

Exporting MARC records for CollectionWiz™

The following instructions briefly explain the process of exporting your MARC records from a variety of popular library automation systems. It is not intended as an authoritative, in-depth document for any single system.

For the most detailed and up-to-date export instructions for the version you are running, we strongly encourage you to check your system's online help, your manual, your system administrator, and/or your vendor's technical support department for assistance with exporting MARC records.

CollectionWiz™ requires that exported MARC records only contain copy (or holdings) data for the library collection on which you are performing the analysis.

95% of the libraries in the U.S use one of the automation systems detailed here:

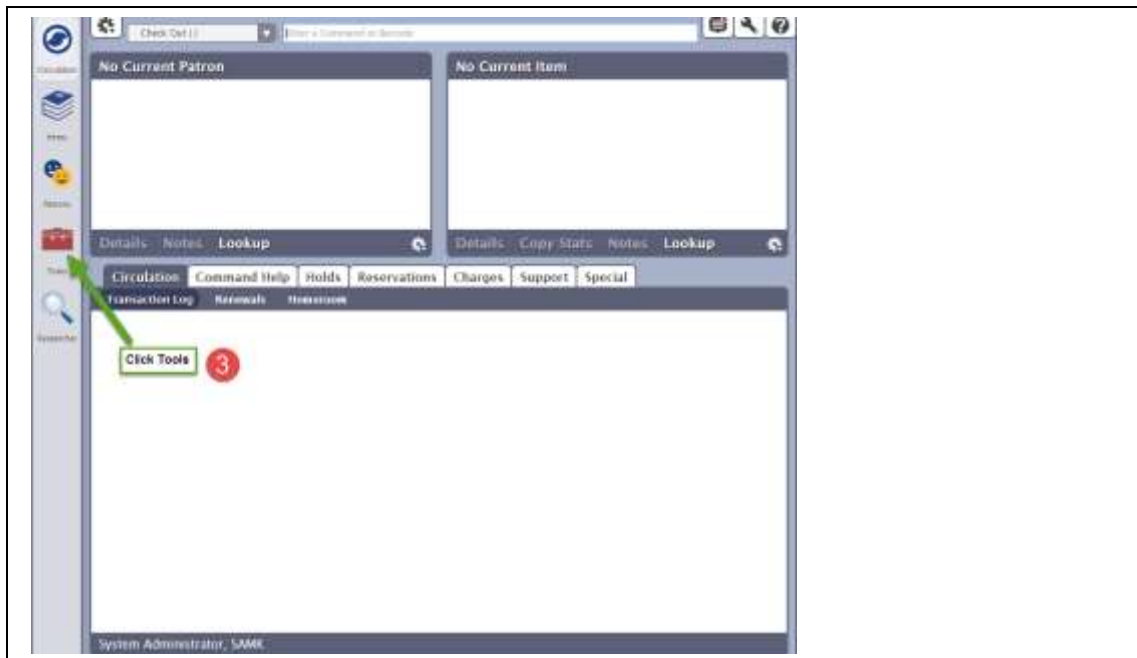
- [Alexandria v7](#)
- [Atrium](#)
- [Follett Destiny](#)
- [M5 Mandarin](#)
- [OPALS](#)
- [SirsiDynix Symphony](#)

Export instructions for the following library automation systems are **NOT** included here, as they are in very limited use. If your school still uses one of these systems and you need assistance exporting your records, please contact your System Administrator or the automation system's Customer Support team. Exported MARC records from these systems may or may not work when uploaded to **CollectionWiz™**.

- Alexandria Mac, Alexandria V
- Alexandria v6
- Athena
- Concourse
- Follett Circ Plus
- InfoCentre
- Library Solution
- Library World
- Mandarin M3
- Sagebrush
- Spectrum
- Surpass
- SirsiDynix Horizon and Unicorn

Alexandria v7 Union Catalog and Individual Library Site MARC Records Export Instructions

- 1) Login to your **goalexandria.com** site
 - a) If you are the **District Administrator**, your login credentials will provide automatic access to **all** library sites, including all (union) MARC data
 - b) **Site librarians**, your login credentials automatically allows you to export **only your library's** MARC records
- 2) Open Alexandria to the **Circulation** window
You can access the Circulation window directly by going to <https://yourlibraryname.goalexandria.com/circulation>
- 3) Click **Tools**



4) Click **Export**



5) Select **Export Items, Title Based**

6) In the **Selections** tab

- a) For **Title with a Policy of**, select **Any Policy**
- b) For **Titles with a Medium of**, select **Any Medium**



- 7) Click **Options** tab and set the following:
 - a) For **Sort Titles by**, select **Title Call Number**
 - b) For **Format**, select **MARC**
 - c) For **Header**, select **Alexandria Header**

- 8) Click **Run**



- 9) **Operation Management** window will appear
If the Operations Management does not automatically appear, click the Wrench icon

- 10) **Export Items, Title Based Completed** will appear

- 11) Click icon to download records (icon appears as a PDF document icon)



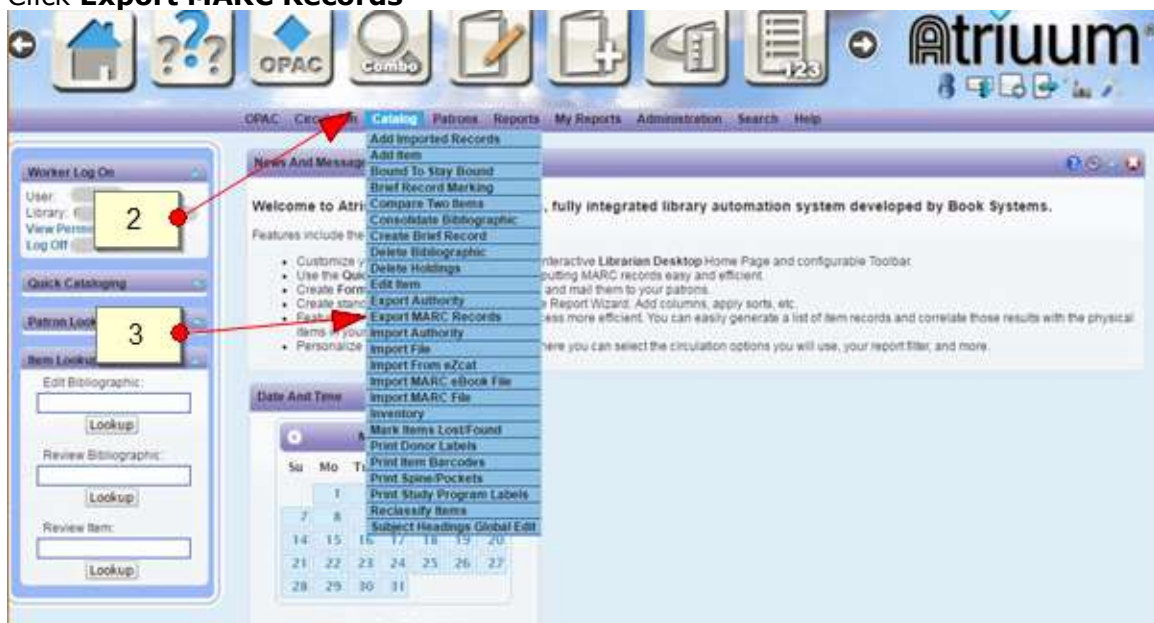
- 12) **IF your library site(s) are hosted by COMPanion**, your records will be downloaded to your default web download file folder on your computer and named **"Export Items, Title Based.txt"**
- 13) **Please rename the file to YourSchoolName.001** prior to uploading to **CollectionWiz™**
- 14) If your library is self-hosted, your file will be placed on your hard drive location and named **"Export Items, Title Based.txt"**
 - a) Windows: **C: \ProgramData\Alexandria Support**
 - b) Macintosh Hard Drive **\Users\Shared\Library\Application Support\Alexandria Support**
 - c) **Please rename the file to YourSchoolName.001** prior to uploading to **CollectionWiz™**.

For further assistance, contact Alexandria technical support at 800-347-4942 or email support@goalexandria.com.

Atrium MARC Records Export Instructions

The following instructions are for individual libraries only. If you are using Atrium for multisite or unified library catalogs, [please see additional parameters below](#).

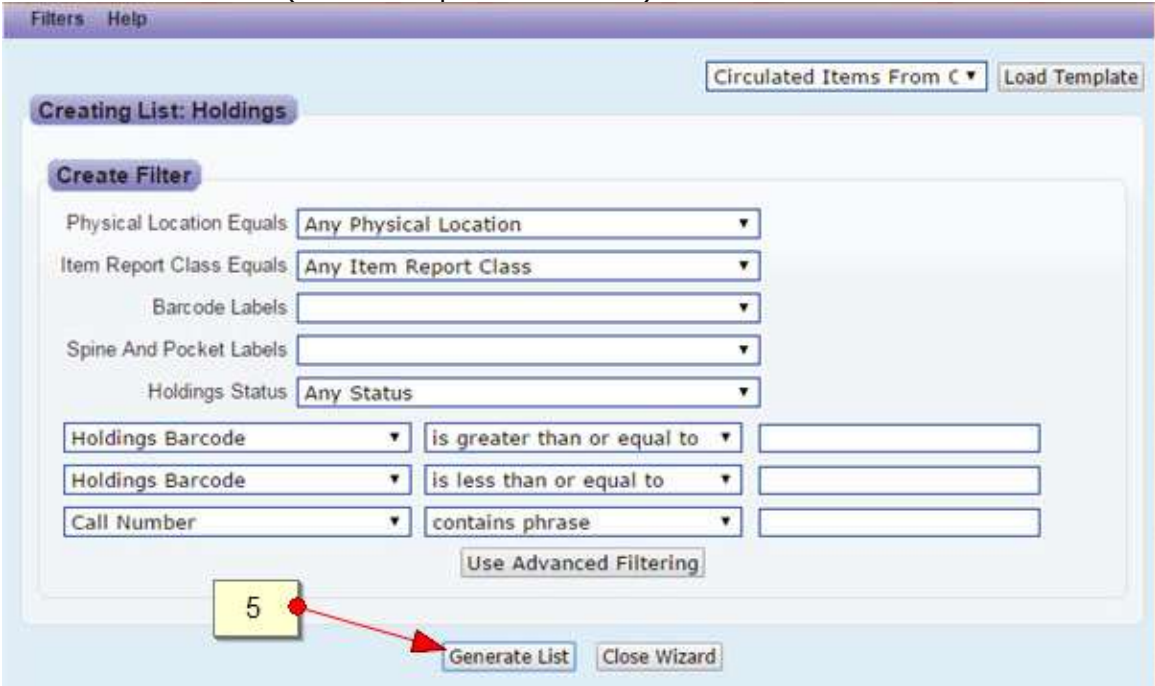
1. Open Atrium
2. Click **Catalog**
3. Click **Export MARC Records**



4. Click **Filter**



5. Click **Generate List** (this will export all records)



- 6. Select the box for **Place copies together in the same MARC Record**
- 7. Click **Export Queued Records**



8. Click **Download This File**9. Click **Save**

10. The file will be saved to the default location **or** you may choose to save to your Desktop.

11. **Rename the file to YourSchoolName.001**, click **Save**.

NOTES: The **Export Queued Records process** may slow down your Atrium system. You may want to consider clicking **Export Queued Records** before or after circulating hours.

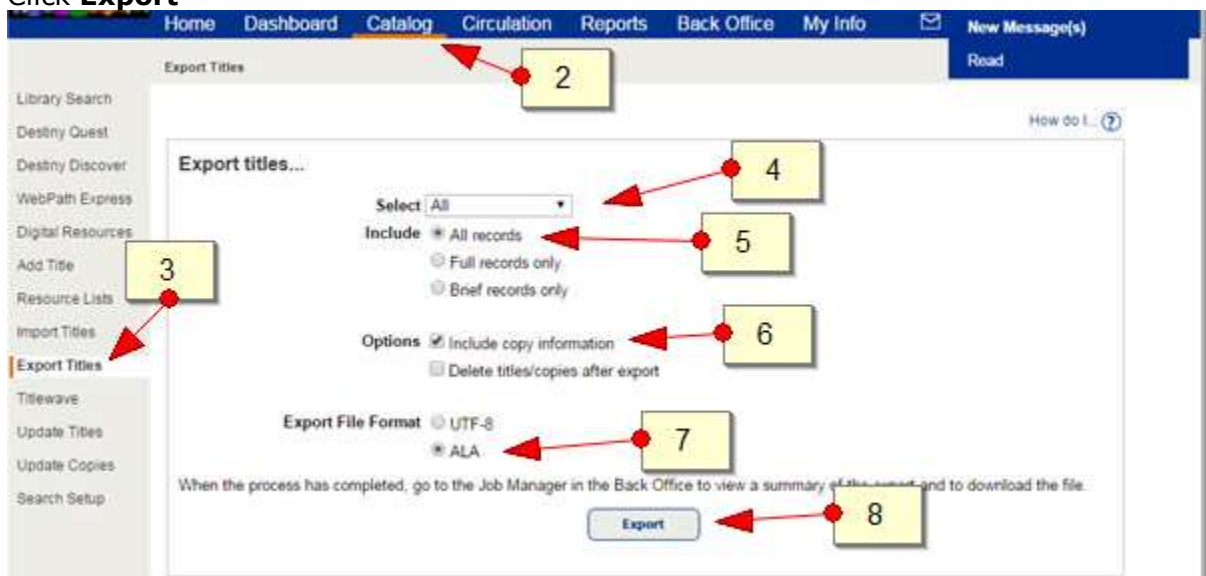
Multisite and unified library site users should contact Book Systems technical support to provide the best possible data for **CollectionWiz™** analysis. For the best and most effective collection analysis, please make certain that the holdings (copy) information fields are exported to meet the following criteria:

1. Each library Site/Location name must be in the same holdings field.
For Example: ABC School's holding Name/Code **cannot** reside in 852 \$a AND 949 \$a or any other field.
2. The **call number holdings field** and **subfield** must be the same for all sites. Multi-part call number should be combined into a single subfield. We do not require cutters to be included in your holdings.
3. Please make certain that the subfield containing the individual member library site code is not duplicated within any field.
4. Please make certain that the call number subfields fields are not duplicated within a holdings field.

For further assistance, contact Book Systems technical support at 888-289-1216 or email support@booksystems.com.

Follett Destiny Union Catalog and Individual library site MARC Records Export Instructions

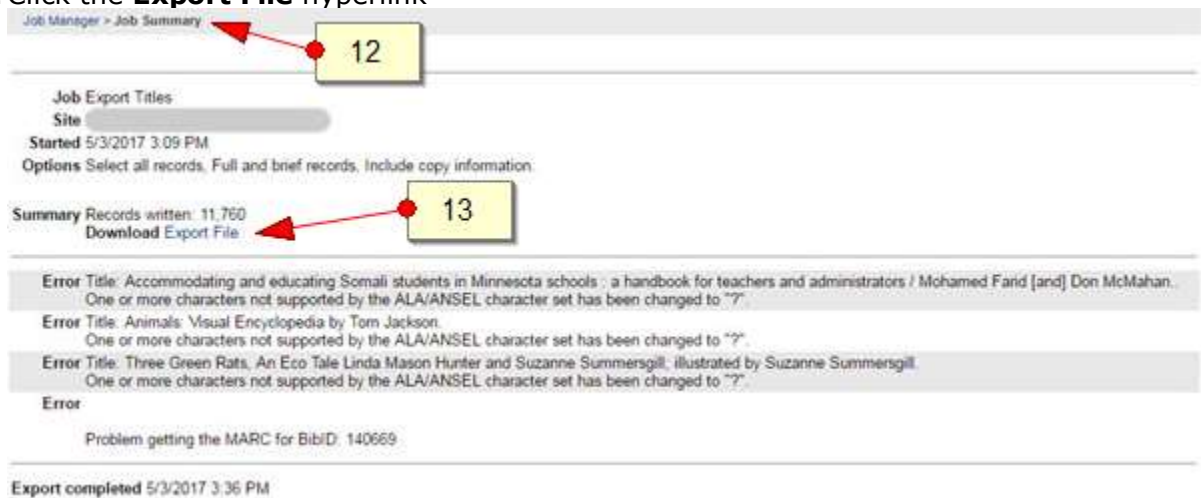
1. Login to Follett Destiny
 - a. If you are a **District Administrator**, aka Super Admin, your login credentials will provide automatic access to MARC data for **all** sites.
 - b. **Site librarians**, your login credentials automatically allow you to export **only** your library's MARC records.
2. Click the **Catalog** tab
3. Click **Export Titles**
4. In the **Select** dropdown menu, select **All**
5. In the **Include** section, select **All records**
6. In the **Options** section, check **Include Copy Information**
(Make certain that **Delete titles/copies after export** is **NOT** checked)
7. In the **Export File Format** section, select **ALA**
8. Click **Export**



9. Click the **Back Office** tab
10. Click **Job Manager**
11. The **Export Titles** job will be the first job listed
 - a. When **Status** shows as **Completed**, click the **View** hyperlink



12. The **Job Summary** will appear
13. Click the **Export File** hyperlink



14. In the **File Download** window, click **Save**
15. The file will be saved to the default location **or** you may choose to save to your Desktop.
16. **Rename the file to YourSchoolName.001**, click **Save**.

For further assistance, contact Follett technical support at 815-759-1700.

M5 Mandarin MARC Records Export Instructions

The following instructions are for exporting MARC records for **single site** libraries.

If you are using M5 Mandarin for a **Union Catalog**, export options are dependent on the services that you have contracted with Mandarin Library Automation. If you require assistance with Union Catalog MARC record export, please contact MLA technical support.

1. Click the dropdown arrow for **Catalog**, select **Cataloging Tools**
2. Click on **export** tab
3. Under **search options**, select the collection for export. This will generally be "Library"
4. Select **bibliographic**
5. In the **Title** field enter [*] (asterisk character)
6. Click **search**
7. Click **select all**
8. Click **next**

The screenshot shows the M5 Mandarin MARC Records Export interface. The interface includes a sidebar with tabs for 'import', 'export', 'isbn/issn fetch', and 'find and replace'. The 'export' tab is selected. The main area shows search options for 'Mandarin Library' and 'bibliographic'. The search criteria are set to 'Title' with an asterisk (*) in the input field. The search button is labeled 'search'. Below the search results, there are buttons for 'select all' and 'deselect all'. The search results show 1430 results, with 1 of 143 displayed. The results list includes titles such as 'The war against Shi'ite Iraq /', 'Raoul Wallenberg :', 'Adolf Eichmann :', 'The Marines of autumn :', 'Flags of our fathers /', 'Oskar Schindler :', 'The 1940s :', 'John McCain :', 'Walking the Bible :', and 'Civil War firsts :'. Each result has a checkbox and a 'details' link.

9. Under **export selected records – export file name (incl .txt ext)**: name your file **YourSchoolName.txt**
10. Click **finish** and leave the window open

export

import

export

isbn/issn fetch

find and replace

export selected records

export file name (incl .txt ext): test.txt

Ez-Transfer Export to BestMARC™

Export only the bib ISBN number

cancel back finish

9 Enter your file name "YourSchoolName.txt"

10

11. Click the **file link** to retrieve export file

Export completed

Export started:04/25/16 01:39:53
Export completed:04/25/16 01:39:55

Number of records processed:4
Number of records exported:4

Query to retrieve updated records:KEYWORD=[[005 "20160425133953.0"]]

Link to retrieve export file:[test.txt](#)

Exceptions

*** None ***

ok Print

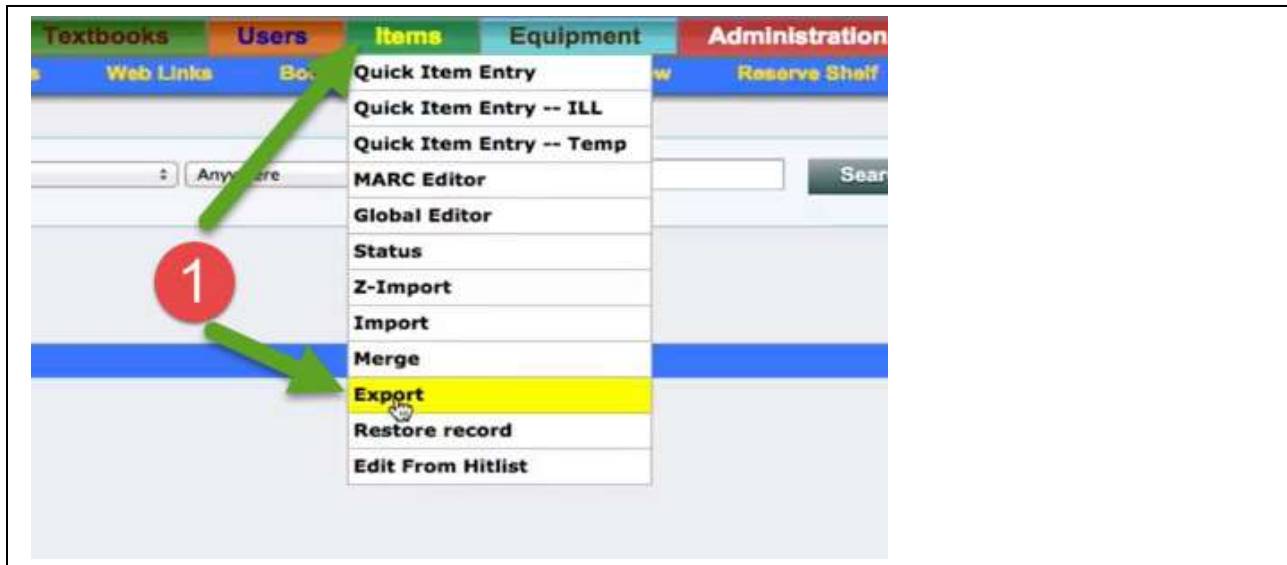
11

12. The records will be downloaded to the default web download file folder on your computer
13. Rename the file extension from **YourSchoolName.txt** to **YourSchoolName.001**

For further assistance, contact Mandarin technical support at 800-426-7477 or email support@mlasolutions.com.

OPALS Multi-Catalog and Individual library site MARC Records Export Instructions

- 1) Login to OPALS
 - a) If you are the **District Administrator**, your login credentials will provide automatic access to **all** library sites. When "entire database" is selected, data from **all sites** will be downloaded.
 - b) **Site librarians**, your login credentials allow you to export **only** your library's MARC records.
- 2) In **Items** tab select **Export**



- 3) In **Select Export type** select **entire database**
- 4) In the **Check to exclude Media Format(s)** check all items **EXCEPT** these two:
 - a) Book
 - b) eBook
- 5) For **Character encoding output**: select **MARC-8**
- 6) Click **Export**



- 7) Confirmation dialog box will appear click **OK**
- 8) Status column will read "**Done**" when file is ready for download
- 9) Click the file link to download the MARC file. Your records will be downloaded to your default web download file folder on your computer. The file name will be numeric and automatically populated by the system. You can only rename the file **after** download.

Status	MARC21 File
Waiting...	
Done.	227.mrc 

- 10) Rename the file **YourSchoolName.001** before uploading to **CollectionWiz™**.

For further assistance contact OPALS technical support at 877-331-1022 or email support@opalsinfo.com.

SirsiDynix Symphony Single Site and Union Catalog MARC Records Export Instructions

The holdings (copy) information field and subfields for your call numbers **should be merged** for the best and most accurate collection analysis. **CollectionWiz™** provides excellent analysis when the call number subfields are merged into a single subfield.

For optimum analysis and budget analysis please do the following if possible:

- The call number holdings field and subfield **must be the same** for all sites. Multi-part call numbers should be combined into a single subfield. We do not require cutters to be included in your holdings
- Please make certain that the subfield containing the individual member library site code is **not** duplicated within a holdings field.

NOTE: Your login credentials control which site data you can export. **Only the District Administrators** have access to multiple sites and can choose to export all sites (the entire union catalog) as well as selected individual sites.

1. Open **Workflows**
2. Click on **Reports and Notices**
3. Select **Schedule New Reports**
4. Select the **Bibliographic** tab
5. Click **Extract Keys for MARC**
6. Click **Setup and Schedule**
7. Select the **Item Selection** tab
8. In the **Library** field, select or enter your library's Building Code.
9. If you are extracting records from multiple sites or the entire union catalog:
 - Select **All** or highlight only the desired sites.
10. Click **Run Now**
11. You must confirm that the **Extract Keys for MARC Export** report is finished by clicking the on **Display Finished Reports**. You may need to click **Refresh** if the report does not appear after several minutes.
12. Open **Cataloging** and right-click on **MARC Export**, then click on **Properties**.
13. In the **MARC export: Property** dialogue box select only the following:
 - **Include 999 holdings tag**
 - **Format of output file:** select **MARC format**
 - Select **Export all records to one file**
 - Click **OK**
14. In the Cataloging menu click **MARC Export**
15. **For Save exported records:** select **On client**
16. For **File name on Client:** name the file **YourSchoolName.001**
17. Click **Export**