

University of Massachusetts Amherst

From the SelectedWorks of Jennifer Eustis

May 13, 2022

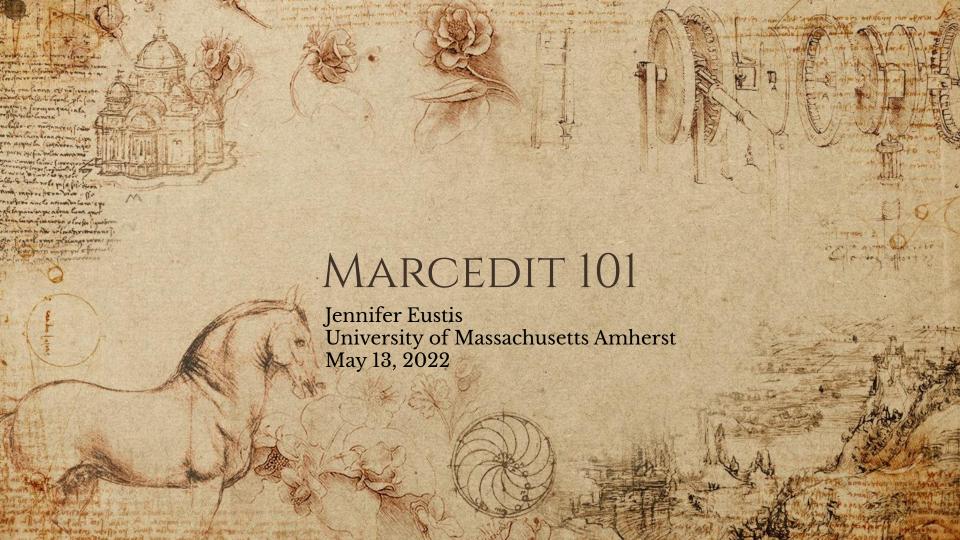
MarcEdit 101 An Introduction.pdf

Jennifer Eustis, University of Massachusetts Amherst



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WHO ARE YOU?

HAVE YOU USED MARCEDIT BEFORE?

WHAT IS ONE THING ABOUT MARCEDIT YOU WANT TO LEARN ABOUT TODAY?

TODAY'S TOPICS

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We are going to see the basics of MarcEdit, a tool created and maintained by Terry Reese. This includes:

- Brief introduction to MarcEdit
- Understanding settings, preferences, and main level menu
- Working in the MarcEditor and and using its features to manipulate MARC data
- Working with tasks lists to create Tasks
- Understanding integrations and regular expressions

By the end of this, I hope that you will come away with:

- Understand how to download MarcEdit and where to find help
- How to update your preferences in Settings
- Use the basic top level features of the Main Menu
- Use the MarcEditor to manipulate and profile MARC records and metadata
- Learn about more advanced features

WHAT IS MARCEDIT?

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MarcEdit is a free suite of tools created and maintained by Terry Reese. These tools are meant to be used with library data, in particular MARC data. As we know, library data comes in different formats and has varying levels of quality. MarcEdit allows you to make edits to one or more records, automate common practices, convert data, or enhance records.

FEATURES & DOWNLOADS

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List of all MarcEdit's features

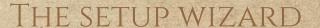
Download instructions for PC and MAC

Sign up for the MarcEdit listserv

Consult the MarcEdit knowledge base

Check out video tutorials

This presentation uses MarcEdit version 7 for PC (single user installation)



When you download and open MarcEdit for the first time, you will be prompted to go through the Setup Wizard. Don't skip this step as it could cause issues later on.

Fill in the MARC format, for the US this will be MARC21.

The default record encoding will be usually UTF8. If you work with primarily MARC8 encoded records, don't worry. You can always update this in your preferences.

You can leave the default for XML processing engine.

MarcEdit 7 Startup Wizard: Page 3	N (TEX	× x some a panil
MarcEdit Data Settings MarcEdit is MARC agnostic, so let's tell it a little about your data.	,	
My MARC Format is:	2	
Default Record Encoding: MARCS/UTF8		
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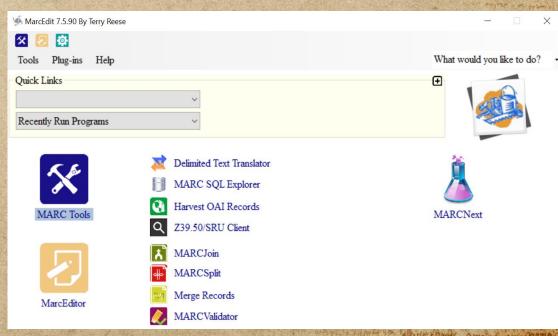
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MAIN MENU & FEATURES

When you open MarcEdit, you reach the main level menu or the main window. One thing about MarcEdit is that often there is more than one place to get to a feature. Notice that here MARCJoin is in my shortcuts. You can also access that feature by going to Tools and then MARC Processing tools.

Plugins are added features. This presentation doesn't cover this. More information can be found on Terry Reese's page on plugins.

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MARCEDIT PREFERENCES: MAIN WINDOW SETTINGS

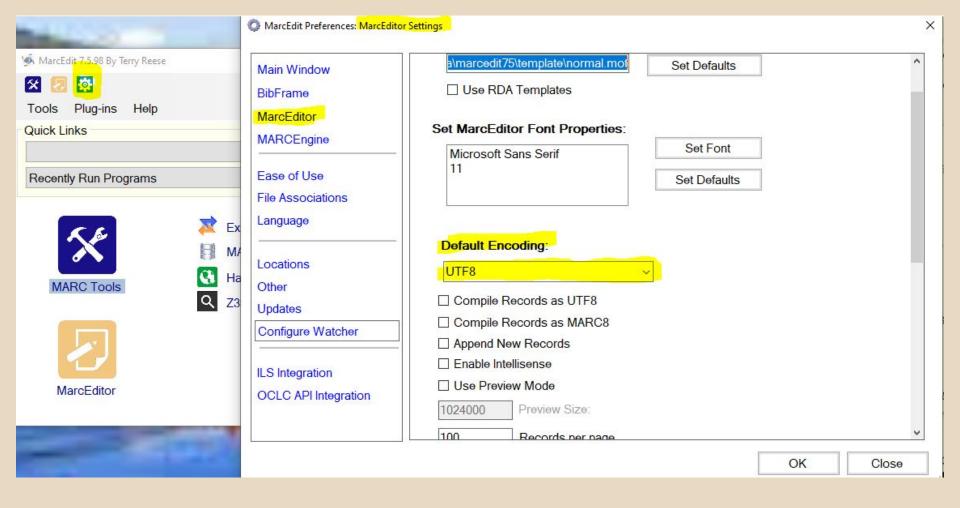
To access your preferences, you can click on the gearbox or go to Tools/Preferences (Ctrl+Shift+P)

In the main window settings, you can:

Select Up to 4 items default programs that display on the main window
Select your default character encoding for the MarcEditor
Set up integrations to an ILS or OCLC
Set a default font and size for your records in the MarcEditor

HOW DO YOU CHANGE YOUR DEFAULT ENCODING?

IF YOU HAVE A FILE WITH ANOTHER
CHARACTER ENCODING, DO YOU NEED TO
UPDATE THE DEFAULT ENCODING AND
THEN CHANGE IT BACK?



MAIN WINDOW FEATURES

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From the main window, you can access:

MarcEdit Tools

MarcEditor

MARC Processing Tools (Joining or Splitting Marc files for instance)

Character Conversion Tools

Cuttering Tools

OAI-PMH Tools

Export

Generate Reports (field count, count by material type)

Verify URLs

Regular Expression Store

OCLC API Operations





From the main window, you can select:

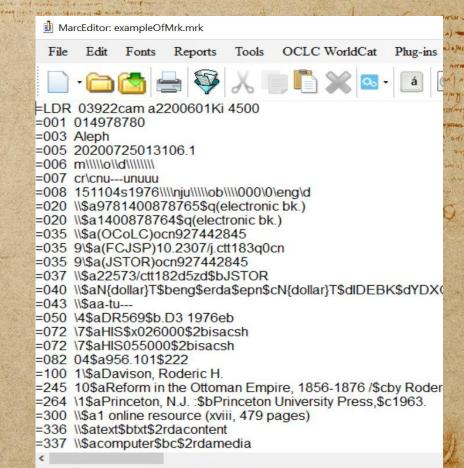
- MarcBreaker: This "breaks" the MARC binary file into a readable format that can be edited in the MarcEditor.
- MarcMaker: This takes the readable format MARC data file and creates the MARC binary file.
- MARC21 to MARC21XML: This converts a MARC21 file to MARC21XML.
- MARC21XML to MARC21: This converts a MARC21XML file to a MARC21 binary file.
- MARC to JSON: This converts a MARC21 file to a JSON file.
- JSON to MARC: This converts a JSON file to a MARC21 file.
- JSON to XML: This converts a JSON file to XML.
- XML to JSON: This converts an XML file to JSON. Options include changing the
 default character encoding only for the tool that you select, translating the MARC
 data to MARC-8 or UTF8. To change the default character encoding, you will need
 to go to Settings.

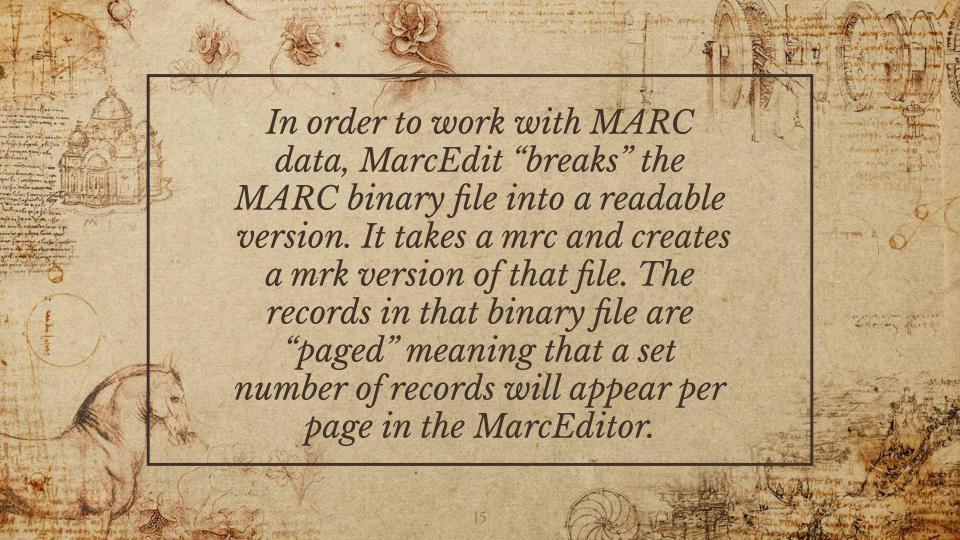


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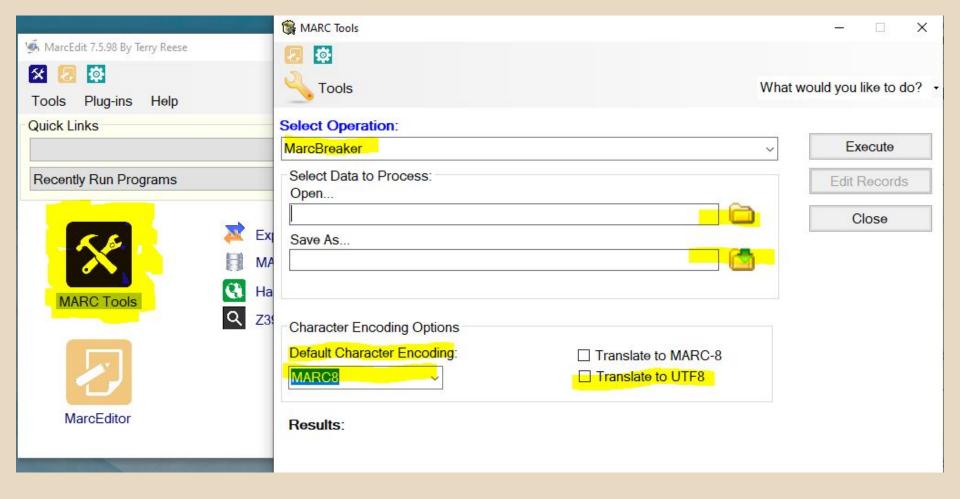
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HOW DO YOU "BREAK" A MARC BINARY FILE TO WORK WITH IT IN THE MARCEDITOR?





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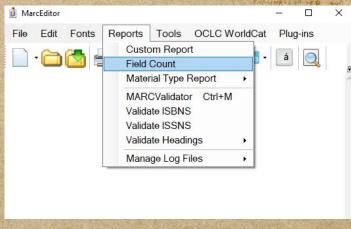
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PROFILING

MarcEdit Features that help to Profile MARC data



- MARC Reports
 - * Field Count
 - * Material Type Count
 - * Custom
- MARC Validation
 - * Validate by rules
 - * Validate by record structure



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CAN YOUR MARC FILE HAVE A VALID RECORD STRUCTURE AND NOT FOLLOW THE RULES?

A MARC record is composed of three elements: the record structure, the content designation, and the data content of the record. The MARC Validator can check the record structure or the content designation here referred to as rules. Record structure consists of having the minimum number of fields in a MARC record and respecting the format of how to construct fields, subfields, fixed fields, or the leader. For more information on record structure go to https://www.loc.gov/marc/specifications/specrecstruc.html. The content designation or rules are outlined in a file that is downloaded when you install MarcEdit. For more information, you can go to https://github.com/cmharlow/ShareFest15MetadataQA/blob/master/examples/MARCEdit/MARCvalidation.md.

MARC VALIDATOR

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O Validate Record Structure			
Remove invalid records			
O View in a HexEditor			



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MANIPULATING

Most Common MARC Manipulation Feautres in the MarcEditor

BASIC MANIPULATION FEATURES

* MARC Fields: Add, Delete, Copy, Build, Find/Replace MARC Subfields: Add, Delete, Find/Replace MARC Indicators: Change,

Find/Replace

Special Undo

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	Ed	lit Field Data	Ctrl+Shift+F3	3
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How do you delete all 900 and any variations in your marc file?

MORE MANIPULATION FEATURES

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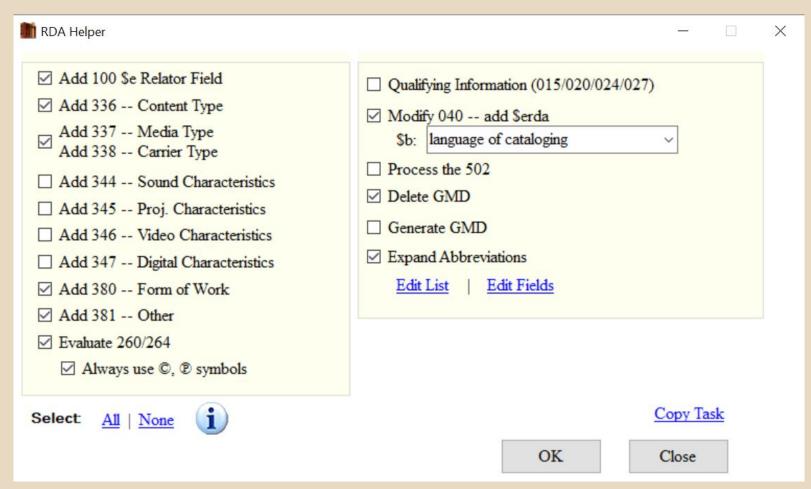
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- Build a Field
- * RDA Helper
- Edit Shortcuts
 - * Change case
 - * Field Edits
 - Find missing or duplicate MARC fields
 - Find missing words in a MARC field
- Sort By
- * Select Records for Edit

CAN YOU ADD A GMD INTO YOUR RECORDS?





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IASKS

Automating common practices

WHAT IS A TASK?

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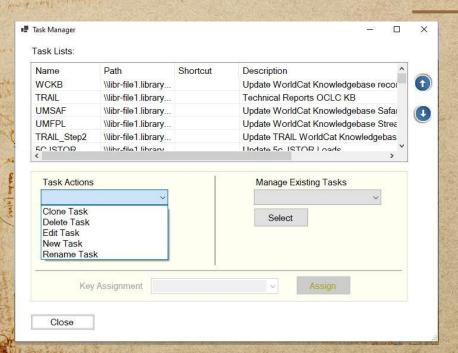
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So far we've been looking at individual tasks. We've changed fields, removed fields, etc. These tasks can be added to a list and run. The tasks in the list are run in sequential order.

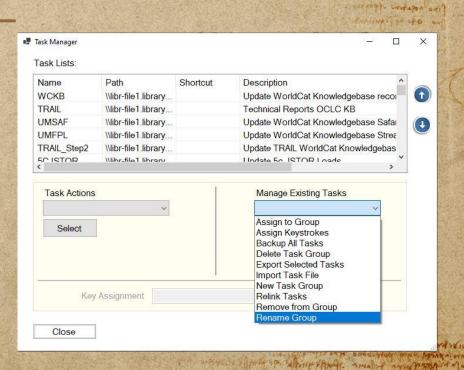
A list of tasks is called a Task. You can create and manage tasks.

WORKING WITH TASKS



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CREATE A NEW TASK

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- Go to Tools and Manage Tasks
- In Task Actions, Select New Task
- Enter a name for your Task
 - * The only way to rename a task is through the Task Actions
- Once you click save, you are brought to the Edit Task List Editor
 - * Add a description
 - * Add tasks using the icons to add, delete, copy, edit

TASK LIST EDITOR

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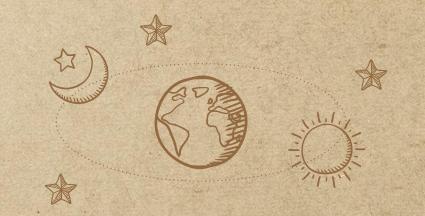
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INTEGRATIONS

INTEGRATIONS WITH ILS AND OCLC

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MarcEdit can talk to other systems such as your ILS or OCLC. Current supported ILS are Koha and Alma. OCLC integration can occur via Z39.50 or the OCLC Search and Metadata API.

For the OCLC API, you will need to request an API key from OCLC.

WHERE TO FIND HELP

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How to set up MarcEdit OCLC Integration

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- Getting started with OCLC's Z39.50 server
- Getting started with MarcEdit Alma Integration

OCLC Z39.50 SETUP

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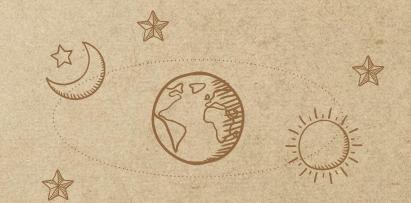
 Username/Password: Your OCLC credentials used to log into Connexion client or browser

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- Advanced Properties allow you to set search parameters for authors, titles, subjects, isbn/issns.
- Options allow to set the character encoding, to retrieve unicode, and how many records are retrieved per page.



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REGULAR EXPRESSIONS

WHAT ARE REGULAR EXPRESSIONS?

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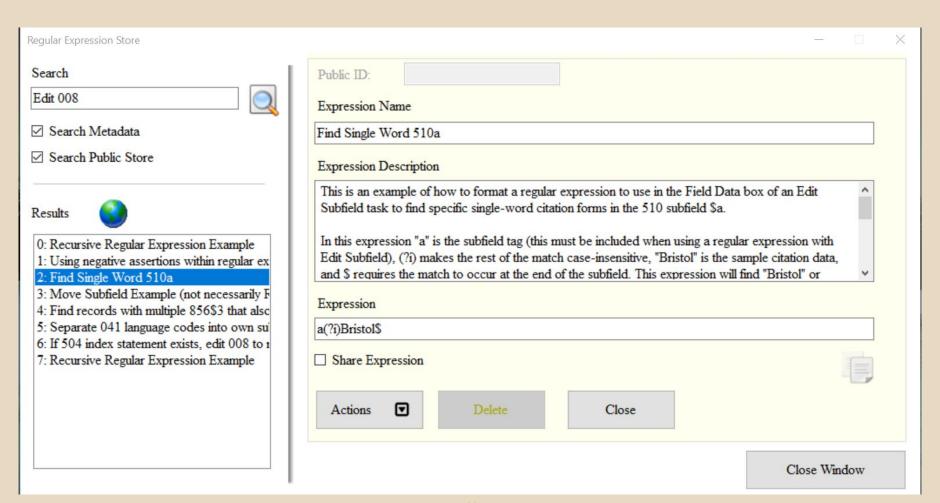
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Regular expressions are a sequence of characters that define a specific pattern in text or a string of characters. These patterns are used often to find an replace text.

For example, an email is a sequence of characters with a pattern, namely characters preceding and following the @ symbol. Another example are U.S. phone numbers which have 3 digits, hyphen, 3 digits, hyphen, 4 digits.



MORE RESOURCES

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LinkedIn Learning (formerly Lynda.com)

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- Library Carpentry: Introduction to Working with Data (Regular Expressions)
- University of Illinois Libraries MarcEdit LibGuide
- University of Illinois Libraries PDF Guide by Patrick Harrington
- * RegexOne: Learn Regular Expressions

THANKS! Any questions? jeustis@umass.edu

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