

## Winnebago (Spectrum) -- Export MARC Records for WISCAT

You may submit your complete database to WISCAT for a strip and reload of holdings as frequently as you choose. It is recommended this be done at least semiannually. Between the times of complete strip and reload, you may also send files of records to add or delete since the time of last contribution.

### A. Exporting the Complete Database:

You can copy material records from Spectrum by exporting them to a file. Any data exported from Spectrum will be in MARC 21 with 852 holdings format (also known as USMARC/852 Holdings Data protocol)

1. On the main Spectrum Circ/Cat screen, click the MATERIALS button and select EXPORT. The *Material Export* window will open.
2. In the *Format* field, select *USMARC/852 Holdings Data*
3. In the *Export* field, choose *Materials Within a Given Range* from the drop-down menu. *NOTE: If you want to export all materials, select All Materials (in MARC file order) and go to step 6.*
4. In the *Index* field, select one of the following indexes for the materials you plan to export: *material number, call number, material type, user-defined fields, or fund.*
5. Type in the range of materials you want to export in the *Start at* and *End at* fields.
6. Type the file name into the *Output file* field, and browse to the location where you wish to save the file.
7. Click the EXPORT button. A window may open stating that *the log file m\_Export.log already exists*. Click APPEND.
8. The records will export. When the process is complete, a window will open to display the number of records exported and the location of the export file.
9. Click OK.
10. Close the *Material Export* window.

### B. Using a Custom Index to send Updates

To send updates (adds, deletes, changes), you need to export a file of materials added during a particular time period. Following are the steps for creating a Custom Index and then using this Custom Index to export materials from your collection.

#### Step One: Creating a Custom Index

1. Close all modules (such as Circulation or Material Edit) on your workstation. Close Spectrum on all other client stations, including the Patrons' Catalog. If you are running Spectrum Web Catalog, you must disconnect it from the Spectrum Server.
2. On the main Spectrum Circ/Cat screen, click the MATERIALS button and select *Custom Indexes*. The *Material Custom Indexes* window will open.
3. In the *Index Name* field, enter a descriptive name for the custom index. This can be any unique name that will help you find this Custom Index in the Index list later. For our example, you may wish to name your Custom Index "WISCAT Export."  
*NOTE: A Custom Index name must be distinct from any of the fields available in the Custom Index. For example, you cannot name your Custom Index "Author" or "Material Number" because these field names are used in the Custom Index.*
4. In the *First Field*, select *Holdingsdate added*
5. Leave the *Second Field* blank
6. Leave the *Third Field* blank

*Vendor instructions current as of 3/7/2006*

7. Click the CHECK FOR USERS button to see if any other client stations are still connected.
  - a) If the window reads “*The material files are not currently in use*”, click **OK** and proceed with **step 9** below.
  - b) If the window reads “*The material files are in use by another part of this program,*” click **OK** and proceed with **step 8**.
8. Ensure you have closed Spectrum on all other client stations and you have closed all other modules on your workstation. Also be sure the Spectrum Web Catalog is disconnected from the Spectrum Server if you are running it. Click the CHECK FOR USERS button again. The window should now read “*The Material Files are not currently in use.*” Click **OK** and continue with **step 9**.

*Note: Spectrum’s Ctdamn utility can help you to monitor client stations that are still open and disconnect these client stations so that you can proceed with building your custom index.*
9. From the **Material Custom Index** window, click BUILD. This process may take some time (5-15 minutes.)
10. When the process is complete, click CLOSE. Close the **Material Custom Index** window). Continue with Step Two.

### **Step Two: Using the Custom Index to export materials**

1. On the main Spectrum Circ/Cat screen, click the MATERIALS button and select EXPORT. The **Material Export** window will open.
2. In the **Export** field, choose **Materials Within a Given Range** from the drop-down menu.
3. In the **Format** field, select **USMARC/852 Holdings Data**.
4. In the **Index** field, select the Custom Index that you created in Step One from the drop-down menu. You will find the Custom Index at the bottom of the drop-down list. (You may need to scroll down to find it.)
5. Click the CHANGE CUSTOM INDEX RANGE button.
  - a. In the **Start at** box enter the first date you wish to include (ex: 9/1/2006).
  - b. In the **End at** box enter the last date you wish to include (ex: 9/30/2006).
  - c. Click OK to close the window.
6. Type the file name of your choice into the **Output file** field, and browse to the location where you wish to save the file.
7. Click the EXPORT button.
8. A window may open stating that the log file m\_Export.log already exists. Click APPEND.
9. The records will export. When the process is complete, a window will open informing you of the number of records exported and the location of the export file. Click **OK**.
10. Close the Material Export window.

**FTP the file to WISCAT. For instructions and the WISCAT FTP server address and login information contact [Beth.Palmquist@dpi.state.wi.us](mailto:Beth.Palmquist@dpi.state.wi.us).**

These instructions have been adapted from the originals prepared by staff at the Connecticut Digital Library, Connecticut State Library for the reQuest statewide library catalog.