



# Spectrum CIRC/CAT Getting Started

*A guide for getting started with  
Winnebago Spectrum CIRC/CAT 5.0*



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# Introduction

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Winnebago Spectrum CIRC/CAT provides fast program operation, flexibility to meet the needs of your library, and dependability! Spectrum's advanced 32-bit programming architecture and data-efficient client/server technology guarantee all three. There is no faster, more dependable library automation program than Spectrum!

Spectrum also lets you work faster. Multi-windowing lets you keep more than one window open on your screen, and Spectrum's multitasking capabilities let you work with one part of the program while other parts are running.

TCP/IP makes Spectrum a partner with the Internet—making your library ready to take part in the information opportunities of the 21st century.

This guide introduces you to the main features of Spectrum CIRC/CAT. (You will want to consult your user and reference manuals for detailed steps and descriptions.) Use it to give you ideas and inspire questions. Also, use it as a place to make reference notes as you make your library an efficient place for community learning.


Some parts of Spectrum Setup are included in this guide. Setup is crucial because the more precisely you tailor your library automation system to meet your individual needs, the better it performs for you. Spectrum provides a variety of options for you to make your library automation program a precise fit.

Get ready to let Spectrum give your library an automation system that is efficient, dependable, and ready to take on any information challenge.

## Using the Spectrum Help system

Spectrum comes with a complete Help system. The Help includes step-by-step directions that you follow as you work, examples that show you how to complete a process, and reference information. It's designed to solve problems you encounter while working with Spectrum as well as instruct you on how to finish a specific task. *Note:* You don't need a connection to the Internet to use the online Help system.

You access the Help system in several ways. Context sensitive help is opened from the program window by clicking the Help button or by pressing the F1 key (Windows) or Help key (Macintosh). You can search for any topic from the Help Topics window by choosing Help Topics from the Help menu. From the Help Topics window, you can search for a specific topic using any of the three tabs: Contents, Index, or Find.

Green text indicates that additional information is available. When you place the screen cursor over these hotspots or links it changes to a pointing hand . Links that are green and underlined are links to another Help topic or popup topics. Popup windows contain definitions and graphics, and do not remain open while you're working with the program because they close as soon as they are clicked for a second time.

You access additional Help topics from the current Help topic by clicking the available links in the current Help window.

There's also a Glossary button in every Help window. When you click it, you get an online glossary to use as a reference tool for Spectrum terms, library terms, and technical terms.

### ***About context-sensitive Help***

If you need help while working with the program, click the Help button (if available) or press the F1 key (Windows) or Help key (Macintosh) to bring up context-sensitive help. Context-sensitive Help opens a Help window with information about the part of the program that is currently active.

For example, if you're printing a list of the materials you found during your catalog search and want to know what information prints, you can press the F1 or Help key while in the Print Bibliographies window and the Help topic that explains printing a bibliography opens.

Using the Help button, F1 key, or Help key is the quickest method of getting help on the part of the program you have currently open.

## **Printing a Help topic**

If you are completing a long process, you may want to print the Help topic for reference.



### **To print a help topic**


- 1 Choose **Print Topic** from the **Options** menu, or click the **Print** button in any topic window.
- 2 Select your **Print** options and click **OK** at the Print window.

*Note:* In Windows, you can print popup window information by placing the pointer on the open popup topic, clicking the right-mouse button, and choosing Print Topic.



## Using the Contents tab

The Contents tab is the table of contents for the program's Help system. The topics in the Help system are arranged by categories called books . The main books are listed in the Contents tab when you open it. Inside the books are pages  or topics listed by title.

You open a book  or topic by selecting it and clicking Open or by double-clicking the book (*Note:* Double-clicking an open book closes it).

### To open the Contents tab from the program

- 1 From the **Help** menu, choose **Help Topics**.
- 2 If the contents are not displayed, click the **Contents** tab.

### To open the Contents tab from a Help window

- 1 Click the **Help Topics** button.
- 2 Click the **Contents** tab.

## Using the Index tab

Help includes an index that you can use to find the information you need. In the Index tab, you search through key words to find the topics with information you want to read. You can scroll through all of the index entries or you can enter a specific word. If you do enter a specific word, the word you enter (or the closest one to it if it isn't in the index) is highlighted in the list of index entries.

The entries in the Index tab are created by the Help system authors. The information here is comparable to an index found in the back of a manual or reference book.

*Note:* Help features may function or appear differently on a Macintosh.

### To open the Index tab from the program

- 1 Choose **Help Topics** from the **Help** menu.
- 2 Click the **Index** tab.

### To open the Index tab from a Help window

- 1 Click the **Help Topics** button.
- 2 Click the **Index** tab.

## To open a topic from the Index tab

- 1 In the box at the top of the **Index** tab, enter the first few letters of the word you're looking for. The group box at the bottom of the window scrolls to the first matching word.
- 2 In the bottom group box, double-click the index entry you want to view the topics for. If more than one topic contains the selected index entry, the Topics Found window opens. (If only one topic is associated with the selected index entry, the Help topic opens.)
- 3 In the Topics Found window, double-click the topic you want to view.

## Using the Find tab

If you want to find all of the information available about a topic, the Find tab should be your first choice for searching the Help system. The Find tab lets you search on a specific word or phrase and locate all Help topics containing that word or phrase.

To open topics from the Find tab, follow the steps listed in the Find Setup Wizard window, which opens the first time you click the Find tab.

After going through the Find Setup wizard, follow the three steps listed on the Find tab. First, enter the word you're searching for. The program then displays related words in the matching words list. You reduce the number of topics displayed in the Topics Found list by selecting matching words to narrow your search, or you can scroll through all of the listed topics and display the topic that interests you.

Searching with the Find tab gives you the most information because it uses a full-text search generated by the program to find topics. This method doesn't limit your information to those topics that the Help system authors found appropriate for a certain topic. Any topic that contains the word or phrase you enter in the "Type word(s) you want to find" box is displayed in the Topics Found list.

*Note:* Help features may function or appear differently on a Macintosh.

### To open the Find tab from the program

- 1 Choose **Help Topics** from the **Help** menu.
- 2 Click the **Find** tab. If this is the first time you have used the Find feature, the Find Setup wizard opens. Follow the instructions in the wizard. You can select the default option, **Minimize database size**.

### To open the Find tab from a Help window

- 1 Click the **Help Topics** button.
- 2 Click the **Find** tab. If this is the first time you have used the Find feature, the Find Setup wizard opens. Follow the instructions in the wizard. You can select the default option, **Minimize database size**.

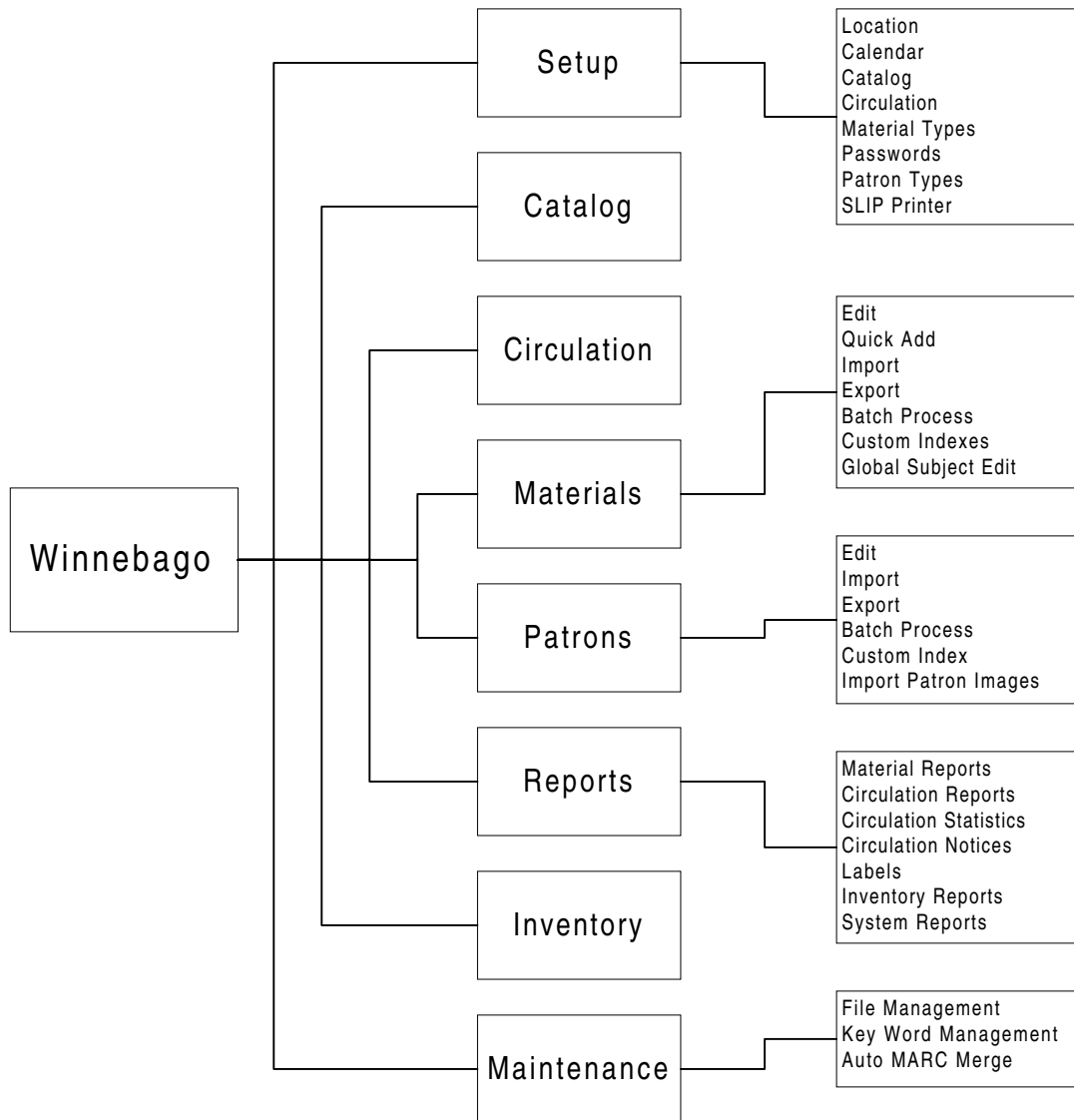
### To search for topics using the Find tab

- 1 In the first box, enter the word or phrase you're searching for. The window displays related words in the matching words list and the topics that contain the specified word or phrase.
- 2 In the second box, select matching words to narrow your search.
- 3 In the third box, double-click the topic you want to view.

You can set options using the Options button in the Find tab to further define your search criteria.

## The Winnebago menu

The following chart displays the selections available from the Winnebago menu.



# Setting up passwords, location, and the calendar

---

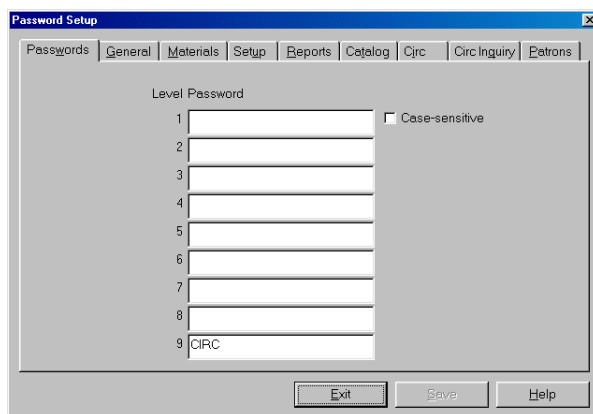
## Manual alert!

Your *Spectrum CIRC/CAT User Manual* and *Reference Manual* are the places to go before you start any Setup procedures! It walks you through all the steps. And it helps you make choices that customize Spectrum CIRC/CAT exactly for your library.

## Password Setup features

Spectrum CIRC/CAT gives you the option of nine password levels for optimum security. The password system is designed so that the highest level (level 9) gives access to any of the lower levels. Also, any intermediate level password accesses any lower level. A level 5 password, for example, opens level 3.

You open the Password Setup window by choosing Setup > Passwords from the Winnebago menu. Using the tabs at the top of the Password Setup window, you can match password levels to a wide variety of commands, functions, and areas in the program. You can also choose not to limit access by passwords by setting a command to 0 (zero).



A checkbox at the top right of the Password Setup window lets you choose whether or not to make your passwords case-sensitive. Case-sensitive passwords must be typed with the correct lower-case or upper-case letters, as they are entered in Password Setup.

The pre-set password for level nine is CIRC. Sagebrush recommends you change this to a password of your own. Passwords can contain up to 20 characters. They can be made up of numbers, symbols, and spaces. Make sure you keep your password record in a safe place.

## Passwords level worksheet

Use this worksheet as a master copy for your passwords and password levels. When you're ready to set up your passwords, photocopy this worksheet. Then, list the passwords and password levels that you set up on the photocopied version. If you ever need to change your passwords, you can create a new photocopy to list your updated passwords. Remember to store the worksheet copy that contains your passwords in a safe place, so only authorized personnel can access it.

### Enter passwords for each level (Password Setup—Passwords tab)

Note: Passwords can contain up to 20 characters each.

Level 1 \_\_\_\_\_ Level 4 \_\_\_\_\_ Level 7 \_\_\_\_\_

Level 2 \_\_\_\_\_ Level 5 \_\_\_\_\_ Level 8 \_\_\_\_\_

Level 3 \_\_\_\_\_ Level 6 \_\_\_\_\_ Level 9 \_\_\_\_\_

\_\_\_ Case-sensitive \_\_\_ Not case-sensitive

### Enter a password level for each program feature (0–9)

#### General

\_\_\_ Inventory \_\_\_ File management \_\_\_ Key word management \_\_\_ Auto MARC merge

\_\_\_ Maximum password entry attempts (1-5)

#### Materials

\_\_\_ Import materials \_\_\_ Export materials \_\_\_ Edit materials \_\_\_ Material batch processing

\_\_\_ Global subject edit \_\_\_ Material custom indexes \_\_\_ Material quick add

## **Setup**

<input type="checkbox"/> Location setup	<input type="checkbox"/> Calendar setup	<input type="checkbox"/> Catalog setup	<input type="checkbox"/> Circulation setup
<input type="checkbox"/> Material type setup	<input type="checkbox"/> Patron type setup	<input type="checkbox"/> SLIP printer setup	

## **Reports**

<input type="checkbox"/> Circulation reports	<input type="checkbox"/> Circulation statistics	<input type="checkbox"/> Circulation notices	<input type="checkbox"/> System reports
<input type="checkbox"/> Material reports	<input type="checkbox"/> Inventory reports	<input type="checkbox"/> Labels	

## **Catalog**

<input type="checkbox"/> Enter catalog	<input type="checkbox"/> Print bibliographies	<input type="checkbox"/> Exit catalog
--	---	---------------------------------------

## **Circulation**

<input type="checkbox"/> Enter circulation	<input type="checkbox"/> Check in	<input type="checkbox"/> Check out	<input type="checkbox"/> Check out/set date
<input type="checkbox"/> Circulation override	<input type="checkbox"/> Mark materials lost	<input type="checkbox"/> Renew patron	<input type="checkbox"/> Add fine
<input type="checkbox"/> Negotiate fine	<input type="checkbox"/> Collect fine	<input type="checkbox"/> Renew materials	<input type="checkbox"/> Reserve title
<input type="checkbox"/> Reserve holding	<input type="checkbox"/> Special reserve	<input type="checkbox"/> Advance booking	

## **Circulation Inquiry**

<input type="checkbox"/> Patron general	<input type="checkbox"/> Patron reserves	<input type="checkbox"/> Patron advance bookings	<input type="checkbox"/> Patron messages
<input type="checkbox"/> Patron fines	<input type="checkbox"/> Patron circ log	<input type="checkbox"/> Patron fine log	<input type="checkbox"/> Material general
<input type="checkbox"/> Material reserves	<input type="checkbox"/> Material advance bookings	<input type="checkbox"/> Material messages	<input type="checkbox"/> Material circ log

## **Patrons**

- ☐ Import patrons
- ☐ Export patrons
- ☐ Edit patrons
- ☐ Patron batch processing
- ☐ Patron custom index
- ☐ Import patron images

## **Enter Spectrum Server password**

This password is requested in the FairCom Server Shutdown window when you shut down Spectrum Server.

Directions for changing this password are located in the *Server* chapter in the *Spectrum CIRC/CAT User Manual*. The default Spectrum Server password is ADMIN (all caps). *Note:* This password is case-sensitive.

Spectrum Server password \_\_\_\_\_



## System Location Setup features

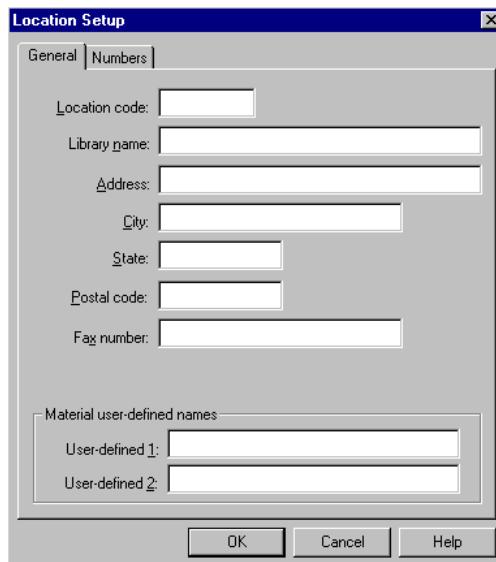
You open the Location Setup window by choosing Setup > Location from the Winnebago menu. The options set up here affect how your entire Spectrum CIRC/CAT program operates.

### General tab

In this tab, you enter your library's location code, address, fax number, and two material user-defined fields.

The four-digit location code is incorporated into printed material and patron labels. It's especially important if your library shares materials with other libraries. Your library's name and address are used on printed receipts, while the fax number is for storage and reference purposes only.

If your library participates in a cooperative library system (such as Winnebago Union CAT or Spectrum Union Catalog) you may need the location code to identify materials from your library. Also, if you print 14-digit barcodes in your Spectrum CIRC/CAT program, your location code must be four characters long.



The screenshot shows a Windows-style dialog box titled "Location Setup" with a close button (X) in the top right corner. The dialog has two tabs: "General" (selected) and "Numbers". The "General" tab contains several text input fields with labels: "Location code:" (a short field), "Library name:" (a long field), "Address:" (a long field), "City:" (a medium field), "State:" (a short field), "Postal code:" (a short field), and "Fax number:" (a medium field). Below these fields is a section titled "Material user-defined names" containing two more text input fields labeled "User-defined 1:" and "User-defined 2:". At the bottom of the dialog are three buttons: "OK", "Cancel", and "Help".

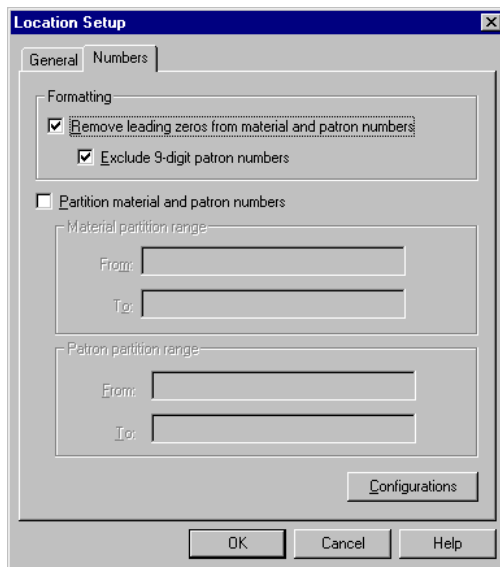
The names used for the user-defined fields can be up to 16 characters long. They add to the fields already in your material records and show up in the Holdings window when you edit materials. They can also be used as indexes in some reports. (An *index* is a common characteristic the program uses to arrange items.)

**Hint:**

*Make sure you understand the basics of your computer operating system before you start. You should know how to open, close, and position windows; click, double-click, and drag items using a mouse; select a menu item and an item in a list; scroll a list or document; and use the tab key when entering information.*

## Numbers tab

Use this tab to define use of barcodes. Spectrum gives you the option to designate ranges for material and patron numbers to make sure you do not accidentally get a patron and a material with the same barcode number. Barcode numbers within a certain range are designated for materials, and numbers in a different range are reserved for patrons.



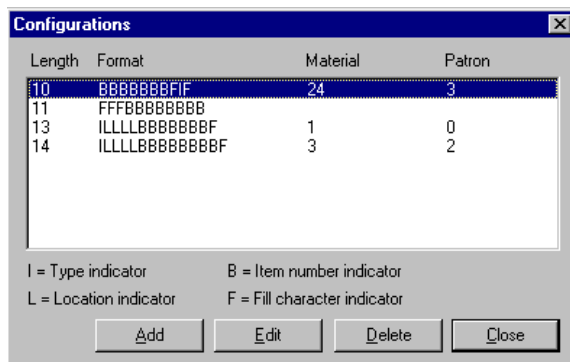
A barcode formatting option lets you remove leading zeros except, if you choose, in the case of 9-digit patron barcodes. This eliminates changes to social security numbers.

If your material and patron barcode numbers are in the same range, do not set a partition. Instead, to avoid confusion, print your patron barcodes with a leading "P."

The Configurations button at the bottom of the window opens the Configurations window. Here you determine the format of your material and patron barcodes. Buttons let you add, edit, or delete a particular configuration. Barcode numbers can include your location code and material or patron type indicators. For example, if you have a material barcode number of 3555589788437K, the first number is a type indicator. It shows that

this is a material. The next four numbers represent the location. The eight numbers after that make up the actual number assigned to the material, and the K is a fill character—that is, an ignored character. In the configuration, this barcode number would be designated as ILLLLBBBBBBBF.

By default, the Configurations window has four different length barcode configurations: 10-, 11-, 13- and 14-digits. These configurations work with all standard barcode configurations. The only time you would need to add or edit existing barcode configurations is if the barcodes used have unusual configurations (meaning they don't fall within the four configurations listed above). Very rarely do you need to add or edit existing barcode configurations.



## Calendar Setup features

Setting up the calendar in the Calendar Setup window is necessary for determining due dates and calculating fines. Spectrum CIRC/CAT lets you organize your calendar with various groups of patrons in mind using customized schedules for each group.

In Calendar Setup you can add, delete, and rename schedules to accommodate these different patron types. For example, if yours is a library in a year-round school, you may need to tailor your library hours and due dates for different classes. You may also want to let faculty check out materials during in-service days or weekends when the library is normally closed.

The Calendar Setup window lets you schedule your library's open and closed days for various schedules for specific months in the year. (You can include settings for next year or several years in advance.)

## Calendar Command Buttons



Add New Schedule



Delete Schedule



Save Changes



Rename Schedule



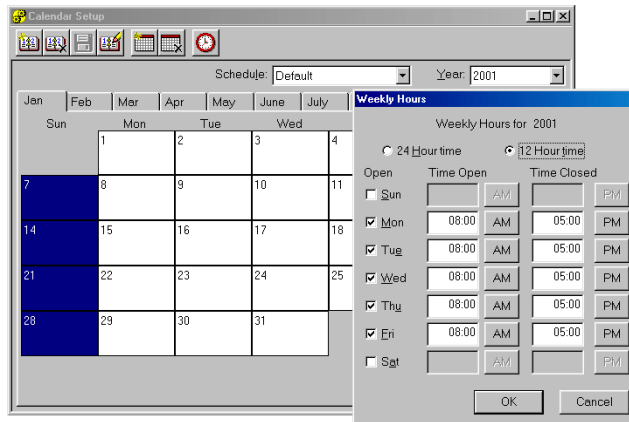
Add New Year



Delete Year



Set Weekly Hours



Buttons at the top of the Calendar Setup window let you add or delete schedules and years. (Schedule and Calendar on the menu bar let you do the same thing.) Another button lets you access the Weekly Hours window.

When you add a new year, the added year automatically sets up the same weekly hours as the preceding year. If you don't want the new year to have the same settings, you can set new hours in the Weekly Hours window.

## Frequently asked questions

**1    *Where does the library name entered in Location Setup appear?***

The library name is used on printed receipts, and is also displayed on the title bar of the Spectrum CIRC/CAT program.

**2    *Is barcode partitioning necessary?***

Not always. If you want to use the same range for both patron and material barcode numbers, you don't need a partition. When you enter the number in circulation, the program looks for the material first. If it doesn't find a material with that number, it looks for a patron. If a material and a patron have the same number, you must enter a "P" before the patron's number.

**3    *How many years can be stored in Calendar Setup?***

Calendar Setup can store up to 42 years and automatically recognizes which are leap years. However, this version of Spectrum CIRC/CAT does not support years after 2039.

**4    *Why do I need to specify library opening and closing times in Calendar Setup?***

Specifying opening and closing times is necessary in order for Spectrum to calculate hourly loan periods.

**5    *How do I print weekly hours and monthly calendars?***

You can print weekly hours and monthly calendars by using Spectrum's System Reports. Click the Reports button in the Navigator toolbar, select System Reports and then select either Calendar-Hours or Calendar-Months. In the System Reports window, click the Options button to set which schedule you want to print, as well as the first month you want to print for your monthly calendar.

# Setting up and managing material records

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## Manual alert!

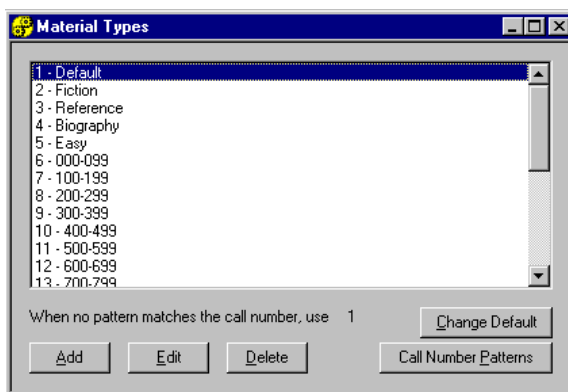
Keep your *Spectrum CIRC/CAT User Manual* and *Reference Manual* close by when you make changes to your materials database. All of the steps for editing one record at a time, importing and exporting files, and using batch processes are outlined in detail. Plus, there is specific information on making changes to MARC 21 data, how to match records, and how to interpret and resolve the errors noted in importing and exporting.

## Setup features for material types

Now you are ready to categorize your materials into types and to set loan periods, fine rates, and grace periods for each type. Whenever you want to add, edit, or delete material types, choose Setup from the Winnebago menu, and then choose Material Types. This opens the Material Types Setup window. Details about particular material types are recorded on the General and Call Number Patterns tabs.

**Material Types Setup window:** Shows the list of material types you currently have and permits you to add, edit, or delete types on this list. Spectrum installs 20 material types for you to customize, but you can have as many as 999.

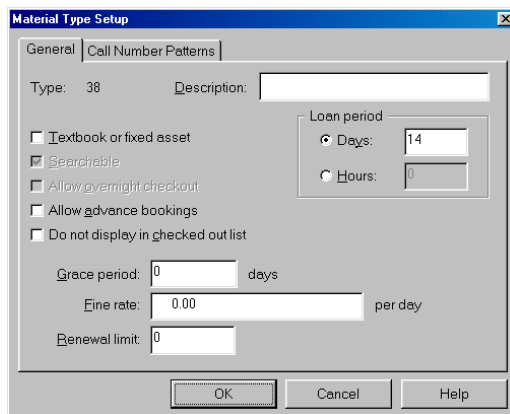
*Note:* You must set up material types before you import or add materials.



Click Add to add a new material type. You are first asked to verify what number the new material type should have. The General Tab opens. You are asked for a description of the new material type. Then you indicate the loan period, grace period, fine rate, and renewal limit. If the material has an hourly checkout period, you decide if it can also be checked out overnight. Other checkboxes ask if the material should be displayed in checked out lists, whether advance bookings are allowed, and if it is a textbook or fixed asset. A textbook or fixed asset does not count toward a checkout limit. You also indicate if you want it to be searchable in the catalog. (Other material types are automatically searchable.)

**Hint:**

Whenever your Spectrum CIRC/CAT database finds a call number it can't associate with a material type, it includes it in the Default Material Type. To see if you have enough types, it is a good idea to print a list of materials from Default. Then you can determine if some of those materials should be in a material type by themselves.

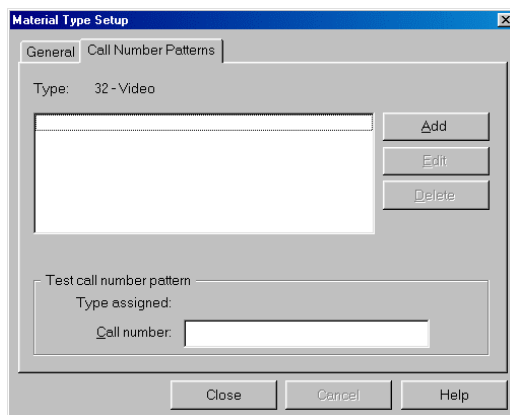


The 'Material Type Setup' dialog box is shown with the 'General' tab selected. It contains the following fields and options:

- Type: 38
- Description: (empty text box)
- ☐ Textbook or fixed asset
- ☒ Searchable
- ☐ Allow overnight checkout
- ☐ Allow advance bookings
- ☐ Do not display in checked out list
- Loan period:
  - ☒ Days: 14
  - ☐ Hours: 0
- Grace period: 0 days
- Fine rate: 0.00 per day
- Renewal limit: 0

Buttons at the bottom: OK, Cancel, Help.

Clicking the Call Number Patterns tab lets you associate call number patterns with the new material type and test them to make sure there are no conflicts. Material types and their call number patterns can also be edited or deleted. Highlight the material type and click the appropriate button at the bottom of the Material Types window—Add, Edit, or Delete. The Call Number Patterns button also accesses the Call Number Patterns tab.



The 'Material Type Setup' dialog box is shown with the 'Call Number Patterns' tab selected. It contains the following fields and options:

- Type: 32 - Video
- (Empty list box for call number patterns)
- Buttons: Add, Edit, Delete
- Test call number pattern:
  - Type assigned: (empty text box)
  - Call number: (empty text box)

Buttons at the bottom: Close, Cancel, Help.

Call numbers patterns are necessary because they are used automatically to assign material types to material records that don't have material information in tag 961wl\_t. If no call number pattern matches those of the new material record you are importing or manually adding, the program assigns the Default material type to the record. The assigned Default material type is listed at the bottom of the Material Types window. Change it by selecting the new default type from the list and clicking the Change Default button.

Material types do not have to be limited to traditional types like fiction or history. For example, you might want to classify materials designated as lost in a library inventory in a special material type such as “Lost 99.” If these materials remain lost, you might consider deleting their records after a certain amount of time—such as three years. Other material types could be created for placing materials temporarily on Special Reserve. (Special Reserve is when you temporarily change a material’s material type to change its checkout status for a short period of time.) Material types for Special Reserve might be called “Winter holidays” or even “Mrs. Smith’s Class.”

For a list of all the material types you have, you can print a Material Type Descriptions report. The Material Type Descriptions report lists the material type name and the properties that describe that type for all material types. The report includes the call number patterns for the material type. To access the Material Type Descriptions report, click the Reports button in the Navigator toolbar and select System Reports > Material Type Descriptions.

## Managing material records

The Spectrum CIRC/CAT Materials module lets you add, delete, and edit material records. You can use Easy Entry for most of your changes. The Edit MARC option is available if you want to do detailed editing, including changes to information located in any tag, indicator, or subfield. (You can also add, edit, and delete individual holdings data.) *Note:* Be sure to set up your material types before adding 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.



**Quick Add**

URL:

Local call number:  Material number:

Volume:  Material type:

Author:

Title:

Publisher:

Place of publication:

Publication date:  ISBN:

Summary note:

Subject

Topical term:

General subdivision:

Form subdivision:

## Material Edit

With the Easy Entry window, you do not need to know MARC 21. Four tabs are offered for different types of materials: Book, Video, Sound, and Computer File. The tab you use to create a material record automatically inserts the correct MARC fields for that category.

**Easy Entry**

Book | Video | Sound | Computer File

Main Entry

Personal Name:

Dates:

Title Statement

Title:

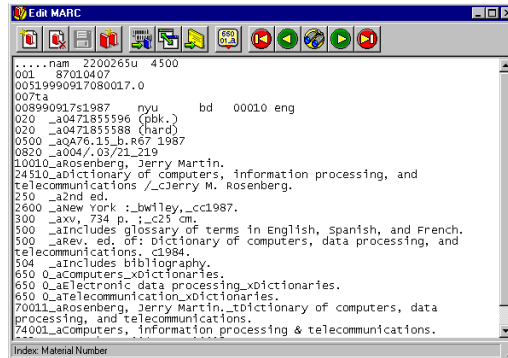
Subtitle:

Statement of responsibility:

Alternate title:

Index: Material Number

The Edit MARC window lets you add, edit, or delete information in MARC 21 Holdings data format. You can change information in any tag field, indicator, subfield, or leader or control fields.



## Viewing web sites

If you activate WebConnect in Catalog Setup, you can store Uniform Resource Locators (URLs)—also known as web addresses—in tag 856 (Electronic Location and Access) subfield \_u. Then patrons can access the web sites from the Catalog using WebConnect.

Many URLs contain underscores ( \_ ) which conflict with the Pre-1997 MicroLIF format. To get around this, the characters %5F are used in place of an underscore, and the MicroLIF standard then interprets this as an underscore. When entering an underscore in a URL, press Control, Shift, and Underscore simultaneously. The window displays an underscore plus a space that is converted to and from %5F when the record is saved or loaded.

## Loading material records

To load a material record in the Easy Entry or Edit MARC window, you must first choose an index from the Index menu to sort your records. Then the five load buttons—First, Previous, Look Up, Next, and Last—let you browse records in whatever index you’ve chosen.

To load a specific record instead of browsing, you also first choose an index. Then, click the Look Up button or Look Up on the Record menu. The Key Value window opens. Enter the value of the record you want. (By default, the index is material number.)

Easy Entry, Edit MARC, and the Holdings window provide four menus—Record, Index, Material, and View—to let you add, delete, change, or view records.

### Record menu Buttons



New Record



Save Record



Duplicate Record



Delete Record



Look Up Record

### Record menu

The record menu lets you add, save, duplicate, look up, and delete material records. In addition, the Record menu helps you navigate through your material records using the First, Next, Previous, and Next buttons.

### Index menu

The Index menu changes indexes as you search for particular material or holding records. In Easy Entry and Edit MARC you can index material records by call number, material number, author, title, subject, ISBN, and LCCN, as well as the two user-defined fields you filled in during Location Setup. Holding records are indexed by call number, material number, and the two user-defined fields.

### Material menu Buttons



Authority Control



Insert MARC Text



Set Material Type



Add Holdings



Delete Holdings

### View menu Buttons



Show Edit MARC



Show Easy Entry



Show Holdings



Show Card Image

## Material menu

The Material menu lets you perform several library tasks. The commands available depend on if you are in Easy Entry, Edit MARC, or the Holdings window.

Authority Control, for example, is an important feature available in Easy Entry in the Material menu. It provides consistency and accuracy in cataloging because it lets you minimize spelling, capitalization, and punctuation inconsistencies in your data. The command is only available when the cursor is placed in one of the boxes in Easy Entry. The box it is placed in determines what Authority Control window opens—title, author, or subject.

Easy Entry also offers the Set Next Number command. This lets you set the next material record number to be assigned.

Edit MARC's Material menu offers the Insert MARC Text command. As in Authority Control, Insert MARC Text minimizes mistakes by letting you pick a valid value from a preset list. Edit MARC also offers Set Next Number and Use Number: n, which assigns the displayed number to the current record.

At the Holdings window, you are able to Set Material Type. This command assigns a material type to a particular holding record. Set Next Number and Use Number: n are also offered.

## View Menu

The View menu lets you view your material and holdings data in several ways. Material records can be viewed in Easy Entry, Edit MARC, and Card Image format. You can also view the holdings data for each material record.

Edit MARC lets you change the font and font size of records with the View menu. You can also change the type of descriptive text you see—that is, the names of fields, subfields, and indicators.

## Managing your holding records

Spectrum CIRC/CAT distinguishes between materials and holdings. Materials are books, CDs, cassettes, and so on (of the same title and author, for example) and holdings are individual copies of a particular material.

You can add, edit, and delete data in the holdings records of materials. The Holdings window for a particular record can be accessed from that record's Easy Entry or Edit MARC window.

When the Holdings window is open, all functions such as New, Delete, and Browse refer to holdings records and not material records. Holding records contain a number of editable fields, but some contain system-generated data and cannot be edited directly.

The Holdings window displays the following fields and data:

- Local call number: FIC Two
- Shelving location:
- Material number: 1
- Material type: 2 Fiction
- Fund:
- Price:
- Volume:
- Acquisition date:
- Vendor:
- Added: 12/13/2000
- Edited:
- Lost:
- Holdings: 2

Material Number	Cell Number	Acquisition date	Vendor
1	FIC Two		
10016	FIC Two		

Index: Material Number

After you complete the first holding's record, you can add more holdings for the same material by clicking the Add Holdings button. The Add Holdings window opens where you enter the number of Holdings to add. The data from the first holding is automatically copied to the second. Any data that differs for the new holding can be edited.

## Importing material records

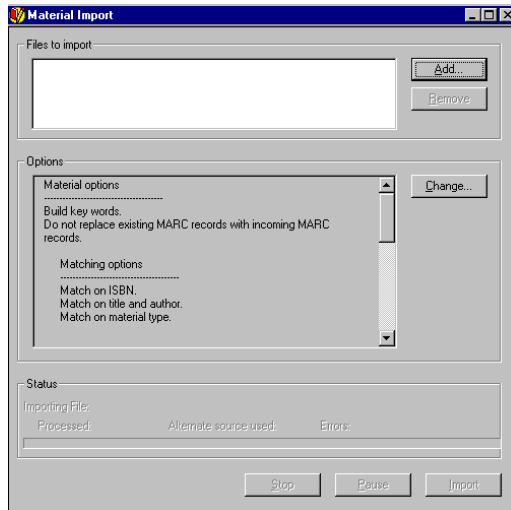
Spectrum CIRC/CAT lets you import or export records from a computer file instead of doing each by hand. For example, you can import a file of material records from a book vendor to make them part of your Spectrum catalog collection.

*Note:* Before importing material records, be sure to set up your material types.

The import process may take some time. The length of time depends on many things: the size of your material collection, the size of the new records, the speed of your computer, and the options you select for importing.

### To import records

Click the Materials button in the Navigator toolbar, and select Import. The Material Import window opens. Click Add to open the Open window. In the Open window, you select the files to add.



After selecting files, return to the Material Import window and click the Change button to reach the Material Import Options window. A checkbox in the Materials tab lets you locate key words and add them to your library's key word list. Others let you match records when certain conditions are met. This enables you to update or replace existing records.

The Holdings tab of the Material Import Options window lets you specify how material numbers are assigned to incoming holding records. A checkbox at the top lets you import any available user-defined data from 961 tag fields.

When the importing process is done, the Material Import Information window opens. It indicates how many records were added and if there were any problems with adding records. Your user manual lists some of the possible error messages, their causes, and what can be done about them. (See the "Importing material records" section in the *Materials* chapter of your user manual.)



***Important!*** If you have Windows 98 on your client computer, make sure that Power Management is not turned on when you import, export, or batch process material records. If Power Management shuts down your computer during any of these processes, your database could become corrupt.

## Importing scenarios

The import options you choose depend on how you want to import your records. Below are two scenarios showing how various setups can produce different outcomes.

### MicroLif file of new records from book vendor

In this scenario, you want to add new records, merge and replace MARC with existing records, and add new holdings.

### To import records into Spectrum CIRC/CAT

- 1 In the Material Import window, click the **Add** button and select the file(s) that you want to import.
- 2 Click the **Change** button. The **Materials** tab of the Material Import Options window opens.
- 3 In the **Materials** tab, make sure the **Build key words** option is selected.
- 4 Select **Replace database MARC records with incoming MARC records**.
- 5 Make sure **Match MARC records using the following criteria** is selected
- 6 Select **Match on title and author**.
- 7 Select **Match on material type**.
- 8 Click the **Holdings** tab.
- 9 Select the **Add holdings** option.
- 10 Select **Import user-defined data from 961 tags**.
- 11 Select **Use the incoming material number**.
- 12 In the **Holdings** tab, click the **Change** button. The Matching Number Resolution window opens.
- 13 Select **Use the alternate source settings to assign a new material number to the incoming data** and click **OK**.
- 14 In the **Starting material number** box, enter the first number to use as a material number for incoming records that can't be imported with their current material number.



- 15 In the **Location code** group, select **852 'a' contains shelving location data. Move 852 'a' to 852 'c'** if you currently store shelving information in tag 852\_a.
- 16 Click **OK** to return to the Material Import window and click **Import** to begin importing.

### **Importing new records without matching any records**

In this scenario, you want to add each incoming record to your database as a new record without matching any existing records. (Follow this scenario if you're importing records from a Winnebago CIRC/CAT for MS-DOS program and want your records to appear the same in Spectrum CIRC/CAT as they did in your old program.)

### **To import new records without matching any records**

- 1 Click the **Add** button and select the files that you want to import.
- 2 In the Material Import window, click **Change**. The **Materials** tab of the Material Import Options window opens.
- 3 In the **Materials** tab, make sure the **Replace database MARC records with incoming MARC records** option is *not* selected.
- 4 In the **MARC record matching** group, select **Do not match records**.
- 5 Click the **Holdings** tab.
- 6 Make sure the **Add holdings** option is selected.
- 7 Make sure the **Import user-defined data from 961 tags** option is selected.
- 8 Select the **Use the incoming material number** option.
- 9 Click **OK** to return to the Material Import window.
- 10 Click **Import** to begin importing.

## Frequently asked questions

**1    *How do I bring up a record that I know is in the database?***

Use the Index menu to select a field. If you know the title, select Title. Then use the Record menu and select Look Up. In the text box, type the title of the material you want to find.

**2    *Where do I enter material acquisition information?***

Material acquisition information such as fun and price can be entered in the Holdings window.

**3    *What data is stored in the 961\_t, \_u and \_v tags?***

The 961\_t stores the material type number. The 961\_u tag stores information from the user-defined fields. The 961\_v tag stores information from the volume field. Sometimes the indicators “wl” are used to indicate that these are “Winnebago local” fields.

**4    *Where does Spectrum’s MARConnect store cataloged web site information?***

MARConnect stores web site information in the 856\_u tag field of your Spectrum database records.

**5    *How can I change the material barcode number of an existing material?***

Find the material you want to edit. From the Record menu, choose Duplicate. Modify the material barcode number in the Holdings window and save the record. Find the original material with the incorrect material barcode number and delete the record.

# Setting up and managing patron types

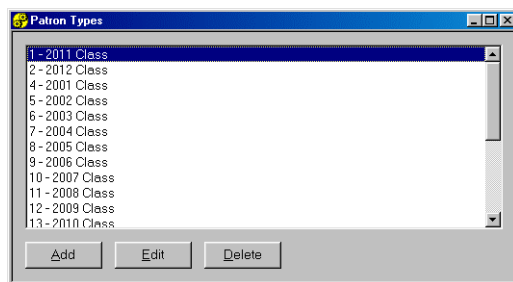
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## Setup features for patron types

In the Patron Type Setup section, you determine your patron categories and set their privileges. Patrons of one type all share the same circulation privileges. You can have as many as 999 types.

The Patron Types window shows a list of your current patron types. You can add, edit, or delete any of the patron types.

*Note:* Be sure to set up your patron types before adding any patron records.



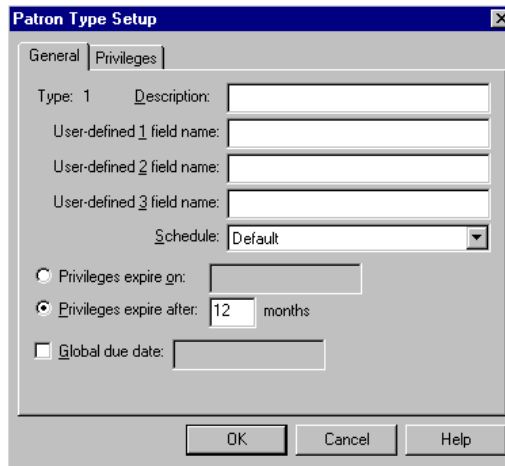
### **Hint:**

*If you have categories like Senior Class, consider naming this type by graduation date (for example Class of '00). This way you won't have to reassign patron types every year.*

To add patron types, click the Add button. You are first asked to verify what number you want for the new patron type. The General tab opens. You are asked to give a description of the new patron type and are offered three user-defined fields. You simply enter the names of the user-defined fields here—such as home phone number or classroom. Later, in the Patron Edit window, you put in the specifics. Schedule refers to the schedules you set up in Calendar Setup. Other options let you specify when this patron type's privileges expire and if this type has a global due date. (A global due date is a specific date by which a patron type must return all checked out materials.)

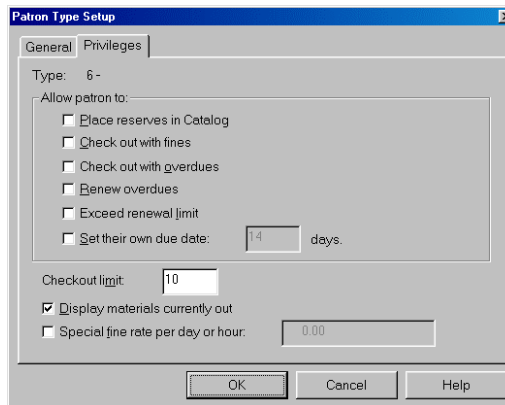
### Manual alert!

You'll find detailed information in the *Spectrum CIRC/CAT User Manual* and *Reference Manual* on the fields in patron records, how to edit patron records, and what patron text file formats you can import.



The image shows the 'Patron Type Setup' dialog box with the 'General' tab selected. The 'Privileges' tab is also visible. The 'Type' field is set to '1'. The 'Description' field is empty. There are three 'User-defined' field name fields, all empty. The 'Schedule' dropdown is set to 'Default'. There are three radio buttons for 'Privileges expire on': 'on', 'after', and 'Global due date'. The 'after' radio button is selected, and the 'months' field is set to '12'. The 'Global due date' field is empty. At the bottom are 'OK', 'Cancel', and 'Help' buttons.

The Privileges tab determines privileges for the new patron type. Checkboxes exist for placing reserves, checkout with fines, checkout with overdues, renewing overdues, exceeding renewal limits, and whether this patron type should be able to set their own due dates. You are also asked to set a checkout limit, to specify if materials currently checked out to this type can be displayed in the Circulation window, and if there is a special fine rate.



The image shows the 'Patron Type Setup' dialog box with the 'Privileges' tab selected. The 'Type' field is set to '6 -'. The 'Allow patron to:' section has several checkboxes: 'Place reserves in Catalog', 'Check out with fines', 'Check out with overdues', 'Renew overdues', 'Exceed renewal limit', and 'Set their own due date'. The 'Set their own due date' checkbox is selected, and the 'days' field is set to '14'. The 'Checkout limit' field is set to '10'. The 'Display materials currently out' checkbox is checked. The 'Special fine rate per day or hour' field is set to '0.00'. At the bottom are 'OK', 'Cancel', and 'Help' buttons.

When editing a patron type, you also enter data in the General tab and Privileges tab windows. With Delete you are simply asked to verify if you really want to delete the highlighted patron type.

If you want a list of all of your patron types, you can print a Patron Type Descriptions report. The Patron Type Descriptions report lists the patron type name and the properties that describe that type for all patron types. To access the Patron Type Descriptions report, click the Reports button in the Navigator toolbar and select System Reports. Then select Patron Type Descriptions from the expanded menu.

## Managing patron records

Spectrum's Patrons module manages your patron records database.

**Editing individual patron records:** Choosing Patron and Edit opens the Patron Edit window. In this window, you can add, edit, and delete patron records. Two new menus are added to the menu bar—Record and Patron.

The **Record menu** lets you add, save, look up, and delete patron records.

The **Patron menu**, on the other hand, lets you change specific aspects of a patron record—such as renewing patron privileges, adding and removing patron images, changing a previously assigned patron type, and designating patron numbers.

**Loading patron records:** Patron records can be indexed by patron number, patron name, patron type, and three user-defined fields.

**Patron image files:** Patron images can be linked with patron records. In order to link patron images, your patron pictures must be in bitmap file format. Sagebrush recommends using patron barcode numbers to name individual patron image files.

### Record menu Buttons



New Record



Save Record



Save as Default



Look Up Patron



Delete Record

### Patron menu Buttons



Renew Privileges



Set Type



Set Next Number

The screenshot shows the 'Patron Edit' window with a toolbar at the top containing icons for New Record, Save Record, Look Up Patron, Delete Record, Renew Privileges, Set Type, and Set Next Number. The form fields are as follows:

Index:	Patron Number	Expires:	03/04/00	Added:	03/04/99
		Usage:	6	Edited:	03/05/99
Patron number:	101301				
Last name:	WOLF				
First name:	MARIE				
Address:	1012 FRANKLIN ST				
City:	CALEDONIA				
State:	MN	Postal code:	55921		
Patron type:	15	Class of '08			
Phone number:	( ) 275-5699				
User-defined 2:					
User-defined 3:					

## Importing patron records

Patron records files can be imported as long as they are in the proper format. New patron records can be added to your database, or you can replace old records with incoming records if the imported files match by name or number. The method you use to import depends on whether the records are new or intended to replace old ones.

*Note:* Be sure to set up your patron types before importing any patron records.



**Important!** If you have Windows 98 on your client computer, make sure that Power Management is turned off when you import, export, or batch process patron records. If Power Management shuts off your computer during the process, your database could become corrupt.

A screenshot of the 'Patron Import' dialog box. The window has a title bar with the text 'Patron Import' and standard window controls. It contains several sections: 'Import File' with a 'Browse' button and a 'Format' dropdown menu set to 'Spectrum fixed-length'; 'Options' with a 'Method' dropdown menu set to 'Update by number', a text box for 'Start numbering at' containing '981', and two unchecked checkboxes labeled 'Clear patron usage' and 'Import date added and date last edited'; and a 'Status' section with 'Processed: 0' and 'Errors: 0' and a progress bar. At the bottom are three buttons: 'Stop', 'Pause', and 'Import'.

## Frequently asked questions

**1    *What could I put in the three user-defined fields?***

If yours is a school library, you might include a student's homeroom, advisor, phone number, guardian, or a teacher's department. In public or corporate libraries, you might want work phone number, office number, or e-mail address.

**2    *How can I go back to a last saved version of a patron's record if I make mistakes while editing?***

Use the Revert to Saved command under the Record menu.

**3    *How do I renew a patron's borrowing privileges?***

There are three ways to renew a patron's borrowing privileges.

- Click the renew icon in the Patron Edit window.
- Use the Renew Privileges command from the Patron menu in the Patrons module.
- Use the Renew Privileges command from the Patron menu in the Circulation module.

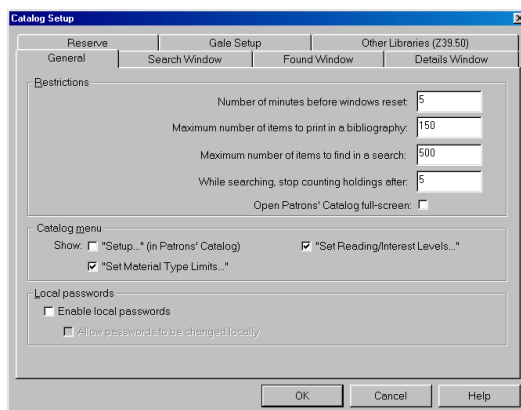
# Setting up and using the catalog

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## Catalog Setup features

The settings you enter in the Catalog Setup windows determine how you and your patrons use your catalog for searches and what catalog information they are able to access. There are seven areas (represented by tabs) for you to enter information.

The General tab determines search parameters—how many items a patron may print in one bibliography, the number of items permitted in each search, and the number of copies of a single material displayed in each search.



In the General tab, you set how many minutes elapse before the catalog windows reset and whether or not to display Catalog Setup items. Choosing to display Catalog Setup items lets you customize each workstation. For example, workstations with Internet access can have WebConnect activated, while those without it would not. Displaying Catalog Setup items is not recommended unless you also password protect local settings.

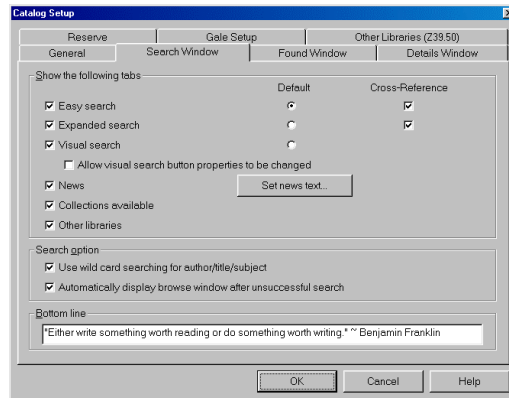
The General tab is also where you decide whether to let patrons limit searches by material or reading levels. And there is an option here to provide local passwords in case you want to limit use of certain workstations to specific patrons.

The Open Patrons' Catalog full-screen option provides extra security. If you select it, the patrons catalog opens full-screen, concealing the taskbar on Windows workstation computers and the menu bar on Macintosh workstation computers. Then patrons can't easily make changes to your computer settings. You can also set up a catalog exit password in Passwords Setup—providing even more security.



## Search Window tab

The Search Window tab sets what type of searches—easy, expanded, or visual—are available. Here you also decide which search window appears first when the catalog opens, and if cross-reference searching is available in either window. (Contact the Sagebrush Sales department for information on purchasing the Cross Reference Words Database.)

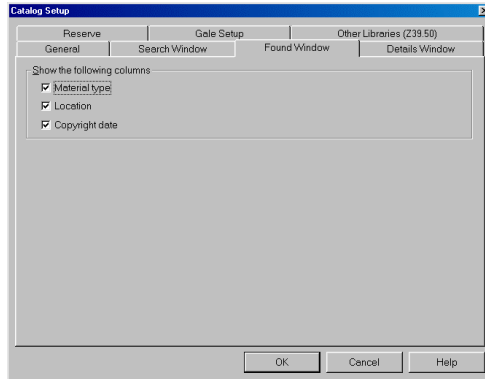


If your library has more than one collection for patrons to search, check the Collections available box here. This enables the Collections Available tab in the Catalog window. Additional collections might include resource collections such as news articles and abstracts produced by WRL. (Only resource collections purchased from Sagebrush Corporation can be accessed.)

Activating the News checkbox lets your patrons access the News tab in Catalog. There they can read library and community news. Your staff enters news text by clicking the Set news text button in the Search Window tab. Also, the Bottom line space lets you enter a message of up to 100 characters to be displayed in the Catalog window.

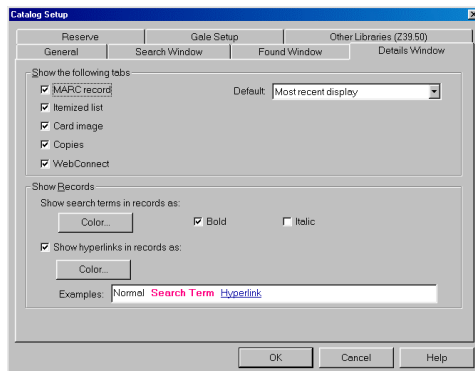
## Found Window tab

The Found Window tab permits additional descriptions of materials by type, location, and copyright date. The Materials Found window normally displays the call number, title, and author of each material. The Found Window tab lets you add material type descriptions, location information, and copyright dates to the display.



## Details Window tab

Here you choose how material details are displayed in the Details Window. You can include one or all of the choices—MARC record, Itemized list, Card image, Copies, and WebConnect. You can even choose which appears first as you open the Details window.

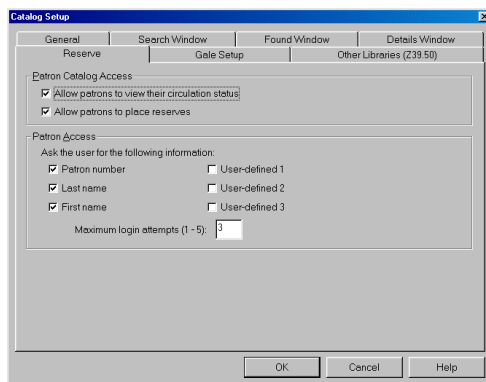


Checking the WebConnect box displays the WebConnect tab in the Details window if there is a web address in the record of a selected material. Also, the WebConnect box must be checked to allow Internet access for Gale online resources.

The Details tab is also the place to change the appearance and color of search terms and hyperlinks. Examples show how the terms appear.

## Reserve Tab

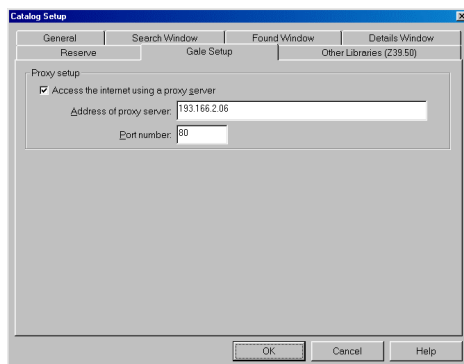
Here you can determine if patrons are able to view their own circulation status and place their own reserves from the catalog. If you choose to let patrons access their own circulation status or place reserves in the catalog, you also choose what information they need to give before doing so and how many attempts they have to provide the correct information.



## Gale Setup tab

If your library uses a proxy server and has a subscription to Gale multimedia resources, you set up the proxy server information in the Gale Setup tab of Catalog Setup.

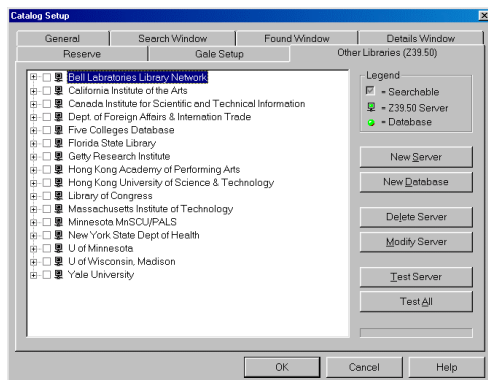
*Note:* Sagebrush no longer offers Gale multimedia subscriptions, but we continue to support Gale for those libraries that already have subscriptions to it.



## Other Libraries (Z39.50) tab

Here you set up communication to remote library databases, such as the Library of Congress or another library in your district. After you establish communication, you search the remote databases using the Other Libraries tab in Catalog. Make sure you select the "Other libraries" option in the Search Window tab of Catalog Setup, otherwise the Other Libraries tab will not be available in the Search window in Catalog.

*Note:* Z39.50 Client may be sold separately from Spectrum CIRC/CAT. For information on obtaining Z39.50 Client, contact Sagebrush's Sales Department at 1-800-533-5430.



## Catalog use features

Librarians and patrons using the Spectrum catalog have many options for doing quality, in-depth searches. Those wanting to do simple searches, as well as those needing to do intensive work, will discover the steps easy to learn. For convenience, Spectrum has included three different search windows—Easy Search, Expanded Search and Visual Search.

### Easy Search

Easy Search offers simplified search by title, author, subject, or key word. This catalog window may be easier to understand for some patrons.

#### Catalog Window Buttons



F1 - Help



Clear



See Also



Browse

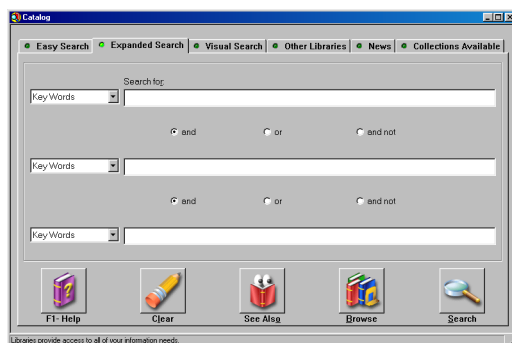


Search



### Expanded Search

Expanded Search permits in-depth searches with Boolean operators. Boolean operators define search parameters in the Expanded Search window by the use of the words *and*, *or*, and *and not*. For example, you can search for Shakespeare *and* plays *and not* comedies. This eliminates Shakespeare's comedies, but not his histories or tragedies. You can also search by key word, title, author, and subject, in addition to series title, call number, material type, copyright date, ISBN, and LCCN.



## Visual Search

If your library has purchased Visual Search, you can define specific searches and link them to visual search buttons. Once you have done this, patrons can perform the defined searches simply by clicking the linked visual search button. Patrons don't need to worry about search terms, Boolean operators or anything else. As long as they know how to click a button, they can search with Visual Search. And, since you can add a descriptive picture to each visual search button, patrons can search simply by choosing a picture.

*Note:* Visual Search is sold separately from Spectrum CIRC/CAT. For information on obtaining Visual Search, contact Sagebrush's Sales Department at 1-800-533-5430.



## Materials Found window

The Materials Found window lists materials that match your search.

### Materials Found Window Buttons



Go Back



Help



Lock



Unlock



Reserve



Stop



Print



Details

Call Number	Title	Author	Copyright	Type	Copies in
636.7 BRO	Training a companion dog /	Broderick, Do	1965	600-699	1/1
636.7 CUR	Cindy, a hearing ear dog /	Curtis, Patrice	1981	600-699	1/1
636.7 HAL	Berry, the bravest Saint Bern	Hell, Lynn	1992	600-699	1/1
636.7 KIE	The new miniature schnauze	Kiedrowski, D	1986	600-699	1/1
636.7 MIL PB	The Common Sense Book c	Miller, Harry	1988	600-699	1/1
636.7 POS	The true book of dogs /	Possell, Elise	1961	600-699	1/1
636.7 RID	Your family dog: the comple	Riddle, Maxw	1981	600-699	1/1
636.7 STA	The bravest dog ever: the b	Standford, Ne	1989	600-699	1/1
636.7 TAY PB	You & your dog /	Taylor, David	1986	600-699	1/1
636.7 TEA	Lost dog /	Teale, Edwin	1961	600-699	1/1
741.5 SCH	*He's your dog, Charlie Bro	Schulz, Charlie	1968	700-799	0/1
741.5 SCH	Snoopy and the Red Baron,	Schulz, Charlie	1966	700-799	1/1
700-799	Widdowson, C	Widdowson, C	1989	700-799	1/1

### Details Window Buttons



Go Back



F1 - Help



First



Previous



Next



Last



HyperSrch



Reserve



Copy MARC

## Details window

The Details button at the bottom lets you access the Details window for more information on specific materials. There are five tabs: Itemized list, MARC record, Card image, Copies, and WebConnect.

Call Number	Title	Author	Publisher	Publication Date	Physical Description	LCCN	ISBN	Subjects
PIC Two	Adventures of Huckleberry Finn /	Twain, Mark	New York : Random House,	c1996	xxviii, 418 p. : ill. ; 25 cm.	96159044	0679448896	<a href="#">Finn, Huckleberry (Fictitious character)--Fiction.</a> <a href="#">Boys--Travel--Mississippi River--Fiction.</a> <a href="#">Boys--Missouri--Fiction.</a>

## Frequently asked questions

### **1    *How are wildcard characters used in searching?***

Wildcard characters can be appended to the end of a search term in order to broaden your search. You can use wildcards in title, author, call number, subject, and key word searches. For example, if you input *air\** on a wildcard search, the search would return hits on *airplane*, *aircraft*, *airline*, *airship*, and so on.

Before you can use wildcards to search, you must enable them in the Search Window tab in Catalog Setup.

### **2    *How is Boolean logic used in searching?***

You can use Boolean logic in the Expanded Search window to:

- broaden a search by using *or*
- narrow a search by using *and*
- limit a search by using *and not* to exclude items.

### **3    *How can I maximize catalog station security?***

During Setup, set patron catalog stations to always open at the maximized position. Then patrons won't have access to the desktop and won't be easily able to make changes. Also, password protect your Patron Catalog so that unauthorized persons can't close the catalog window.

### **4    *Do I have to click the clear icon before each search?***

No. You can simply change the logic, source, key word, or phrase on any line.



# Setting up and using circulation

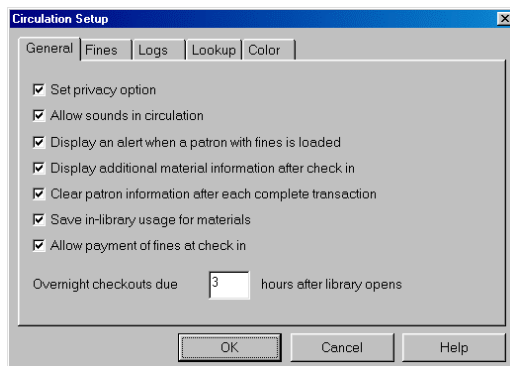
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## Circulation Setup features

In the Circulation Setup windows, you decide how your library's day-to-day circulation activities are handled. There are five tab areas for you to consider: general, fines, logs, lookup, and color.

### General tab

Circulation basics are established here, such as whether or not to have audible computer sounds when checking out materials, and if you want fine alerts (when the barcode of a patron with fines is entered).

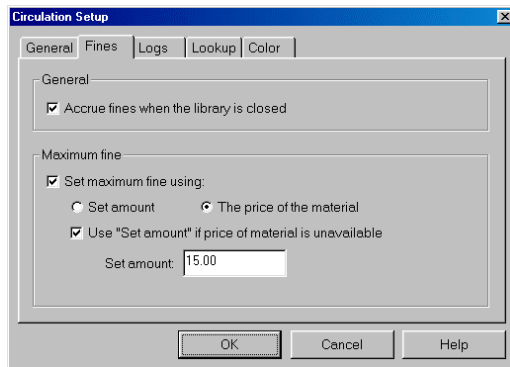


You decide at the General tab if you want additional information displayed about materials just checked in. Choosing this option lets you see which patron just returned the material and the first person on its reserve list.

In the General tab, you also decide if patron information should be cleared from the window after each transaction. In addition, there is an option here for patron privacy that suppresses all material titles (regardless of material or patron type) in the Circulation window. Other options permit you to track in-library materials usage, set the exact hour when overnight checkouts are due, and allow payment of fines at checkin.

## Fines tab

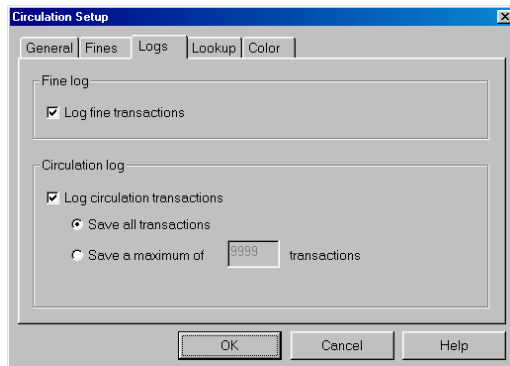
Here you set the details of fines—how and when you want them to accrue.



The screenshot shows the 'Circulation Setup' dialog box with the 'Fines' tab selected. The 'General' section has a checked checkbox for 'Accrue fines when the library is closed'. The 'Maximum fine' section has a checked checkbox for 'Set maximum fine using:', with 'The price of the material' selected via a radio button. Below this, there is a checked checkbox for 'Use "Set amount" if price of material is unavailable' and a text input field for 'Set amount' containing the value '15.00'. At the bottom are 'OK', 'Cancel', and 'Help' buttons.

## Logs tab

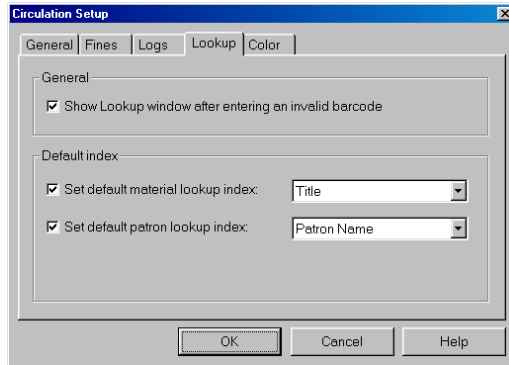
At this tab you choose whether to activate fine logs and circulation logs. For the best accuracy, you should keep the logs activated at all times. For example, materials checked out when the circulation log is turned off are not logged even if the circulation log is on when they are checked in.



The screenshot shows the 'Circulation Setup' dialog box with the 'Logs' tab selected. The 'Fine log' section has a checked checkbox for 'Log fine transactions'. The 'Circulation log' section has a checked checkbox for 'Log circulation transactions', with two options below it: 'Save all transactions' (selected via a radio button) and 'Save a maximum of' followed by a text input field containing '9999' and the word 'transactions'. At the bottom are 'OK', 'Cancel', and 'Help' buttons.

## Lookup tab

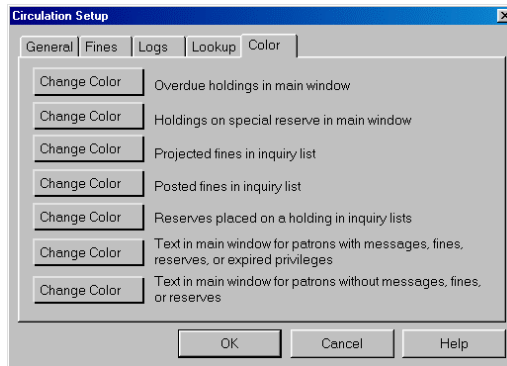
This is where you decide whether you want the Lookup window in Circulation to appear automatically each time an invalid barcode is entered. The Lookup window lets you search for a patron or material and return the item to the Circulation window in order to complete the transaction.



In the Lookup tab you also set the default Lookup material and patron indexes. In other words, will the Material Lookup window first show material number, title, author, call number, or subject?

## Color tab

The color options that you choose in the Color tab of Circulation Setup determine the colors of certain circulation attributes. You can set a different color for overdue items in a patron's checked out list and Check In window, holdings on special reserve, projected fines in the Fines tab in Patron Inquiry, and so on. If you specify different colors for options in Circulation Setup, it makes it easy to spot if a patron has expired privileges or fines, for example, when you load a patron in Circulation.



## Circulation Buttons



Check Out



Check In



Renew Check Out



Advance Booking



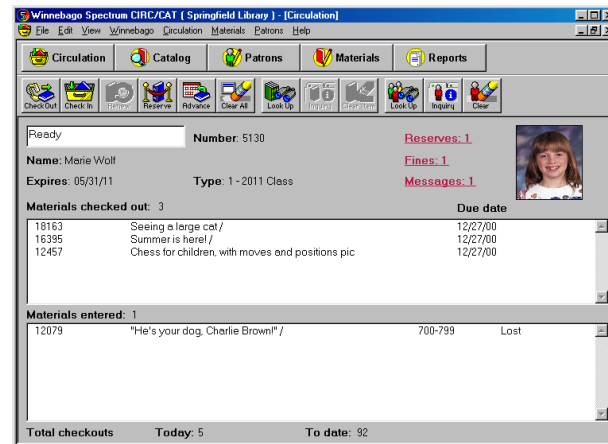
Reserve



Clear All

## Circulation use features

The circulation part of the program performs all of your circulation duties, including basic ones like checkout, checkin, renewing materials, and managing fines. It also lets you see information about the patron, including what materials the patron has checked out and when they are due.



Depending on what you have specified during Setup, the Circulation module alerts you to anything you need to know before completing a transaction. You learn, for example, if a material is reserved or if a patron has fines.

A very important feature lets you designate Special Reserves. Here you temporarily change the material type of an item so you can change the loan period, fine rate, or its status. This is particularly helpful if your library is in a school and teachers want to set aside books on various topics when they are being studied. In a public library, Special Reserve might be used to separate books for book clubs.

There are many circulation commands. Some commands do different things depending on what menu you are in. The following are some examples:

## Material-related Buttons



Look Up



Inquiry



Clear Item

## Patron-related Buttons



Look Up



Inquiry



Clear Patron

## Look Up

This command lets you locate patrons from the Patron menu or materials from the Materials menu and return selected ones to the Circulation window.

## Inquire

This command lists general information about the patron in the Patron menu, including what materials the patron has checked out.

In the Materials menu, the Inquire command displays the material's itemized list, MARC record and card image. In this menu you also get local information, including holdings, status, and the due date if it is checked out. You can save time by checking more than one record at a time.

## Circ Log

This command lets you see the circulation history of materials if accessed from the Materials menu. In the Patron menu, it lets you view a patron's circulation history.

## Advance Booking

This command reserves the selected material(s) for a specific date in the future over a specific time period, regardless of the material's loan period.

## Reserves

This command reserves materials for a patron in the Circulation window, lists what an individual patron has reserved in the Patron menu, and shows who has reserved a specific material when you approach it from the Material menu.

## Messages

This command permits librarians to add, delete, or view messages on either the Patron or Material menus.

## Frequently asked questions

**1    *How do I find out who has a certain material checked out?***

Look up the material by title. Select the material and choose Inquire. (You can do this from the Materials menu or by clicking the Material Inquiry button.) The local Information window shows the status and name of the person who has the material.

**2    *How can I tell who last checked out a particular material?***

Enter the material and select it. Then select the Circ Log under the Materials menu to view the names of the patrons who have checked it out, or choose Inquire from the Materials menu to see the last user.

**3    *Why would I put a message on a material?***

You can use a message to keep track of any information about a particular material that you want recorded, such as damage or money paid for lost items that would need to be refunded.

**4    *What is Special Reserve and how does it work?***

Special Reserve temporarily changes the material types of various records. When reset, the material types revert to their original categories.

**5    *How can I keep track of lost books?***

Change the material's status to lost, or use Special Reserve to change the material type to one designating lost.

# Printing reports, notices, and labels

Spectrum CIRC/CAT lets you print a wide variety of reports to help you manage and analyze your circulation and catalog processes. You can print material and circulation reports, circulation statistics and notices, labels, inventory reports, and system information. The windows for printing these various reports are accessed from Reports in the Winnebago menu.

**Manual alert!**

The *Spectrum CIRC/CAT User Manual* and *Reference Manual* give detailed information for printing all of the various report types.

## Available reports

### Material Reports

Report	Indexed by
Authors	author
Call Number Statistics	call number
Key Words	key word
Materials	material number, title, author, call number, material type, material user-defined fields, material custom indexes
Materials by Copyright Date	copyright date
Materials by Date Added	holding date added
Materials by Tag/Subfield	material number
Materials MARC 21 Data	material number, title, author, material custom indexes
Materials with Subjects	material number, material custom indexes
Number of Holdings by Type	material type
Publisher Statistics	publisher
Shelflists	call number
State Database	material number, material type, date added
Subjects	subject



Report	Indexed by
Subjects with Materials	subject
Unused Material Numbers	material number

## Circulation Reports

Report	Indexed by
Circulation Activity Log	material number, patron number
Combination Circulation Lists	<b>Primary:</b> patron number, patron name, patron custom index <b>Secondary:</b> title, author
Expired Patron Cards	patron number, patron name, patron type, patron user-defined fields, patron custom index
Fine Activity Log	material number, patron number, fine date
Fines	<b>Primary:</b> material number, title, author, call number, material type, material user-defined fields, patron number, patron name, patron type, patron user-defined fields, patron custom index <b>Secondary:</b> patron name, patron type, patron user-defined fields
Material Messages	material number
Materials Checked Out	material number, title, author, call number, material type, material user-defined fields, patron number, patron name, patron type, patron user-defined fields, patron custom index
Materials with Usage	material number, title, author, call number, material type, user defined fields, material custom indexes

Report	Indexed by
Overdues	<p><b>Primary:</b> material number, title, author, call number, material type, material user-defined fields, patron number, patron name, patron type, patron user-defined fields, patron custom index</p> <p><b>Secondary:</b> patron name, patron type, patron user-defined fields</p>
Patron Messages	patron number
Patrons	patron number, patron name, patron type, patron user-defined fields, patron custom index
Patrons with Usage	patron number, patron name, patron type, patron user-defined fields, patron custom index
Reserves	<p><b>Primary:</b> title, author, patron number, patron name, patron type, patron user-defined fields, patron custom index</p> <p><b>Secondary:</b> patron name, patron type, patron user-defined fields</p>
Unused Patron Numbers	patron number
Advance Bookings	material number, patron number, patron name, patron type, patron user-defined fields
Advance Booking Pick List	call number

## Circulation Statistics reports

Report	Indexed by
Checkout and Fine Statistics	file order
In-Library Usage by Material	material number
In-Library Usage by Material Type	material type
Number of Patrons by Type	patron type
Usage by Material Type	material type
Usage by Patron Type	patron type
Usage Totals from Circulation Log	material number, patron number

## Circulation Notices

Report	Indexed by
Fines	patron number, patron name, patron type, patron user-defined fields
Overdues	patron number, patron name, patron type, patron user-defined fields
Reserves	patron number, patron name, patron type, patron user-defined fields
Advance Bookings	patron number, patron name, patron type, patron user-defined fields

## Labels

Report	Indexed by
Circulation Barcodes	n/a
Mailing Labels	patron number, patron name, patron type, patron user-defined fields, selected barcodes

<b>Report</b>	<b>Indexed by</b>
<b>Material Barcodes</b>	material number, title, author, call number, material type, material user-defined fields, selected barcodes, material custom indexes
<b>Material Spine Labels</b>	material number, title, author, call number, material type, material user-defined fields, selected barcodes
<b>Patron Barcodes</b>	patron number, patron name, patron type, patron user-defined fields, selected barcodes, patron custom index

## Inventory Reports

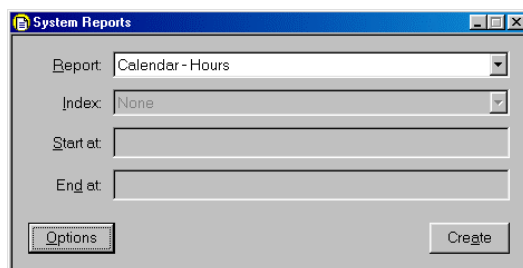
<b>Report</b>	<b>Indexed by</b>
<b>Materials Entered</b>	material number, title, author, call number, file order
<b>Materials Entered Out of Order</b>	call number
<b>Materials Entered that were Overridden</b>	material number, title, author, call number, file order
<b>Materials Found this Period</b>	material number, title, author, call number, file order
<b>Materials Lost</b>	material number, title, author, call number, material type, file order
<b>Materials Not Lost</b>	material number, title, author, call number, material type, file order
<b>Materials Remaining to be Entered</b>	material number, title, author, call number, file order
<b>Unrecognized Barcodes</b>	call number

## System Reports

Report	Indexed by
Calendar—Hours	n/a
Calendar—Months	n/a
Material Type Descriptions	material type number
Patron Type Descriptions	patron type number
System Information	n/a

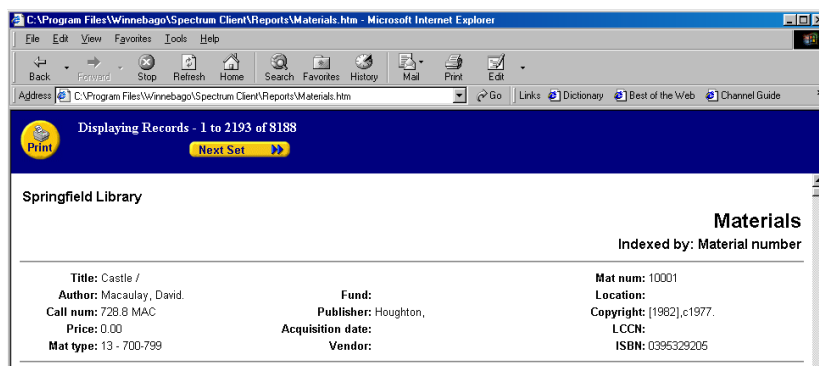
After installing and setting up your Spectrum CIRC/CAT program, it is a good idea to print a System Information report. The System Information report contains data about your Spectrum CIRC/CAT system, such as partition levels, circulation statistics, numbers of materials and patrons, and so on.

You can print a System Information report by clicking the Reports button in the Navigator toolbar and then selecting System Reports > System Information. Click Create to print the report.

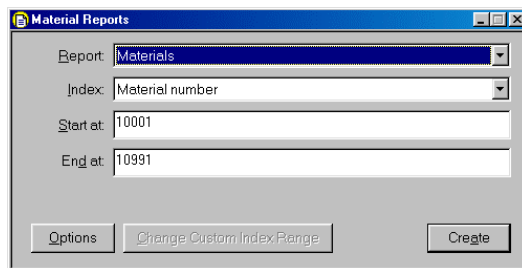


The screenshot shows a window titled "System Reports". Inside, there are four labeled fields: "Report" with a dropdown menu showing "Calendar - Hours", "Index" with a dropdown menu showing "None", "Start at" with an empty text box, and "End at" with an empty text box. At the bottom left is an "Options" button, and at the bottom right is a "Create" button.

Most Spectrum CIRC/CAT reports are generated in your Internet browser window, where you can preview and print them. The browser offers you many options for customizing how the report displays and prints. It also creates one or more .htm files that you can use in many ways, such as publishing them on an Intranet, e-mailing to other library staff or administration, and so on. Circulation notices and labels are generated in a Spectrum preview window rather than in your browser like the rest of the program reports. Generating to a program window lets you easily position your notices and labels on the page.



Material and patron reports are among the reports you may want to print soon after setting up Spectrum CIRC/CAT. Material and patron reports can be indexed using the custom indexes you created in the Material and Patron Custom Index windows.



Once you have chosen your type of report, you select how it is organized and the range of data to include. Various options are available, depending on the type of report.

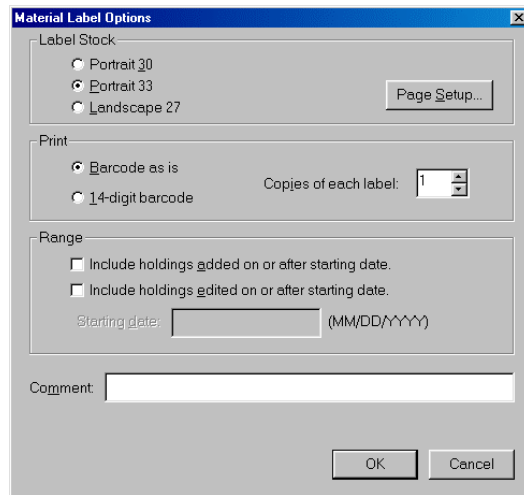
The Custom Index Range Selection window lets you set a specific range for the custom index you want to use by letting you enter ranges for each of the indexes' three data fields.

To print barcode labels, click the Reports button in the Navigator toolbar and select Labels. Then select the type of barcode labels you want to print from the Label box.

Barcode labels can be printed for both materials and patrons. You can use a variety of printers, but the legibility of the barcodes may vary. For example, the more characters in your barcodes, the thinner the lines. Sagebrush recommends 600 dpi resolution or better for printing barcodes. The quality of your toner cartridge also affects print quality. And keep in mind that using label protectors may make a slightly imperfect barcode even more difficult to scan.

A drop-down menu in the Labels window lets you choose circulation barcodes, material barcodes, or patron barcodes. (You can also print mailing labels and material spine labels.) In the Labels window, you also choose how you want your material or patron labels indexed (Circulation barcodes do not require an index).

The Options button at the bottom of the Labels window is available when you choose either material or patron barcodes. Click it to reach an Options window where you are asked how many copies, should they be converted to 14-digits, how they should be printed on the label—landscape or portrait—and the range you want printed. Patron barcode labels also let you include a leading ‘P’ to identify it as a patron barcode, user-defined fields, and an expiration date.

The image shows a dialog box titled "Material Label Options". It has a blue title bar with a close button. The dialog is divided into several sections. The first section is "Label Stock" with three radio buttons: "Portrait 30", "Portrait 33" (which is selected), and "Landscape 27". To the right of these buttons is a "Page Setup..." button. The second section is "Print" with two radio buttons: "Barcode as is" (selected) and "14-digit barcode". To the right of these is a "Copies of each label:" label followed by a spinner box showing the number "1". The third section is "Range" with two checkboxes: "Include holdings added on or after starting date." and "Include holdings edited on or after starting date.", both of which are unchecked. Below these checkboxes is a "Starting date:" label followed by a text input field and the format "(MM/DD/YYYY)". At the bottom of the dialog is a "Comment:" label followed by a large text input field. In the bottom right corner are "OK" and "Cancel" buttons.

After you have used Spectrum CIRC/CAT for circulation functions, you may want to print one or more of the Circulation reports. The Circulation reports give information about fines, overdues, materials checked out, and so on.

The example below explains the process for printing an Overdues report. This example creates a report of overdues grouped by classroom (the patron user-defined 1 field is set up as "classroom" in this example). By following the steps below, you create a separate overdue list for each classroom with students listed in alphabetical order.

### To print an Overdues report

- 1 Click the **Reports** button in the Navigator toolbar.
- 2 Select **Circulation Reports > Overdues**.
- 3 From the **Index** box, select **Patron User-Defined 1**. (In this example, Patron User-Defined 1 was set up as classroom.)
- 4 From the **Secondary Index** box, select **Patron Name**.
- 5 Click the **Options** button. The Circulation Reports Options window opens.
- 6 Click the box next to **Page break on main index change** to place a check in it, and click **OK**.
- 7 Click the **Create** button to create the report.
- 8 Click the **Print** button in the navigation bar. The Print window opens.  
*Note:* If you use Internet Explorer on a Macintosh, the **Print** button is not available. Choose **Print** from the **File** menu and click **Print**.
- 9 Click **OK** (Windows) or **Print** (Macintosh) to print the report.



## Frequently asked questions

**1    *How do I make a list of everything that's checked out to a patron?***

From the Reports button in the Navigator toolbar, choose Circulation Reports > Materials Checked Out. In the Circulation Reports window, set the index to either Patron Number or Patron Name. Set the range appropriately for the name or number desired.

**2    *How can I print replacement barcode labels?***

From the Reports button in the Navigator toolbar, choose Labels > Patron Barcodes or Material Barcodes. In the Labels window, select Selected Barcodes as your index. Click the Select Barcodes button. Enter the barcode numbers needing replacement labels.

**3    *How can I print barcode labels for records I've added or edited, even if they don't have a range in common?***

From the Reports button in the Navigator toolbar, choose Labels > Material Barcodes or Patron Barcodes. In the Labels window, choose Selected Barcodes from the Index box. Click the Select Barcodes button. In the Selected Barcodes window, choose whether the barcodes are patron or material barcodes. Enter the barcode number and click Add New for each barcode you want to print. Click OK when you've entered all the barcode numbers and click Create to generate your report.

# Making backups

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It is very important that you make regular backups of your Spectrum CIRC/CAT system. If you don't, it may prove very costly to your library at some point. Many things can damage your data. Someone can accidentally delete a file or use a defective disk. Static electricity can wipe out data.

It is also important to keep several copies of your data. One copy is not enough because any small defect in the backup or what you stored it on could cause major problems.

Your Spectrum program provides a backup program called Ctdump. Unlike outside backup programs, you run Ctdump when your server is running. However, when you are backing up your files you must not add, edit, or delete material or patron data, or check materials in or out. Catalog searches can continue as normal—as long as no one reserves materials from the catalog.

Everything you need for making backups is installed when you install your Spectrum Server program. Spectrum automatically installs Ctdump, Ctrdmp (a restore program), and script files for making backups.

During installation you are asked if you would like to set up an automatic daily or weekly backup schedule. If you do not choose automatic backup, the server's configuration file will not include any backup script to be run. But all of the files for backing up are still installed, so you can use them later. At that time you can modify the server's configuration file to include a line telling the server which script to run—weekly, daily, or immediately. Check your user manual for detailed explanations of the script files.

## Backing up *without* using Ctdump

Backing up the database requires copying all of the database files and placing them elsewhere for safekeeping. However, the process becomes more complicated when you have a program (such as Spectrum Server) controlling access to the database files.

When the Spectrum Server program is *not* running (or when there is no server, as in the single-user Spectrum program), the full backup can be done by any industry-standard backup utility. However, when Spectrum Server is running, it has control of the Spectrum database files.

Because some database files are open (in use by Spectrum Server), they're locked from being used by any other program, such as a database utility or backup program. (The only way to access the files is to be a client of the Spectrum Server program.) The standard

backup program can't back up files that are being used (in this case, by the Spectrum Server program). Because some files would be backed up and some wouldn't be, the backup data would be incomplete. It wouldn't consist of all the database files necessary to completely restore the Spectrum database.

Before Spectrum CIRC/CAT 4.0, you could not back up (or have a good backup if you did so) without first shutting down the Spectrum Server program. Since Spectrum CIRC/CAT 4.0, Spectrum includes a backup program (Ctdump) that automates and facilitates the backup process—including letting you make backups while the server program is running. However, you can still make backups without taking advantage of Spectrum CIRC/CAT's backup program.

### To back up *without* using Ctdump

- 1 Shut down the Spectrum Server program.
- 2 Copy all the necessary files (.dat and .idx) to another location.

Or, use a standard backup program to copy all the necessary files in the Spectrum Server folder. (*Note:* If you miss any files, your backup is incomplete, and therefore not capable of restoring your system to a good condition.)

- 3 Start the Spectrum Server program again.

## Backing up using Ctdump

Using the Ctdump program, you can make a backup of your Spectrum database files (either immediately or at a scheduled, perhaps recurring, time), without ever shutting down your Spectrum Server program. In fact, you *must* keep Spectrum Server running during this backup.

What about your Spectrum client programs (such as Spectrum CIRC/CAT or Spectrum Patrons' Catalog)? Although you don't have to shut them down, you may want to.

While a backup is in progress, your client programs must *not* perform any functions that can change material data, patron data, or circulation information. You must not add, edit or delete material or patron data or check materials in or out, reserve materials, and so on. If you do so, the Ctdump program may not be able to back up those open (busy) files, and your backup will be incomplete and not sufficient to be used for restoring data.

However, your client programs can perform *some* normal functions, such as catalog lookups (as long as no one reserves materials from the Patrons' Catalog program), and the backup will go unnoticed by your library patrons.

Still, to be safe, you may want to make sure your backups are created safely by backing up when the library is closed or when all Patrons' Catalog programs are shut down.

### Compatibility

The Spectrum backup processes apply to the client/server variations of Spectrum CIRC/CAT, Spectrum CIRC, and Spectrum CAT. These processes don't apply to the single-user variations of these programs.

### Disk space requirements

The size of the backup file will be the same as all the files being backed up. (The backup process doesn't compress your files in any way.) So, to find out how big the backup file will be, you can add up the sizes of all your data (.DAT) and index (.IDX) files.

### Server must be on

If either your Spectrum Server program or your server computer is off, the Ctdump program cannot back up your database files. Even if your server computer is temporarily off when the scheduled backup time passes, the backup process won't execute. Instead, it will wait for the next scheduled backup time.

# Shortcut keys in Spectrum CIRC/CAT

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## Circulation shortcuts

Looking up records	Windows	Macintosh
Look up patrons	CTRL+8	COMMAND+8
Look up materials	CTRL+6	COMMAND+6
Display holdings (in Lookup window)	ALT+D	COMMAND+D
Load item	ALT+L	COMMAND+L
Circulating materials	Windows	Macintosh
Check out	CTRL+1	COMMAND+1
Renew checkout	CTRL+2	COMMAND+2
Check in	CTRL+3	COMMAND+3
Clearing data	Windows	Macintosh
Clear all	CTRL+5	COMMAND+5
Managing Circulation messages	Windows	Macintosh
Add message	ALT+A	COMMAND+A
View message	ALT+I	COMMAND+I

Delete message	ALT+D	COMMAND+D
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<b>Reserving materials</b>	<b>Windows</b>	<b>Macintosh</b>
Reserve a material title	CTRL+4	COMMAND+4
Reserve a holding	CTRL+H	COMMAND+H
Delete a reserve	ALT+R	COMMAND+R
Advance booking	CTRL+B	COMMAND+B

---

<b>Inquiring about materials and patrons</b>	<b>Windows</b>	<b>Macintosh</b>
Inquire about a material	CTRL+7	COMMAND+7
View previous material	ALT+S	COMMAND+S
View next material	ALT+N	COMMAND+N
Inquire about a patron	CTRL+9	COMMAND+9

---

<b>Managing fines</b>	<b>Windows</b>	<b>Macintosh</b>
Manage fines	CTRL+0 (zero)	COMMAND+0 (zero)
Collect fine	ALT+O	COMMAND+O
Negotiate fines	ALT+N	COMMAND+N
Add fine	ALT+A	COMMAND+A

View fine details	ALT+D	COMMAND+D
Print receipts	CTRL+T	COMMAND+T

## Catalog shortcuts

Searching the catalog	Windows	Macintosh
Enter a search term	ALT+R	COMMAND+R
Browse key words	ALT+B	COMMAND+B
Set material type limits	CTRL+M	COMMAND+M
Set reading/interest levels	CTRL+R	COMMAND+R
Reserve a material	CTRL+T	COMMAND+T
View circulation status	CTRL+L	COMMAND+L
Show a collection	CTRL+S	
Search the collection	ALT+S	COMMAND+S
Clear the Catalog window	ALT+L	COMMAND+L
Choosing a search type	Windows	Macintosh
Key words	ALT+K	COMMAND+K
Titles	ALT+T	COMMAND+T

<b>Searching the catalog</b>	<b>Windows</b>	<b>Macintosh</b>
Authors	ALT+A	COMMAND+A
Subjects	ALT+U	COMMAND+U
<hr/>		
<b>Reviewing found materials</b>	<b>Windows</b>	<b>Macintosh</b>
Sort materials by call number	ALT+N	COMMAND+N
Sort materials by title	ALT+T	COMMAND+T
Sort materials by author	ALT+A	COMMAND+A
Sort materials by material type	ALT+Y	COMMAND+Y
Go back to previous window	ALT+G	COMMAND+G
Lock materials	ALT+L	COMMAND+L
Unlock materials	ALT+U	COMMAND+U
Reserve materials	ALT+R	COMMAND+R
Print bibliography	ALT+P	COMMAND+P
View details about materials	ALT+D	COMMAND+D



## Material Edit shortcuts

Loading materials	Windows	Macintosh
First record	CTRL+F	COMMAND+F
Previous record	CTRL+K	COMMAND+K
Look Up	CTRL+=	COMMAND+=
Next record	CTRL+G	COMMAND+G
Last record	CTRL+L	COMMAND+L
Editing materials	Windows	Macintosh
View MARC record / Easy Entry	CTRL+E	COMMAND+E
Add new material	CTRL+N	COMMAND+N
Show card image	CTRL+I	COMMAND+I
View Holdings	CTRL+H	COMMAND+H
Save record	CTRL+S	COMMAND+S
Delete record	CTRL+D	COMMAND+D
Editing holdings	Windows	Macintosh
Add holdings	CTRL+9	COMMAND+9

<b>Loading materials</b>	<b>Windows</b>	<b>Macintosh</b>
Delete holdings	CTRL+0 (zero)	COMMAND+0
Set material type	CTRL+T	COMMAND+T
Use material number	CTRL+U	COMMAND+U

## Patron Edit shortcuts

<b>Loading patron records</b>	<b>Windows</b>	<b>Macintosh</b>
Choose record search index	ALT+I  Use arrow keys to select an index.	COMMAND+I  Use arrow keys to select an index.
First	CTRL+F	COMMAND+F
Previous	CTRL+G	COMMAND+G
Look Up	CTRL+=	COMMAND+=
Next	CTRL+K	COMMAND+K
Last	CTRL+L	COMMAND+L
<b>Editing patron records</b>	<b>Windows</b>	<b>Macintosh</b>
New record	CTRL+N	COMMAND+N
Save record	CTRL+S	COMMAND+S
Delete record	CTRL+D	COMMAND+D

<b>Loading patron records</b>	<b>Windows</b>	<b>Macintosh</b>
<b>Use Number</b>	CTRL+U	COMMAND+U
<b>Select patron type</b>	CTRL+T	COMMAND+T
<b>Add patron image</b>	CTRL+I	COMMAND+I
<b>Remove patron image</b>	CTRL+M	COMMAND+M

# Computer basics

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## Managing your desktop

Both Windows and Macintosh let you customize your computer desktop so you can access programs and locate files easily.

## Creating shortcuts in Windows

You can create shortcuts for Spectrum programs and utilities on a Windows-based computer. The directions below tell you how to create shortcuts both on the desktop and in the Start menu for the Spectrum Rebuild utility. Follow these directions, entering the utility-specific information (marked with a bullet (•) below) at the appropriate time.

### To create a shortcut on the Windows desktop

- 1 While the mouse cursor is over the desktop (not over a folder or icon), click the right mouse button. A popup menu appears.
- 2 From the popup menu, choose **New > Shortcut**. The Create Shortcut window opens.
- 3 In the **Command line** box, enter the file name and path of the program's executable file or use **Browse** to find the file.
  - For Spectrum Rebuild, enter `c:\program files\winnebago\spectrum client\rbld32t.exe` (Note: If your program is stored on a drive other than c:\, substitute the appropriate drive letter in this command. Your Spectrum Rebuild program may have been installed to a different folder during installation.)
- 4 Click **Next**. The Select a Title for the Program window opens.
- 5 In the **Select a name for the shortcut** box, enter the name of the program you're creating the shortcut for.
  - For Spectrum Rebuild, enter *Spectrum Rebuild*.
- 6 Click **Finish**. The shortcut is created on the desktop.

## To create a shortcut in the Start menu

- 1 Using the right mouse button, click an empty area of the taskbar (not over an application). The taskbar is the toolbar on your desktop that contains the **Start** button. A popup menu appears.
- 2 From the popup menu, choose **Properties**. The Taskbar Properties window opens.
- 3 Select the **Start Menu Options** tab, **Start Menu Programs** tab, or **Advanced** tab, depending on your operating system.
- 4 Click **Add**. The Create Shortcut window opens.
- 5 In the **Command line** box, enter the file name and path of the program's executable file or use **Browse** to find the file.
  - For Spectrum Rebuild, enter `c:\program files\winnebago\spectrum client\rbld32t.exe` (Note: If your program is stored on a drive other than c:\, substitute the appropriate drive letter in this command. Your Spectrum Rebuild program may have been installed to a different folder during installation.)
- 6 Click **Next**. The Select Program Folder window prompts you to select a folder.
- 7 If the folder you want to place the shortcut in exists, select it and click **Next**. If the folder doesn't exist, click **New Folder**, enter the folder name, and click **Next**.
  - For Spectrum Rebuild, select or enter the folder name *Spectrum Rebuild*.
- 8 In the **Select a name for the shortcut** box, enter the name of the program you're creating the shortcut for.
  - For Spectrum Rebuild, enter *Spectrum Rebuild*.
- 9 Click **Finish**. The shortcut is created in the **Start** menu.
- 10 Click **OK** to close the Taskbar Properties window.

## Creating aliases in Macintosh

You can create aliases for Spectrum programs and utilities on a Macintosh computer. The directions below tell you how to create aliases on both the desktop and in the Apple menu.

### To create an alias on the Macintosh desktop

- 1 Double-click the icon of your hard drive on your desktop.
- 2 Select the icon of the program file you want to make an alias of (for example, *Rebuild TCP/IP*).
- 3 From the **File** menu, choose **Make Alias**. A copy of the icon appears in the same location as the icon name (for example, *Spectrum Rebuild alias*) in italics.
- 4 Drag the alias to the desktop and rename it as necessary.

*Note:* These steps may vary slightly depending on the version of your operating system.

### To create an alias and place it in the Apple menu (Mac OS 7.5 and higher)

- 1 Double-click the icon of your hard drive on your desktop.
- 2 Select the icon of the program file you want to make an alias of (for example, *Spectrum Rebuild*).
- 3 From the **Apple** menu, choose **Automated Tasks > Add Alias to Apple Menu**.
- 4 To find the new alias, open your **System Folder** and then open the **Apple Menu Items** folder.
- 5 To run the program using the alias, click the **Apple** menu icon and choose the alias.

## Deleting items

You can delete items on the desktop (folders and files) by selecting them and then pressing the Delete key. You can also select the item and then drag it to the Recycle Bin (Windows) or the Trash (Macintosh).

## Ejecting a disk

You should eject a disk when you finish using it. To eject a disk from a Macintosh computer, select the disk and drag it to the Trash. To eject a disk from nearly all other computers, press the Eject button (near the disk drive).

## Window conventions

This section offers tips for navigating Microsoft Windows and describes common Windows terminology.

## Defining drive and directory

The word *drive* refers to the physical device that stores your data. A letter is associated with each drive on your computer, such as (C:) or (F:). Information on drives is organized into folders, or directories. Most Windows programs use the term *folder* instead of directory. The word *directory* is used most often in MS-DOS programs. For example, your C: drive might contain a Program Files folder containing program files, a My Documents folder containing document files, a Windows folder containing Windows system files, and so on. The statement "C:\Windows" refers to the Windows folder on your C: drive. Folders can contain other folders and files.

*Note:* Drive and hard disk are often used as synonyms in everyday conversation. However, a hard disk is actually the device used to store data, and a drive is the device that reads and writes data to a disk.

## To view the hierarchy of folders and files using Windows Explorer

- 1 On the taskbar, click the **Start** button (located in the bottom left-hand corner of the screen).
- 2 Point to **Programs**, and then click **Windows Explorer**. The Exploring window opens. (On some operating systems, you should click **Programs** > **Accessories** > **Windows Explorer**.)
- 3 Click a folder on the left side of the window to display its contents on the right. Click the **plus signs** (+) to display more folders.

*Note:* To quickly open a folder and display its subfolders, double-click the folder on the left side of the Exploring window.

## To view the hierarchy of folders and files using the My Computer icon

- 1 Double-click the **My Computer** icon. The My Computer window opens.
- 2 Double-click the icon of the drive you want to look at. Windows displays the files and folders contained in the drive.
- 3 To open a file or folder or to start a program, double-click it.



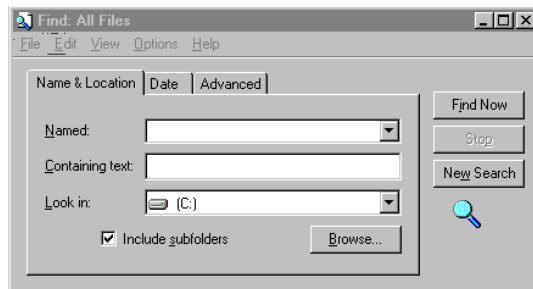
*Note:* To return to the previous folder, press the **Backspace** key on your keyboard or click the **Up** button on the toolbar that resembles a folder with an arrow in it.

## Finding a file or folder

If you know a file or folder's name but are not sure of its location, you can search for it by using the Find feature.

### To find a file or folder

- 1 Click the **Start** button (located in the lower left-hand corner of the screen), and then point to **Find**.
- 2 Click **Files or Folders**. The Find: All Files window opens.



**Find: All Files**  
Use this window to search for a file or folder.

- 3 In the **Named** box, type all or part of the file's name. (If you want to specify where Windows should begin its search, click **Browse**.)
- 4 Click **Find Now**.



## Toolbar tips

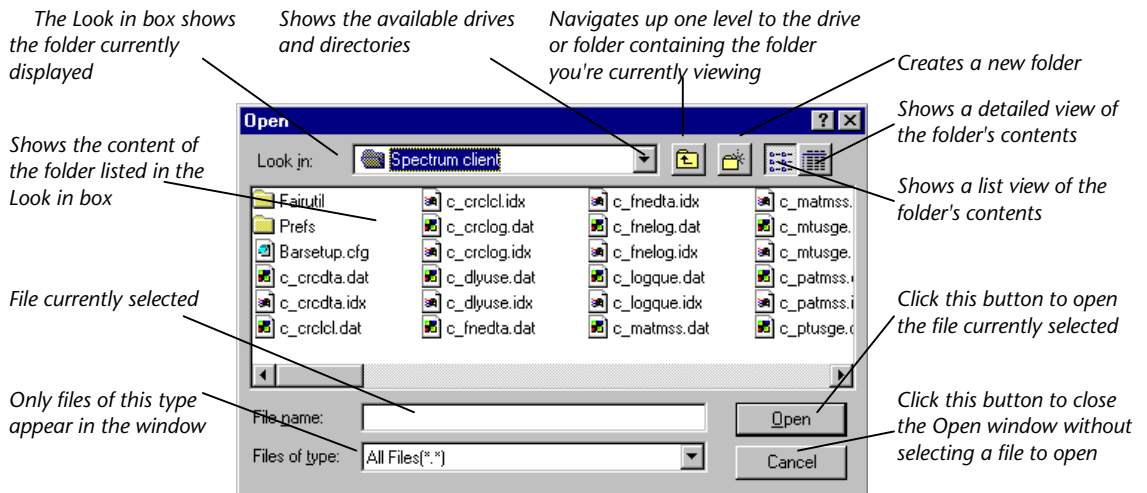
If the toolbar is not visible, click the View menu, and then click Toolbar. You can use tool tips to learn the function of any toolbar button. By resting your mouse pointer on a toolbar button for a few seconds, the button name (function) is displayed.

## Browsing to locate a file or folder

You can browse to locate a file or folder from the current program. You may be locating a folder to either open or import a file.

### To browse to locate a folder or file

1 In the **Open** window, search for the file you want to open.



2 If the file you're searching for is displayed in the Open window, select it and click **Open**. If the folder containing the file is displayed in the Open window, select the folder and click **Open**. (It's contents become visible.) Then select the file you want to open and click **Open**. If neither the file nor its folder are in the Open window, you need to locate the drive and then the folder where the file is stored (continue with step 3).

3 To navigate to the correct folder, click the down arrow located to the right of the Look in box.

4 Find the correct drive or folder, select it and click **Open**. The contents of the item you selected are displayed in the Open window.

- 5 Find the correct folder, select it and click **Open**.
- 6 After you find the correct file, select it and click **Open**. The file name appears in the File name box.
- 7 Click **Open**.

## Software conventions

Some of these conventions depend on your computer's operating system.

## Using commands

There are four ways to use commands in the program (all four methods may not be available for every command):

- **Click a button**—located in the Navigator toolbar, the toolbar of many program windows, and in other areas of program windows.
- **Choose a menu command**—located in the menu bar in the Winnebago Spectrum CIRC/CAT window. For example, in Patron Edit, the Save command is located in the Record menu.
- **Enter a shortcut key**—use by pressing a combination of keys on your keyboard. Shortcut keys are displayed beside commands in the menu, and also indicated by an underlined letter in a function's name. For example, the shortcut key for the Save command is Ctrl + S. Press the Control key and the S key on your keyboard simultaneously.

*Note:* Three useful shortcut combinations are: Ctrl + X (cut), Ctrl + C (copy), and Ctrl + V (paste).

- **Scan a barcode command**—Available for many commands in Circulation. For example, to check out a book, you can scan the book's barcode with a barcode reading device, and then scan the checkout barcode command from a pre-printed list of commands.

## Using Undo

You can use the Undo command in the Edit menu to undo many commands. However, you can only undo the last action.





## Selecting items

You can select item(s) and commands and activate buttons by clicking and double-clicking them.

- **Clicking.** To click a button or command, move the cursor over the item and press the left mouse button once.
- **Double-clicking.** In many situations, you can save yourself steps by double-clicking items instead of clicking them and then clicking the “action” button (Open, Save, and so on). To double-click a button or command, move the cursor over the item and press the left mouse button quickly twice in succession.
- **Select default buttons.** Throughout Spectrum CIRC/CAT, you can “click” default buttons by pressing the Return or Enter key or by scanning the Return command barcode.

## Selecting/deselecting options

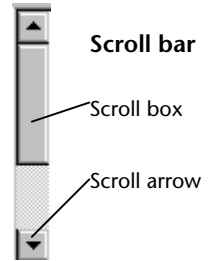
You can select an unselected option—and deselect a selected option—by clicking the option. Windows where you select or deselect options usually have some options selected by default. The following chart shows options in their selected and deselected states.

Option element	State	Appearance
Radio button	Selected	
	Deselected	
Checkbox	Selected	
	Deselected	

## Navigating a list

Use the horizontal or vertical scroll bars to view more information in a list or window.

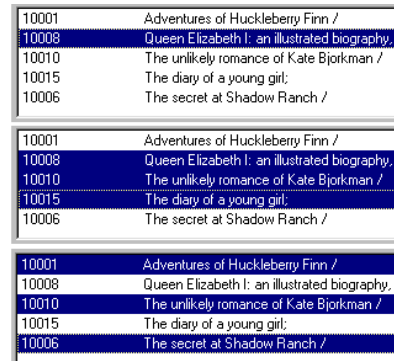
- Use the up, down, left and right scroll arrows to move the list or window in small increments. Click the arrow in the direction you want to move the list or window.
- Use the scroll box to move the list or window quickly. Click the scroll box and drag it in the direction you want to move the list or window.
- Click in the gray area of the scrollbar (not the scroll box) and hold the mouse button until the list or window moves quickly to the area you want to view.
- If you have an extended keyboard, you can use the Page Up, Page Down, Home, and End keys to move around in a scrollable list instead of using the scroll bar. In some windows, the arrow keys also work. (See also “Navigating without a mouse” later in this section.)



## Selecting/deselecting items in a list

You can use the following methods to select items in a list, such as materials in the Materials checked out list. These methods apply to most lists in the Spectrum CIRC/CAT program.

- To select only one item, click it.
- To select consecutive items in a list, hold down the Shift key and click the first and last item in the range you want.
- To select nonconsecutive items in a list, hold down the command key (Macintosh) or the Control or Ctrl key (Windows) and click the individual items you want.



You can deselect all items selected by clicking a blank row in the list. You can also deselect one item at a time by holding down the command key (Macintosh) or Control (Ctrl) key (Windows) and clicking highlighted items you want to deselect.

# Managing your windows

## Moving windows

You can move a window to view a window underneath it or place it in a more convenient location on your computer screen. To move a window, click its title bar and drag it to the desired location.







## Resizing windows

You can resize most windows. Making a window bigger can save you time because you don't need to scroll as much to see more information in the window.

In Windows you can position the cursor over a window's border or corner. When the cursor changes to a double arrow, you can resize the window. Just click and drag the corner or border until the window is the size you want.





In Mac OS, you can resize any window that has a size box in the lower right corner . Click and drag the size box to make the window larger or smaller.

In Windows, you can also maximize a window to its largest size available by selecting the maximize box  in the upper right corner. To resize the window to its original size, click the  box. To minimize the window, click the minimize  box.

## Navigating between windows

Spectrum CIRC/CAT 4 lets you open many windows simultaneously. To move from one window to another (for example, from the Patron part of the program to the Circulation part of the program), you don't need to close the first window to view the second. You can use the shortcut Ctrl + Tab (or Ctrl + F6) to move between windows.

## Closing windows

You can close windows when you're done using them. To close a window, click the close box in the upper left corner— in Macintosh—or upper right corner— in Windows.

## Navigating without a mouse

You can operate your Spectrum program without using a mouse. Spectrum provides several methods to access and move around windows by pressing certain keys on the keyboard. Refer to Spectrum online Help for more information.

Method	Description
Direction keys	The program supports OS-standard movement keys, such as the Tab and arrow keys. Press the Tab key to move from one field to the next field (Press Shift + Tab to move to the previous field). Move through radio button lists and other lists with the arrow keys.
Activation keys	The program supports keys, like the Enter key and the spacebar, that enter, select, or change settings. For example, when the field you want is highlighted, press the spacebar to switch the option on or off—or modify the contents by typing the correct values.
Shortcuts	The program provides keyboard shortcuts (indicated by an underlined "hot" letter in a function's name). In the Save command, for example, the letter S is underlined (Save)—showing that you can press Alt + S (Windows) or Command + S (Macintosh) to save the data.

## Frequently asked questions

**1    *How do I start a program in Windows?***

With your mouse click the Start button on-screen, point to Programs, and point to the name of the program. Then click the program.

**2    *How do I create a shortcut in Windows?***

Find the item in Explorer or in My Computer. Then single click on it with your RIGHT mouse button. You have two choices. You can create a shortcut icon in that window that may be moved elsewhere, or you can use the SEND TO option to create a shortcut that is automatically placed on your desktop. The item can be a file, program, folder, printer, or computer.

**3    *How do I load a program in Windows?***

Insert the floppy or CD-ROM into the correct drive. Click the Start button, and then click Run. In the open box, type the drive location and the name of the program you want to load. If you are unsure of the name of the file, click Browse and click the name of the file.

**4    *How do I find the MS-DOS prompt in Windows?***

The MS-DOS prompt is found in the Programs folder in the Start menu. Click the Start button, point to Programs, and then click MS-DOS prompt.

**5    *How do I switch from one open window to another in Windows?***

Click the button on the taskbar that has the name of the window you want to switch to, or press and hold the ALT key while pressing the tab key until the correct window is displayed.

**6    *I'd like Spectrum to open automatically when I turn on my client stations. Can I do that?***

Yes. On the client station, click the Start button and point to Settings. Click Taskbar and then click the Start menu Programs tab. Click Add, and then click Browse. Locate and select the Spectrum client program and click open. Click Next and double-click the Startup menu. Type the name you want to see on the Startup menu and click Finish.

To remove the program from the Startup menu, click Start, Settings, and then Taskbar. Click the Start menu programs and remove. Double click the Startup folder and select the Spectrum client program. Click Remove. Click Okay.

**7    *What is TCP/IP?***

TCP/IP stands for Transmission Control Protocol/Internet Protocol. It is the set of procedures or rules on which communication in the Internet is based. The Spectrum Server must have TCP/IP installed so that the clients can locate the server across the network.

**8    *How do I start the Spectrum Server after I've installed it?***

Windows 95/98: Click the Start button, point to Programs, point to Spectrum Server, and then click Spectrum Server.

Windows NT: Go to Programs and select Spectrum Server.

Windows 95/98/NT: Find and open the Winnebago folder, click the Spectrum Server icon, and then select the program icon called ctsrvr.exe.

Macintosh: Select the program icon called ctsrvr.exe.

**9    *When shutting down the server, what is the password and should I change it?***

The Administrative Password is ADMIN and must be typed in all upper case letters. We do not recommend changing this password. If you do change the password and forget it, you can delete the faircom.fcs file in the Spectrum Server folder and restart. The server recreates this file and the password reverts to the default of ADMIN.



# Where to go for more information

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Spectrum CIRC/CAT is easy to learn. But as with anything else, there are certain basics you need to master. And once you have mastered the basics, you discover Spectrum contains many other facets that save time and make your library run much smoother. Whenever you need to do a task you have not used Spectrum for in the past, you should check your manual.

A few minutes with the manual really does save you hours. You are sure to find features you didn't know existed. Over and over we hear people say, "You mean I can do that with Spectrum? I wish I had known that last year!"

Another place to go is as close as your Spectrum program. Spectrum CIRC/CAT comes with Help, a complete online reference tool. Whenever you get stuck, Help is there with examples and step-by-step directions you can follow as you work. You can even find help on how to use Help! For more information on using online help see "Using the Spectrum Help system" earlier in this guide.

You can also subscribe to a listserv. This is an electronic mailing list. There are many geared to library professionals. Sagebrush's Spectrum listserv is WINNEBAGO-LIBNET. To subscribe, enter your mail program and type the e-mail address, majordomo@MR.net. In the body of the message, type Subscribe WINNEBAGO-LIBNET. You will receive a response acknowledging your membership.

And, of course, you can reach Sagebrush Technical Support with one call at 1-800-654-3002. With your purchase of Spectrum CIRC/CAT you receive one full year of Sagebrush's Customer Support Agreement Plan. CSAP includes phone support, replacement program disks or CDs, program updates as available, and manual revisions. After the first free year of CSAP, you can purchase additional years of this valuable support at a preferred customer rate simply by keeping your CSAP current.

# Glossary

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## Symbol

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### 14-digit barcode number

A barcode number that includes a type indicator, 4-digit location code, and check digit, in addition to the 8-digit core item number.

### 1987 MicroLIF

Microcomputer Library Interchange Format. Bibliographic information format developed as a variation to the USMARC/852 Holdings Data format.

## A

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### add-on

A program or feature purchased separately which runs in conjunction with other programs, such as Sagebrush Corporation programs.

### alphanumeric

Relating to numbers and/or letters of the alphabet. For example, programs that let you enter alphanumeric characters let you enter both letters and/or numbers such as the barcode b4ff-nn67. Also, when in alphabetical order, numbers are displayed first.

### append

To put something at the end of something else, for example to append information at the end of an import file.

### Apple menu

The menu at the far left of the menu bar on Macintosh computers that contains desk accessories, control panels, and aliases for frequently used software applications.

### archive

To compress and store a record to conserve disk space.

## B

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### backup (*n.*)

A copy of computer data.

### back up (*v.*)

The action of copying computer data onto other media.

### backup copy

A copy of programs/data and related files that can be used to restore lost or damaged programs and files. Store your backup copies in a secure place so if you have problems, you'll be able to restore your files.

### barcode

A computer-generated symbol assigned to a patron, material, or command that indicates a number value when scanned.

### batch

Relating to a group process, such as multiple adding or editing of records.

### batch process

To delete or make changes to a group of material or patron records.

### bibliographic data

Information about a material record, often in USMARC format.

### bitmap

A graphical image used as a method for displaying pictures on a computer. The file name extension for files in Microsoft Windows and OS/2 that contain bitmap representations of images is .bmp.

### bookmark

Ability to mark a topic or area in online documents such as online Help and Web pages/sites.

### Boolean operators

The words And, Or, and And Not used to specify the relationship between multiple search terms.

### browse

To search through a list or database. For example, to search through the CIRC/CAT database for key words or records.

### button

A clearly bounded area that causes an action when clicked.

### button bar

See *tool bar*.

### byte

A unit of data storage containing eight bits, equivalent to one character.

## C

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### **call number**

A set of letters/numbers that indicate where a material should be shelved in a library. Examples of call numbers include B10290, and ART33.

### **call number patterns**

A code that helps attach material types to material records that don't have material type information in the 961 w1 tags. So when a material record is added or imported, the program reads the call number patterns of each of those material records, and assigns them material types accordingly.

### **card image**

A format for viewing a material record's data that closely resembles a catalog card.

### **case-sensitive**

A setting that tells the program to distinguish uppercase letters from lowercase letters.

### **CAT**

The CAT part of Spectrum CIRC/CAT that can either supplement or replace traditional card catalogs.

### **cataloging source**

A MARConnect program term. This field's value will be entered as the Cataloging source and will automatically be entered into tag 040 subfield \_a of the MARC record. This is the USMARC code or the name of the organization(s) that created the original record or modified an existing record. (The source of this code is *USMARC Code List for Organizations*, maintained by the Library of Congress.)

### **CD**

Compact Disc. A medium for storing data in digital form, which can be accessed with a CD-ROM.

### **CD-ROM drive**

A drive that reads CDs. It may be installed in the computer or it can be externally connected.

### **character**

A symbol as in a letter or number.

### **character set**

A defined list of characters recognized by the computer hardware and software. Each character is represented by a number. The ASCII character set, for example, uses the numbers 0 through 127 to represent all English characters as well as special control characters.

### **check digit**

The last number in a 14-digit barcode number. The check digit is calculated using the other digits of the barcode number. This digit enhances data security. A check digit is also included in an ISBN to verify that the ISBN is valid.

### **CIRC**

The CIRC part of Spectrum CIRC/CAT that can replace traditional, manual circulation routines, such as checking materials in and out, and so on.

### **circulation log**

The record of checkin and checkout transactions done at a library.

### **circulation message**

A message that can record information about a material or patron. For example, a material message can record damages a material has (such as missing or torn pages). A patron message can document that a patron's reserved materials are now available.

### **circulation sound**

A beep or beeps that occur when you do certain circulation-related actions.

### **client**

A computer connected to the server from which it accesses information. A Patron lookup computer (also known as a Patrons' Catalog computer) is a client computer to the Spectrum server.

### **close box**

A small box in the upper right (Windows) or left (Macintosh) corner of a window which, when clicked, closes the window.

### **code page**

Another name for character set. See *character set* for more information.

### **command**

A letter, or word, or instruction entered that tells a program what to do.

### **command barcode**

A barcode that can be scanned to carry out a circulation command instead of choosing a menu command, clicking a button, or using a keyboard shortcut.

### **compatible**

Relating to software or hardware that can work together without special modification, as in IBM-compatible--meaning software or hardware that can be used with IBM computers.

### **condition**

A circumstance that must be met before the specified process is performed.

### **configuration file**

A file that contains program settings. These files have a .cfg extension and should not be deleted.

### **context-sensitive Help**

Help associated with the current task opposed to the general Help information for the application. You can press the F1 button or the Help button to call context-sensitive Help.

### **control fields**

Fields on material's USMARC record (tags 001-007) whose format is similar to the leader.

### **copy**

See *holding*.

### **copy/paste**

These actions quickly enter repeated text in text boxes. The following shortcut keys copy and paste text:

- Macintosh - *copy* = Command + C, *paste* = Command + V
- Windows - *copy* = CTRL + C, *paste* = CTRL + V.

### **corporate author**

The name of a commercial entity that produces media such as a company or group, examples include IBM or SADD (Students Against Drunk Driving).

### **CPU**

Central Processing Unit. Portion of a computer that directs the sequences of operations and initiates the proper commands to the computer for execution.

### **cross-reference word**

A catalog key word that is related to another catalog key word. Also called a *See Also word*.

### **cursor**

The screen pointer, usually blinking, that marks your position.

## **D**

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### **data**

Numerical or other information represented in a form suitable for processing by computer.

### **data compression**

The storage of data in a way that makes it occupy less space than if it were stored in its original form. Compression programs work to reduce the size of files. You can fit more data on a floppy disk if your files are compressed first because compressed files minimize the amount of disk storage space required.

### **database**

A collection of files from which a program retrieves information. For example, the Spectrum CIRC/CAT database files contain data about material records, patron records, circulation transactions, and so on.

### **date stamp**

Field attached to each holding record that shows the date added to the system, mostly used in reports.

### **default**

A value the computer selects when no other is specified.

### **Delete key**

The key used to erase or remove data from memory or disk.

### **desktop**

The whole computer screen, representing your workspace. Shortcuts (Windows) or aliases (Macintosh) can reside on your desktop.

### **diacritic**

A mark added to a letter to change that letter's phonetic value. For example, the ~ mark which appears above the letter *n* in Spanish words is a diacritic.

### **disk**

A magnetic storage medium for data (either hard disk or floppy).

### **DNS**

Domain Name System. Hierarchical system that identifies computers in a network. DNS uses a combination of text names, separated by periods, to create a unique "address" that refers to the IP address of a computer.

**double-click**

To click the mouse button twice; used to open programs and files.

**download**

To transfer a file or program from a main computer to a secondary computer or disk.

**drag**

To move an object by using a mouse. To do this, move the mouse pointer to the object, then hold down the mouse button and move the mouse.

**drive**

A device built-in or attached to a computer for reading and writing data recorded on disks.

**due date restriction**

See *Global due date*.

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**E**

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**Easy Entry**

A part of the Spectrum CIRC/CAT program in which you can add, edit, and delete a material record's bibliographic data, but the complete MARC record can not be viewed. Compare to Edit MARC.

**easy search**

The catalog tab at which key words and/or key phrases can be used to search for material records.

**Edit MARC**

A part of the Spectrum CIRC/CAT program in which you can add, edit, and delete a material record's bibliographic data, and view the complete MARC record - including tags, indicators, and so on. Compare to Easy Entry.

**error message**

A display on the screen indicating the process did not succeed.

**Escape key**

A key on the keyboard that lets the user leave the current process.

**executable**

A file containing a program which is ready to be executed (run).

**expanded search**

A catalog search for selected records using two or three search terms and/or one or more Boolean operators.

**export**

To write data from the current database to a separate file.

**expression**

A meaningful combination of symbols (such as "barcode > 14000") used in the condition of an if-then statement.

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**F**

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**field**

A group of characters that are treated as a unit. For example, postal code would be one field in an address record in a mailing list file. Also, the location in a record where specific information is stored, such as the Address field in a patron record.

**file**

A group of related documents or data stored under a common name.

**file server**

A computer, usually with a large hard disk, that sends, receives, and stores files and programs on a network.

**Finder**

This lets Macintosh users copy and manipulate files and execute programs by moving icons on the desktop. Shows programs currently running.

**fine**

Monetary penalty a patron can receive for returning materials late, damaged, and so on.

**fine log**

The record of a patron's fine activity, including fine reduction, payments, and increases.

**firewall**

A security procedure that separates and protects data on a local network from being accessed from the Internet.

**fixed-length tags**

See *control fields*.

**floppy disk**

Portable media used for data storage.

**folder**

Another name for subdirectory or directory (as in MS-DOS). Retains files with similar characteristics.

**format**

To prepare a disk for storing data. Necessary before a new disk can be used. Formatting also destroys all the data already on a disk.

**FTP**

File Transfer Protocol. There are computers on the Internet set up as file repositories. Using an FTP client on your computer, such as WS\_FTP, you can log onto one of these computers and send and receive files.

## **function keys**

Keys at the top or side of the keyboard that are assigned a duty by the active program.

## **G**

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### **general note**

This field contains general information about a material. This information is stored in tag 500\_a of a MARC record.

### **global due date**

The date by which all patrons must return all checked out materials.

### **global password**

One password that works at all password prompts. Also called master password.

### **grace period**

The length of time after a material is overdue before fines accrue.

## **H**

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### **hard copy**

A printout of computer data.

### **hard disk**

A disk used to store large quantities of data for quick retrieval that may be located inside or outside the computer.

### **hardware**

The physical equipment of a system such as the computer, printer, and keyboard.

### **headers**

The field names that appear at the top of columns and reports.

### **Help button**

A button used to access details on a program's use and operation.

## **Help key**

The key on the keyboard (the F1 key for Windows and the Help key for Macintosh) that calls up a screen or window designed to give more details about processes in the program.

## **Help topics command**

A command that displays the opening window of Help for the program's online Help system.

## **holding**

A holding is a term used in Spectrum CIRC/CAT. A material record contains all the data describing a material, such as the USMARC 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). It 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.

## **Home Page**

The file available for access at a World Wide Web site intended chiefly to greet visitors, provide information about the site, and direct them to other sites with more related information.

## **hosts file**

File containing the matched IP address and machine names of computers in a network.

## **hot key**

A key or combination of keys that allows quick movement to specific places on the screen or short cuts to specific actions. These are useful when using a computer without a mouse.

## **HTTP**

Hypertext Transfer Protocol. The Internet transfer protocol used by the World Wide Web.

## **hyperlink**

A "jump" or link to another location within a document or to a location in a different document online. The target of a hyperlink can be text, or it can be an image, audio or video file.

## **hypertext**

Text in a computer displayed document that contains a "jump," or link to another part of the document or to another document.

## **I**

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### **icon**

A graphic that conveys more information and, in some instances, can perform certain actions in programs and on the desktop.

### **import**

To enter data from a properly formatted file into a program database.

### **index**

A common characteristic that programs arrange items by.

**indicator**

One of the two characters after the tag number in a MARC record. Also refers to the first number of a 14-digit barcode. This number identifies the barcode as a material or patron barcode.

**in-library usage**

The record of materials used only within the library and not checked out. The use of these materials can be recorded by "checking in" materials found around the library after patron use.

**inquiry**

A command in Circulation that lets you view a record's information.

**interest level**

The grade or age level of students most likely to want to read a particular book.

**Internet**

A group of interconnected computer networks reaching around the world. A "network of networks."

**invalid barcode**

A barcode number that doesn't exist in a database.

**inventory**

A library's total assets. The inventory part of Spectrum CIRC/CAT verifies what materials are accounted for/not accounted for by requiring you to enter barcodes of items found in your library.

**IP address**

Internet Protocol address. The location address of a computer in a network. Computers within the network use this address to communicate with one another. An IP address consists of four sets of numbers, from 0 to 255, separated by dots.

**IPX/SPX**

Internetwork Packet Exchange / Sequential Packet Exchange. A protocol for transmitting information on Novell NetWare networks. Primarily used on older Novell networks.

**ISBN**

International Standard Book Number. A 10-digit code, not unique to each copy of a book.

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**K****key phrase**

Phrases in the title, subject, or note fields of material records (used in material searches).

**key word**

Three or more characters in the title, subject, or note field of material records (used in material searches).

**key word pointers**

A connection between the key words used in the catalog and the instance of those characters in the database. These pointers need to be created before searching by key word can be done in catalog.

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**L****landscape page orientation**

Makes a page longer horizontally than vertically.

**language code**

Language codes are a three character code that are stored in the language code portion of the 008 MARC field. Some common language codes are: eng - English, spa - Spanish, ger - German, fre - French, and rus - Russian.

**LCCN**

Library of Congress Call Number. A sequence of numbers used to identify materials.

**leader**

The first field in a material's MARC record.

**leading zeros**

Zeros at the beginning of a barcode number to make it 14-digits long.

**librarian's computer**

A computer reserved for the librarian/media specialist to set up the program, edit records, print reports, and complete circulation transactions. Also known as *circulation computer*.

**ligature**

A double character, or a type consisting of two or more letters or characters united, such as the double "ss" in the German language.

**linefeed**

The operation that prepares the next character to be printed and then moves the cursor down to the next line on a page. Originally this would have been done by "feeding" paper through the printer.

**link**

A highlighted word or picture in a document that "jumps" to another location within a document or to a location in a different document. The target of a link can be text, or it can be an image, audio or video file. Also called *hyperlink*.

**loan period**

The amount of time a material may be checked out (this does not include grace period).

**local data**

Library-specific information for each copy of a material, including material numbers, call number, and so on. The holding of a material contains this data.

**local password**

A password that limits catalog access at a computer that the Spectrum Patrons' Catalog program is installed on. A local password only applies to the individual Patrons' Catalog computer, so local passwords need to be set up at each Patrons' Catalog computer.

**location**

This can refer to either shelving location or location code, depending on which part of the program you are in. See the program help or manual to determine which is referred to in the program.

**location code**

A four-digit code identifying the library site the material belongs to. The location code is included in 14-digit material numbers and their barcodes.

**logic conditions**

See *Boolean operators*.

**lookup computer**

A computer reserved for catalog functions. Also known as Patrons' Catalog computer.

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**M****m\_import.log file**

Tracks errors that occur during the material import process.

**machine name**

Name of a physical computer. Can be used as the address for where a computer is located on the network.

**map call number pattern**

Procedure that lets you assign material types to incoming materials according to their call numbers.

**MARC**

Machine-Readable Cataloging. Relating to the computer-readable Library of Congress-designed system of storing data about materials.

**MARC\_001 file**

The file that MARConnect creates in order to store your cataloged websites. This file is stored in the same directory as your MARConnect program. The program shouldn't change this file unless you tell it to. By default, the MARC file named MARC\_001 is created the first time you catalog a website.

**MARC 21**

The MARC 21 Format for Bibliographic Data is a set of codes and content designators defined for encoding machine-readable records. It is designed to be a carrier for bibliographic information about printed and manuscript textual materials, computer files, maps, music, serials, visual materials, and mixed materials. Bibliographic data commonly includes titles, names, subjects, notes, publication data, and information about the physical description of an item. This supercedes USMARC and CAN/MARC formats.

**MARC data**

A material's bibliographic information that appears in USMARC format.

**MARC record indicator**

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

**master password**

This password is able to access any part of the program. The master password is the same as the level 9 password.



**master word**

The word entered at the See Also window to create references for. A word patrons might enter in a catalog search that could have alternative or related words to broaden or limit their search.

**material barcode number**

A material identification number consisting of up to 30 digits. Each material record is assigned a material barcode number.

**material code**

The numbering system accounting for each unique title in Union CAT.

**material copies**

See *holdings*.

**material inquiry**

A circulation feature that lets you view details about a material currently selected in the Circulation window. When you inquire about a material, you see information about it in these views: itemized list, MARC record, card image, and local information.

**material list**

A report listing materials currently in the system.

**material type**

The number that represents the category of a material. Materials of one type all share the same circulation properties.

**material type description**

The name of the material type (for example, Fiction, Reference, Art, Oversize books, and so on).

**material type limits**

Settings that let you search the catalog for specific types of materials.

**material usage**

The number of times a material is checked out or renewed. Material usage statistics are system maintained.

**megabyte**

One million characters, or bytes. Abbreviation: MB.

**memory**

The place where information is stored on a computer. Computer memory is erased when the computer is turned off. Hard disk memory is maintained when the computer is turned off.

**menu**

A list of items to choose from.

**MicroLIF**

Microcomputer Library Interchange Format. A variation of MARC record designed by computer companies for easier reading.

**mode**

A particular functioning arrangement or condition, such as the Add, Edit, and Browse modes.

**modem**

A device that lets 2 or more computers communicate data to each other over conventional phone lines.

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**N**

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**Name (of library)**

The name of the institution that uses Spectrum CIRC/CAT. This institution's name can appear on some notice and barcode labels.

**network**

Two or more computers connected to each other to allow easy sharing of information. Computers in a network can be connected by cables, telephone lines, or even through wireless communication.

**note field**

The field in both the MARC and MicroLIF records of a material containing a brief description of the material.

**notice**

A reminder that can be printed and sent to a patron regarding their fines, overdues, reserves, or bookings.

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**O**

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**online Help**

Documentation about the program that is built into the program. The program's Help system is often available by clicking a Help button in program windows or from a Help menu. You do not need a Web browser to access online Help.

**OPAC**

Online Public Access Catalog.

**operating system**

Master control program that runs the computer. For example, Windows 95/98/NT/2000 or Mac OS.

**overnight privileges**

The ability for a material to be checked out from the library overnight.

## P

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### **Page Down key/Page Up key**

Keys on the keyboard that move the screen information down and up one length.

### **partition**

A divider that separates barcode number ranges between materials and patrons.

### **password**

The code word used to protect all or part of a program.

### **password levels**

Degrees (1-9) that determine how much of the program a password can access. The higher the level of a password, the more powerful that password is. The program regards the master password and level 9 password as equal.

### **patron inquiry**

A circulation feature that lets you view the name, barcode number, address, data added, date library privileges expire, patron types, user-defined information, materials checked out, materials on reserve, fine information (can also be printed), usage total, and the number of messages attached to the patron's record of the patron currently in the Circulation window.

### **patron type**

The number that represents the category of a patron. Patrons of one type all share the same circulation properties.

### **patron type description**

The name of a patron type (for example, Library staff, 2001 class, and so on).

### **patron usage**

The number of times a patron checks out or renews. Patron usage statistics are system maintained.

### **personal digital assistant (PDA)**

A lightweight, hand-held, usually pen-based computer, which most of the time uses the Palm operating system. This can be used in conjunction with the Spectrum-in-Hand program to enter barcodes for portable circulation and inventory.

### **ping**

A DOS command that verifies connections to a remote computer or computers by sending echo packets to the computer and listening for echo reply packets. It can be used to test both the computer name and the IP address of a computer.

### **place website assessment in tag**

A MARConnect program term. This field's value determines which field in the MARC record will store your website quality rating. If you do not want to store a quality rating, leave this field blank. The recommended tag is 514.

### **pointer**

The connection between a key word entered at the search window and one instance of the key word's characters in a material record. Pointers are created through Build/rebuild key words in Material Import and Update Key words in the Rebuild program.

### **popup**

An online Help text window that temporarily displays information when the user clicks the hotspot text. This window does not remain open while working with the program like main online Help windows.

### **port**

An input/output channel through which a peripheral device can communicate with the computer.

### **portable barcode reader/scanner**

Hand-held device for scanning barcodes. Good for performing circulation activities and inventory.

### **portrait page orientation**

Makes a page longer vertically than horizontally.

### **posted fine**

A fine calculated when an overdue material is checked in, or when fines are added manually by the library staff. A posted fine is the amount due, not the projected fine amount.

### **preview**

To view data on-screen in the format it is printed.

### **Print Receipts option (Circulation menu)**

*Note:* This option is only available if you've purchased the SLIP feature for Spectrum CIRC/CAT.

If selected, checkout slips are printed with only the checkout receipt options and fine receipt options you set up. If it's not selected, no checkout or fine receipts print regardless of what options you've set up.

**Print Screen key**

The "Print Screen" key on the keyboard that, sometimes in conjunction with another key, captures the displayed screen so it can be printed from another program such as Paint on Windows.

**privacy option**

Option in Circulation and Reports that can conceal the identity of materials from association with patrons.

**privilege**

The library abilities assigned to a patron type. Examples of these abilities include checkout limit and ability to renew overdue materials.

**privilege field**

A field that is protected from being edited under normal circumstances.

**projected fine**

A fine calculated for materials not yet checked in (this amount is subject to change before becoming a posted fine). A material with a projected fine has an asterisk (\*) next to it in the Patron Fine window.

**prompt**

A message from the computer that requires a reply from the user. The cursor position where the user's reply is entered.

**protocol**

The language that computers in a network use to communicate. Two computers must use the same protocol to communicate with each other.

**public note**

This field contains information relating to the electronic location of the source identified in the field. This information is stored in tag 856\_z of a MARC record.

**purge**

To delete.

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**R****RAM**

Random Access Memory (read-write memory). Memory that can be read or written to.

**range**

A set of data defined by starting and ending values.

**read**

To access a data file and examine its contents without making any modifications.

**reading level**

The difficulty of a material as measured by the grade level of a student who would most benefit by reading it.

**reading/interest level limits**

Settings that let you search the catalog for materials that are of interest to people of certain reading grades, interest ages, and/or interest grade levels.

**rebuild**

To repair or partially recreate files.

**record**

A group of related data fields, such as material information. Fields make up records, and records make up files.

**Recycle Bin**

The place in the Windows operating system where deleted files are stored, corresponding to the Trash on Macintosh.

**renewal limit**

The number of times a particular material can be repeatedly checked out to the same patron.

**report**

Printed copy of related information. For example, the Materials Checked Out report is a report documenting all the materials currently checked out of the library.

**Resource Collection**

A database that consists of article records that compliment the library's material records. These records can contain whole or condensed magazine/newspaper articles. You can search a Resource Collection using the catalog. Although Resource Collections are designed to work with certain Sagebrush Corporation programs, they must be purchased separately.

**restore**

To copy data or a program from a backup for the purpose of returning that data or program to the condition of the data or program at the time the backup was generated.

**retry**

To try to perform a process again after receiving an error message.

**right-click**

To click with the right (or secondary) mouse button.

## ROM

Read Only Memory. A permanent memory chip for program storage that contains data that can't be changed.

## S

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### schedule

Custom calendar setting for each patron type. Different library schedules can be set up for different patrons based on the times when they use the library.

### screen

The entire viewing area of a monitor. Not to be confused with *window*.

### scroll

To move sequentially among consecutive items in a list.

### search

To look for specific items by specific characteristics.

### search engine

A utility that lets Web users enter keywords (and in some cases, additional search criteria), then compiles a list of Internet locations containing the key words. Example of search engines include Northern Lights, Yahoo, Alta Vista, and Lycos.

### searchable

Whether a material can be found by a catalog search. This material type designation is useful if you don't want patrons to locate certain library materials (such as textbooks or fixed assets) when searching through the catalog.

### searchable collection

The portion of your database records that can be accessed by a catalog search.

## See Also word

A catalog key word that is related to another catalog key word (also called a cross-reference word). Similar meanings or common categories usually link their words. For example, the words *work* and *labor* are See Also words because they can both mean the same thing.

### sequence

The arrangement of records in order according to an index.

### server

The computer in a networked system that responds to requests from other computers on the network.

### set a due date

Procedure that lets you establish a date by which materials are due.

### set up

To prepare the program for use, to tailor the system to your particular needs.

### shelving location

A description of the physical location of the holding within the specified location.

### shortcut key combinations

Key combinations, or hot keys, that simplify navigation in windows when entering data.

### shut down

To close out of programs or turn equipment off.

### single user program

The Spectrum CIRC/CAT program for one computer only. Administrative functions and material searches are done on the same computer.

## size box

A small box in the corner of most windows used to alter window sizes.

## SLIP

Supply Library Information to the Patron. Software created by Sagebrush Corporation that enables printed checkout receipts, fine receipts, and fine notices from Spectrum CIRC/CAT. SLIP printouts are printed on a narrow slip of paper instead of an 8 ½ x 11 sheet. These printouts can be kept for a library's records or can be given to patrons.

## SLIP comments

Text that can appear on your checkout and fine slips. For example, you may want to put a comment on your fine notices reminding patrons of your fine payment policy. Each comment can be up to 40 characters long.

## software

Programs that run on a computer. For example, Spectrum CIRC/CAT.

## sort

To arrange your material records according to one or more indexes.

## source

The field(s) in material records that the computer searches for a match in catalog resources. The program takes key words from these fields to build, rebuild, or update key word pointers.

## special fine rate

A patron type's fine rate that overrides a material type's usual fine rate.

**special reserve**

A Circulation command used to assign temporary material types to a material used in an atypical situation.

**Spectrum MARConnect**

A program that lets library professionals catalog websites and add them to their collection.

**Spectrum Web Catalog**

A program that lets patrons at remote sites access and search your library's collection with the aid of a Web browser. It also lets library professionals develop and customize a home page for their library without needing to know HTML.

**Spectrum WebConnect**

A program that provides a link to electronic resources as cataloged in the USMARC 856u tag.

**spine labels**

Labels that contain the call number of a material. These labels are called "spine" labels because they are often located on the spine of a book.

**splash screen**

An image that appears for a few seconds before a Help topic is displayed or a program starts.

**start page**

The page used to first access an HTML-based Help site.

**status**

The state of a material. For example, checked in or checked out.

**stock**

Physical description of the material you're using to print on. For example, *paper stock* or *label stock*.

**storage device**

The equipment that accesses the storage media. For example, zip drives and tape drives.

**storage media**

A device on which you can store computer data, such as backups. Examples: a computer's internal hard disk, floppy disks, tape cartridges, zip disks, and so on.

**store**

To keep in computer memory or on disk.

**subfield**

A subfield divides the data in a field into more details. For example, Publication, tag number 260, has several subfield codes:  
a - place of publication  
b - name of publisher  
c - date of publication

**subfield codes**

Characters (letters or numbers) that represent each subcategory of a field.

**subfield data**

The information stored in a subfield.

**summary**

Information that describes the general contents of the described material. You could place a summary, an abstract, a review, or simply a phrase describing the material or website in the summary field. This information is stored in tag 520\_a of a MARC record.

**suppressed materials**

Checked out materials that do not appear in the Materials checked out list in the Circulation window.

**symbology**

The way a barcode is printed. Symbology is designed to give you the ability to provide labels to different library systems and their specific needs.

**system**

The full combination of computer hardware and software.

**system details note**

This information is found in tag 538 subfield \_a of the MARC record. It contains system information about an item.

**system-generated fine**

Fine for overdue materials that the program automatically accrues. Fines are calculated according to the fine rates that are set.

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**T****tab space**

The space created between characters when the Tab key is pressed.

**tag**

(v.) To mark an item, distinguishing it from all unmarked items, for the purpose of assigning a particular status to it.  
(n.) A field that holds specific information about a record. It includes a tag number, indicator, and subfields.

**tag descriptor**

The name of the tag field.

**tag field**

The tag number and its data.

**tag number**

A number that identifies a field in records that are in either the MicroLIF or MARC format.

**TCP/IP**

Transmission Control Protocol / Internet Protocol. A set of networking protocols used with a large variety of systems. TCP/IP serves as the networking protocol currently used for communication on the Internet.

**text to precede assessment**

A MARConnect program term. MARConnect will automatically add text from this field to your quality rating of a website when it creates the MARC record. For instance, if you want your quality rating to have descriptive text precede it, such as "Quality rating (1-low to 5-high)", enter the text here.

**textbook/fixed asset**

A type of library material such as a textbook, an item of furniture, or A/V equipment, which can be treated differently than typical library materials, such as books. Materials with the textbook/fixed asset designation aren't counted in a patron's checkout limit.

**textbox/text field**

Entry line or box where users enter requested values.

**title bar**

A bar on top of a window. The title bar contains the name of the file or application. In many graphical user interfaces, including the Macintosh and Microsoft Windows interfaces, you move (drag) a window by grabbing the title bar.

**tool bar**

A row of small buttons usually arranged across the top of your program window. Each button represents a commonly used command. These buttons can behave like pushbuttons, check boxes, or radio buttons.

**tool tip**

Most toolbars use ToolTips to describe button commands. A tool tip is a small popup window that appears near a toolbar button to explain its purpose to the user. You view tool tips by keeping the mouse pointer over the button you want to see a description for.

**transmit**

To send electronically via modem communications.

**type (n.)**

The classification of a patron or material. See also *material type* and *patron type*.

**type (v.)**

To enter information from the keyboard.

**type of computer file or data note**

A MARConnect program term. This field's value will automatically be entered into tag 516 subfield *\_a* of the MARC record. This field contains information that characterizes the computer file.

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**U****Uniform Resource Locator (URL)**

See *Web address*.

**uninstall**

To remove installed software or hardware from the computer. Some applications must be removed with an uninstall program, which removes all files that were installed with the program and restores any modifications made to system files.

**upload**

To transfer data from a secondary computer, portable unit, or disk to a main computer.

**user-defined**

Named or determined by the user.

**USMARC**

The MARC format for material records cataloged for use in the United States prior to 1998. This format is superseded by the MARC 21 format. See *MARC 21*.

**USMARC/852 Holdings Data**

Machine Readable Cataloging Bibliographic information format developed by the Library of Congress in the 1960's.

**utility**

A program providing a limited service applicable in a variety of situations, as a tool or component intended to be used with other programs.

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**V****value**

The data entered that a program uses to identify a particular record or group of records.

**value set from**

A MARConnect program term. The value of the data comes from either the options you set in the Options window, or the information you enter in the main MARConnect window.

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**W**

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**Web address**

A string of letters and/or numbers that locates a World Wide Web page/site on the World Wide Web. For example, Sagebrush Corporation's Web address is [www.sagebrushcorp.com](http://www.sagebrushcorp.com).

**Web browser**

Commonly called "browser." Software program for displaying Web pages/sites on the World Wide Web. Examples of browsers include Microsoft Internet Explorer and Netscape Navigator.

**Web page**

An HTML document published on an Internet Web server. The primary medium of the World Wide Web. Welcome pages and Home pages are examples of Web pages.

**Web server**

A computer on which the hypertext documents of Web sites reside, accessible by users of the World Wide Web.

**web site**

A set of pages published on a Web server and accessed via the Internet by means of software called a browser. Web sites have, at a minimum, one page. Most sites have a Welcome page (often called "Home Page") from which the viewer can, by means of hypertext links, jump to related pages of the site or even to different websites.

**Welcome page**

The first page displayed when you access a website. Typically serves as a website's greeting and table of contents. Often called "home page."

**wildcard character (\*)**

The asterisk (\*). When you search the catalog, you can use the wildcard character to replace other characters in your search.

**window**

The area on the screen which displays the program/file currently open. Not to be confused with *screen*.

**window elements**

The checkboxes, popup menus, text boxes, buttons, and other control and entry devices in a window.

**write (to disk)**

To copy data from one storage medium to another.

**write over**

To overwrite. To replace existing data with new data.

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**Z**

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**Z39.50**

A communications standard used by Winnebago Spectrum, prepared by the National Information Standards Organization (NISO).





# About Sagebrush Corporation

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Sagebrush Corporation is a rapidly growing library and information services company focusing on the education market. Sagebrush delivers a powerful array of integrated information resource management solutions to the education world. We are dedicated to providing solutions to enhance educational access to information, to help librarians and students achieve their goals, and to build bridges for educational success. Sagebrush Corporation offers solutions in three main areas: technology, learning resources, and library services.

## ***Technology Solutions***

Under the Sagebrush, Nichols, and Winnebago names, we have been bringing information technology solutions to libraries for nearly 20 years. Sagebrush Corporation's core technology solutions, Athena and Winnebago Spectrum, are integrated library automation systems developed for Windows. We also offer a host of complementary products including Athena WebServer and Spectrum Web Catalog, which put a library's entire catalog on the Internet.

## ***Learning Resource Solutions***

Sagebrush Corporation is committed to providing schools and libraries with the highest quality products and services through Econo-Clad Books and American Library Publishers. In addition to quality-bound books, Sagebrush also offers reading program software and other education materials to schools and libraries.

## ***Library Service Solutions***

Sagebrush Corporation offers book publishers and distributors the highest quality MARC records, cataloging, and processing services. Sagebrush is known for the strength of its Dewey/Sears database, its excellent hit rate for school library collections, and its outstanding customer service.

Through these three distinct but closely related solution areas, Sagebrush Corporation spans the breadth of library and information services for schools and libraries.

For more information on Sagebrush Corporation, visit Sagebrush's website:  
[www.sagebrushcorp.com](http://www.sagebrushcorp.com).

# About Sagebrush's Technical Support

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Sagebrush is committed to providing fast, knowledgeable technical support when you need assistance.

**Phone** 1-800-654-3002

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**Fax** 1-507-725-5530

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**E-mail** [support@sagebrushcorp.com](mailto:support@sagebrushcorp.com)

You can also visit our website at [www.sagebrushcorp.com](http://www.sagebrushcorp.com) for contact and technical support information. Plus, at our website you'll be able to see the most up-to-date company and product information, including documentation that you can download in PDF format (viewable with Adobe Acrobat Reader 3.0 or later).

# Customer Support Agreement Plan (CSAP)

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With the purchase of Spectrum CIRC/CAT, you receive a Sagebrush Customer Support Agreement Plan (CSAP) FREE, which guarantees you a full year of unlimited technical support. With a Sagebrush CSAP, you'll enjoy:



Call Sagebrush Technical  
Support toll-free at  
1-800-654-3002

- FREE support via phone, fax, modem, or the Internet.
- FREE program enhancement updates.
- FREE documentation updates.
- FREE replacement disks if yours are damaged or lost.
- A FREE subscription to our customer newsletter with news, tips, and ideas you can use.
- A FREE subscription to our customer listserv—the perfect place to share ideas with your peers.

CSAP does not include repairing equipment that is out of warranty or fixing data. If you have any questions about this service, please call our Sales Department at 1-800-533-5430 or e-mail them at [sales@sagebrushcorp.com](mailto:sales@sagebrushcorp.com).

## Technical Support checklist

To help us assist you more efficiently, please have your customer number or serial number available when you contact our support staff with questions about your program.

Note: You can e-mail your questions to technical support at [support@sagebrushcorp.com](mailto:support@sagebrushcorp.com).

Before you call, follow this checklist:

- ☐ Make sure you have current backups.
- ☐ Write down the steps you performed before the problem occurred.
- ☐ Write down any error messages that the computer displayed.
- ☐ Consult your manual or Help for any information related to the problem.
- ☐ Make sure you know the operating system that you use and its version number.
- ☐ Make sure you know your Sagebrush program's version number.
- ☐ Place your phone by the computer and make sure you know its phone number (in case our support staff must call you back).
- ☐ Have your customer number ready.
- ☐ Write down the following information and store it in a handy place.

**Customer number:** \_\_\_\_\_

**Date of program purchase:** \_\_\_\_\_

**CSAP expiration date:** \_\_\_\_\_

# Comments or suggestions?

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If you have any comments or suggestions about your Spectrum CIRC/CAT product, we'd like to hear from you! Your comments help us develop products that meet your satisfaction.

There are a variety of ways you can send us suggestions or comments about the Spectrum CIRC/CAT program or its accompanying documentation (the user manual and Help).

You can:

- Send an e-mail to *support@sagebrushcorp.com*
- Call Sagebrush Corporation at 1-800-654-3002
- Fax Sagebrush Corporation at 1-507-725-5530

In your correspondence, please be sure to indicate whether you're commenting about the Spectrum CIRC/CAT software or its documentation. We appreciate your input. Thank you for helping us serve you better.



1-800-654-3002

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