

University of Massachusetts Amherst

From the Selected Works of Jennifer Eustis

March 26, 2019

Introduction to MarcEdit Part I and II

Jennifer Eustis, *University of Massachusetts Amherst*

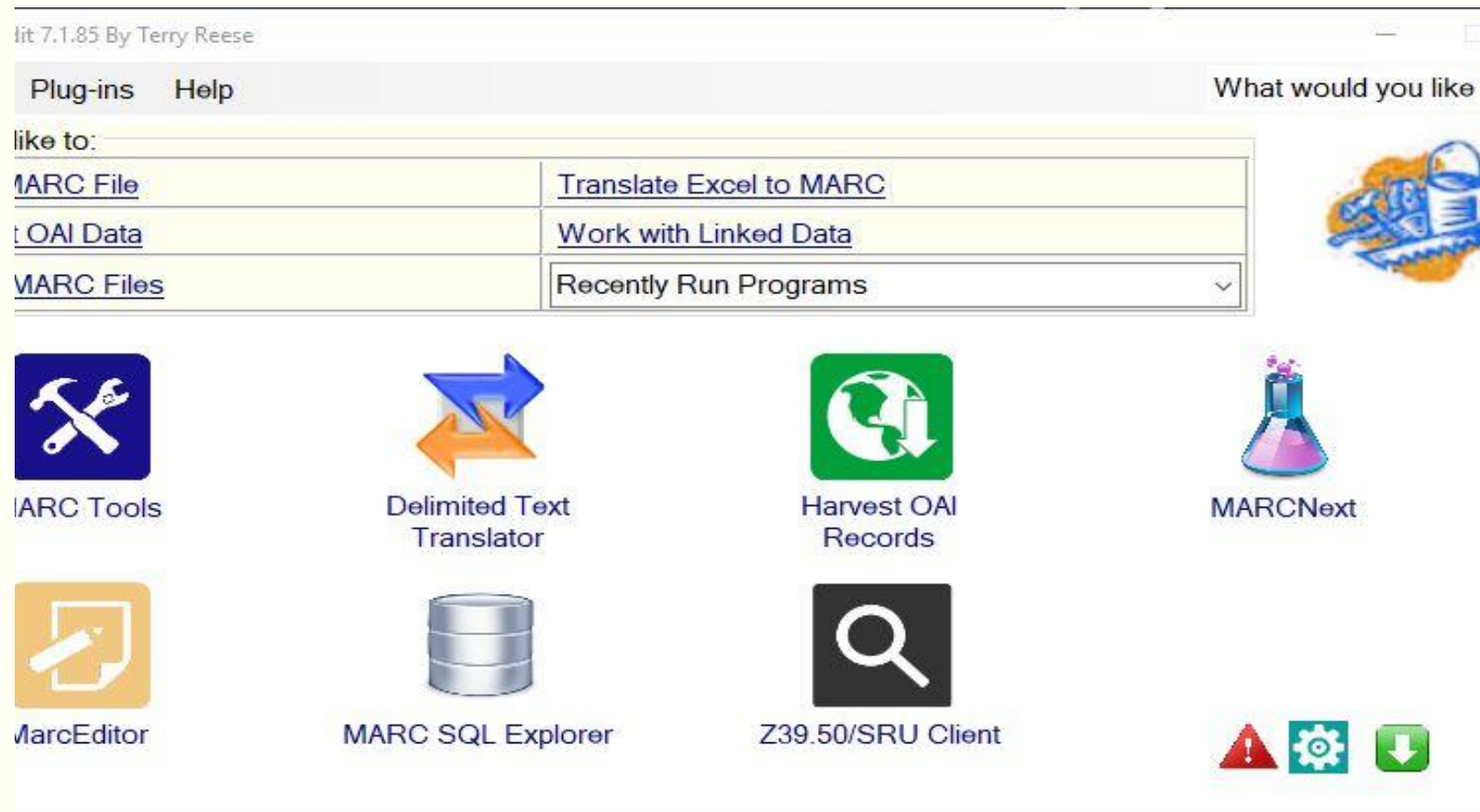
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Available at: <https://works.bepress.com/jennifer-eustis/7/>

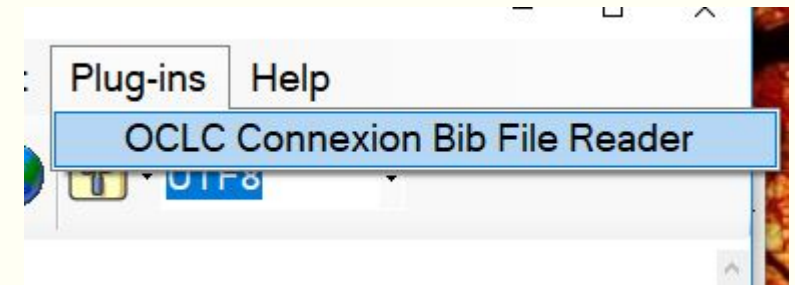
INTRODUCTION TO MARCEDIT

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



OCLC API Key Settings



[Request an OCLC Key](#)



Harvest OAI Records



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 than 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>

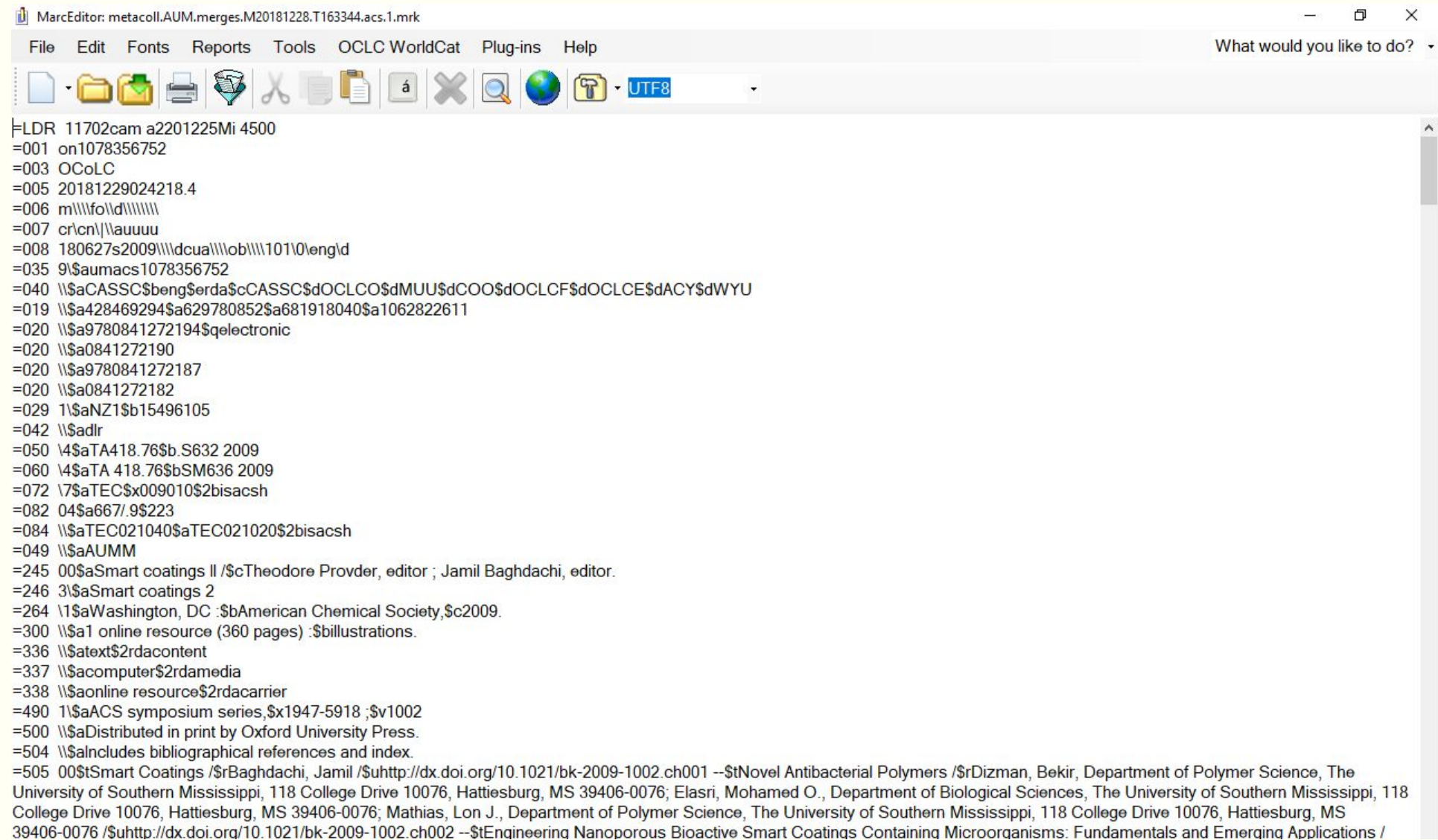
Part I: Why Is A Tool Needed?

metacoll.AUM.merges.M20181228.T163344.acs.1.mrc

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coatings 288 1USaWashington, DC :USbAmerican Chemical Society,USc2009.88 USa1 online resource (360 pages) :USbillustrations.88
USatextUS2rdacontent88 USacomputerUS2rdamedia88 USaonline resourceUS2rdacarrier881 USaACS symposium series,USx1947-5918 ;USv100288
USaDistributed in print by Oxford University Press.88 USaIncludes bibliographical references and index.8800UScSmart Coatings /USrBaghdachi, Jamil
/USuhttp://dx.doi.org/10.1021/bk-2009-1002.ch001 --UScNovel Antibacterial Polymers /USrDizman, Bekir, Department of Polymer Science, The University
of Southern Mississippi, 118 College Drive 10076, Hattiesburg, MS 39406-0076; Elasmri, 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 /USuhttp://dx.doi.org/10.1021/bk-2009-1002.ch002 --UScEngineering
Nanoporous Bioactive Smart Coatings Containing Microorganisms: Fundamentals and Emerging Applications /USrFlickinger, M. C., BioTechnology
Institute, University of Minnesota, Minneapolis and Saint Paul, MN 55455, Department of Biochemistry, Molecular Biology and Biophysics, University
of Minnesota, Minneapolis and Saint Paul, MN 55455; Fideale, M., BioTechnology Institute, University of Minnesota, Minneapolis and Saint Paul, MN
55455; Gosse, J., BioTechnology Institute, University of Minnesota, Minneapolis and Saint Paul, MN 55455, Department of Biochemistry, Molecular
Biology and Biophysics, University of Minnesota, Minneapolis and Saint Paul, MN 55455; Polzin, K., BioTechnology Institute, University of Minnesota,
Minneapolis and Saint Paul, MN 55455; Charaniya, S., BioTechnology Institute, University of Minnesota, Minneapolis and Saint Paul, MN 55455,
Department of Chemical Engineering and Materials Science, University of Minnesota, Minneapolis and Saint Paul, MN 55455; Solheid, C., BioTechnology
Institute, University of Minnesota, Minneapolis and Saint Paul, MN 55455; Lyngberg, O. K., BioTechnology Institute, University of Minnesota,
Minneapolis and Saint Paul, MN 55455, Department of Chemical Engineering and Materials Science, University of Minnesota, Minneapolis and Saint Paul,
MN 55455; Laudon, M., BioTechnology Institute, University of Minnesota, Minneapolis and Saint Paul, MN 55455; Ge, H., Department of Chemical
Engineering and Materials Science, University of Minnesota, Minneapolis and Saint Paul, MN 55455; Schottel, J. L., Department of Biochemistry,
Molecular Biology and Biophysics, University of Minnesota, Minneapolis and Saint Paul, MN 55455; Bond, D. R., Department of Microbiology, University
of Minnesota, Minneapolis and Saint Paul, MN 55455; Aksan, A., Department of Mechanical Engineering, University of Minnesota, Minneapolis and Saint
Paul, MN 55455; Scriven, L. E., Department of Chemical Engineering and Materials Science, University of Minnesota, Minneapolis and Saint Paul, MN
55455 /USuhttp://dx.doi.org/10.1021/bk-2009-1002.ch003 --UScSmart Surfaces for the Control of Bacterial Attachment and Biofilm Accumulation
/USrIsta, Linnea K.; Mendez, Sergio; Balamurugan, Sreelatha S.; Balamurugan, Subramanian; Rama Rao, Venkata G.; Lopez, Gabriel P. /US
uhttp://dx.doi.org/10.1021/bk-2009-1002.ch004 --UScPerformance Testing of Waterborne Antibacterial and High-Solids Coatings /USrClemans, D. L.,
Department of Biology, Eastern Michigan University, Ypsilanti, MI 48197; Rhoades, S. J., Department of Biology, Eastern Michigan University,
Ypsilanti, MI 48197; Kendzorski, J. J., Department of Biology, Eastern Michigan University, Ypsilanti, MI 48197; Xu, Q., Coatings Research
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48197 /USuhttp://dx.doi.org/10.1021/bk-2009-1002.ch005 --UScNovel, Environmentally Friendly, Antifouling/Fouling Release Coatings Developed Using
Combinatorial Methods /USrChisholm, Bret J.; Christianson, David A.; Stafslie, Shane J.; Gallagher-Lein, Christy; Daniels, Justin /US
uhttp://dx.doi.org/10.1021/bk-2009-1002.ch006 --UScCoatings via Self-Assembly of Smart Nanoparticles /USrMinko, Sergiy, Department of Chemistry and
Biomolecular Science, Clarkson University, Potsdam, NY 13699; Luzinov, Igor, School of Material Science and Engineering, Clemson University,
Clemson, SC 29630; Motornov, Mikhail, Department of Chemistry and Biomolecular Science, Clarkson University, Potsdam, NY 13699; Sheparovych, Roman,
Department of Chemistry and Biomolecular Science, Clarkson University, Potsdam, NY 13699; Lupitskyy, Robert, Department of Chemistry and
Biomolecular Science, Clarkson University, Potsdam, NY 13699; Liu, Yong, School of Materials Science and Engineering, Clemson University, Clemson,
SC 29630; Klep, Viktor, School of Materials Science and Engineering, Clemson University, Clemson, SC 29630 /US
uhttp://dx.doi.org/10.1021/bk-2009-1002.ch007 --UScNanostructured Electrooptically Active Smart Coatings Based on Conjugated Polymer Networks:
Precursor Polymer Approach, Devices, and Nanopatterning /USrAdvincola, Rigoberto C. /USuhttp://dx.doi.org/10.1021/bk-2009-1002.ch008 --UScSynthesis
of Acrylic Polymer Nanoparticles: Speculation about Their Properties and Potential Uses /USrJones, Frank N., Coatings Research Institute, Eastern
Michigan University, 430 West Forest Avenue, Ypsilanti, MI 48197; Minq, W. (Marshall), Eindhoven University of Technology, Den Dolech 2, 5612 AZ
```



Part I: Why MarcEdit?



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.

For Everyone

Current 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 an 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.

| | |
|---------------------|-------------------|
| System Manufacturer | Dell Inc. |
| System Model | OptiPlex 7050 |
| System Type | x64-based PC |
| System SKU | 07A1 |
| Processor | Intel(R) Core(TM) |

Find: System Type

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



Part I: Main Menu

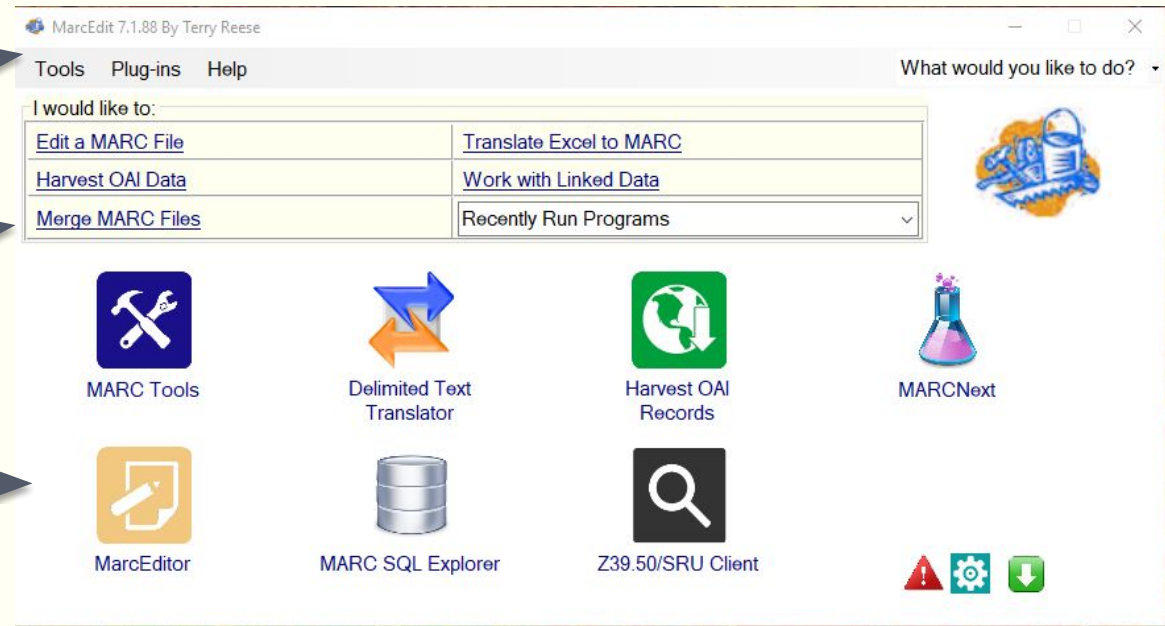
This is the Main Menu for MarcEdit v.7 on a PC.

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.

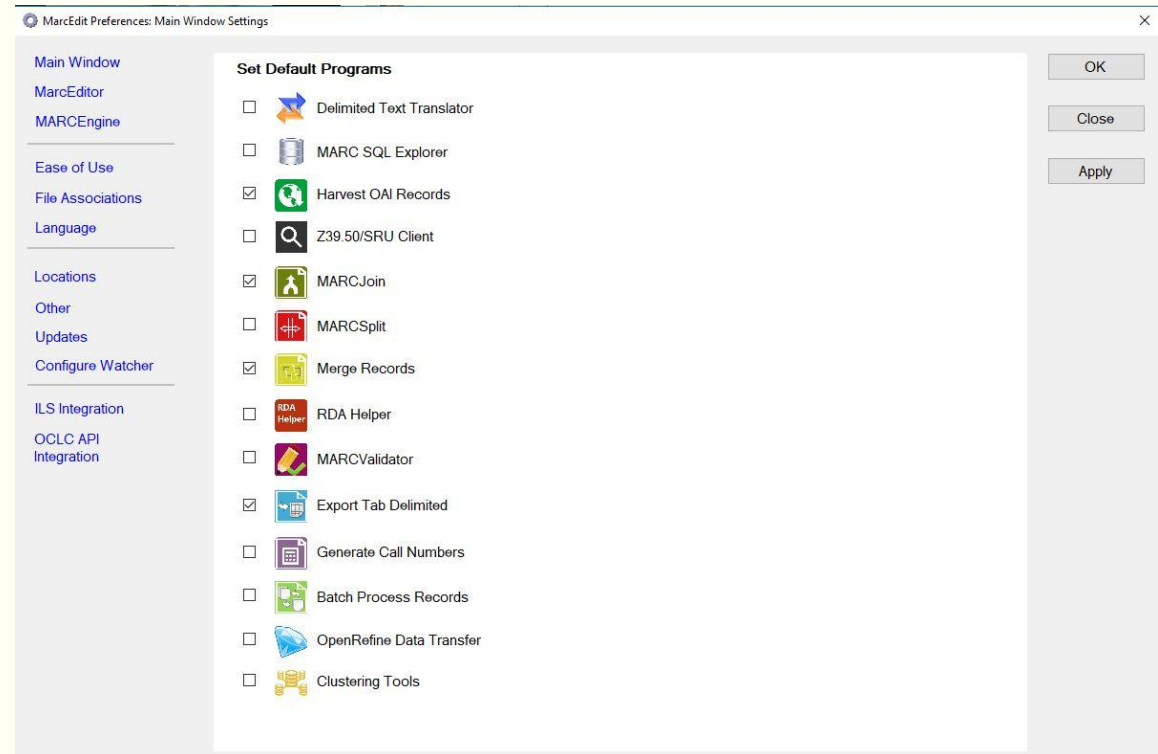
Here you'll find settings, update information, and general information.



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

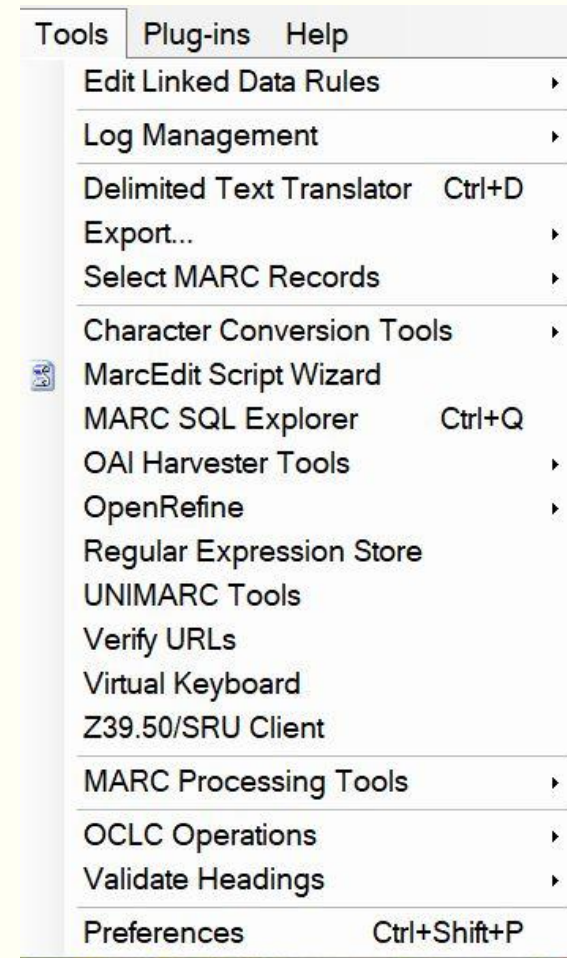


Part I: Tools through Main Menu

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.)



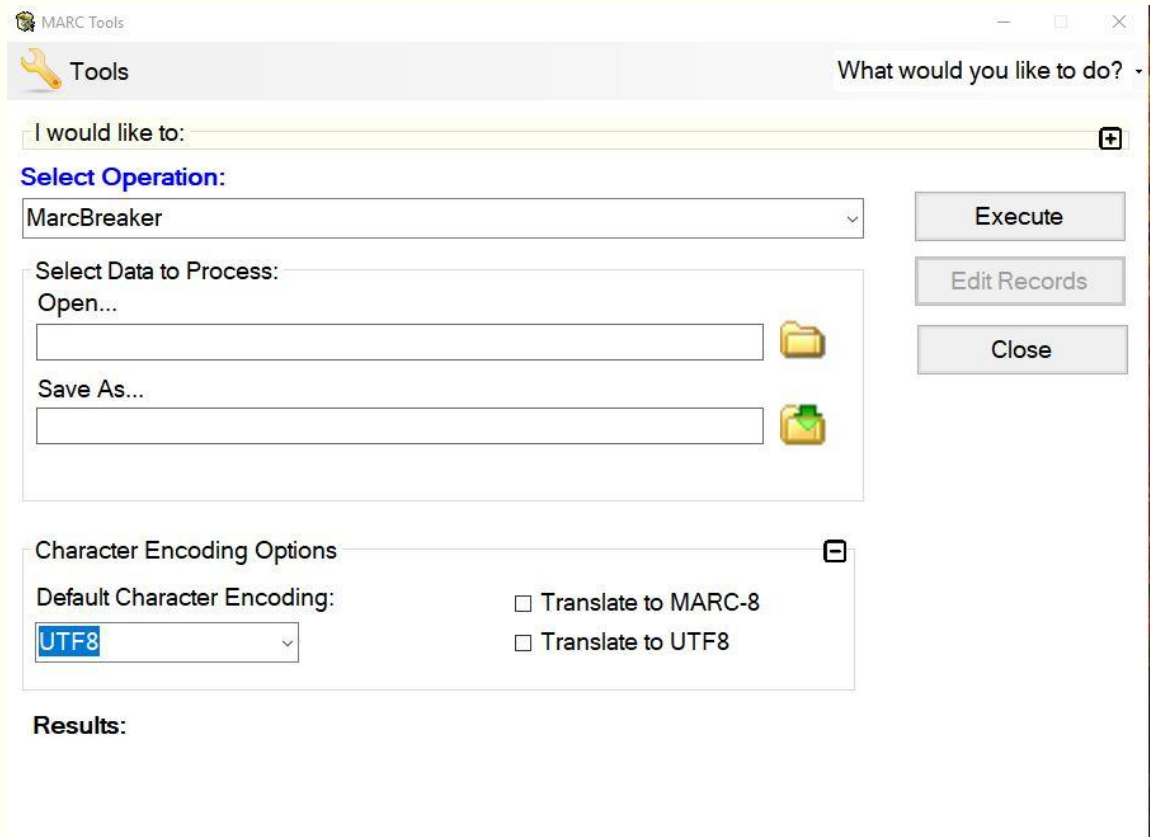
Part I: MARC Tools through Shortcut

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.



The screenshot shows the 'MARC Tools' application window. The title bar reads 'MARC Tools'. Below the title bar is a toolbar with a wrench icon and the word 'Tools'. To the right of the toolbar is a dropdown menu labeled 'What would you like to do?'. The main area of the window is divided into several sections. At the top, there is a text input field labeled 'I would like to:' followed by a plus icon. Below this is a section titled 'Select Operation:' with a dropdown menu currently showing 'MarcBreaker'. Underneath, there is a section titled 'Select Data to Process:' with two options: 'Open...' and 'Save As...'. Each option has a corresponding text input field and a folder icon. To the right of these input fields are three buttons: 'Execute', 'Edit Records', and 'Close'. At the bottom, there is a section titled 'Character Encoding Options' with a dropdown menu showing 'UTF8' and two checkboxes: 'Translate to MARC-8' and 'Translate to UTF8'. Below this is a section titled 'Results:'.

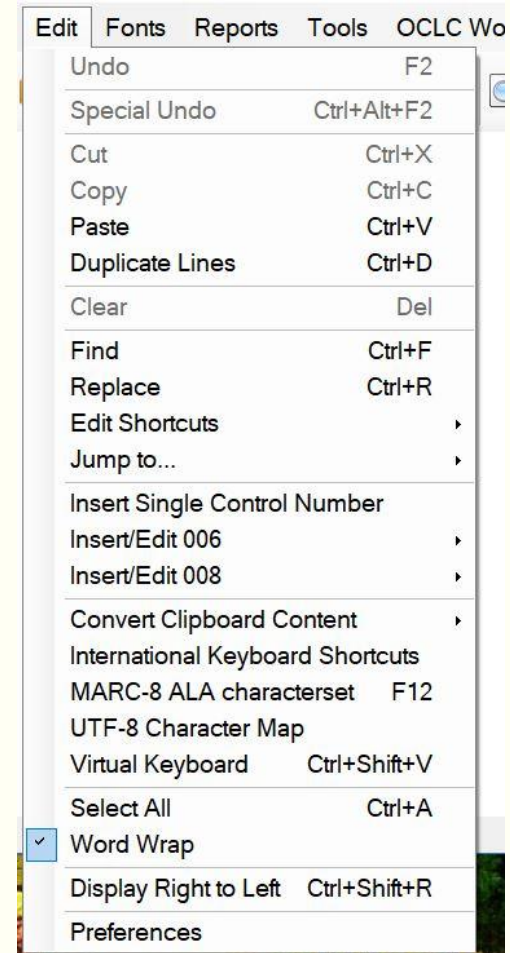
Part I: Edit Options In MarcEditor

Find and Replace

Jump To

Insert 006 or 008

Diacritics



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, ...

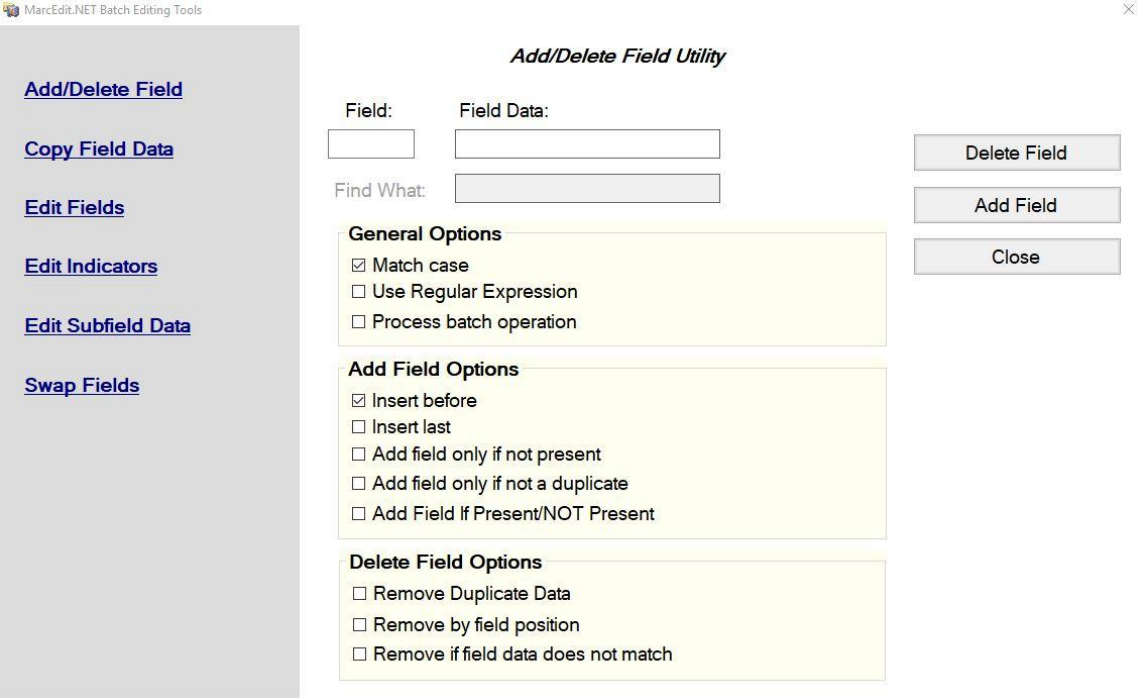
You can do this just by matching the case. Additions can be added last, only if the field isn't present or not a duplication.

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

The screenshot shows the 'Add/Delete Field Utility' dialog box within the MarcEdit.NET Batch Editing Tools application. The dialog has a title bar with the application name and a close button. On the left is a sidebar with five blue links: 'Add/Delete Field', 'Copy Field Data', 'Edit Fields', 'Edit Indicators', and 'Edit Subfield Data'. Below these links is a 'Swap Fields' button. The main area of the dialog is titled 'Add/Delete Field Utility' and contains several input fields and checkboxes. At the top, there are two input fields labeled 'Field:' and 'Field Data:'. Below these is a 'Find What:' input field. To the right of these fields are three buttons: 'Delete Field', 'Add Field', and 'Close'. Below the input fields are three sections of options, each in a yellow box. The first section is 'General Options' with three checkboxes: 'Match case' (checked), 'Use Regular Expression' (unchecked), and 'Process batch operation' (unchecked). The second section is 'Add Field Options' with five checkboxes: 'Insert before' (checked), 'Insert last' (unchecked), 'Add field only if not present' (unchecked), 'Add field only if not a duplicate' (unchecked), and 'Add Field If Present/NOT Present' (unchecked). The third section is 'Delete Field Options' with three checkboxes: 'Remove Duplicate Data' (unchecked), 'Remove by field position' (unchecked), and 'Remove if field data does not match' (unchecked).

Part I: Exercise: Add A Field (MarcEditor)

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

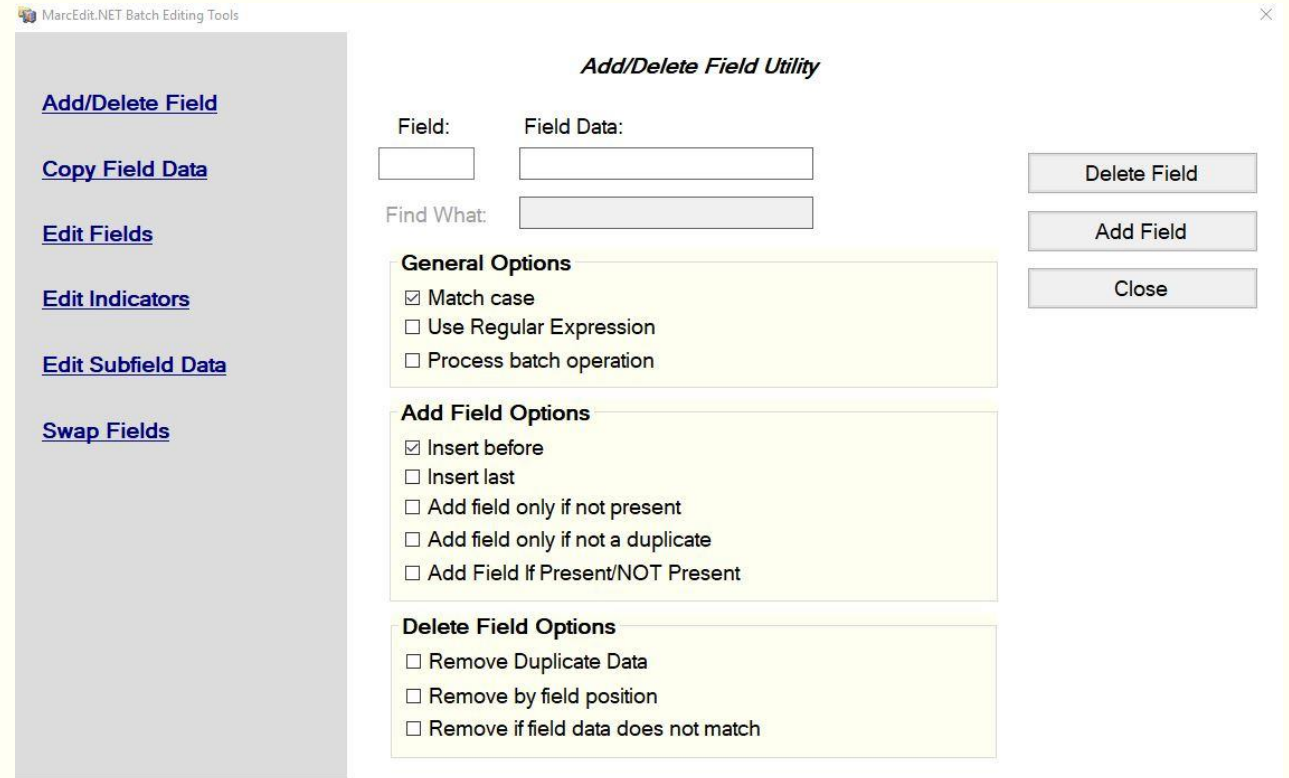


The screenshot shows the 'Add/Delete Field Utility' dialog box within the 'MarcEdit.NET Batch Editing Tools' application. The dialog has a title bar with the application name and a close button. On the left is a grey sidebar with a list of links: [Add/Delete Field](#), [Copy Field Data](#), [Edit Fields](#), [Edit Indicators](#), [Edit Subfield Data](#), and [Swap Fields](#). The main area is white and contains the following elements:

- Field:** A text input field.
- Field Data:** A text input field.
- Find What:** A text input field.
- Buttons:** 'Delete Field', 'Add Field', and 'Close' are located on the right side.
- General Options:** A yellow-shaded box containing three checkboxes: ☒ Match case, ☐ Use Regular Expression, and ☐ Process batch operation.
- Add Field Options:** A yellow-shaded box containing five checkboxes: ☒ Insert before, ☐ Insert last, ☐ Add field only if not present, ☐ Add field only if not a duplicate, and ☐ Add Field If Present/NOT Present.
- Delete Field Options:** A yellow-shaded box containing three checkboxes: ☐ Remove Duplicate Data, ☐ Remove by field position, and ☐ Remove if field data does not match.

Part I: Exercise: Delete A Field (MarcEditor)

Delete any 655 fields with Electronic books.



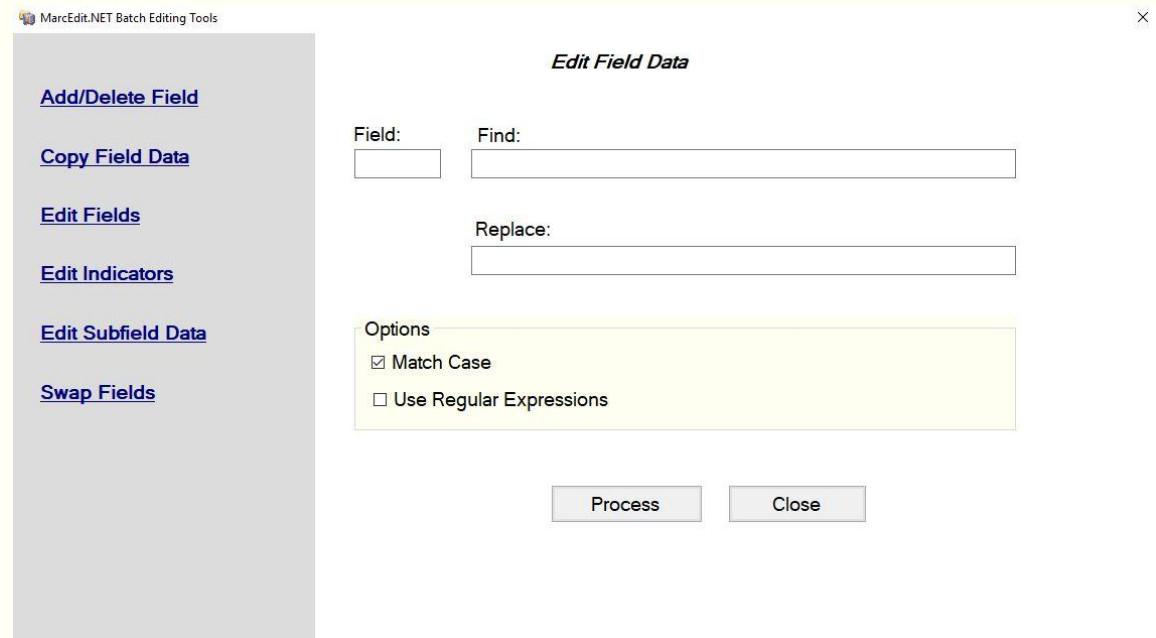
The screenshot shows the 'Add/Delete Field Utility' dialog box within the MarcEdit.NET Batch Editing Tools application. The dialog has a title bar with the application name and a close button. On the left is a sidebar with several menu items: 'Add/Delete Field' (highlighted), 'Copy Field Data', 'Edit Fields', 'Edit Indicators', 'Edit Subfield Data', and 'Swap Fields'. The main area of the dialog is titled 'Add/Delete Field Utility' and contains the following elements:

- Field:** A text input field.
- Field Data:** A text input field.
- Find What:** A text input field.
- General Options:** A section with three checkboxes:
 - ☒ Match case
 - ☐ Use Regular Expression
 - ☐ Process batch operation
- Add Field Options:** A section with five checkboxes:
 - ☒ Insert before
 - ☐ Insert last
 - ☐ Add field only if not present
 - ☐ Add field only if not a duplicate
 - ☐ Add Field If Present/NOT Present
- Delete Field Options:** A section with three checkboxes:
 - ☐ Remove Duplicate Data
 - ☐ Remove by field position
 - ☐ Remove if field data does not match

On the right side of the dialog, there are three buttons: 'Delete Field', 'Add Field', and 'Close'.

Part I: Exercise: Edit A Field (MarcEditor)

Edit the 856 \$z statement to Connect to online resource



The screenshot shows the 'Edit Field Data' dialog box within the MarcEdit.NET Batch Editing Tools application. The dialog has a title bar with the application name and a close button. On the left is a grey sidebar with a list of menu items: 'Add/Delete Field', 'Copy Field Data', 'Edit Fields', 'Edit Indicators', 'Edit Subfield Data', and 'Swap Fields'. The main area is white and titled 'Edit Field Data'. It contains three input fields: 'Field:' (a small box), 'Find:' (a long box), and 'Replace:' (a long box). Below these is an 'Options' section with two checkboxes: 'Match Case' (checked) and 'Use Regular Expressions' (unchecked). At the bottom are 'Process' and 'Close' buttons.

MarcEdit.NET Batch Editing Tools

Edit Field Data

Field:

Find:

Replace:

Options

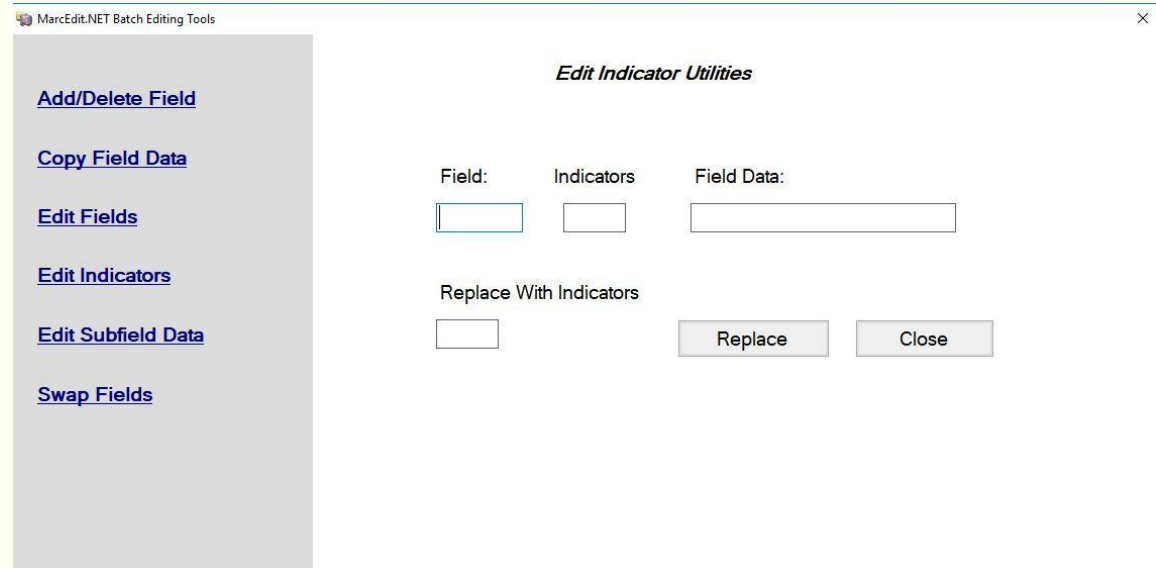
☒ Match Case

☐ Use Regular Expressions

Process Close

Part I: Exercise: Change Indicators (MarcEditor)

Change all the 856 indicators to 4 and 0.



The screenshot shows the 'Edit Indicator Utilities' dialog box within the 'MarcEdit.NET Batch Editing Tools' application. On the left is a vertical menu with the following options: [Add/Delete Field](#), [Copy Field Data](#), [Edit Fields](#), [Edit Indicators](#), [Edit Subfield Data](#), and [Swap Fields](#). The main area of the dialog is titled 'Edit Indicator Utilities' and contains three input fields labeled 'Field:', 'Indicators', and 'Field Data:'. Below these fields is a section labeled 'Replace With Indicators' with a single input field. At the bottom right are two buttons: 'Replace' and 'Close'.

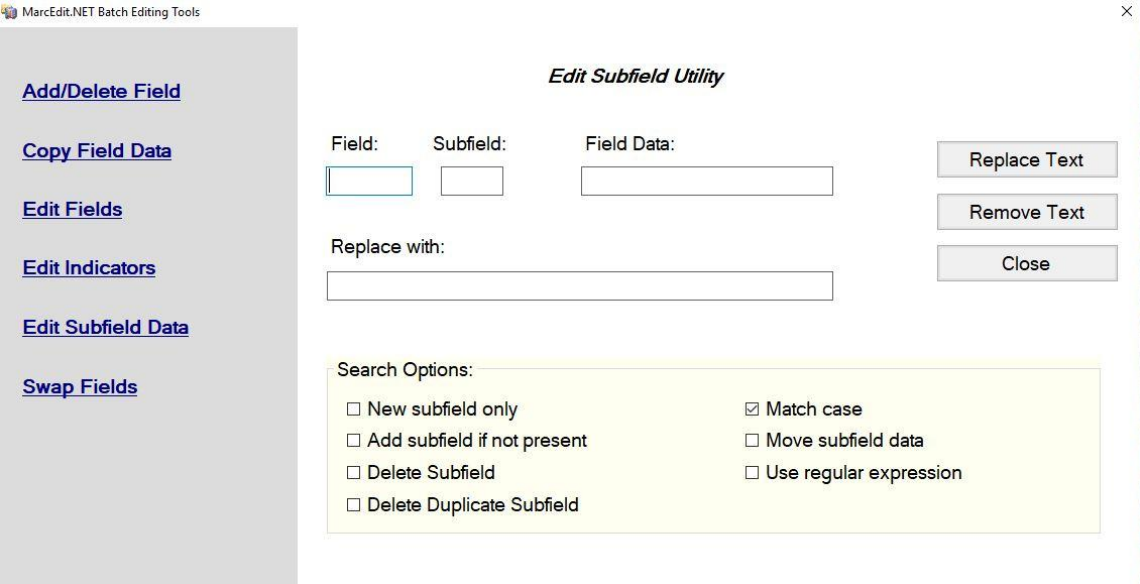
| Field: | Indicators | Field Data: |
|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> |

Replace With Indicators

Part I: Exercise: Edit Subfield Data (MarcEditor)

Remove the 856 \$z.

Then add a new 856 \$z with the phrase
“Link to online resource”



The screenshot shows the 'Edit Subfield Utility' dialog box within the MarcEdit.NET Batch Editing Tools application. The dialog has a title bar with the application name and a close button. On the left is a grey sidebar with a list of actions: 'Add/Delete Field', 'Copy Field Data', 'Edit Fields', 'Edit Indicators', 'Edit Subfield Data' (which is highlighted), and 'Swap Fields'. The main area of the dialog is titled 'Edit Subfield Utility' and contains the following fields and controls:

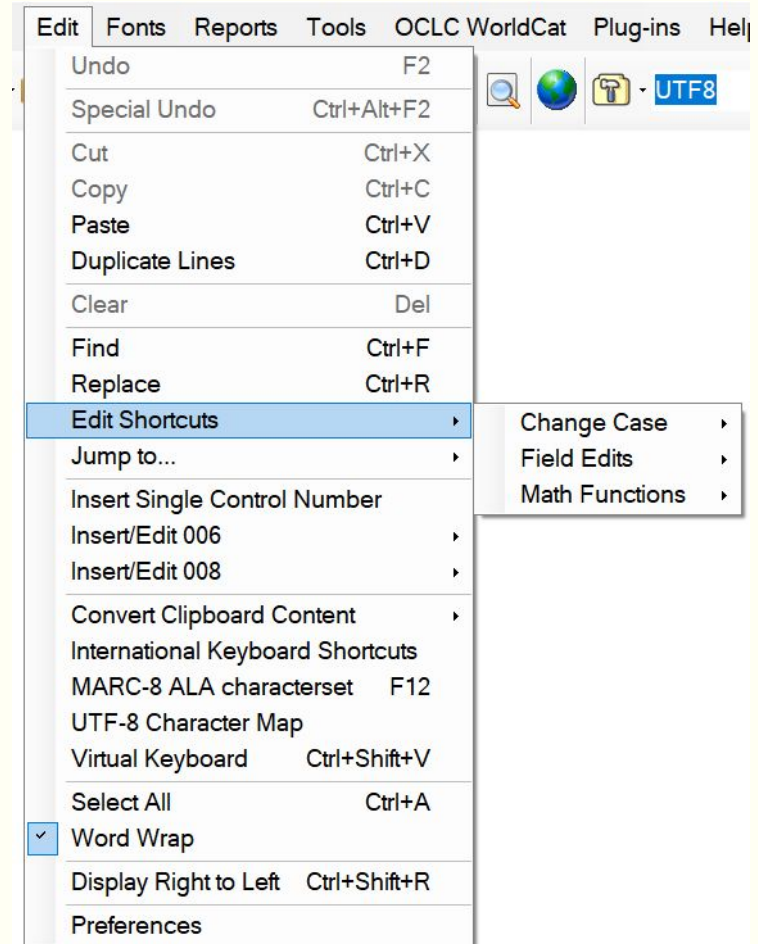
- Field:** A text input field.
- Subfield:** A text input field.
- Field Data:** A text input field.
- Replace with:** A text input field.
- Buttons:** 'Replace Text', 'Remove Text', and 'Close' are located on the right side of the main area.
- Search Options:** A section at the bottom with a yellow background containing several checkboxes:
 - ☐ New subfield only
 - ☐ Add subfield if not present
 - ☐ Delete Subfield
 - ☐ Delete Duplicate Subfield
 - ☒ Match case
 - ☐ Move subfield data
 - ☐ Use regular expression

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.

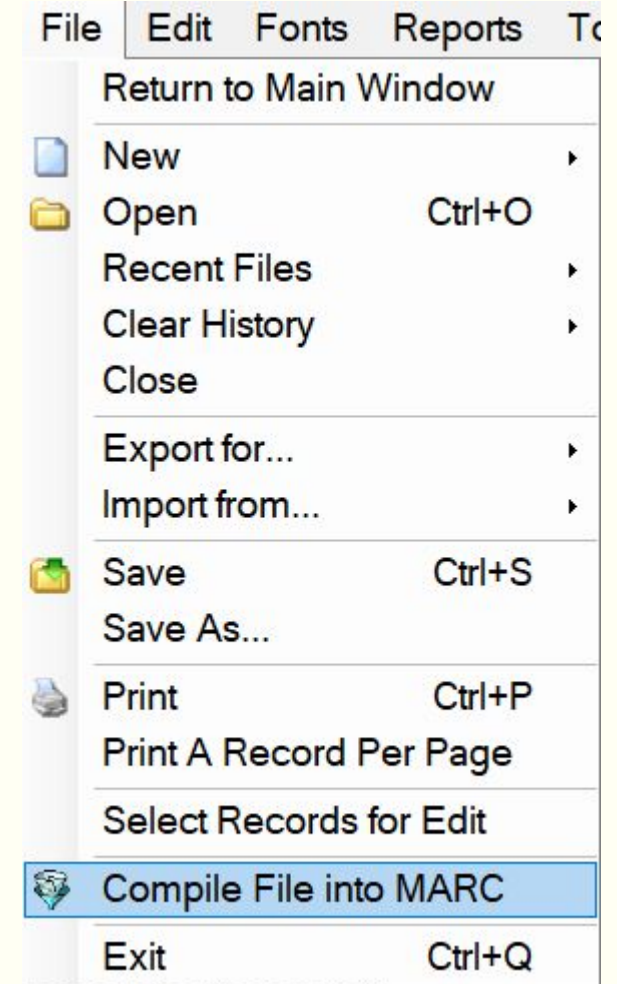
- Clean Smart Characters
- Clean ISBD Punctuation
- Correct {lcub}/{rcub} Mnemonic Errors
- Generate Paired ISBN-13 Values
- Find Fields Missing A Word
- Find Records Missing Field
- Find Records With Duplicate Tags
- Limit Number of Fields
- Swap Title



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).



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

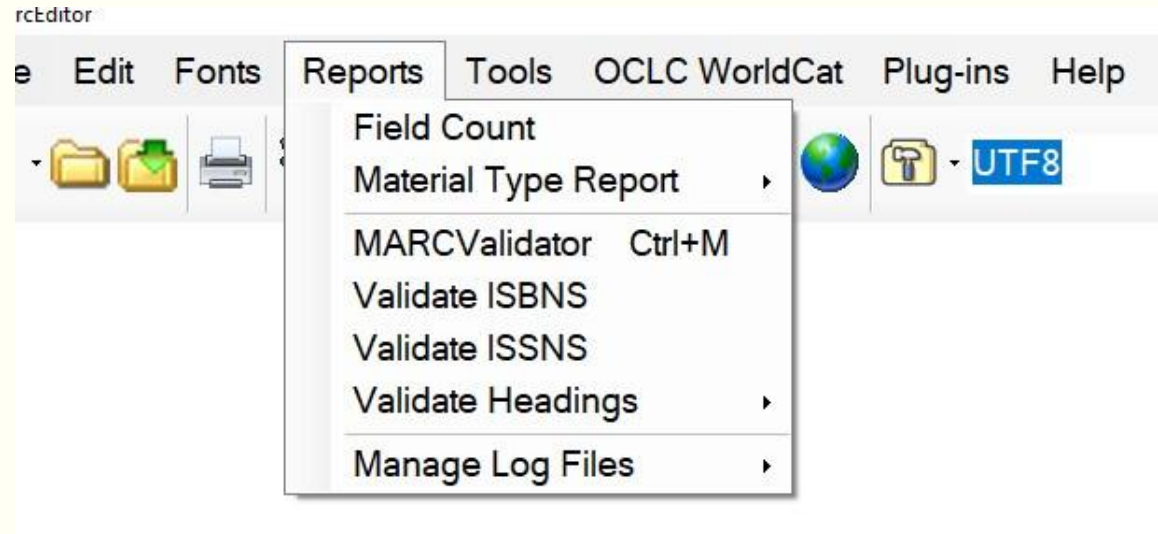
Field Count:

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.



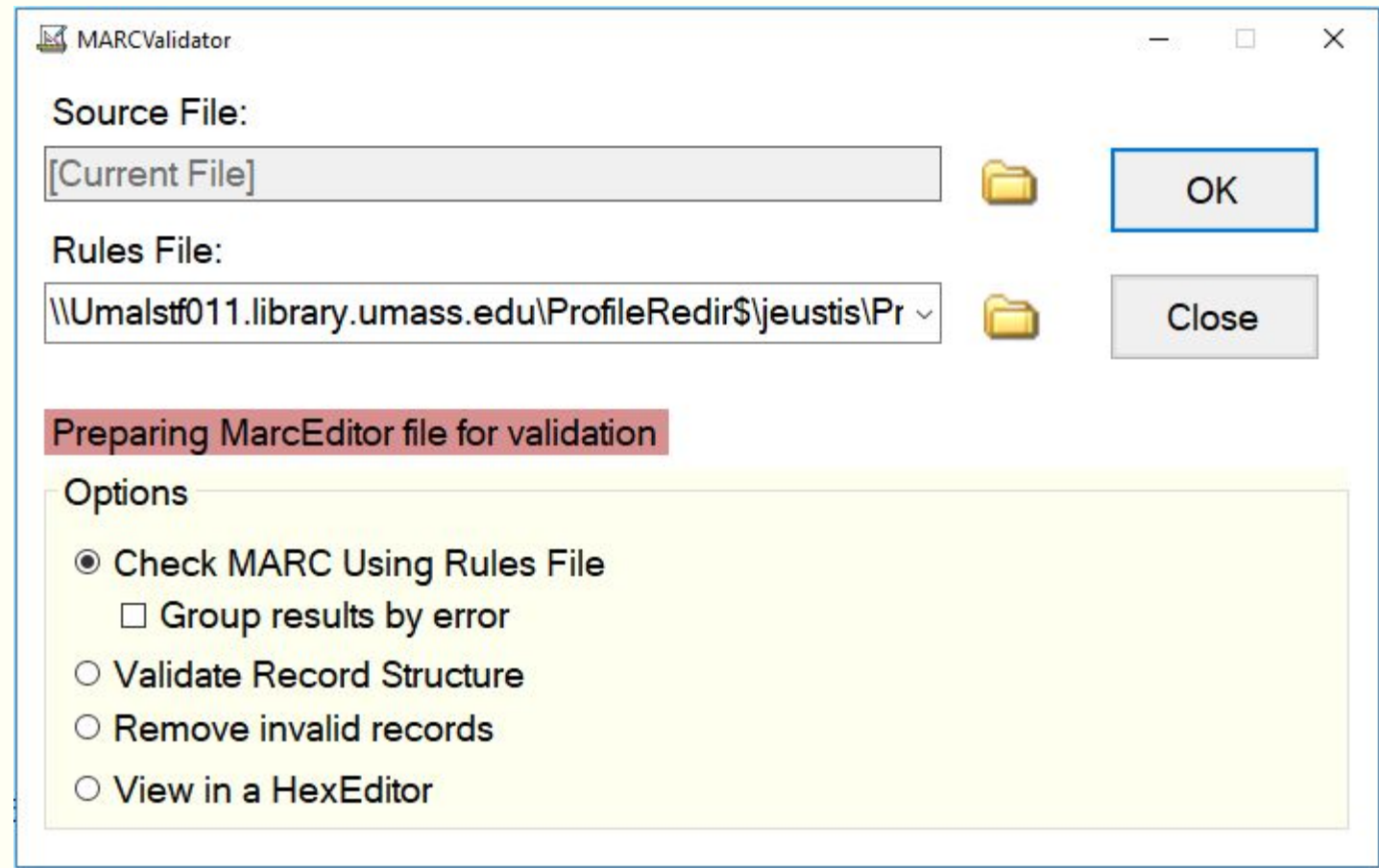
| Found Text | Action |
|-------------------------------|------------------------|
| =LDR 02615ngm a2200349 a 4500 | Jump to Record #: 28 |
| =LDR 02864ngm a2200361 a 4500 | Jump to Record #: 85 |
| =LDR 02968ngm a2200337 a 4500 | Jump to Record #: 1... |
| =LDR 02652ngm a2200349 a 4500 | Jump to Record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

The screenshot shows the MarcEdit.NET application window titled "MarcEdit.NET: Modify Selected MARC Records". The window contains a table with two columns: "Record ..." and "Display Field". Below the table are two links: "Does Not Match" and "Invert Selections". A search section includes a "Search:" label, a dropdown menu, a text input field, and a magnifying glass icon. Below the search field are several checkboxes: "Retain Checked Items", "Exact Word Match", "Match Case" (which is checked), "Use Regular Expressions", and "Search all Record data". Below these checkboxes is a label "Source MARC File:" followed by a text input field containing "L:\Safari\OReilly Safari Academic Platform 2" and a folder icon. On the right side of the window, there is a vertical stack of buttons: "Import File", "Generate Report", "Delete Selected", "Export Random", "Export Selected", and "Exit". Below these buttons is a "Display Field:" label and a text input field containing "245\$a".

| Record ... | Display Field |
|------------|---------------|
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |

[Does Not Match](#) | [Invert Selections](#)

Search:

☐ Retain Checked Items
☐ Exact Word Match
☒ Match Case
☐ Use Regular Expressions
☐ Search all Record data

Source MARC File:

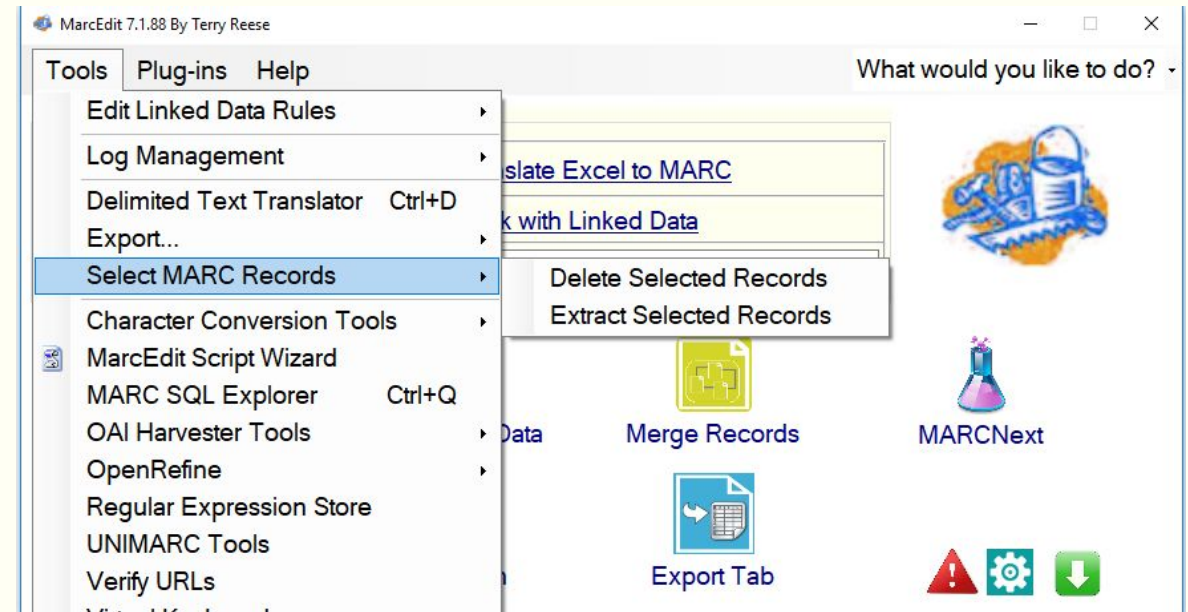
Buttons: Import File, Generate Report, Delete Selected, Export Random, Export Selected, Exit

Display Field:

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.

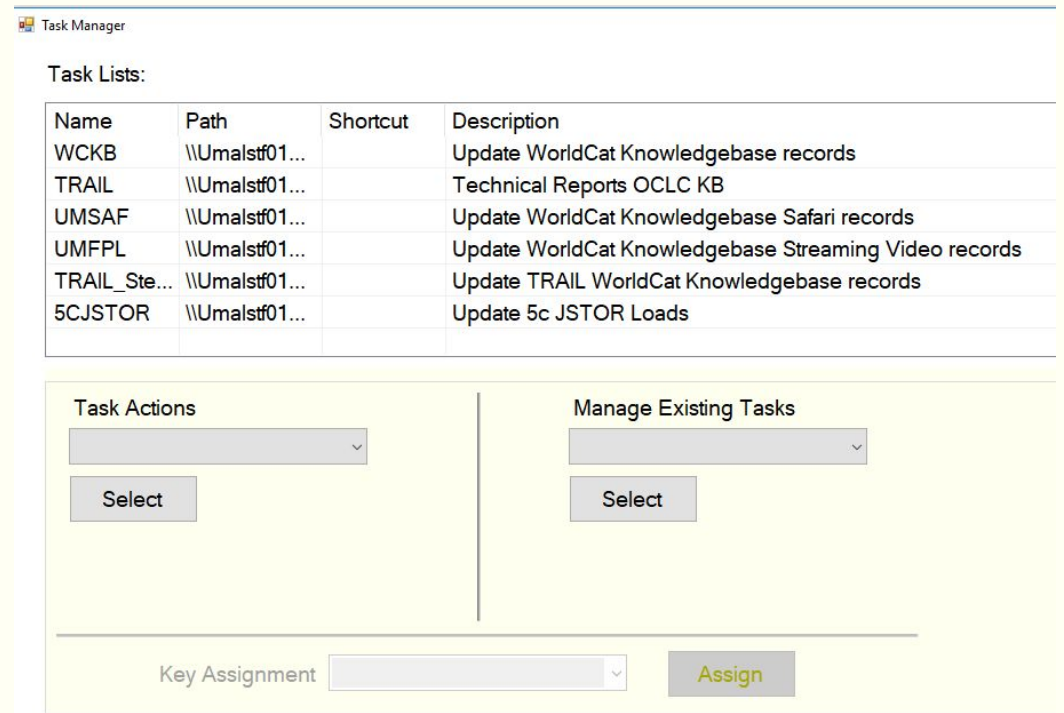


Part II: Create and Manage Tasks

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.



The screenshot shows a web application window titled "Task Manager". It contains a table of task lists and several management controls.

| Name | Path | Shortcut | Description |
|--------------|----------------|----------|---|
| WCKB | \\Umalstf01... | | Update WorldCat Knowledgebase records |
| TRAIL | \\Umalstf01... | | Technical Reports OCLC KB |
| UMSAF | \\Umalstf01... | | Update WorldCat Knowledgebase Safari records |
| UMFPL | \\Umalstf01... | | Update WorldCat Knowledgebase Streaming Video records |
| TRAIL_Ste... | \\Umalstf01... | | Update TRAIL WorldCat Knowledgebase records |
| 5CJSTOR | \\Umalstf01... | | Update 5c JSTOR Loads |

Below the table, there are two main sections:

- Task Actions:** A dropdown menu and a "Select" button.
- Manage Existing Tasks:** A dropdown menu and a "Select" button.

At the bottom, there is a "Key Assignment" dropdown menu and an "Assign" button.

Part II: MarcJoin/Split/Merge

MarcEdit allows you to:

- Join 2 or more files

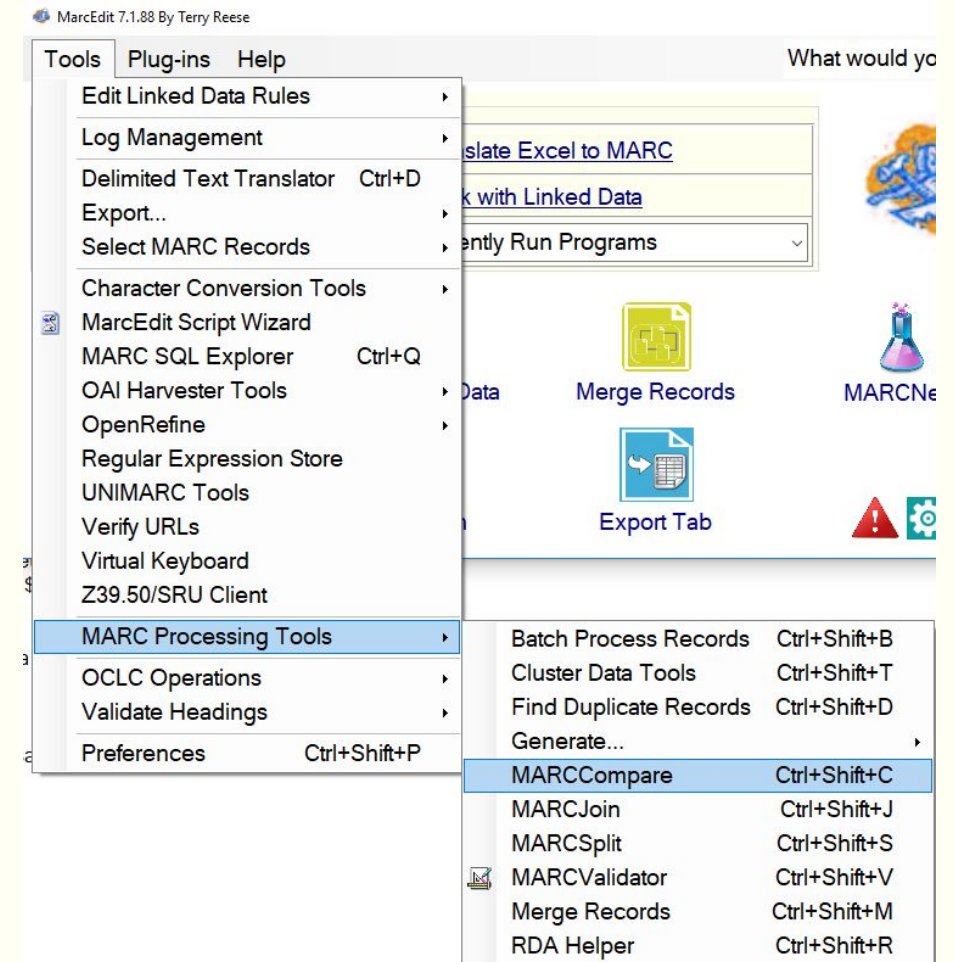
This process appends all the files into one new giant marc file. It will not check for duplicates.

- 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.

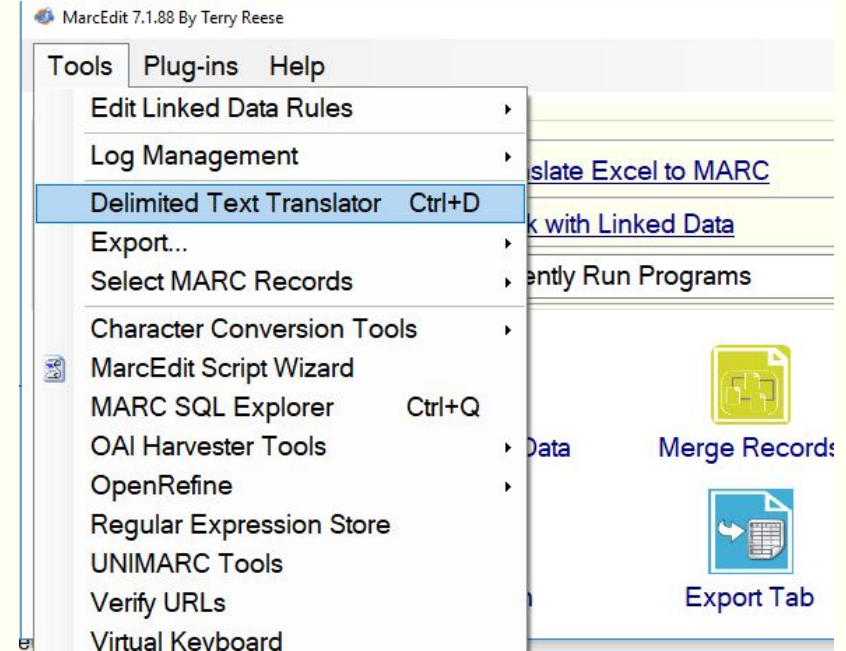
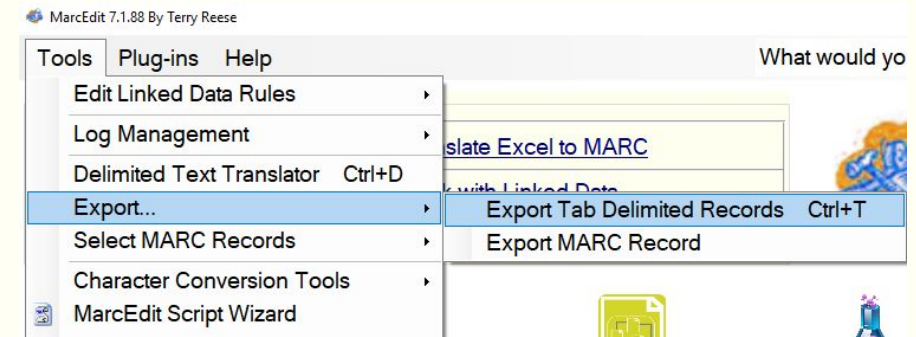


Part II: Exporting/Importing Delimited Files

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.

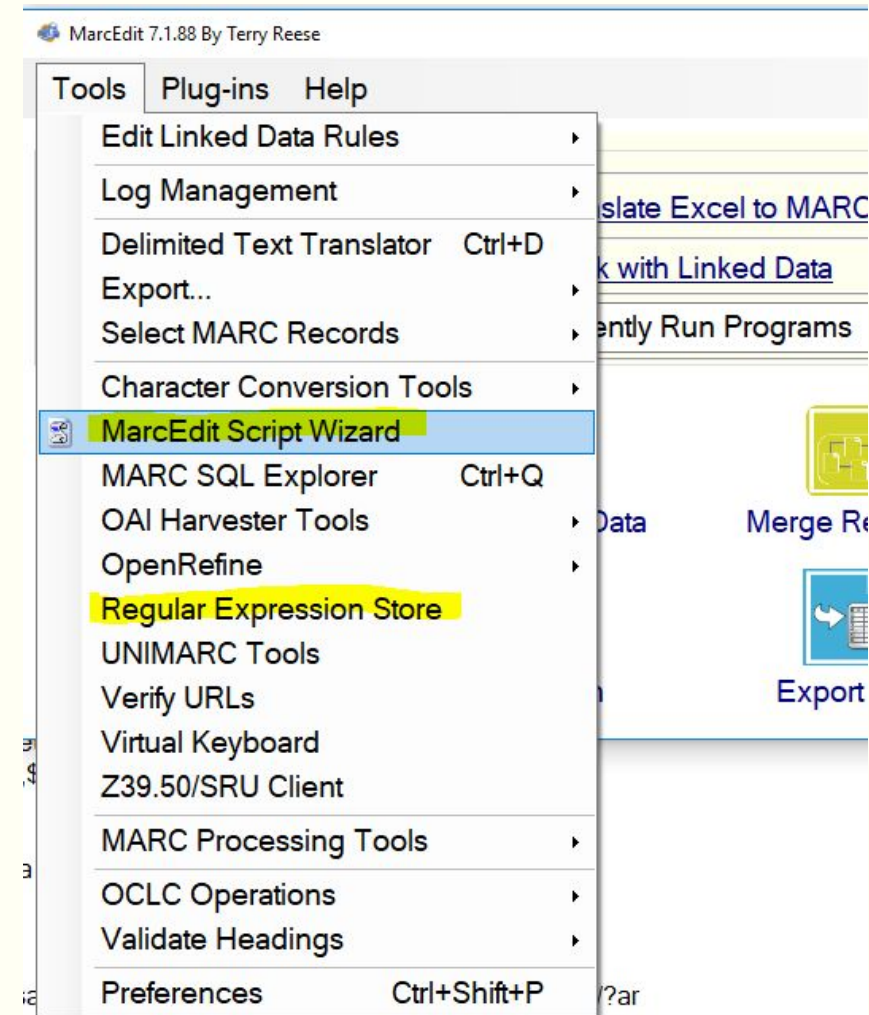


Part II: Advanced Batch Editing Tools

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!

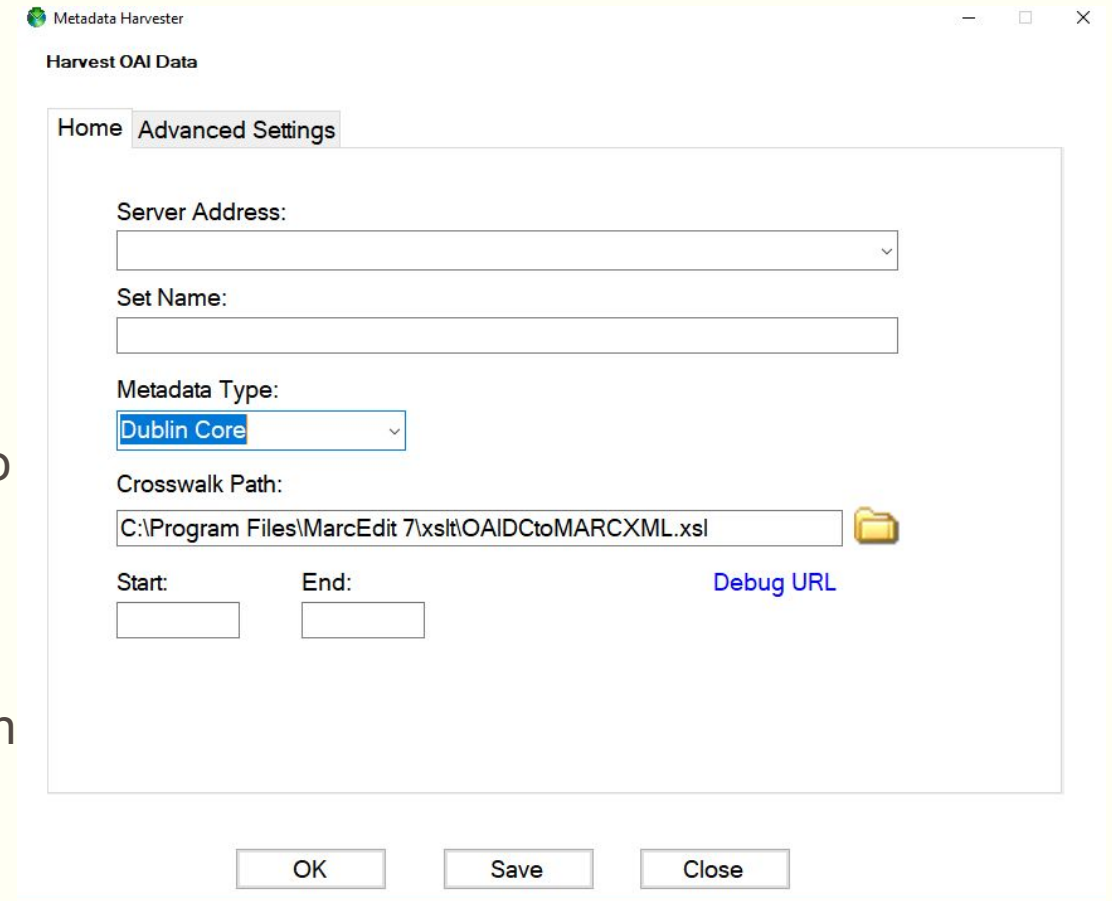


Part II: Harvesting

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.



The screenshot shows the 'Metadata Harvester' application window with the 'Harvest OAI Data' dialog box open. The 'Advanced Settings' tab is selected. The dialog contains the following fields and controls:

- Server Address:** A text input field with a dropdown arrow on the right.
- Set Name:** A text input field.
- Metadata Type:** A dropdown menu with 'Dublin Core' selected.
- Crosswalk Path:** A text input field containing 'C:\Program Files\MarcEdit 7\xslt\OAIDCtoMARCXML.xsl' and a folder icon on the right.
- Start:** A text input field.
- End:** A text input field.
- Debug URL:** A blue text link.
- Buttons:** 'OK', 'Save', and 'Close' buttons at the bottom.

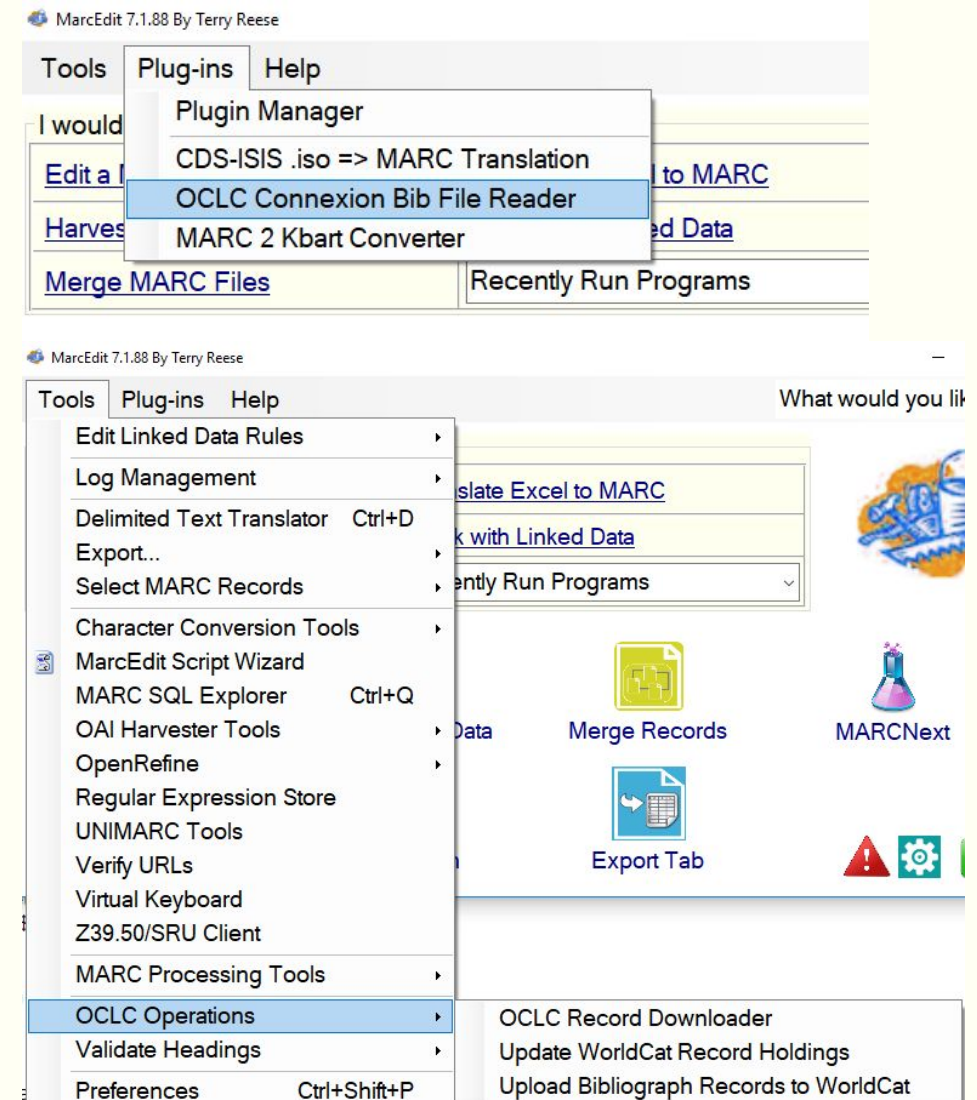
Part II: Integrations

Integrations exist for ILS, Connexion, and OCLC API.

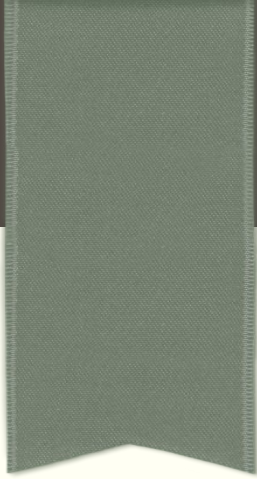
The supported ILS are currently Alma and Koha.

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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