BiblioFile

Converted Local Database

Installation

Contents

Introduction

This document provides instructions for installing the converted Local Database into your **BiblioFile**™ system. The package accompanying these instructions includes a CD or DVD containing your ITS•**forWindows**™ Active file MARC records in **BiblioFile** format.

Use the following instructions, and the accompanying CD or DVD to install the converted database into your new **BiblioFile** system. Be sure to read and perform the **Before You Begin** steps as appropriate for your location. For further assistance with performing any functions referenced in these instructions, see the related **BiblioFile Help** topic. To view the Help Contents in **BiblioFile**, click **Help | BiblioFile Help**.

Before You Begin

On the computer where your **BiblioFile** Local Database is located (your **BiblioFile** *server*):

1. Identify a convenient timeframe for the installation. Depending on the speed of your computer and the number of records to be uploaded, this could take an extended period of time. For example, a 100,000 record database running on a new computer, which meets the minimum system specifications, will probably take about four hours to load.

2. If possible and convenient, copy the contents of the CD or DVD you received from TLC to a new folder on your hard disk. This will ensure a faster and more reliable upgrade.

3. The following bulleted items apply only to locations that have worked with **BiblioFile** during the database conversion time period, and may have created records, profiles, or established settings that they wish to preserve.

   - If the current **BiblioFile** database contains any MARC bibliographic or authority records that have not been backed up, back up those records now by exporting them.

     To do this:

     a. Click **File | Batch Export** in **BiblioFile** and the **Batch Export** dialog will display.

     b. Determine a name for the export file and in the **Options** section:

- In the **File Name** text box, type the full path (including the file name) to the location where you wish to place the file.

    OR…….

- Click the ellipsis button (**…**) to open the **Save As** dialog box, and then use the **Save in** list to navigate to the location where you want to save the exported records to.

    1. The default file name, **Extracts.raw** will populate the **File Name** box automatically.
    2. If you wish to change the file name, remove the default file name information and type the desired name.
    3. When the name is displayed as desired, click **Save**.

c. From the **Save Mode** list, select **Append** or **Overwrite**.

d. Select the **Remove records after export** check box if you want to remove the records from your database permanently.

e. From the **Record Encoding** list, select **Leader Byte 09**, **MARC 8**, or **USC/Unicode**, as desired.

f. Use **Filters** to select specific records you want to export from your Local Database. TLC recommends using the **Filter by Date** option to make a complete backup of all *Bibliographic* records.

g. When all settings are as desired, click **Go** to start the export process.

See the **Gap Data** section on Page 3 for instructions on how to import these records after the converted database is installed.

- If you wish to preserve any existing configuration settings (Z39.50 search profiles, label configurations, templates, macros, etc.), back them up by exporting them to a file.

  To do this:

  a. Click **Tools | Export Settings** in **BiblioFile**.
  b. Select the **plus sign** (**+**) to the left of each setting type, to display the list of available settings for that type.
  c. You can click **Check All** to select all settings or:

      - Select the check box to the left of the plus sign to select all settings under that type.

      OR….

      - With a list expanded (click the **+** sign), select the check boxes for each setting you wish to export from that type.

  d. When all settings are selected as desired, click **OK**.
  e. A **Save As** dialog will display. Use the **Save In** list to navigate to the desired drive and folder. In the **File name** box, type the *file name* you wish to export the settings to.
  f. Click **Save**.
  g. The **BiblioFile Advice** dialog displays **Settings Exported**.
  h. Click **OK**.

  To view instructions on how to import these settings after this installation is complete:

In the **BiblioFile Help**, under the **Contents** tab, expand the **BiblioFile Menus** entry, then expand the **Tools Menu** entry and select the **Import Settings** topic.

Installation

The following instructions will take you through the installation of the converted database.

1. **If you copied the CD/DVD contents to a hard disk folder**: Navigate to the folder, run **Setup.exe**, and continue to Step 3.

   If you did NOT copy the contents to a folder: Insert the CD or DVD you received with this package.

2. An installation program should begin automatically. If it does not, navigate to the root directory of the CD or DVD and run **Setup.exe**.

3. Follow the screen prompts. To confirm you have a usable backup, you will be asked to confirm (twice) you are aware that *all* of the existing MARC records in your **BiblioFile** Local Database will be overwritten and lost.

4. Wait for the **BiblioFile** database to finish the upload. A window will open providing a minimal level of feedback on the processes being performed. An **OK** dialog will appear when the process is complete.

5. Your **BiblioFile** Local Database is now ready to be used.

6. Continue to the next section to read information regarding the handling of records your library created in **BiblioFile** while your database was being converted (*Gap Data*), and *Error Records*, and *Duplicate Record* files created during the database conversion process.

Gap Data

If you added new MARC records to **BiblioFile** while TLC was converting your Active file, import those records now. These will be the records you previously saved to Export files during the conversion time period, and/or the records you extracted in Step 3 on Page 1.

To do this:

    a. Click **File | Batch Import** and the **Batch Import** dialog will open.

- Under **Source File**, type the full path (including the file name) to the location where the file(s) to be imported are located.

  OR.......

- Click the ellipsis button (**…**) to display the **Open** dialog box.

  1. Use the **Look In** list to navigate to the location where the file(s) to be imported are located.

  2. The default **Files of type** setting will be **MARC 21 Files**, which displays files with an extension of **.raw**, **.cp**, or **mrc**. If your export files have different extensions select the **All Files** option.

  3. In the **File Name** box type the desired file name, or select a file from the list and the file name will display. Click **Open**.

  The **Batch Import** dialog will return with the path and file name displayed under **Source File**.

b. Under **Local Database Protection**, from the **Bibliographic** and **Authority Records** lists, select **No Protection**, **Control Number Protection**, or **Extended Protection**. For further instructions, in **BiblioFile Help**, under the **Contents** tab, expand the **BiblioFile Menus** entry, then expand the **File Menu** entry, and then select the **Batch Import** topic.

c. Under **Output**, verify the displayed file names for **Duplicate** and **Error Records**, and the **Overwrite file if it exists** check box are set as desired. To change the file names retype the displayed information, or click the ellipsis button (**…**) to navigate to the desired location and file. **Important**: Do not press enter after typing the file name or the *Import* process will start.

d. As desired, under **Miscellaneous** select the **Update Field 005** check box to insert the current date into the 005 field for any records imported through the **Batch Import** process.

e. When all options are set as desired click **Go** to start the import process. Repeat Steps **a** thru **e** for each file you wish to import.

Error Records and Duplicates

With the converted Active file, TLC may also have supplied two additional files: ERRORS.RAW and DUPES.RAW.

- **ERRORS.RAW** contains records that could not be loaded. **BiblioFile** is less forgiving than ITS•**forWindows** about invalid characters, and will prevent their entry (with a pop-up message) during normal cataloging.

  During batch load operations, such as the conversion TLC performed on your Active file, records containing invalid characters are written to an exceptions file (ERRORS.RAW).

  Exception records contain an 011 field describing the reason for the load failure. Such records must be edited in ITS•**forWindows** to correct or remove the invalid characters. The records must then be loaded into **BiblioFile**.

- **DUPES.RAW** contains records that could not be loaded because their control number duplicated another record in your Active file. Only the first instance is retained.

  If you received this file, open it in **BiblioFile** by clicking **File | Open** and resaving each record with a new control number.

  BiblioFile can generate a new unique control number for you depending on your prefix preferences. Those options are viewed by clicking **Tools | Options | Auto Control Numbers**. See the **Auto Control Numbers** Help topic under **Tools Menu**.

Library Support

If you have any questions about these instructions, please call TLC Library Support on 800.852.4911 or 304.229.0100 (international customers), FAX to 304.229.0295, or e-mail: Support@TLCdelivers.com

Also, visit our World Wide Web site: http://www.TLCdelivers.com