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Introduction to MarcEdit Part I and II

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bepress™

INTRODUCTION TO MARCEDIT
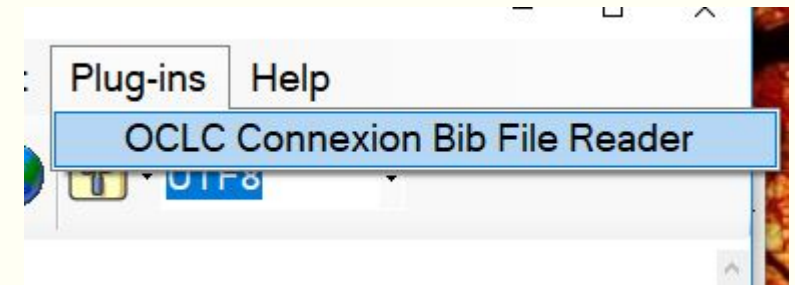
MarcEdit Version 7.1.85
Brought to you by:
Jennifer Eustis
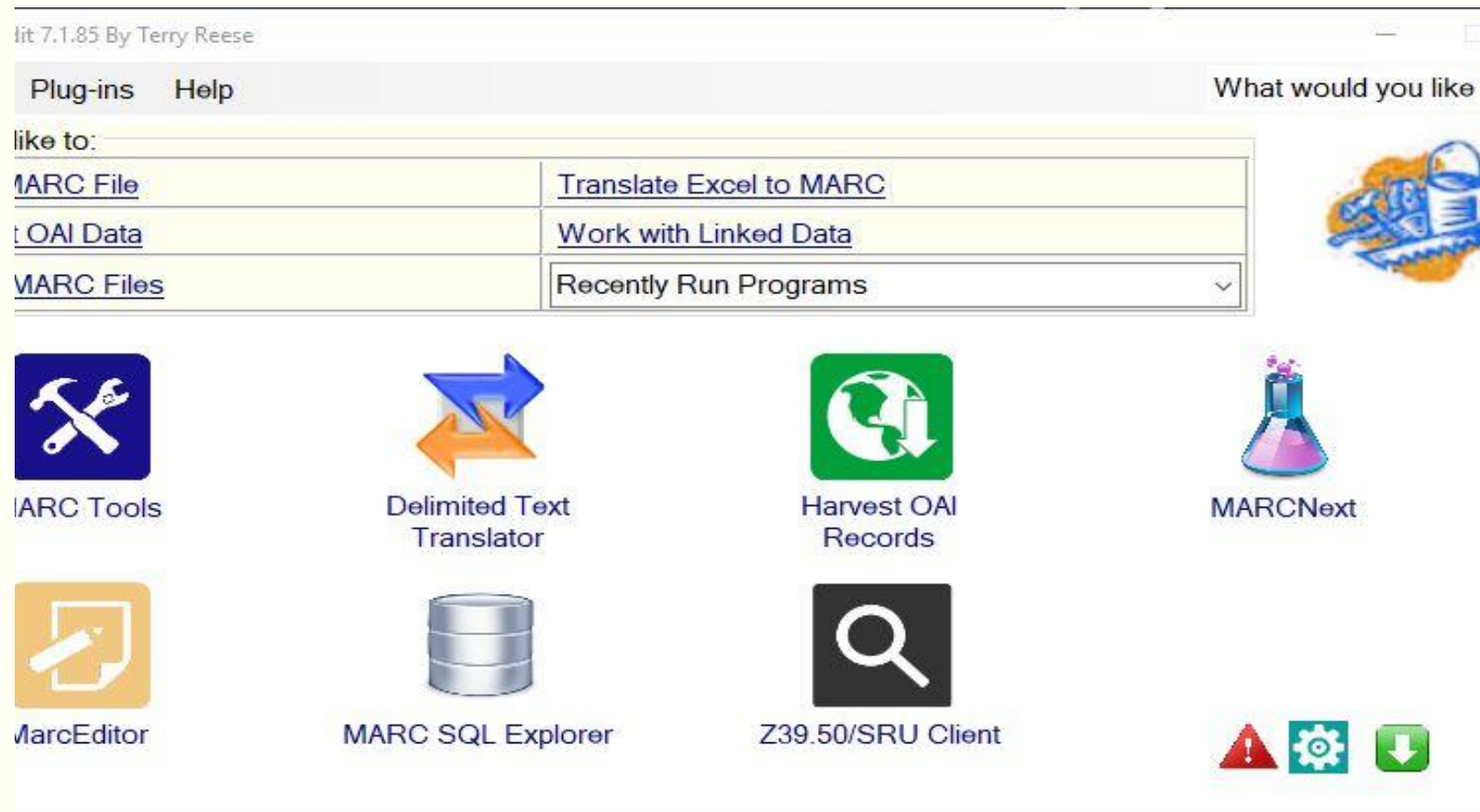
Presentation Outline

- Part I: Introduction to MarcEdit version 7
  - Resources on MarcEdit
  - Downloading MarcEdit
  - General Features for working with Marc data
    - Main Menu
    - Settings
    - MarcBreaker/MarcMaker
    - MarcEditor basic edit functions
    - MarcEditor and Batch Tools

- Part II: Advanced Features of MarcEdit
  - Brief overview of
    - Exporting/Importing delimited files
    - Harvesting
    - OCLC Connexion integration
    - OCLC API integration
  - Overview of
    - Field Count/Material type report
    - Marc Validator
    - Select records for edit
    - Delete records from a set
    - Create and manage tasks

Part I: Welcome to MarcEdit

"MarcEdit was initially conceived in the summer of 1999, and finished largely in response to a major database clean-up project that had been planned for the Oregon State University's electronic catalog. The problem was simple; a large number of Marcive records were entering the database with invalid call numbers. The problem had been discovered over the summer, and our initial response was to correct our Marcive profile. The problem, however, was that no one knew how many incorrect records had made it into our system. So we began pulling together list of data in an effort to see how much work needed to be done. The results were staggering–45,000 records needed to be corrected in the database. These records were mainly from series in which we had classed documents materials into LC, rather then using the SuDoc numbers contained in the Marcive records." – Terry Reese, https://marcedit.reeset.net/about-marcedit

What is MarcEdit? It is the Swiss Army Knife of Library Metadata!

Part I: Resources

Download

- https://marcedit.reeset.net/downloads

This page provides access to the current and past versions of the software.

You will also find:

- Plug-ins or additional functionality
- XSLT files (these are already included in the standard download)

MarcEdit -- Your complete *free* MARC editing utility

Resources

- Terry Reese's help page, https://marcedit.reeset.net/help has links to
  - MarcEdit listserv
  - MarcEdit Knowledge base
  - MarcEdit 101 Webinar by Terry Reese
  - Videos on YouTube
  - Terry Reese's email

- Tutorials
  - https://marcedit.reeset.net/tutorials

- Plug-ins
  - https://marcedit.reeset.net/managing-plugins-in-marcedit

Part I: Why Is A Tool Needed?

Part I: Why MarcEdit?

MarcEditor: metacoll.AUM.merges.M20181228.T163344.acs.1.mrk

File   Edit   Fonts   Reports   Tools   OCLC WorldCat   Plug-ins   Help

What would you like to do?

UTF8

```
=LDR  11702cam a2201225Mi 4500
=001  on1078356752
=003  OCoLC
=005  20181229024218.4
=006  m\\\\fo\\d\\\\\\\\
=007  cr\cn\|\\auuuu
=008  180627s2009\\\\dcua\\\\ob\\\\101\0\eng\d
=035  9\$aumacs1078356752
=040  \\$aCASSC$beng$erda$cCASSC$dOCLCO$dMUU$dCOO$dOCLCF$dOCLCE$dACY$dWYU
=019  \\$a428469294$a629780852$a681918040$a1062822611
=020  \\$a9780841272194$qelectronic
=020  \\$a0841272190
=020  \\$a9780841272187
=020  \\$a0841272182
=029  1\$aNZ1$b15496105
=042  \\$adlr
=050  \4$aTA418.76$b.S632 2009
=060  \4$aTA 418.76$bSM636 2009
=072  \7$aTEC$x009010$2bisacsh
=082  04$a667/.9$223
=084  \\$aTEC021040$aTEC021020$2bisacsh
=049  \\$aAUMM
=245  00$aSmart coatings II /$cTheodore Provder, editor ; Jamil Baghdachi, editor.
=246  3\$aSmart coatings 2
=264  \1$aWashington, DC :$bAmerican Chemical Society,$c2009.
=300  \\$a1 online resource (360 pages) :$billustrations.
=336  \\$atext$2rdacontent
=337  \\$acomputer$2rdamedia
=338  \\$aonline resource$2rdacarrier
=490  1\$aACS symposium series,$x1947-5918 ;$v1002
=500  \\$aDistributed in print by Oxford University Press.
=504  \\$aIncludes bibliographical references and index.
=505  00$tSmart Coatings /$rBaghdachi, Jamil /$uhttp://dx.doi.org/10.1021/bk-2009-1002.ch001 --$tNovel Antibacterial Polymers /$rDizman, Bekir, Department of Polymer Science, The
University of Southern Mississippi, 118 College Drive 10076, Hattiesburg, MS 39406-0076; Elasri, Mohamed O., Department of Biological Sciences, The University of Southern Mississippi, 118
College Drive 10076, Hattiesburg, MS 39406-0076; Mathias, Lon J., Department of Polymer Science, The University of Southern Mississippi, 118 College Drive 10076, Hattiesburg, MS
39406-0076 /$uhttp://dx.doi.org/10.1021/bk-2009-1002.ch002 --$tEngineering Nanoporous Bioactive Smart Coatings Containing Microorganisms: Fundamentals and Emerging Applications /
```

Part I: Why Is A Tool Needed And Why MarcEdit?

- MarcEdit allows you to:
  - View in a readable format marc records
  - Edit marc records

- And….
  - Harvest records in a variety of metadata standards
  - Clean up marc records for batch processes
  - Look up LC Class numbers
  - Connect to your OCLC Connexion account
  - Connect to OCLC WorldCat
  - Work with marc records as spreadsheets
  - Connect to OpenRefine
  - RDA help and enhancements
  - Validate marc records

Part I: Download & Install MarcEdit

Go to
https://marcedit.reeset.net/downloads

Make sure you select the right download for your computer:

- Windows (32bit)
- Windows (64bit)
- MacOS
- Linux
- Other

Select Non-Administrator and save the MarcEdit_Setup file (typically an .msi file format). Double click that file once saved and follow the directions.

r **Everyone**

rent Development

- **MarcEdit 7.1.x/MacOS 3.1.x** (Updated 1/9/2018 (Windows [ChangeLog]); 1/9/2018 (MacOS [ChangeLog]); 5/28/2018 (Linux [ChangeLog])); 5/28/2018 (Other [ChangeLog])
  Windows 32-bit download | Windows 64-bit download | MacOS | Linux | Other (zip) | Previous Builds

- **MSI Cleaner** (Updated Nov. 2017)
  zipped download
  The MSI Cleaner is a simple tool that can be used to "clean" a MarcEdit installation on those rare occasions when installation problem occurs and MarcEdit can no longer be uninstalled (and re-installed). This tool cleans the registry and installation cache so that MarcEdit can be uninstalled and re-installed.

- **XSLT Downloads:**
  Various XSLT files created over the years can be found on GitHub at: https://github.com/reeset/marcedit_xslt_file
  Simple instructions for loading new XSLT translations into MarcEdit can be found at: https://marcedit.reeset.net /software/xslt/load.txt

- **Plug-in Downloads:**
  MakeCheckDigit Plugin
  OCLCHelper Plugin
  RIS2MARC Plugin (GitHub)
  Internet Archive to HathiTrust Plugin (GitHub)

Part I: Windows Tip

Windows (32bit) or Windows (64bit)

Go to your System Information,
Properties, or About your Computer.

Find: System Type

https://support.microsoft.com/en-us/help/
15056/windows-7-32-64-bit-faq

System Model   OptiPlex 7050
System Type   x64-based PC
System SKU   07A1
Processor   Intel(R) Core(TM

All Control Panel Items ▶ System   Search Control Panel

Control Panel Home   View basic information about your computer

Device Manager   Windows edition
Remote settings   Windows 7 Professional
System protection   Copyright © 2009 Microsoft Corporation.
Advanced system settings All rights reserved.

                          Get more features with a new edition of
                          Windows 7

System
Rating: 5.8 Windows Experience Index
Processor: Intel(R) Xeon(R) CPU   E5462 @ 2.8
                          2.80 GHz
Installed memory (RAM):   4.00 GB
System type: 64-bit Operating System
Pen and Touch: No Pen or Touch Input is available for th
                          Display

Part I: Main Menu

This is the Main Menu for MarcEdit v.7 on a PC.

At the top, you'll find Tools, Plug ins and help. Tools here are more options in addition to the shortcuts.

The links in the table lead to help on the Internet.

This display is configurable through Settings. The advantage is to have easy shortcuts to tools you use often.

Here you'll find settings, update information, and general information.
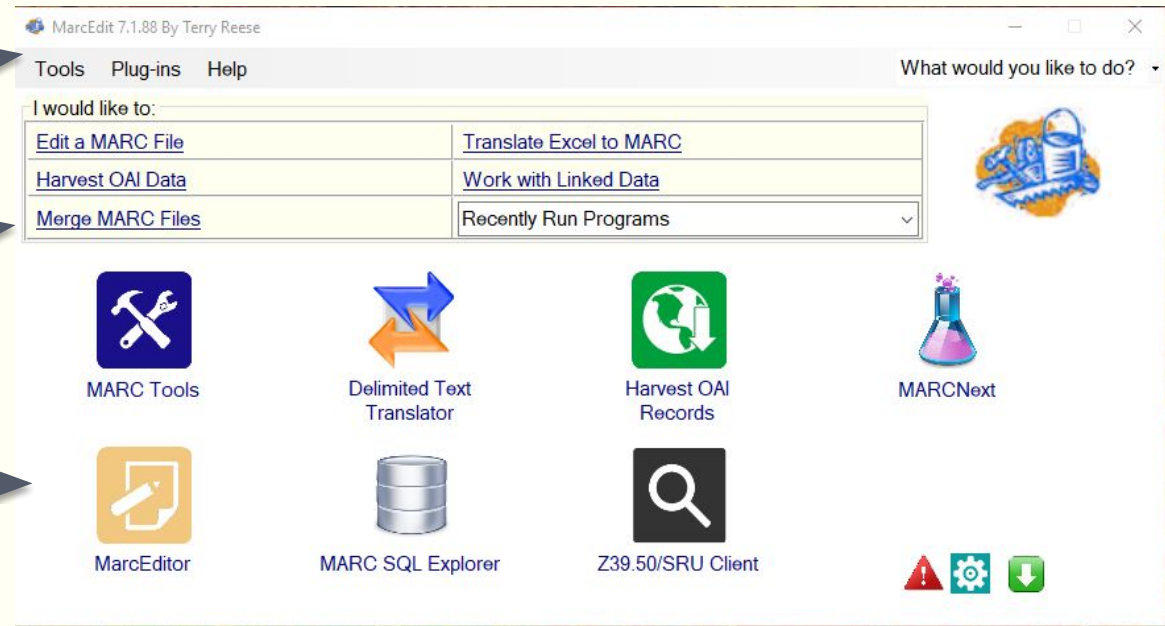
Part I: Settings

Settings allows you to:

- Set your shortcuts on main window

- Set Font and character encoding defaults for MarcEditor

- Set General Options for working with records (marc21 or ???)

- Set language

- More advanced – configurations for ILS and OCLC API integration

- More advanced – configure watch folder
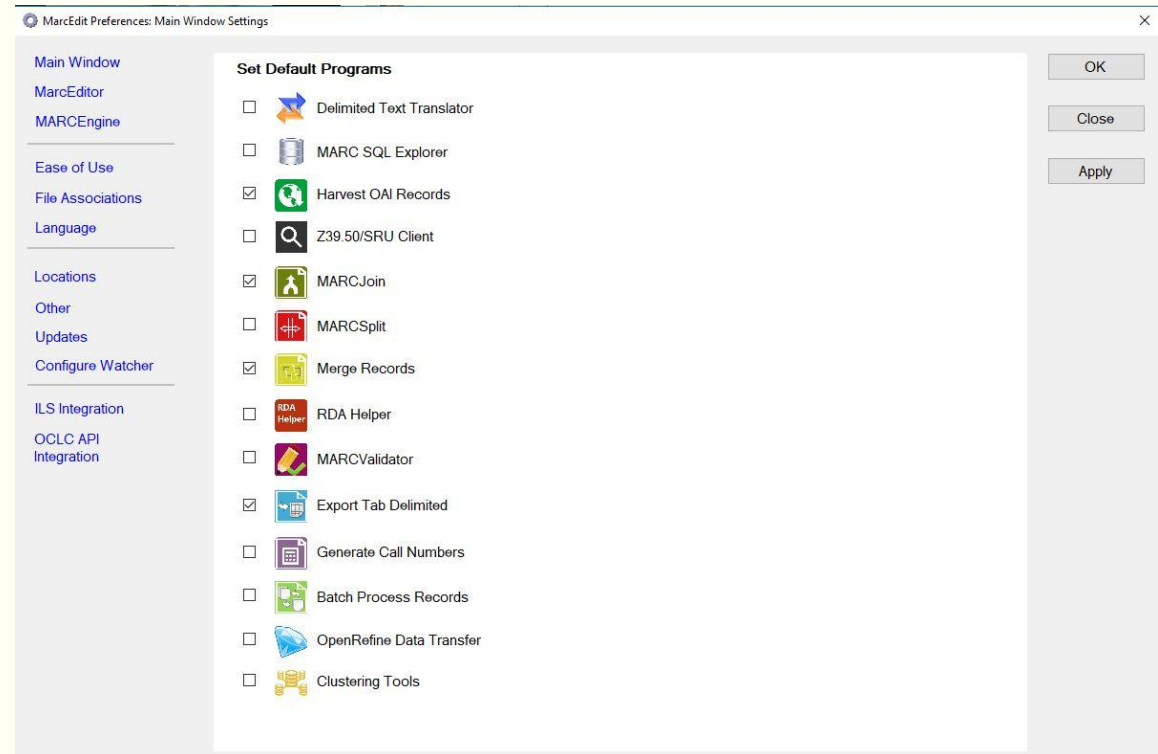
Part I: Tools through Main Menu

Preferences under Tools is Settings. It is just a different way to access settings.

Notice that Tools offers another way to launch a tool other than the shortcuts. There is:

- Open Refine, Marc Processing Tools (Split, Join, Merge, etc.)

Tools	Plug-ins	Help
Edit Linked Data Rules		▶
Log Management		▶
Delimited Text Translator	Ctrl+D	
Export...		▶
Select MARC Records		▶
Character Conversion Tools		▶
MarcEdit Script Wizard		
MARC SQL Explorer	Ctrl+Q	
OAI Harvester Tools		▶
OpenRefine		▶
Regular Expression Store		
UNIMARC Tools		
Verify URLs		
Virtual Keyboard		
Z39.50/SRU Client		
MARC Processing Tools		▶
OCLC Operations		▶
Validate Headings		▶
Preferences	Ctrl+Shift+P	

Part I: MARC Tools through Shortcut

This is where you will spend a lot of time. Here you can:

- Create a readable version of your marc21 record(s), the .mrk file format: MarcBreaker

- Save or compile a readable version of your marc21 record(s) to the Marc21 binary format, the .mrc file format: MarcMaker

It is necessary to break a .mrc or marc binary file to work with this file in the Marc Editor.

Other options include transforming files of other standards to marc21 or another standard. For instance, MODS to MARC, MARC to Dublin Core are options.

Part I: Edit Options In MarcEditor

Find and Replace

Jump To ….

Insert 006 or 008

Diacritics

Edit	Fonts	Reports	Tools	OCLC Wo

Undo   F2
Special Undo   Ctrl+Alt+F2
Cut   Ctrl+X
Copy   Ctrl+C
Paste   Ctrl+V
Duplicate Lines   Ctrl+D
Clear   Del
Find   Ctrl+F
Replace   Ctrl+R
Edit Shortcuts   ▶
Jump to...   ▶
Insert Single Control Number
Insert/Edit 006   ▶
Insert/Edit 008   ▶
Convert Clipboard Content   ▶
International Keyboard Shortcuts
MARC-8 ALA characterset   F12
UTF-8 Character Map
Virtual Keyboard   Ctrl+Shift+V
Select All   Ctrl+A
✓ Word Wrap
Display Right to Left   Ctrl+Shift+R
Preferences

Part I: MARC Batch Editing Tools in MarcEditor

This is the core of the Swiss knife. You can add or delete fields, change indicators, add or delete subfields, …
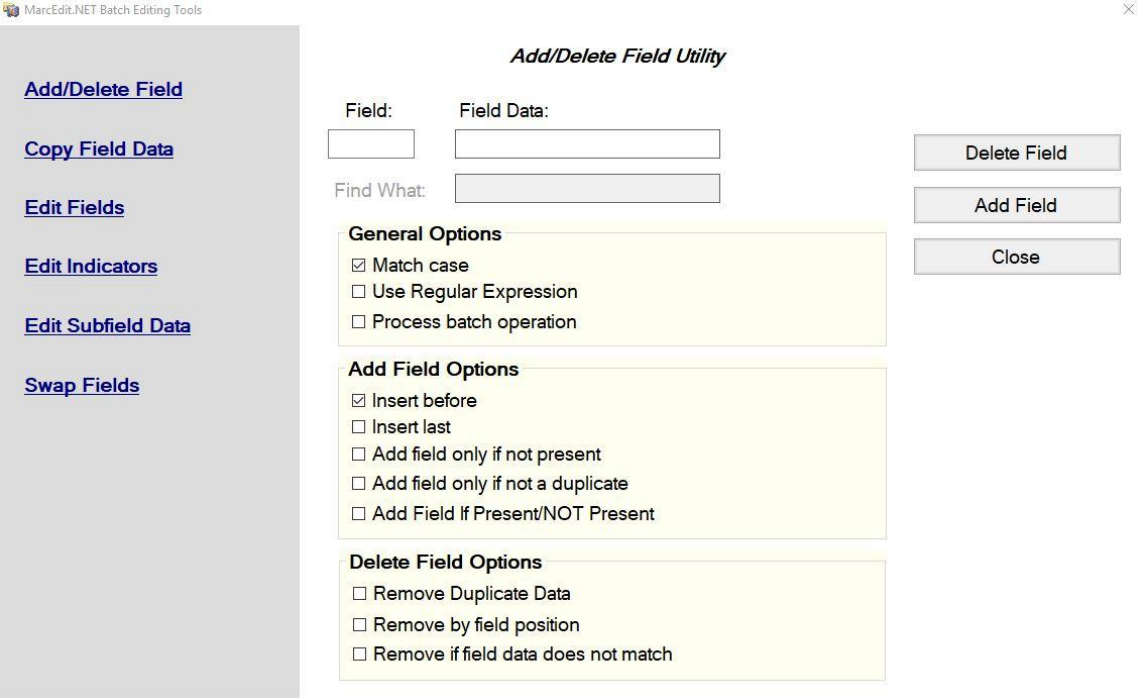
You can do this just by matching the case. Additions can be added last, only if the field isn't present or not a duplication.

For any work here, remember that in MarcEdit, the \ means that an indicator is blank and the subfield delimiter is $.

Part I: Exercise: Add A Field (MarcEditor)

Add a 910 field with your initials and today's date…

Part I: Exercise: Delete A Field (MarcEditor)

Delete any 655 fields with Electronic books.

Part I: Exercise: Edit A Field (MarcEditor)

Edit the 856 $z statement to Connect to
online resource

Part I: Exercise: Change Indicators (MarcEditor)

Change all the 856 indicators to 4 and 0.

Part I: Exercise: Edit Subfield Data (MarcEditor)

Remove the 856 $z.
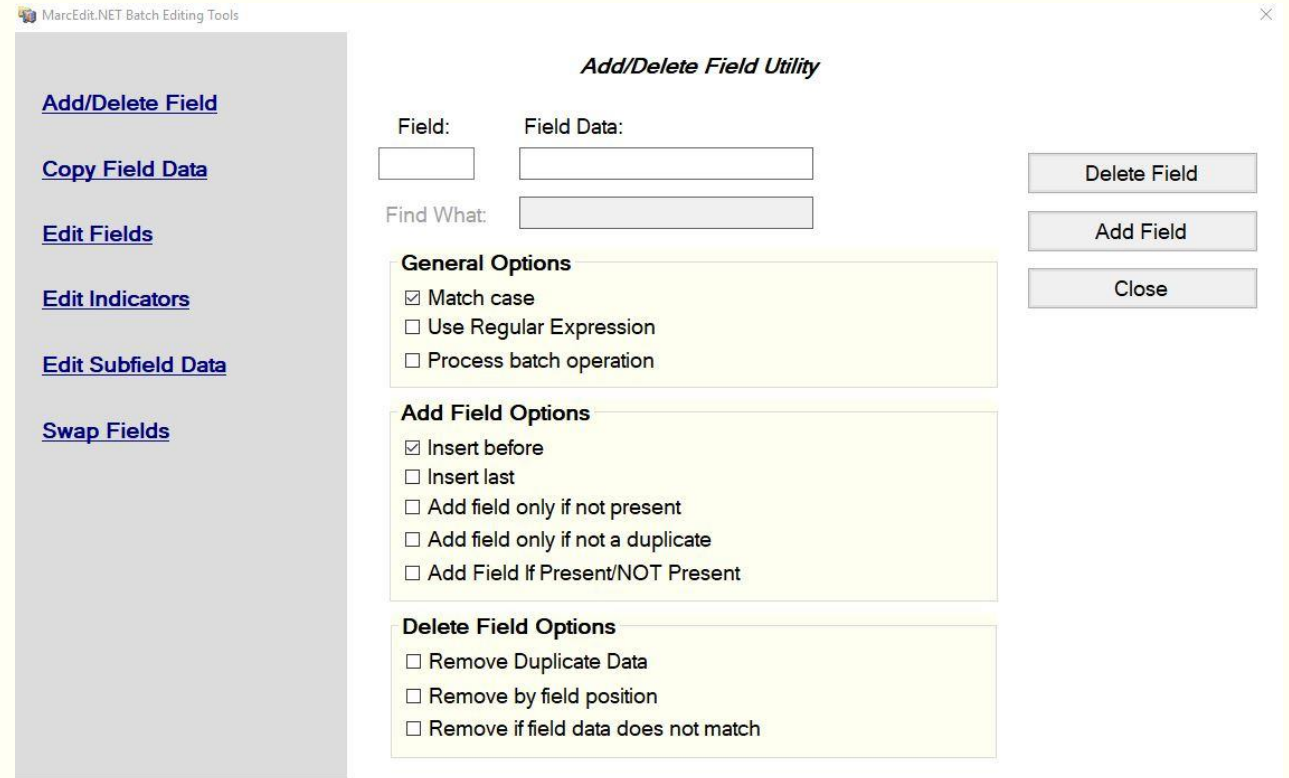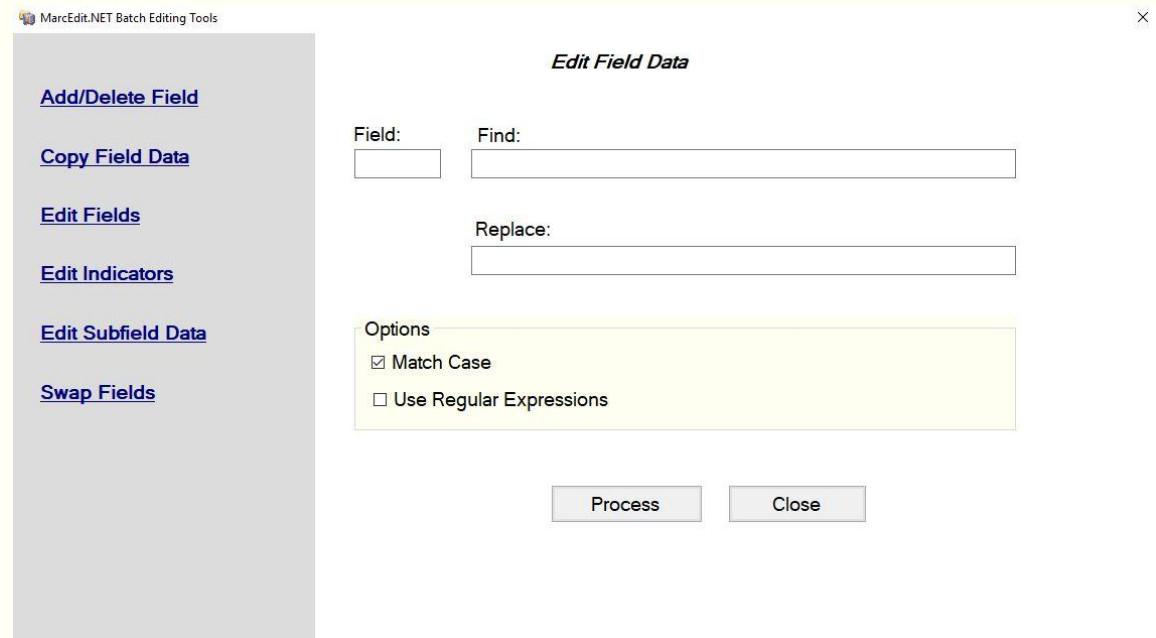
Then add a new 856 $z with the phrase "Link to online resource"

MarcEdit.NET Batch Editing Tools

Add/Delete Field

Copy Field Data

Edit Fields

Edit Indicators

Edit Subfield Data

Swap Fields

Edit Subfield Utility

Field: Subfield: Field Data:

Replace with:

Replace Text

Remove Text

Close

Search Options:

☐ New subfield only   ☑ Match case
☐ Add subfield if not present   ☐ Move subfield data
☐ Delete Subfield   ☐ Use regular expression
☐ Delete Duplicate Subfield

Part I: Edit Shortcuts

Change Case allows you to change to UPPER, lower, Title Case, Initial case, or only capitalize the first letter.

Field Edits allow you to a number of key operations such as find a missing field or clean smart characters.
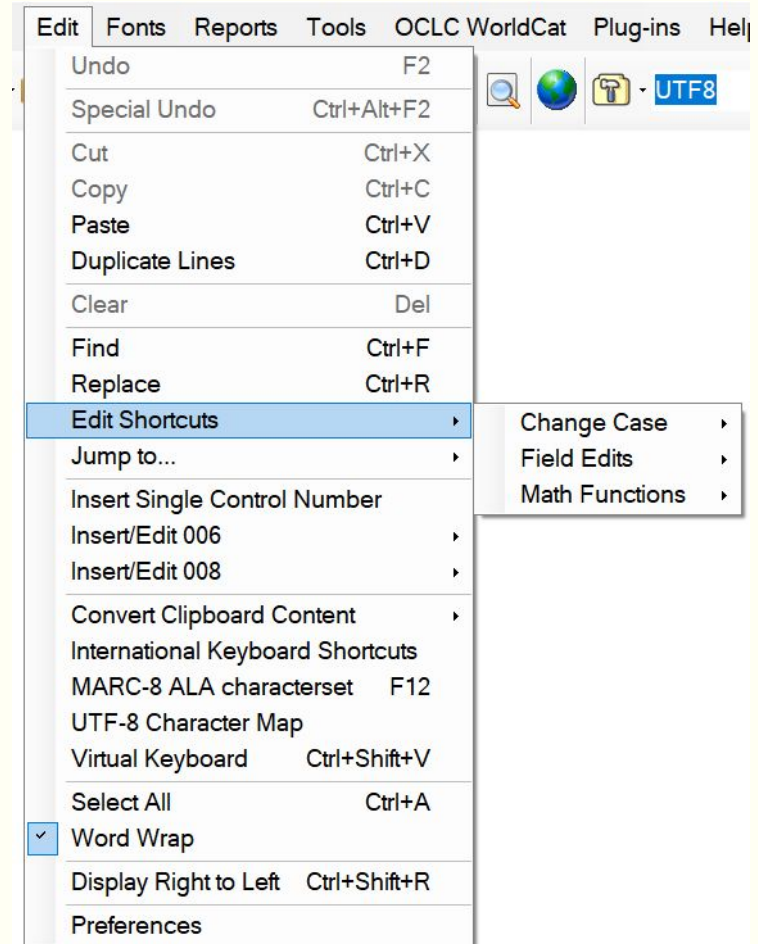
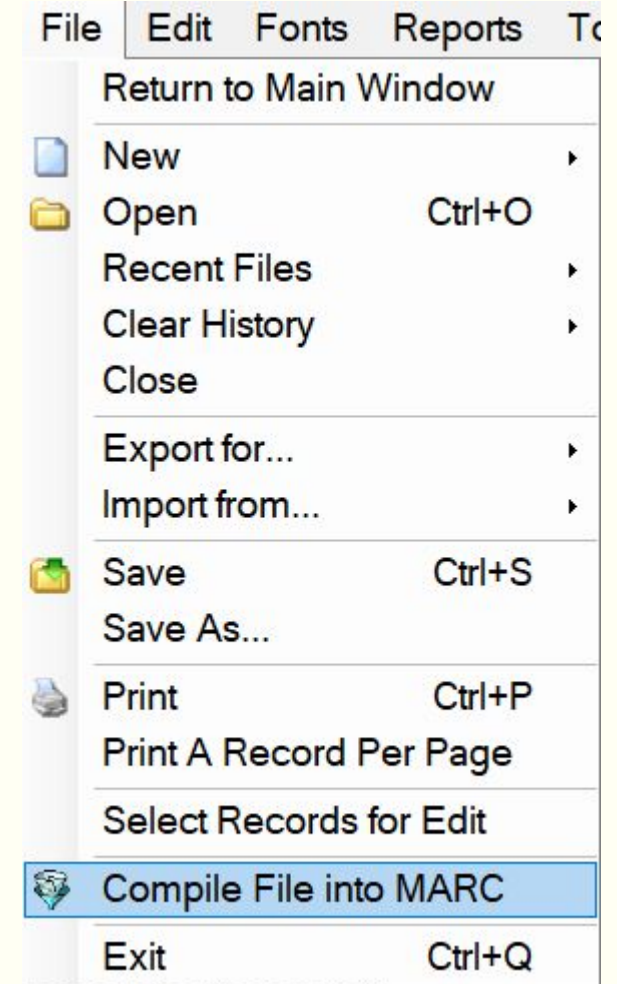# Part I: Saving Your .mrk back to .mrc

Most systems will only take the .mrc format of the MARC record file. When you are working in the editor, you are working with the .mrk.

To ensure all your edits are safely saved to the .mrc file, you have to create or "compile" the file into MARC. Go to File/Compile File into MARC. You can select the name and where you want to save the file (.mrc).

File	Edit	Fonts	Reports	To

Return to Main Window

New ▸

Open   Ctrl+O

Recent Files ▸

Clear History ▸

Close

Export for... ▸

Import from... ▸

Save   Ctrl+S

Save As...

Print   Ctrl+P

Print A Record Per Page

Select Records for Edit

Compile File into MARC

Exit   Ctrl+Q

Part II: More Advanced Features of MarcEdit

- Field Count/Material Type Report

- Marc Validator

- Select records for edit

- Delete records from a set

- Create and manage tasks

- Use of regular expressions and other options with Batch Editing Tools

- MarcJoin

- MarcSplit

- MarcMerge

- Exporting/Importing Delimited Files

- Harvesting

- OCLC Connexion Integration

- OCLC API Integration

# Part II: Field Count/Material Type Report

Field Count:

This is extremely helpful to know what MARC fields are in the entire set and how many of those fields are present.

Material Type Report:

Metadata record sets can include a variety of formats. This report will list the number of records per format: books, online books, video, electronic resource video, sound recording, online sound recording.

This report also allows you to find records by type. This will generate a list in a separate window for the LDR's with that particular type.
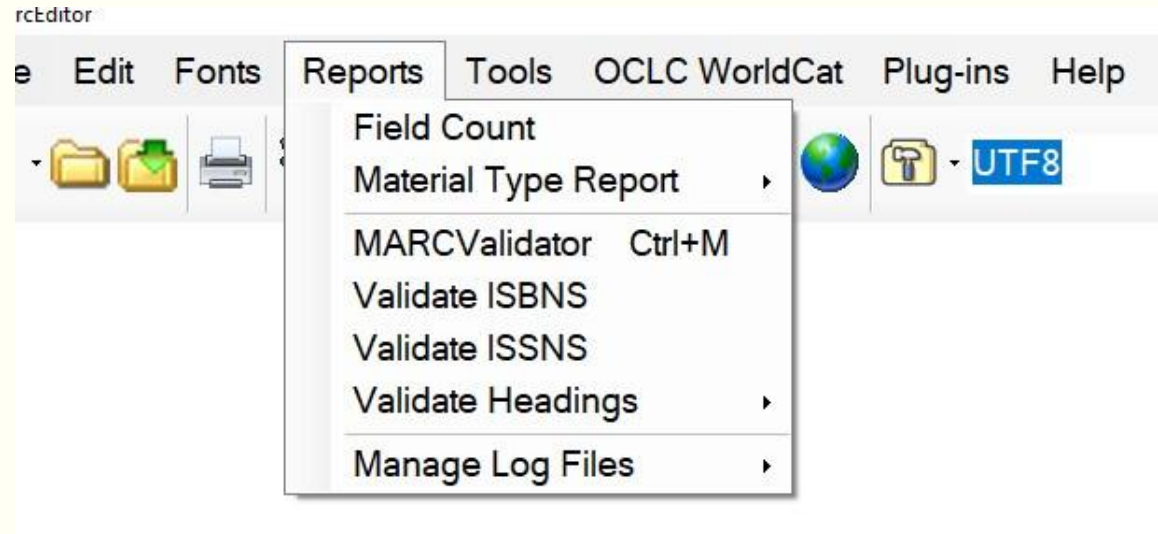

Found Text	Action
=LDR 02615ngm a2200349 a 4500	Jump to Record #: 28
=LDR 02864ngm a2200361 a 4500	Jump to Record #: 85
=LDR 02968ngm a2200337 a 4500	Jump to Record #: 1...
=LDR 02652ngm a2200349 a 4500	Jump to Record #: 1...
=LDR 02282ngm a2200349 a 4500	Jump to Record #: 1...
=LDR 01892ngm a2200349 a 4500	Jump to Record #: 1...
=LDR 01582ngm a2200349 a 4500	Jump to Record #: 2...

Part II: Marc Validator

You can check the rules, record structure and remove invalid records.

Where do the rules come from? Terry Reese updates the rules files manually when there are updates. These changes are reflected in your MarcEdit when you do an update.

Other validations include checking ISBN, ISSN, and headings. There is also the RDA helper to ensure records are RDA compatible.
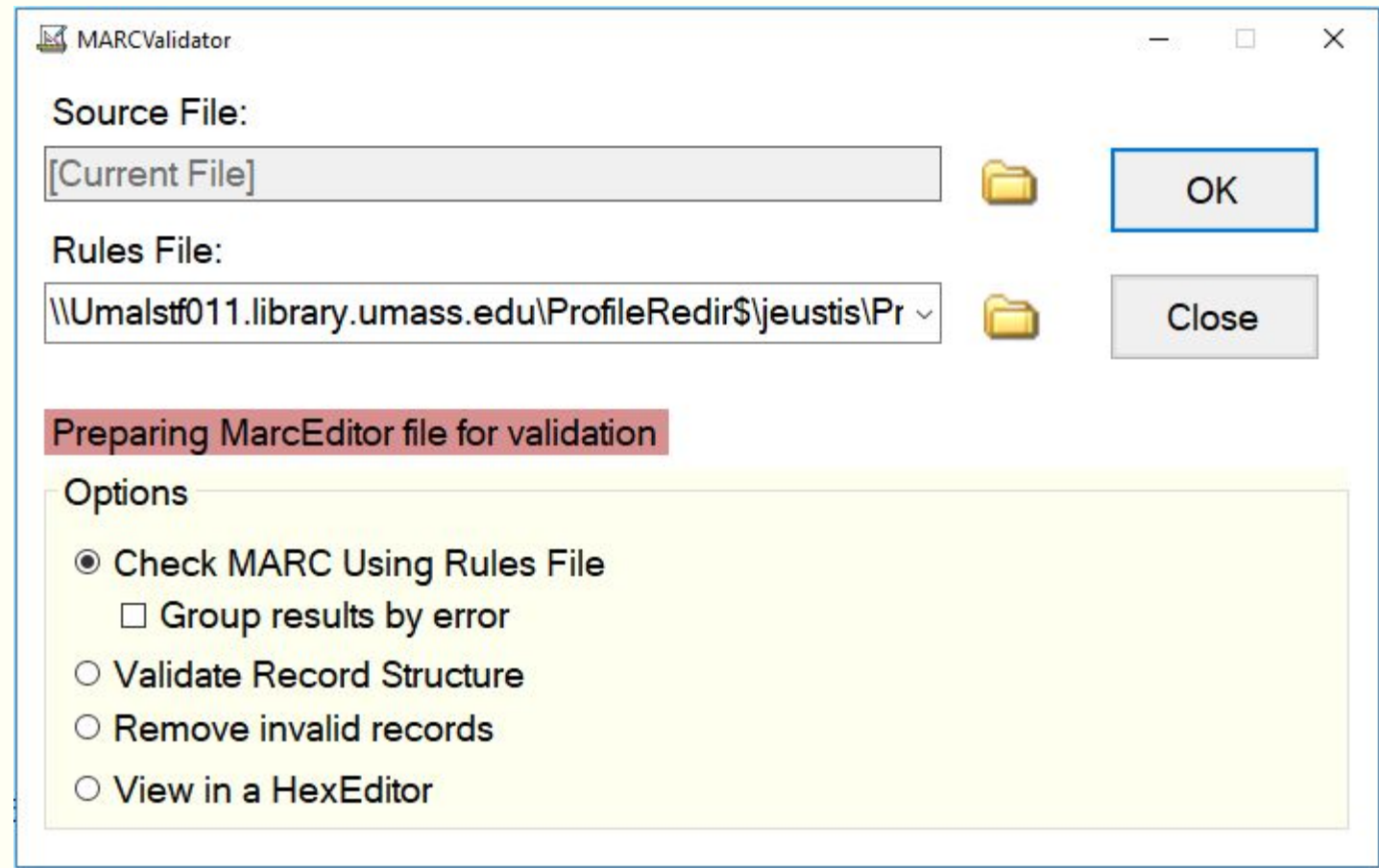
Part II: Select records for edit

Sometimes it is necessary to only work on a subset of the entire set of records. This function, "Select records for edit" does this.

When doing this, select the display field. What is the determining factor of the subset? Do you need to work on the 856 field or titles?

If you are already in the editor, it will automatically select the marc file that you are currently working with.

Once you select the display field, import the file and then search for what you're looking for.

Part II: Delete records from a set

Deleting records from a set is an option that is selected via the main menu rather than in the MarcEditor.

Once you select "Delete Selected Records", a new window will pop up and you select the marc file and the parameters from which to delete files from your set of marc records.
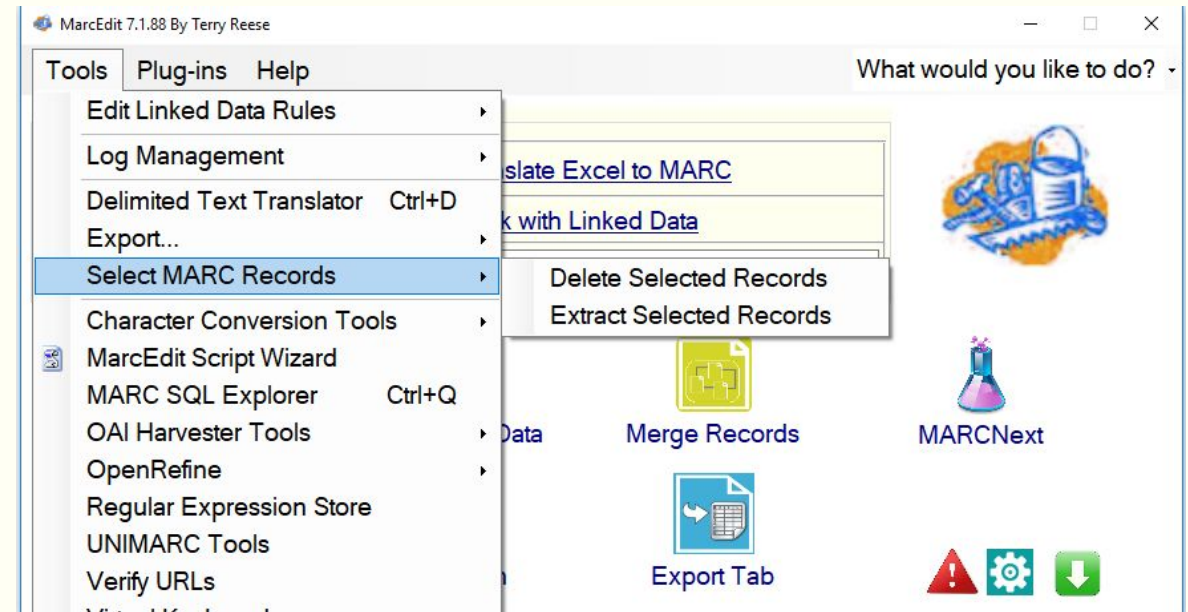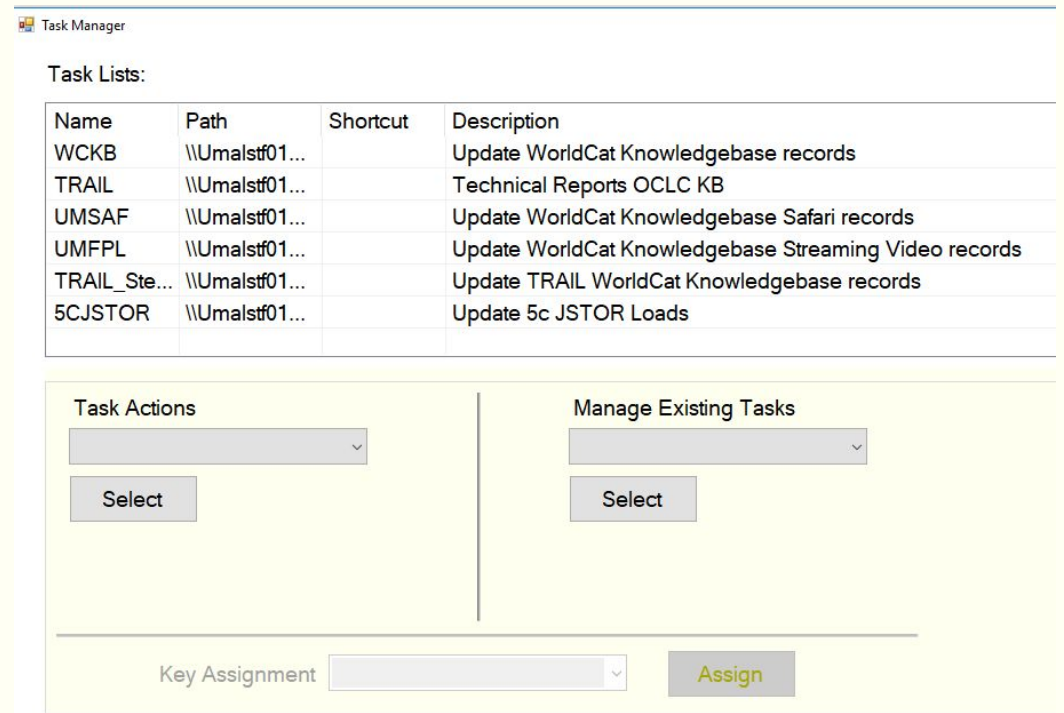
Part II: Create and Manage Tasks

With certain files, there are "functions" or "tasks" that you perform each time. For instance, you need to add the proxy prefix to the url in the marc field 856.

You can go to Tools and add a prefix. Or you can create a Task. Tasks perform one and/or more "functions" on a marc file.

You can copy existing Tasks, create new ones, and even share them.

Part II: MarcJoin/Split/Merge

MarcEdit allows you to:
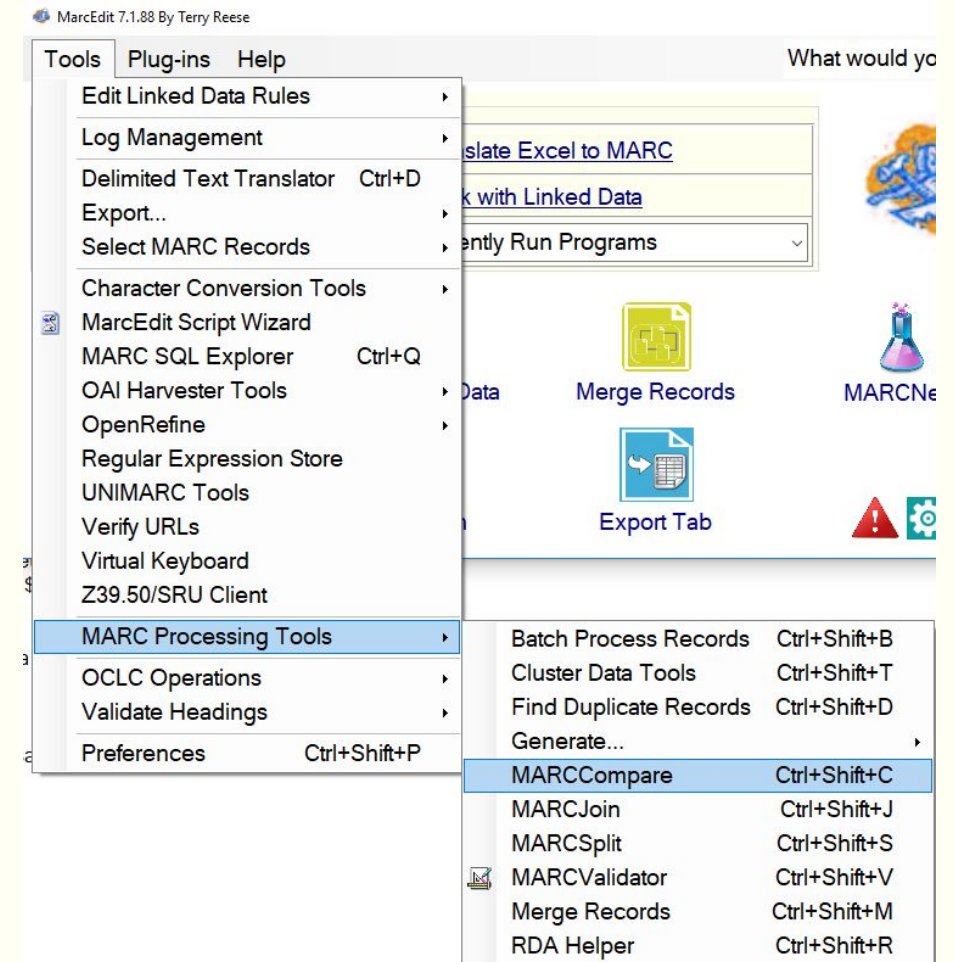
- Join 2 or more files

This process appends all the files into one new giant marc file. It will not check for duplicates.

- Merge 2 or more files

This will bring together marc files and it's necessary to set the parameters of how the files will merge.

- Split a file

If you have an extraordinarily large file, splitting it into smaller chunks makes it easier to work with.

Part II: Exporting/Importing Delimited Files

It is possible to export marc files as a delimited file such as csv or tsv which can be opened in Excel or OpenRefine.

MarcEdit also allows you to import and translate a delimited file to a marc file. If you are thinking of KBART files, then you're in luck. There's a plug-in that will allow you to import into the MarcEdit and translate into a marc file your KBART file!

Another cool function is the ability to export and import from OpenRefine.
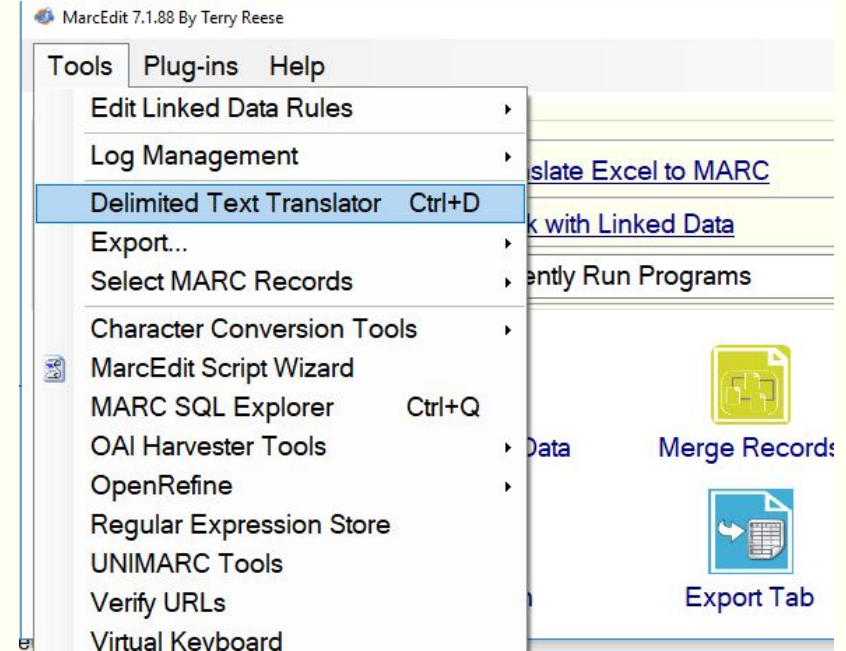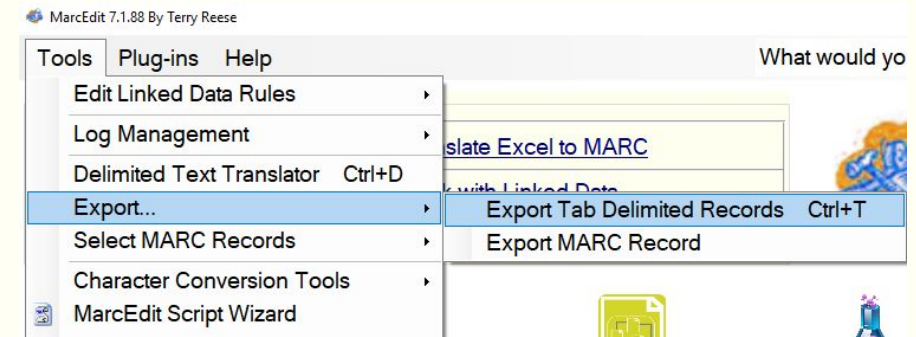
Part II: Advanced Batch Editing Tools

The MarcEdit Script Wizard will help you create functions with conditional logic.

If you're a fan of regular expressions, you can write these yourself. Or even better, head off to the regular expression store and find the "free" regex that fits your needs.

If you have questions, ask on the MarcEdit list serv. Very often Terry will answer you himself!
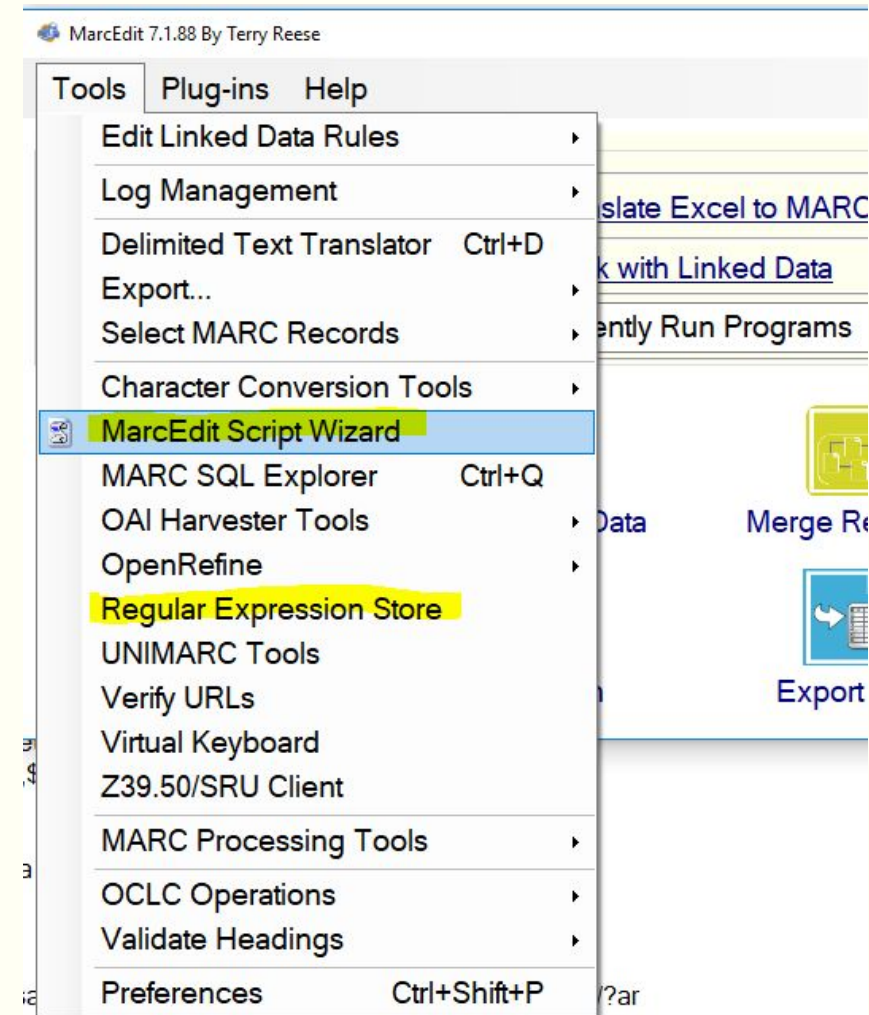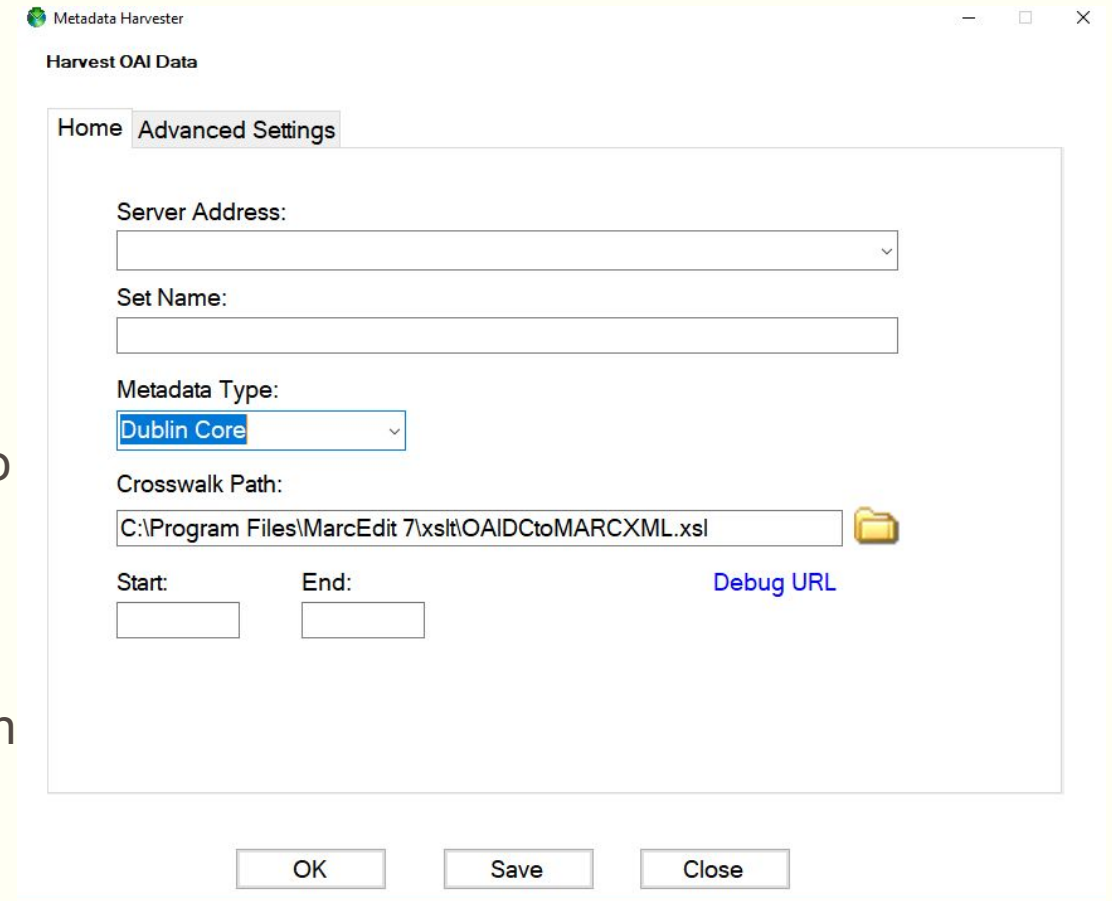
Part II: Harvesting

Harvesting means bringing in metadata from a remote digital repository. For this to work, the remote digital repository needs to be configured to expose its metadata via OAI PMH or the Open Archives Initiative Protocol for Metadata Harvesting.

OAI PMH can include descriptive metadata in the Dublin Core, OAI MARC, MODS, and MARCXML standards. You can harvest the raw data or map it to another standard using one of the default xls or one that you created.

Harvesting can be a little finicky. If there are errors in the xml metadata being harvesting, the harvest will possibly not being able to finish.
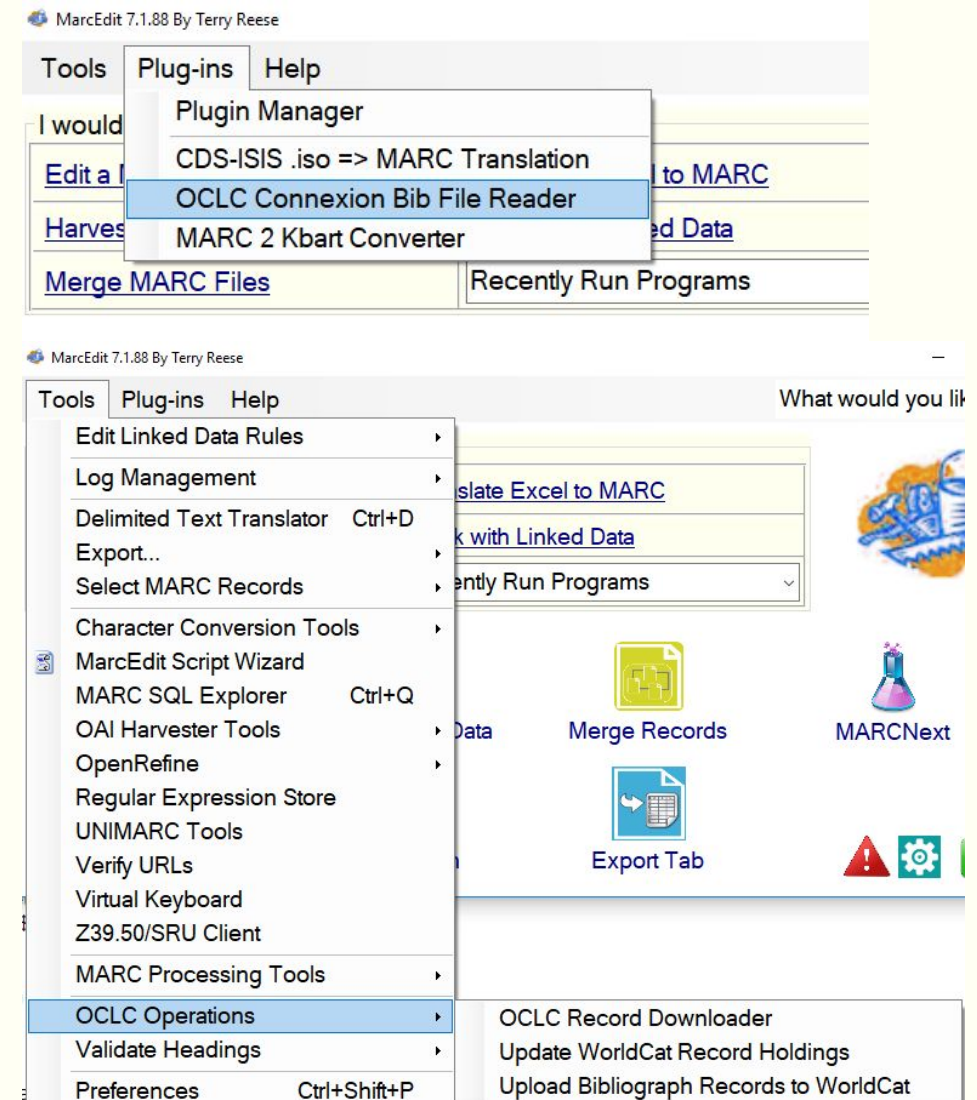
Part II: Integrations

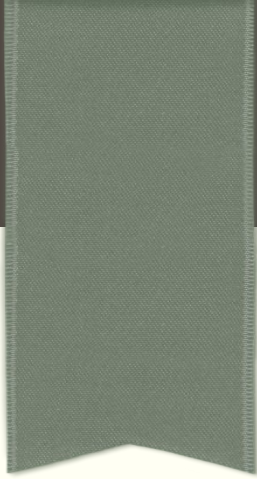Integrations exist for ILS, Connexion, and OCLC API.

The supported ILS are currently Alma and Koha.

The integration with Connexion will bring in records from your local save file.

The OCLC API integration requires an API key for Metadata and Search.

Notes

THANK YOU

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