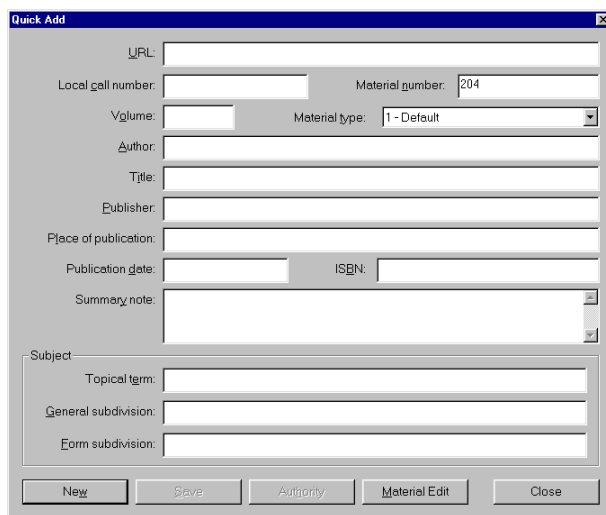# 4

Materials

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.

For information about the Quick Add window, see "About the Quick Add window". For help adding records with Quick Add, see "Adding records with Quick Add in the *Materials* chapter of the *Spectrum CIRC/CAT User Manual*.

About the Quick Add window

The Quick Add window provides a fast and simple way to enter new materials into your Spectrum CIRC/CAT database.

Quick Add window
In this window, you add basic information for new materials.

For information about the fields in the Quick Add window, see "Fields of the material record (Quick Add)" in the *Material/Holding Fields* appendix of the *Spectrum CIRC/CAT Reference Manual*.

This table describes the various elements in the Quick Add window.

Option	Description
New	To start entering a new material record, click New.
Save	To save the current record, click Save.
Authority	To use local authority control for author, title, or subject information, place the cursor in one of these fields, and click Authority.
Material Edit	To change from Quick Add to Material Edit, click Material Edit. *Note:* Material Edit allows you to enter information not available from the Quick Add window.

Material Edit

The Material Edit features enable you to manage your material records. Among other things, you can use this feature to add, edit and delete material records. For help performing Material Edit tasks, see "Managing materials and holdings" in the *Materials* chapter of the *Spectrum CIRC/CAT User Manual*.

About Material Edit menus and commands

You provide the program instructions using menu commands. Often a particular command can also be given by clicking a button.

Record menu commands

The Record menu contains commands to add, save, look up, and delete material records.

Command	Button	Description
New [Record]		Displays a blank record or a record with default data in which you create a material or holding record to add to the material collection.
Save [Record]		Saves the current material record and its holdings.
Revert to Saved	n/a	Reverts to the last saved version of the current material record rather than saving the changes. You might use this command after you've made considerable changes to a record, only to discover the changes you made were wrong.
Duplicate [Record]		Creates a new material record based on the current material record.

Command	Button	Description
Save as Default	n/a	(Available in the Edit MARC and Holdings windows.) Saves the current record as the default material or holding record.
Delete Default	n/a	(Available in the Edit MARC and Holdings windows.) Deletes the default material record and its holdings.
First [Record]		When used from the Easy Entry or Edit MARC windows, displays the first material record in the database (according to your current index). When used from the Holdings window, displays the first holding record for the loaded material record.
Previous [Record]		When used from the Easy Entry or Edit MARC windows, displays the material record that immediately precedes the current record. When used from the Holdings window, displays the previous holdings record for the loaded material record.
Look Up [Record]		Displays the material record whose index value is equivalent to the value you specify (if the program doesn't find an exact match, it loads the next closest record).
Next [Record]		When used from the Easy Entry or Edit MARC windows, displays the material record that immediately follows the current record. When used from the Holdings window, displays the next holdings record for the loaded material record.

Command	Button	Description
Last [Record]		When used from the Easy Entry or Edit MARC windows, displays the last material record in the database (according to your current index). When used from the Holdings window, displays the last holding record for the loaded material record.
Delete [Record]		Removes the current material record and its holdings from the database.

Index menu commands

The Index menu lets you change the index by which your material records are sorted. The index fields available depend on the active window (Easy Entry, Edit MARC, or Holdings).

Material menu commands

The Material menu lets you manage several library-specific aspects of your material records. Many of these commands are available only in the Holdings window.

Command	Button	Description
Authority Control		(Available in the Easy Entry window.) Lets you select an existing title, author, or subject for the current material record.
		The command is only available when the cursor is placed in one of the boxes named above; each box opens a different Authority Control window. This command switches with the Insert MARC Text command.

Command	Button	Description
Insert MARC Text		(Available in the Edit MARC window.) Lets you select a valid value from a preset list. When you select the Insert MARC Text command, a window opens that lists all the valid values for the tag, subfield, or indicator where the cursor was located. This command switches with the Authority Control command.
Set Material Type		(Available in the Holdings window.) Lets you set a material type for a holding record.
Set Next Number	n/a	Lets you set the next material number to assign to a material record.
Use Number: n	n/a	(Available in the Edit MARC and Holdings windows.) Assigns the displayed number (n), if available, to the current holding record.
Add Holdings		(Available in the Holdings window.) Adds multiple holding records to your material record.
Delete Holdings		(Available in the Holdings window.) Deletes a range of holding records that you specify.

View menu commands
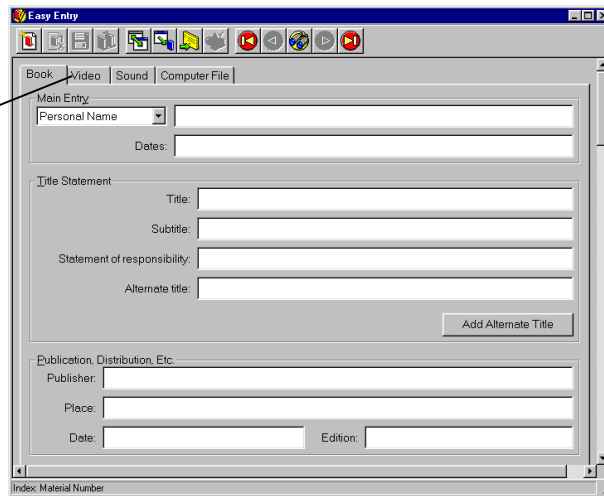
The View menu lets you view your material and holdings data in various ways. You can view the material record in the Easy Entry and Edit MARC formats (where you edit your data) and in the Card Image format. You can also view the holdings data for each material record in the Holdings window.

Command	Button	Description
[Show] Edit MARC		Switches from the current window to the Edit MARC window. This command switches with the Easy Entry command.
[Show] Easy Entry		Switches from the current window to the Easy Entry window. This command switches with the Edit MARC command
[Show] Holdings		Displays the holding data for the current material record.
[Show] Card Image		Displays the current material record's data in a card catalog format.
MARC Expansion	n/a	(Active in the Edit MARC window only.) Lets you change the amount of descriptive text added to the display of MARC data. You can change the expansion setting from "none" to "moderate" (default) to "full."
Font	n/a	(Active in the Edit MARC window only.) Lets you change the font and size of the MARC data viewable in the Edit MARC window. This feature is not available in this version of Spectrum CIRC/CAT.
Bold/Italic	n/a	(Active in the Edit MARC window only.) Lets you change the style of descriptive text (the names of fields, subfields, and indicators)—but not data— viewable when the MARC Expansion is set to either "moderate" or "full."

About the Easy Entry window

In the Easy Entry window, you add and edit material records in an easy-to-use format. You start by selecting a template for the type of material you are cataloging. You do this by clicking the appropriate tab. For example, if you are cataloging a Video, select the Video template by clicking the Video tab; the program displays the fields most commonly used for cataloging videos. When using these templates, you don't need to be familiar with the MARC 21 with 852 holdings data format.

You choose a template by clicking the appropriate tab.

Easy Entry window

In this window, you manage your material records in an easy-to-use format.

The Easy Entry window has four templates for material records:

- Book
- Video
- Sound
- Computer File

Note: The templates do not limit you to a particular type of material; when cataloging an item, you can switch among the different templates. For example, you can view the record for a book in the Video tab. However, if you do, the program displays only those fields from the book's record that are commonly used for cataloging a video.

For a description of the different fields in the Easy Entry window, see "Fields of the material record (Easy Entry)" in the *Material/Holding Fields* appendix of the *Spectrum CIRC/CAT Reference Manual*.

About the Edit MARC window

The Edit MARC window lets you edit material information in MARC 21 with 852 holdings data format—meaning 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 21 record, and you provide the record's content.
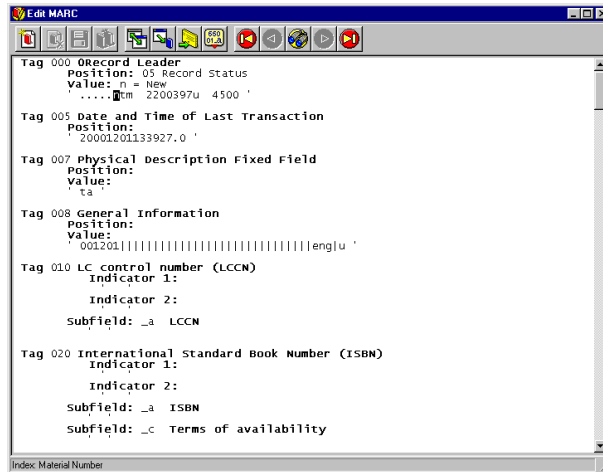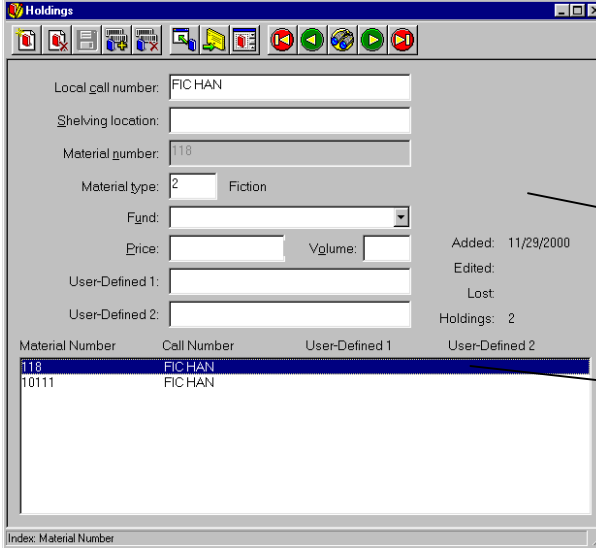
Edit MARC window
In this window, you manage your material records using the MARC 21 with 852 holdings data format.

You can customize the amount of supporting information and how it is displayed. For more information, see "Customizing the Edit MARC window" in the *Materials* chapter of the *Spectrum CIRC/CAT User Manual*. For a description of common MARC fields, see "Material and holding fields" in the *Material/Holding Fields* appendix of the *Spectrum CIRC/CAT Reference Manual*.

About the Holdings window

Use this window to add, edit, and delete holding data. Remember, "material" refers to a library item in general, such as a book, periodical, filmstrip, and so on. "Holding" refers to a particular *copy* of a material.

Holdings window
In this window, you manage the holding records associated with the loaded material record.
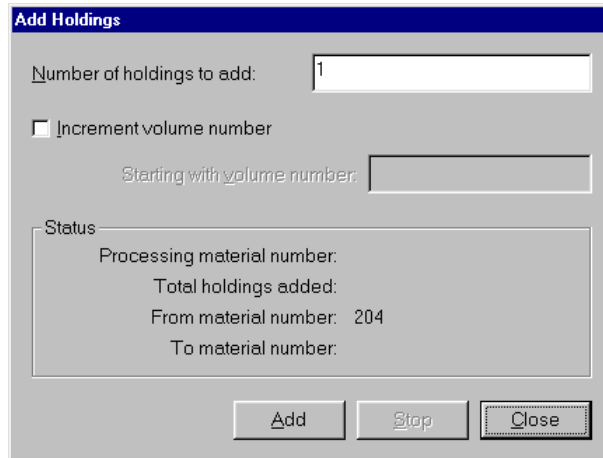
You use the top portion of the window to view and edit the holding information for the holding record selected below.

You use the bottom portion of the window to select the holding record whose data you want to view and/or edit.

For more information about the fields on the Holdings window, see "Fields of the holding record" in the *Material/Holding Fields* appendix of the *Spectrum CIRC/CAT Reference Manual*.

About the Add Holdings window

Use the Add Holdings window to add multiple holdings to the loaded material record. You start by selecting an existing holding, and then specify the number of new records you want added. The program adds the specified number of holding records using the selected holding as a template.
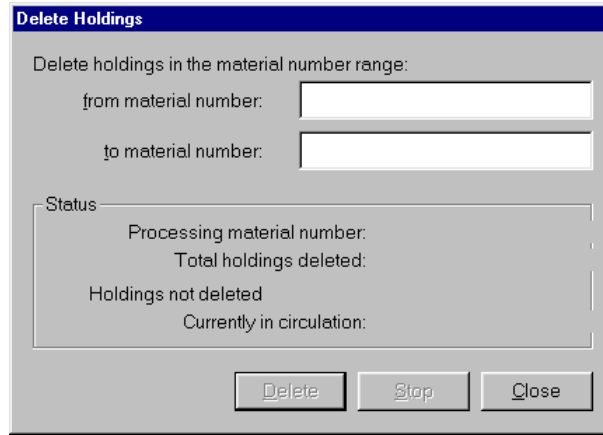
	Add Holdings window In this window, you add multiple holdings to the loaded material record.

This table describes the various elements in the Add Holdings window.

Option	Description
Number of holdings to add	Enter the number of holdings you want to add.
Increment volume number	Select this check box if you are entering volumes in a series and want the program to increment volume numbers.
Starting with volume number	If the "Increment volume number" check box is selected, enter the volume number that you want assigned to the first holding. The program increments the volume number for subsequent holdings.
Add	When you are ready for the program to add the holdings, click Add.
Stop	Once the program has started adding holdings, you can click Stop to halt the process. *Note:* Any records created before you click Stop are *not* deleted.

About the Delete Holdings window

Use the Delete Holdings window to remove multiple holding records for the loaded material record. You start by specifying a range of material numbers. The program then deletes all holdings for the loaded material record that fall within the specified range.

Delete Holdings window
In this window, you delete multiple holding records.
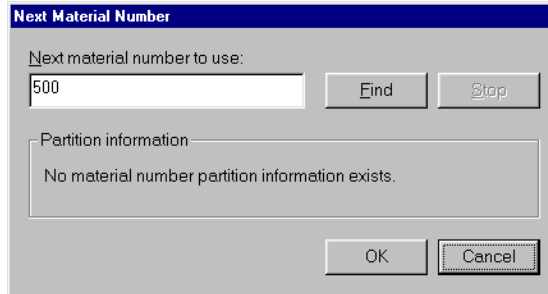
After you delete holdings, the window displays the number of records deleted and the number that were not deleted because they are currently being circulated.

This table describes the various elements on the Delete Holdings window.

Option	Description
From	Enter the starting material number. The program deletes holdings for the loaded material record that fall within the range specified by the From and To values.
To	Enter the ending material number. The program deletes holdings for the loaded material record that fall within the range specified by the From and To values.

About the Next Material Number window

Use this window to find the next available material number. You enter a starting number and the program finds the next available number. This number is loaded in the Use Number: menu option of the Material menu. The next time you add a holding, the program will assign this material number to it.

Next Material Number window
In this window, you specify a starting number, and the program finds the next available material number.

This table describes the various elements on the Next Material Number window.

Option	Description
Next material number to use	This specifies the material number that the program will assign to the next holding.
Find	To find the next available material number, click Find.

About the Paste MARC window

You can copy MARC data from an outside source, such as the Library of Congress or MARConnect, into your Spectrum CIRC/CAT database. You start by locating a MARC record from an outside source and copying it to the clipboard. You then paste the record into the Edit MARC window. If there is already a MARC record loaded in the Edit MARC window, the program displays the Paste MARC window.

You use this window to indicate whether the program should replace the displayed MARC record and keep all its holdings, or create a new MARC record with a default holding.

Paste MARC window
In this window, you indicate whether the MARC data in the clipboard should be used to replace the existing Spectrum CIRC/CAT MARC record or to create a new MARC record.

This table describes the various elements on the Paste MARC window.

Option	Description
Replace	This option replaces data in the existing MARC record with the data in the clipboard. Any holdings already associated with the existing MARC record are preserved.
New	This option creates a new MARC record and assigns it a default holding.

Material Import

The Material Import feature lets you add material and holding records to Spectrum CIRC/CAT by importing them from a file of MARC records. For help performing Material Import tasks, see "Importing material records " in the *Materials* chapter of the *Spectrum CIRC/CAT User Manual*.

About the Material Import window

The Material Import window allows you to import material records into your Spectrum CIRC/CAT database.
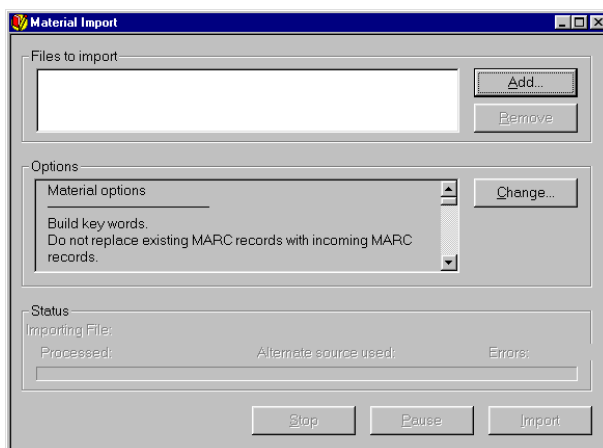
Material Import window
In this window, you import material records.

This table describes the various elements in the Material Import window.
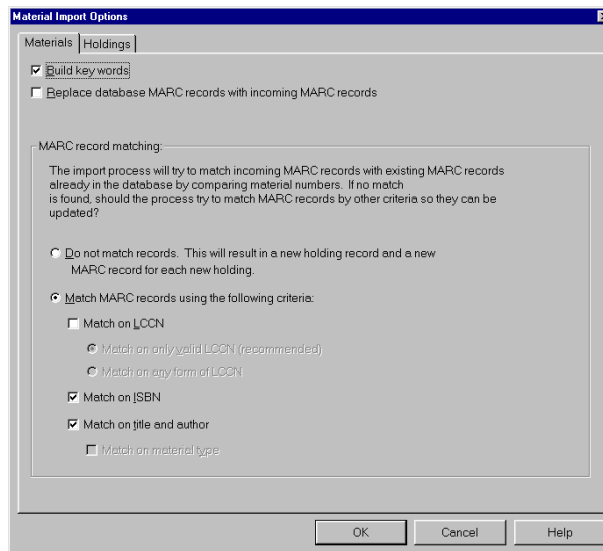
Element	Description
Files to import	Lists the names of all files selected for importing with the Add button.
Add	Opens a window so that you can choose the files you want to import.
Remove	Removes the selected file from the Files to import list.
Options	Lists the options currently selected for importing files.
Change	Opens the Material Import Options window so that you can change the options settings.
Processed	Displays how many records have been added to the database during the import process.
Errors	Displays how many records were not added to the database.
Alternate source used	Displays how many materials were renumbered using the alternate source specified in the setup options.
Stop	Stops the import process. *Note:* If you stop the import, you cannot restart it. In other words, you cannot have the program start importing at the last record imported. If you decide that you do want to import the remaining records, you must import the complete file.
Pause	Pauses the import process.
Import	Starts the import process and—after you click the Pause button—restarts the process.

About the Material Import Options window

Use the Material Import Options window to specify import options. These options determine how the program will import the records. Among other things they determine what the program should do when an incoming record matches a record already in your database. They also specify how the program should identify matching records, whether or not new key words should be created, and more.

About the Materials tab

Use the Materials tab of the Material Import Options window to choose the options that determine how the program imports material records.

Materials tab
In this window, you specify how you want the program to import material records.

The various options are described below.

Option	Description
Build key words	Locates key words in the records being imported and adds them to your catalog's list of key words.
	After key words have been built from an imported record, you can use these key words as searchable terms to locate the record in a catalog search.
	Sagebrush recommends that you build key words while importing so that you can begin using the catalog right away. However, if you don't use the catalog, you don't need to build the list. You can import more quickly if you don't create key word connections. You can always build key words at a later time. For more information, see "Updating Key words" in the *Rebuild* chapter of the *Spectrum CIRC/CAT User Manual*.
Replace database MARC records with incoming MARC records	If an incoming MARC record matches a record already in your database and this option is selected, the program replaces the existing record with the incoming record. If a record being imported matches an existing record and you didn't enable this "replace" option, the program doesn't store the incoming material record. However, if you select the Add holdings option in the Holdings tab, the program does store the incoming record's holding data, connecting it to the existing material record.

Option	Description
MARC record matching	Matches records being imported with records already in your database according to the options you choose. For more information about the matching options, see "Matching records when importing" later in this chapter.
	Note: If the program finds a match and you've selected the replacing option (see the previous option), the program replaces the database record with the incoming record.
	Order of checking: When importing records into Spectrum CIRC/CAT, the program first checks for a match on the material number. Then, incoming records are compared with existing database records according to the matching options in the MARC record matching group. If you select two or more matching options, the program looks for a match using the first field selected (for example, LCCN). If the program determines that the records match based on that field, it stops checking. If no match is found using that field, or the field is blank in both records, the program refers to the next option chosen.

About the Holdings tab

Use the Holdings tab to specify how the program should deal with holdings data when importing.

Holdings tab
In this tab, you set the holdings and material numbers options.

The various options in the Holdings tab are described below.

Option	Description
Add holdings	Adds any holdings data from material records being imported to your database. Unless you're importing just to update the MARC 21 data of your existing records, you most likely want to include holdings.
	If you select this option, you also need to choose the method for assigning material numbers to the incoming records.
	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.

Option	Description
Import user-defined data from 961 tags (when present)	Incorporates into your collection material type data (subfield _t) and user-defined data (subfield _u) from records that have 961 tags. The material type number found in the 961 tags overrides the type number generated by call number matching. For more on call number matching, see "Setting up material types" in the *Setup* chapter of the Spectrum CIRC/CAT User Manual.
Preferred source of material number	Lets you assign or choose the material number from incoming records. You can either use the incoming material number (the number attached to the record you're importing) or use a sequence of numbers starting at the material number you choose.
Alternate source	Lets you assign the beginning material number for a range of numbers to be used if there is a problem using the preferred source of material numbers.
Matching number resolution	Specifies what the program should do if the preferred material number is already in use. You can change this setting using the Change button (see below).
Change	Opens the Matching Number Resolution window. In this window you can choose to replace the existing data with incoming records (selecting this option overwrites holdings in your database with those that are imported that match on material number). You can also select to use the alternate source to assign material numbers to incoming records that match the material number of a holding in your database.
Location Code	Lets you specify whether the 852_a field of the incoming records contains shelving location data or location code data. If you specify "shelving location data", the program moves this data to the 852_c field of the resulting Spectrum CIRC/CAT record.

For more information on using the Holdings tab, see "Step 2: Specifying import options" in the *Materials* chapter of the *Spectrum Union Catalog User Manual*.

About the Matching Number Resolution window

During an import, an incoming record may have the same material number and location code as a record already existing in the database. You use the Matching Number Resolution window to tell the program how it should deal with this type of situation.

You access the Matching Number Resolution window from the Holdings tab of the Material Import Options window.
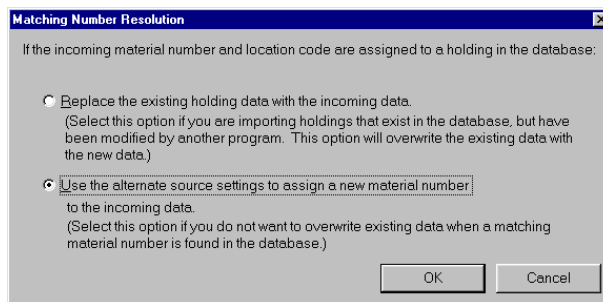
Matching Number Resolution window
You use this window to specify what the program should do when a incoming record has the same material number and location code as an existing record.

This table describes the elements in the Matching Number Resolution window:

Element	Description
Replace the existing holding data with the incoming data	Replaces the holdings of the record in the Spectrum database with the holdings of the incoming record—if the material number of the incoming record is already assigned to a material in your collection. If the record with the matching material number (in your collection) only has one holding record, the material record is overwritten.
	You should select this option if you are importing holdings that exist in the database but have been modified by another program.
Use the alternate source settings to assign a new material number to the incoming data	Obtains the location code and material number from the alternate source—if the material number of the incoming record is already assigned to a material in your collection.
	You should select this option if you do not want to overwrite existing data when a matching material number is found in the database.

Matching records when importing

What happens when you import a record that you already have in your material database? Do you get two identical material records, or one material record with two holdings records? This is determined by the options you choose for MARC record matching. These options determine whether the program should create a new, if similar, material record—or just add a new local holdings record to the existing material record.

There are several options for comparing incoming material records with existing records. By specifying what data is compared, you decide what it takes for records to match and be considered records for the same material.

Order of checking

When importing records into Spectrum CIRC/CAT, the program first checks for a match on the material number. Then, incoming records are compared with existing database records according to the matching options in the MARC record matching group. If you select two or more matching options, then records are checked for each matching option in the order listed in the Materials tab of the Material Import Options window until a match is found or each selected option is checked.

The program looks for a match using the first field selected (for example, LCCN). If the program determines that the records match based on that field, it stops checking. If no match is found using that field, or the field is blank in both records, the program refers to the next option chosen.

Matching on LCCN

The program can use Library of Congress Control Numbers (LCCNs) to determine whether an incoming record matches any existing record in your database. If the LCCN of an incoming record matches the LCCN of an existing record, the two records are determined to be the same.

The LCCN field may contain invalid data. Because of this, you can also choose to match only on valid data (recommended) or on any form of LCCN data.

Tag used

The program evaluates the MARC record's tag 010_a for LCCN information. Here are some ways that LCCNs can be displayed: 87-123456, 95-12564/AC/r96, 2008-15860.

Because of issues related to the year 2000, the Library of Congress plans to restructure the format of the LCCN. For information about the format of a valid LCCN, see the Library of Congress web site at http://lcweb.loc.gov/marc/lccn.html.

If no LCCN data?

If the program can't find data in the LCCN field, it checks the Control Number (tag 001). That is, if you choose to match on LCCN, but a record has no data in tag 010, the program looks at tag 001 to determine a match. (You cannot match only on tag 001. If you turn off LCCN matching, the program won't refer to tag 001.) *Note:* Unlike LCCN, the Control Number in tag 001 may *not* be a unique identifier for MARC records.

Matching on ISBN

The program can use International Standard Book Numbers (ISBNs) to determine whether a record being imported matches any existing record in your database.

Tag used

For ISBN information, the program evaluates the MARC record's tag 020_a.

About matching on ISBNs

Unlike LCCNs, MARC records can contain more than one ISBN.

Use LCCN matching too?

When matching on ISBNs, you may want to match on LCCNs as well, in case two database records have matching ISBNs. Match on ISBN by itself *only* if you know it can be used as a unique identifier of records.

When you have both the Match on ISBN *and* Match on LCCN options selected (and if the record being imported and the record in the database have both ISBN and LCCN data), the program doesn't consider the records to be the same if their ISBNs match but their LCCNs don't.

Set ISBNs

The program ignores all "set" ISBNs. A set ISBN is an ISBN which contains the word "set" in its data. For example 0-12-5642-1Xset is ignored by Spectrum.

If multiple ISBNs are imported, the set ISBN is ignored and the program then looks at the next ISBN for a match with current materials.

Matching on title and author

The program can use a combination of title and author fields to determine whether an imported record matches any existing record in your database. To be considered a match, the imported record and the record in your database must have *identical* data in *both* fields.

Tags used

For title, the program checks only tag 245 (subfields _a and _b). For author, the program checks only tag 100_a. The program checks these fields as a unit. Remember, to be considered a match, the record being imported and the record in your database must have *identical* data in *both* fields.

With other options

You can use other matching options in combination with title and author matching. For example, some records may be considered identical if you match only on title and author. But if you also select the Match on LCCN option, and both records contain LCCN data but that data conflicts, then the mismatch on LCCNs overrides a title and author match. The records aren't considered identical.

Matching on material type

In addition to matching on title and author, you can also use the material type field to determine whether holdings being imported should belong to any existing material record.

This option can help prevent materials of different material types (such as a paperback and video of the same title) from being combined in one material record when you want them as separate records.

Note: The Match on material type option is available only if you choose to match on title and author alone—and *not* on LCCN and/or ISBN.

About the Diacritics window

The Diacritics window appears whenever you import records that contain diacritics. Diacritics are accented characters such as ñ, à, and ç that are common in non-English words.

Because computers rely on code pages to display diacritics, the program needs to know what code page to use for the incoming diacritics. The Diacritics window helps you choose the correct code page for the data you are importing.

Diacritics

Diacritical marks were found in the selected file.

Select each code page to see sample data using that code page. Then choose the one that looks most correct.

| OK | Cancel | Help |
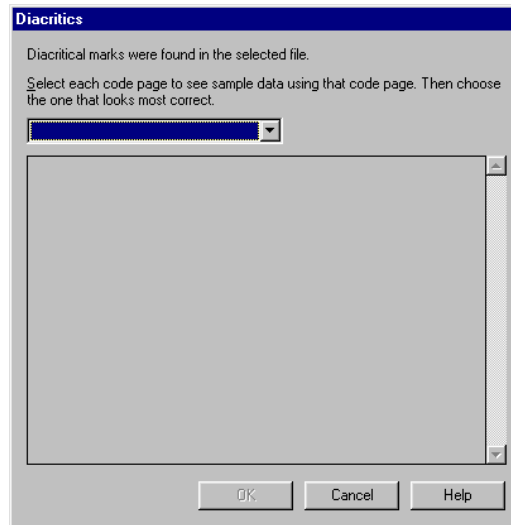
Diacritics window
In this window, you specify the code page to be used with the data you are importing.

This table describes the various elements in the Diacritic window:

Element	Description
Select each code page to see sample data	Choose a code page from the list. The program displays sample data using the selected code page. If the data displays properly, the code page is the correct page to use with the incoming data. *Note:* If you know that the incoming data uses several different code pages, choose Autodetect from the code page list. This tells the program to try and identify the correct code page on a record-by record basis.
OK	Click OK to have the program import using the selected code page.

Material Export

The Material Export feature lets you copy MARC records from your Spectrum CIRC/CAT database to a file that can be used by another program. For help performing Material Export tasks, see "Exporting material records" in the *Materials* chapter of the *Spectrum CIRC/CAT User Manual*.

About the Material Export window

The Material Export window contains several elements that provide information about the export process. The window's buttons also let you control elements of the export process.
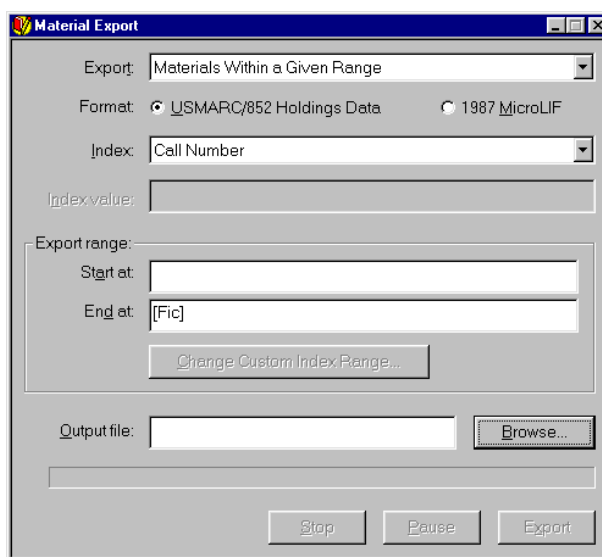
Material Export window
In this window, you choose the options necessary to export material records.

This table describes the elements on the Material Export window:

Element	Description
Export	Lets you choose the type of export process. You can export materials within a range that you specify, all materials (in MARC file order), or individual materials. If you export all materials (in MARC file order), you don't specify an index. If you export materials individually, then you must enter the material number to export in the Index value box. *Note:* You can also export all of your records by choosing Materials Within a Given Range and accepting the default range, which includes all records.
Format	Lets you choose the format in which to export materials. You can export records as USMARC with 852 Holdings Data (default) or as 1987 MicroLIF.
Index	If you're exporting a range of records, lets you choose the field by which your records are sorted. You can index your records by call number, material number, material type, user-defined fields, custom index, or fund.
Index value	If you're exporting individual records, lets you choose the material number to export.
Export range Start at/End at	If you're exporting a range of records, lets you specify the first and last record to export. The default values include the first and last records in your database.
Change Custom Index Range	Changes the custom index range if that index is chosen.
Output file	Contains the exported records. You can search for the name of the file by clicking the Browse button. If you choose to export to a floppy disk, you are prompted to enter the next disk when needed.

Material Batch Processing

The Material Batch Processing feature enables you to change information in your material records. You specify exactly what records you want to process and the changes you want made to these records. Once you've done this, the program makes the specified changes to all matching records. For help performing Material Batch Processing tasks, see "Batch processing material records" in the *Materials* chapter of the *Spectrum CIRC/CAT User Manual*.

About the Range window

You use the Range window to specify which records should be processed.

Range window
In this window, you define the range of records to process.

The Set Tags button is available when the field selected may have more than one tag associated with it (such as Title). This button lets you specify which tag(s) the program evaluates.

This table describes the various elements in the Range window.

Element	Description
Field	Lets you select the field by which you want to index all your records (including material number, call number, title, author, user-defined fields, material type, ISBN, and LCCN).
Start at/End at	Lets you select the range of records to be processed. Initially, the default starting and ending values of the index you select are displayed, which include all of your material records.
Location	Lets you select the location of the file specifying the material numbers of the records that you want processed. This box is available only when you select "Material number (from a file)" in the Field list (see above).
Select File	Lets you select the file containing the records to batch process. *Note:* This box is only available when you select "Material number (from a file)" from the Field box.
File name	Displays the name of the file containing the records to batch process. *Note:* This box is only available when you select "Material number (from a file)" from the Field box.
Set Tags	Lets you select which tag(s) to index by. The Set Tags button is available—here and in other windows—when the field selected may have more than one tag associated with it (such as Author or Title).

For more information on using the Range window, see "Step 1: Specifying the records to process" in the *Materials* chapter of the *Spectrum CIRC/CAT User Manual*.

About the Title Tags window

If you specify the Title field in the Range window, Add Condition window, Edit Condition window, Add Action window, or Edit Action window, a Set Tags button becomes available. Clicking this button opens the Title Tags window.

You use the Title Tags window to specify exactly which tags in the MARC record contain the title information that you want evaluated. This is necessary because the MARC standard allows title information to be stored in a variety of tags.
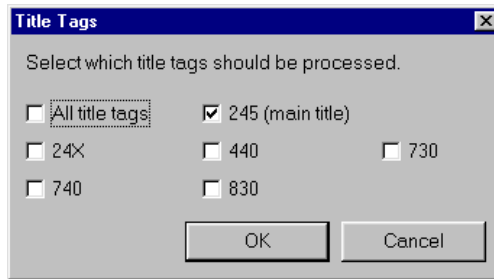
Title Tags window
In this window, you define exactly which tags contain the title information that you want evaluated.

The Title Tags window lists the tags that can contain title information. You select the tags that you want evaluated.

For more information on using the Title Tags window, see "Specifying tags to process" in the *Materials* chapter of the *Spectrum CIRC/CAT User Manual*.

About the Author Tags window

If you specify the Author field in the Range window, Add Condition window, Edit Condition window, Add Action window, or Edit Action window, a Set Tags button becomes available. Clicking this button opens the Author Tags window.

You use the Author Tags window to specify exactly which tags in the MARC record contain the author information that you want evaluated. This is necessary because the MARC standard allows author information to be stored in a variety of tags.
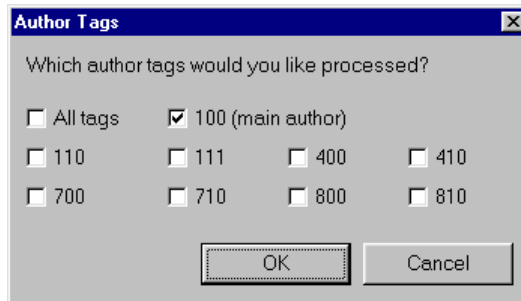
Author Tags window
In this window, you define exactly which tags contain the author information that you want evaluated.

The Author Tags window lists the tags that can contain author information. You select the tags that you want evaluated. If you select "All tags" the program evaluates all author tags.

For more information on using the Author Tags window, see "Specifying tags to process" in the *Materials* chapter of the *Spectrum CIRC/CAT User Manual*

About the Conditions window

Before a record is processed, not only must it fall within the range specified in the Range window, it must also satisfy any conditions that you have specified.

The Conditions window shows the specified conditions and lets you access the Add Condition, Delete Condition and Edit Condition windows.
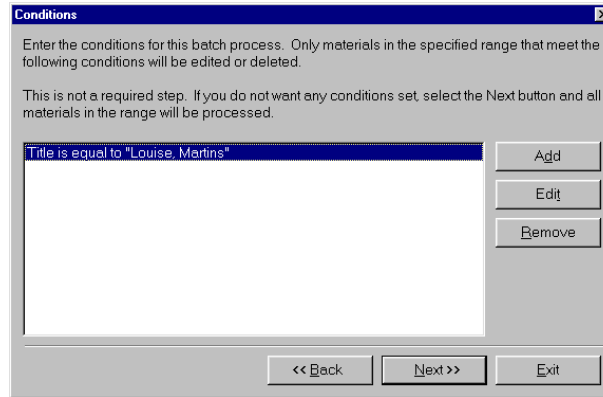
Conditions window
This window displays the existing conditions and provides you with a way to add new conditions as well as delete and edit existing conditions.

This table describes the various elements in the Conditions window.

Element	Description
Add	Opens the Add Condition window so that you can specify new conditions.
Edit	Opens the Edit Condition window so that you can edit the selected condition. Before clicking this button, make sure that you have selected an existing condition.
Remove	Removes the selected condition. Before clicking this button, make sure that you have selected the condition that you want to remove.

For more information on using the Conditions window, see "Step 2: Setting batch process conditions" in the *Materials* chapter of the *Spectrum CIRC/CAT User Manual*.

About the Add and Edit Condition windows

Use these windows to specify a batch process condition. Remember, the batch process modifies only those materials that meet the condition(s) specified.

Edit Condition window
In this window, you define a condition a record must meet to be processed.

If using multiple conditions, you need to set Boolean operators. If this is the first condition you have entered, the Boolean operators are unavailable.

This table describes the various elements in the Add and Edit Condition windows.

Element	Description
Find materials that match this AND previous conditions.	(Available when a previous condition exists.) Both this and the previous condition must be true for the action to be applied to the selected records.
Find materials that match either this OR previous conditions.	(Available when a previous condition exists.) Either this or another condition must be true for the action to be applied to the selected records.
Condition field	The material record field on which this condition depends.
Condition	The relationship of the values in the condition string to the condition field, such as "is equal to," "contains," or "begins with."

Element	Description
Condition value	User-entered values as they relate to the condition field. For example, in the condition, "material number is equal to 1005", *1005* is the condition value.
Set Tags	Lets you select which tag(s) to index by. The Set Tags button is available—here and in other windows—when the field selected may have more than one tag associated with it (such as Author or Title).

For more information on using the Add and Edit Condition windows, see "Step 2: Setting batch process conditions" in the *Materials* chapter of the *Spectrum CIRC/CAT User Manual*.

About the Condition Options window

Use the Condition Options window to specify options for the condition that you are adding or editing.

Note: With some fields, you cannot set condition options. When you select one of these fields you do not encounter the Condition Options window.

The Condition Options window can contain different elements depending on the condition field and the condition selected. For example, the program displays the window shown below when you specify a "Location code is less than" condition.

Condition Options window
In this window, you specify how the program compares the condition value you enter with the values in the selected field.

Depending on the conditions selected in the Add Condition or Edit Condition window, this window may contain different options than those shown here.

This table describes the elements in the window shown above.

Element	Description
Numeric	Compares the entire value of the number, not just the values of the starting digits. This option is available only in one of the following situations: • if the condition field you choose is either Call Number or a user-defined field, or • if you're using a numeric comparison type. For example, if you compare numbers numerically, the number 124 would be higher than the number 30.
Text—Whole word only	Processes your condition value exactly as you enter it in the Add Condition or Edit Condition window. This option compares the entered value as a unit, matching on the condition value(s) exactly as entered (for example, the value "America" won't match "Americas" or "American"). You can select Case-sensitive to process only conditions that match the capitalization of your condition value.

Element	Description
Text	Processes records containing your condition value. Using this option, the value "America" matches "Americas" or "American."
	The Text option compares the values of the starting digits, not the entire value of the number. For example, if you compare numbers as text, the first digits in the entire number are compared. In that situation, 30 would be higher than 124 because the program would view the number 3 as higher than the number 1.
	You can select Case-sensitive to process only conditions that match the capitalization of your condition value, and you can select Ignore punctuation to disregard any punctuation marks in the condition value or in the records it processes.

The program displays the window shown below when you specify a "Title is equal to" condition.

Condition Options window
In this window, you specify how the program compares the condition value you enter with the values in the selected field.
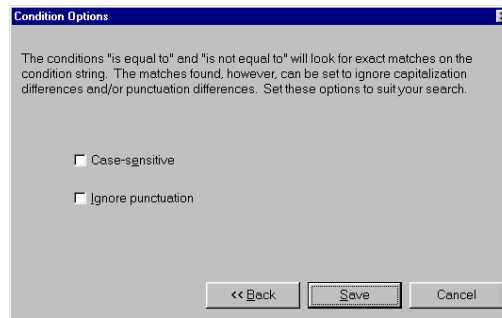
Depending on the conditions selected in the Add Condition or Edit Condition window, this window may contain different options than those shown here.

This table describes the elements in the window shown above.

Element	Description
Case-sensitive	Processes only conditions that match the capitalization of your condition value.
Ignore punctuation	Disregards any punctuation between words (not within words) when evaluating a condition. For example, if this option is selected, the comma in "1,000" is not ignored when the program evaluates the condition. However, the comma in "Yes, you" is ignored.

For more information on using the Condition Options window, see "Setting options for batch process conditions" in the *Materials* chapter of the *Spectrum CIRC/CAT User Manual*.

About the Actions window

You use Batch Process actions to specify exactly what you want done to the processed records. The Actions window shows the specified actions and lets you access the Add Action, Delete Action and Edit Action windows.
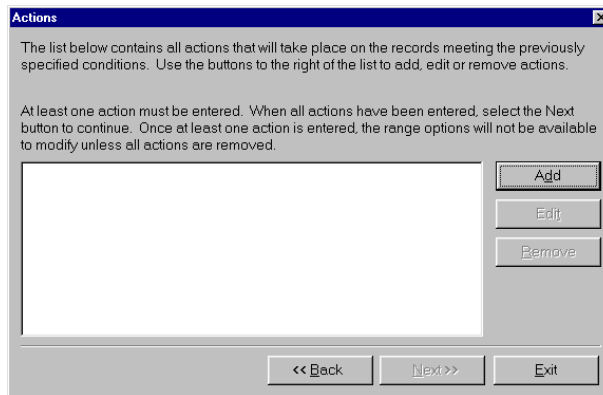
Actions window
This window displays the actions that will be taken on the material records that fall within the specified range and meet the specified conditions.
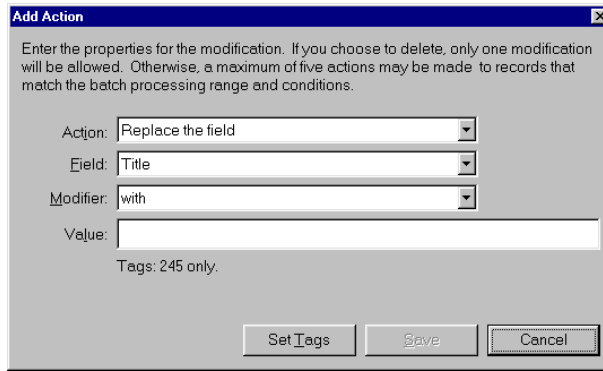
This table describes the various elements in the Actions window.

Element	Description
Add	Opens the Add Action window so that you can specify new actions.
Edit	Opens the Edit Action window so that you can edit the selected action. Before clicking this button, make sure that you have selected an existing action.
Remove	Removes the selected action. Before clicking this button, make sure that you have selected the action that you want to remove.

For more information on using the Actions window, see "Step 3: Setting batch process actions" in the *Materials* chapter of the *Spectrum CIRC/CAT User Manual*.

About the Add Action and Edit Action windows

Use these windows to specify batch process actions. Remember, actions specify exactly what you want done to the processed records.

Add Action window
In this window, you define the actions to be taken on the material records.

This table describes the various elements in the Add Action and Edit Action windows.

Element	Description
Action	The change you want to make in the batch process. *Note:* The other elements in this window depend on the action you choose here. For example, if you choose the "add to the end of" action, you need to specify the field to add to and the value(s) to add. If you choose "Delete the material," no other options are available.
Field	If necessary, the record field to be changed according to the action listed above.
Modifier	If necessary, the qualification (like "with," "the text," or "any characters in the set") whose value is entered in the next box. The modifiers available depend on the action you choose. For example, if you choose to replace a field, you have to indicate the values to replace the field with. In this case, the modifier is "with."
Value	If necessary, the value(s) to replace a current field's value, the value(s) to add to the specified field, or the value(s) to remove from the specified field.

For more information on using the Add Action and Edit Action windows, see "Step 3: Setting batch process actions" in the *Materials* chapter of the *Spectrum CIRC/CAT User Manual*.

About the Finalize window

You use the Finalize window to verify that the range, conditions, and actions you have specified are correct. If you find that something needs to be changed, you can go back to the appropriate window and change it. Or, if you are certain that everything is the way you want it, you can start the batch process.
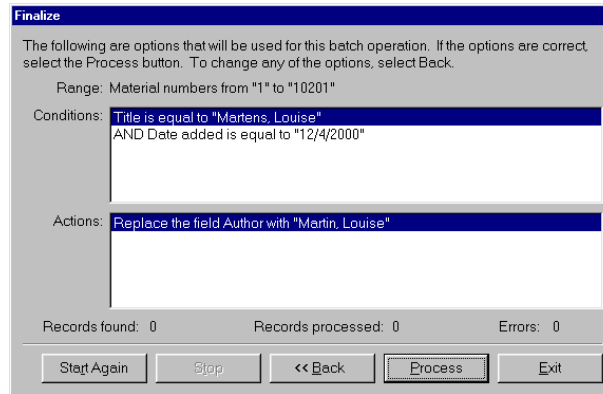
Finalize window
In this window, you can review the range, conditions, and actions for the material batch process.

This table describes the various elements in the Finalize window.

Element	Description
Range	Describes the range of records to be processed.
Conditions	Describes conditions that a record must satisfy before it is processed.
Actions	Describes the actions to be performed on the specified records.
Start Again	Restarts the process of defining the batch process so that you can redefine ranges, conditions, and actions. *Note:* When you click this button, any settings that you have already entered for the batch process are lost.
Stop	Stops the process.

Element	Description
Back	Returns to the previous window.
Process	Starts processing.
Exit	Exits the batch process feature without processing records.

For more information on using the Finalize window, see "Step 5: Starting the batch process" in the *Materials* chapter of the *Spectrum CIRC/CAT User Manual*.

About batch process statistics

After you click Process in the Finalize window, the batch process begins. The following statistics are displayed to provide you with information about the progress of the batch process:

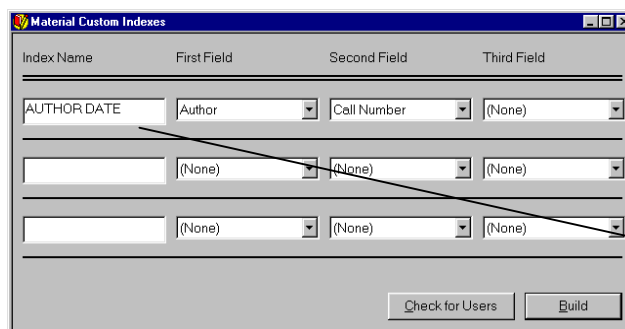| Statistic	Description
Records found	The number of records found in your specified range.
Records processed	The number of records that meet the condition(s) you specified which have been processed with the action(s) you specified.
Errors	The number of errors found during the batch process. *Note:* These errors are not stored in a log file.

Material Custom Indexes

The Material Custom Indexes features allow you to create your own indexes based on up to three fields. This gives you the ability to control how records are sorted when you export and create reports.

For help creating and managing material custom indexes, see "Creating material custom indexes" in the *Materials* chapter of the *Spectrum CIRC/CAT User Manual*. For information about the Material Custom Indexes window, see "About the Material Custom Indexes window".

About the Material Custom Indexes window

You can add up to three custom indexes for materials. Each custom index can be built using a combination of up to three fields.

Material Custom Indexes window
In this window, you can create up to three custom indexes to use for printing and exporting.

In the window shown here, only one custom index has been created (AuthorDate).

This table describes the various elements in the Material Custom Indexes window.

Element	Description
Index Name	The name of a material custom index (up to 25 characters long). You may want to name a custom index so that it describes the fields that make it up—letting you identify the custom index more easily during exporting and printing. Custom index names are always displayed in all capital letters.
First, Second, and Third Fields	These boxes display the material record fields that make up a custom index. *Note:* When specifying fields, be aware that "Location" refers to shelving location within your library.
Check for Users	Lets you check whether other users are using material files. A custom index cannot be built while material files are in use.
Build	Starts the build process for material custom indexes.

For information about fields that can be used in material custom indexes, see "Available material custom index fields".

Available material custom index fields

The following table lists the fields that can be used in a material custom index. For each field, the table shows the number of characters used when building a custom index. *Note:* Dates are indexed as two-character binary numbers representing the year as four digits.

Field	Number of characters
Author	32
Call number	26
Copyright	2
Fund	26
Holding date added	2
Holding date edited	2
Location	20
Location code	4
MARC date added	2
MARC date edited	2
Material number	30
Material type	2
Price	4
Publisher	32

Field	Number of characters
Title	48
User-defined 1	28
User-defined 2	28

Note: When building an index, the program can only use a limited number of characters per field (the actual number of characters used varies depending on the field). For this reason, if records in the index are longer than a field's character limit, the index does not sort on the entire field. Instead it sorts based on the first x characters, where x is the field's limit.

Note: When specifying fields, be aware that "Location" refers to shelving location within your library.

Global Subject Edit

Subject variations are subjects that are alike except for punctuation or capitalization. The Global Subject Edit feature allows you to identify subject variations and fix them so that only one variation of a subject is used. For help performing Global Subject Edit tasks, see "Editing subjects globally" in the *Materials* chapter of the *Spectrum CIRC/CAT User Manual*.

About the Global Subject Edit window

The Global Subject Edit window displays the subjects used in your database. For each subject, it shows the number of variations.
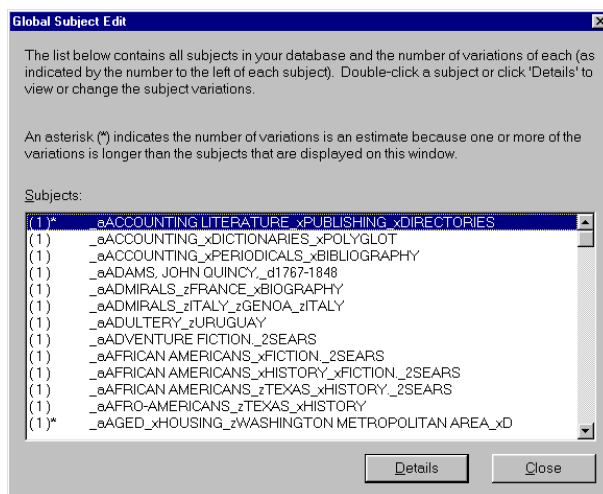
Global Subject Edit window
This window displays the number of variations of each subject in your database.
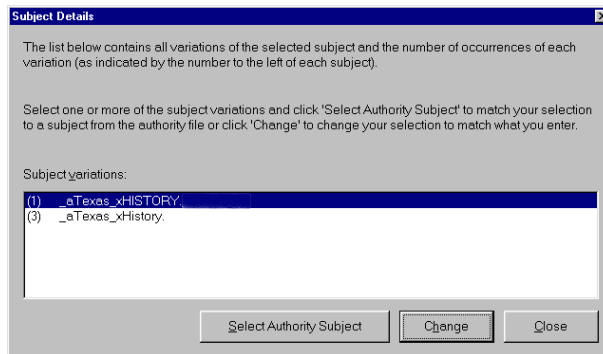
This table describes the various elements in the Global Subject Edit window.

Element	Description
Subjects	Lists all the subjects in your database. The number of subject variations is listed to the left of each subject. If an asterisk is displayed, the number of variations is an estimate because only the first 48 characters of each subject are checked by the program.
Details	Opens the Subject Details window and shows the variations for the selected subject.
Close	Closes the Global Subject Edit window.

For more information on using the Global Subject Edit window, see "Editing subjects globally" in the *Materials* chapter of the *Spectrum CIRC/CAT User Manual*.

About the Subject Details window

The Subject Details window shows the variations of the subject that you selected in the Global Subject Edit window.

Subject Details window
This window displays the variations of the selected subject.

This table describes the various elements in the Subject Details window.

Element	Description
Subject variations	Lists all the variations of the subject selected in the Global Subject Edit window. The number of occurrences is listed to the left of each subject variation. You can select more than one variation.
Select Authority Subject	Opens the Select Authority Subject window so that you can select an authority subject. The program can then change the selected subject variations to the authority subject. This button is not available until after you select at least one subject variation.
Change	Opens the Change Subject(s) window so that you can manually enter a subject (or edit a master subject). The program can then change the selected subject variations to the subject you enter.
Close	Closes the Subject Details window and returns you to the Global Subject window.

For more information on using the Subject Details window, see "Viewing subject details" in the *Materials* chapter of the *Spectrum CIRC/CAT User Manual*.

About the Select Authority Subject window

You use the Select Authority Subject window to choose an authority subject. The program then uses this authority subject to replace the subject variations that you have selected in the Subject Details window.
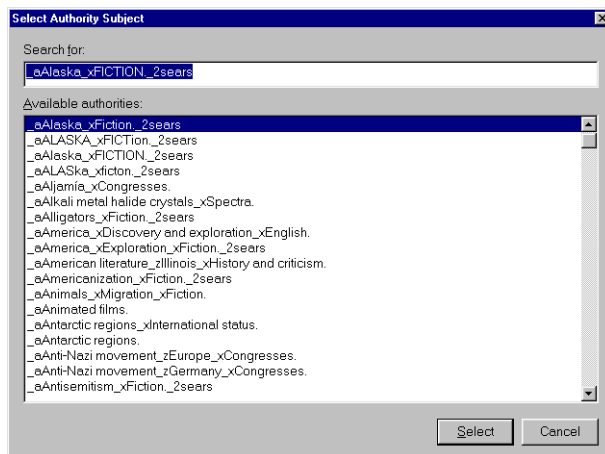
Select Authority Subject window
In this window, you can select a subject to use as the authority subject for subjects you want to globally change.

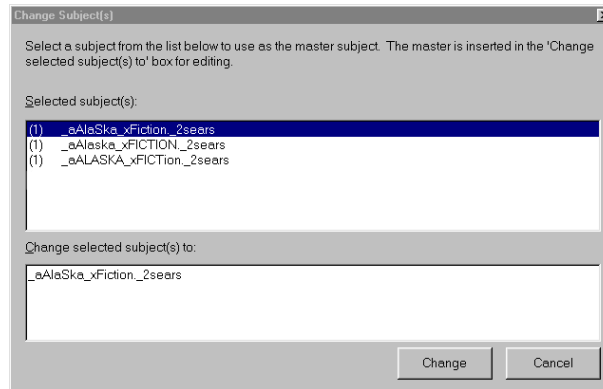This table describes the various elements in the Select Authority Subject window.

Element	Description
Search for	Use this box to enter a subject or the first part of a subject. The program then selects the first subject in the "Available authorities" box that matches the characters you type.
Available authorities	This box lists the subjects already in your database. You can scroll through the list to identify the authority subject you want to use. Or, you can use the "Search for" box to search for an authority subject.
Select	After selecting an authority subject, click this button to have the program replace the subject variations you selected in the Subject Details window with the authority subject.
Cancel	Click this button to return to the Subject Details window without globally changing subjects.

For more information on using the Select Authority Subject window, see "Using authority subjects" in the *Materials* chapter of the *Spectrum CIRC/CAT User Manual*.

About the Change Subject(s) window

You use the Change Subjects window to manually enter a subject (or edit a master subject). The program then uses this subject to replace the subject variations that you selected in the Subject Details window.

Change Subject(s) window
In this window, you enter the subject that the program uses to replace the variations selected in the Subject Details window.

This table describes the various elements in the Change Subject(s) window.

Element	Description
Selected subject(s)	This box displays the subject variations selected in the Subject Details window. If you select a subject from this box, the program will enter it in the "Change selected subject(s) to" box.
Change selected subject(s) to	This is the subject that the program uses to replace the variations already selected in the Subject Details window.
Change	After entering or editing a subject, click this button to have the program replace the selected subject variations with the one in the "Change selected subject(s)" box.
Cancel	Click this button to return to the Subject Details window without globally changing subjects.

For more information on using the Change Subject(s) window, see "Using a manually entered subject for global changes" in the *Materials* chapter of the *Spectrum CIRC/CAT User Manual*.