determine how you want your materials to be imported into the Spectrum CIRC/CAT database.

Material Holdings Options window Here you need to verify the information in the window.

Material import scenario 1

You may want your records to appear the same in your Spectrum CIRC/CAT program as they do in your current CIRC/CAT for Mac OS or CIRC/CAT for MS-DOS program. The following are the recommended steps you should complete.

To set your material import options

- 1 Make sure the **Replace database MARC records** ... option is not selected.
- 2 Make sure that *none* of the matching options in the **MARC record matching** group are selected.

Material import scenario 2

You may want matching records from your CIRC/CAT for Mac OS or CIRC/CAT for MS-DOS database to merge creating only one MARC record with multiple holdings (copies). For example, if you have several copies of *The Catcher in the Rye* and each copy has a separate MARC record in your current CIRC/CAT for Mac OS or CIRC/CAT for MS-DOS database, you can merge these records into one MARC record with several holdings of *The Catcher in the Rye*. The following are the recommended steps you should complete.

To merge matching records to create on MARC record

- 1 Make sure the **Replace...** option is not selected.
- 2 Make sure **Match on title and author** and **Match on material type** are the only options selected.

Moving To Spectrum steps continued...

10 Click Next to continue.

The Patron Import Options window opens.

| Patron Import Options Patron records will be imported from the PATRONS.IMP file. Records will be imported by patron number (included in the PATRONS.IMP file) as new patrons to your database. Any existing patron records will be deleted prior to the import. | Patron Import Options window Here you can choose to clear patron usage. |
|---|--|
| Before running the import program, you should verify the following: | |
| Any patrons currently entered into Spectrum have been exported. The following patron options are set correctly. | |
| Set the following patron option(s) | |
| Clear patron usage | |
| | |
| | |
| << <u>B</u> ack <u>N</u> ext>> E <u>x</u> it | |

All patron records are imported using the patron.imp file. *Caution:* It's important that you have not added any patrons to your Spectrum CIRC/CAT database. If you have existing patrons in your Spectrum CIRC/CAT database, they will be deleted during the import. If you've entered records into your Spectrum CIRC/CAT database, you should export them now and then reimport after you're finished with the moving process.

- 11 Read and verify the information in the top portion of the window.
- 12 Select Clear patron usage, if desired.
- 13 (CIRC/CAT for Mac OS only.) Select Include import date in record, if desired.
- 14 Click Next to continue.

The Import to Spectrum Database window opens.

| 😚 Import to Spectrum Database 🛛 🛛 🔀 | Import to |
|---|--|
| Click the Process button to start the import process. After you click the Process button, this window displays the progress of the import. | Spectrum Database window Here you start importing and |
| File being Processed: | monitor the import's progress. |
| Active Process: | |
| Importing Setup files | |
| Importing Patron records | |
| Importing Material MARC records | |
| Importing Circulation files | |
| Importing and merging Cross-Reference words | |
| Stop | |

Here you can start the importing process and, while importing, you can follow the import's progress in the **Active Process** group box.

15 Click the **Process** button. The program starts importing your files. *Note:* If your Import folder doesn't contain all of the files needed, the import program informs you which file(s) are missing.

Important! The following message may appear: "Some expected files are missing. The files missing are: Words.imp - containing Cross-Reference words." This is an unnecessary file in the moving to process. Click **OK** to bypass this message and to continue viewing the log file.

When the import process is complete, the Database Import Complete window opens.

16 Click the **View Log File** button to display your import information or click **Exit** to close the import program.

Viewing the tspimprt.log file

The import program creates a log file (tspimprt.log) that contains the results of your importing. Below is an example of this log file displayed in SimpleText.

| tspImprt.log 02/15/99 | | |
|----------------------------|----------|--|
| Setup Import Results | | |
| Patron Types: | 24 | |
| Material Types: | 38 | |
| Call Numbers: | 103 | |
| Patron Import Results | | |
| Patron Records Imported: | 22 | |
| Low Patron: | 20 | |
| High Patron: | 10000032 | |
| Material Import Results | | |
| Material Records Imported: | 64 | |
| Low Material: | 1000: | |
| High Material: | 1001002 | |
| Circulation Import Results | | |
| Circulation Transactions: | 5 | |
| Circulation Log Entries: | 10 | |
| Local Circulation Entries: | 7 | |
| Fine Transactions: | 11 | |
| Fine Log Entries: | 14 | |
| Lost Materials: | 4 | |
| Reserve Materials: | 4 | |
| Material Useage: | 8 | |
| Patron Useage: | 8 | |
| Daily Useage: | 1 | |
| Material Messages: | 5 | |
| Patron Messages: | 5 | |
| Cross-Reference Results | | |
| Words Imported: | 14 | |

tspimprt.log file (Macintosh)

This is an example of a tspimprt.log file viewed in SimpleText. After you import, you can click the View Log File button to display this file. Below is an example of this log file displayed in WordPad.

|) 🖉 🖬 🙆 🗛 🐰 🖻 🖻 🕒 | | |
|----------------------------------|----------|---|
| | | * |
| spImprt.log 02/15/99 | | |
| Setun Import Results | | |
| coup import repaired | | |
| Patron Types: | 24 | |
| Material Types: | 38 | |
| Call Numbers: | 103 | |
| | | |
| 'atron Import Results | | |
| number noticed models | 22 | |
| Patron Records Imported: | 22 | |
| Nich Detron: | 10000022 | |
| nigh Facton. | 10000032 | |
| Material Import Results | | |
| dentrative enternant internation | | |
| Material Records Imported: | 64 | |
| Low Material: | 10001 | |
| High Material: | 10010021 | |
| | | |
| irculation import Results | | |
| Circulation Transactions: | 5 | |
| Circulation Log Entries: | 10 | |
| Local Circulation Entries: | 2 | |
| Fine Transactions: | 11 | |
| Fine Log Entries: | 14 | |
| Lost Materials: | 4 | |
| Reserve Materials: | 4 | |
| Material Useage: | 8 | |
| Patron Useage: | 8 | |
| Daily Useage: | 1 | |
| Material Messages: | 5 | |
| Patron Messages: | 5 | |
| | | |
| ross-Reference Results | | |
| | | |

tspimprt.log file (Windows)

This is an example of a tspimprt.log file viewed in WordPad. After you import, you can click the View Log File button to display this file.

Sagebrush recommends that you view your log file. After you import, you can click the View Log File button to display this file. Or, if you choose to exit the Import program, you can find and open the tspimprt.log file in your Spectrum CIRC/CAT folder. The tspimprt.log file displays the following import results: setups, patron, material, circulation, and cross-reference words.

Viewing error files

Any possible errors that occurred during the import can be viewed by opening the following files (they are located in your Spectrum CIRC/CAT folder):

- c_import.log (errors that occurred while importing circulation information).
- m_import.log (errors that occurred while importing material information).
- p_import.log (errors that occurred while importing patron information).
- xreferr.log (errors that occurred while importing cross-reference information).

Setting up your Spectrum CIRC/CAT program

Now that you've imported the files from your CIRC/CAT for Mac OS or CIRC/CAT for MS-DOS program, you have to set up your Spectrum CIRC/CAT program before you can use it. See the *Spectrum CIRC/CAT Getting Started Guide* for setting up your program.