



Using MarcEdit

Presentation for the Eastern Great Lakes
Innovative Users Group, October 20, 2006
Toledo, Ohio

This presentation came about after I found myself sending three messages in one week suggesting the use of MarcEdit to solve problems posed on the IUG list.

I am by no means an expert in every facet of MarcEdit. My aim today is to give a brief tour of what MarcEdit looks like, and to show some examples of what I have been able to do with it.

Background

- Developed by Terry Reese at Oregon State University
- Currently on version 4.6.63 (version 5 beta available)
- It's Freeware!!!
Downloadable from

<http://oregonstate.edu/~reese/marcedit/html/index.php>

The MarcEdit Start Page

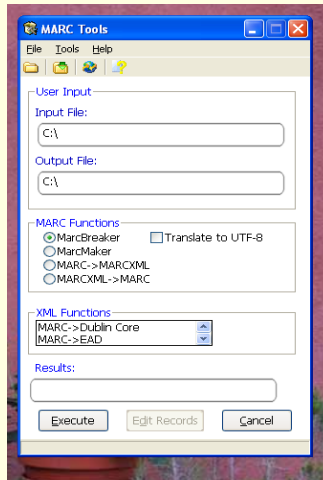


When MarcEdit opens, you see this Start Page

Menus at top and left edge, plus common choices in main window.

We'll click on MARC Tools menu

MARC Tools Menu



User Input box:

Enter name of Input file, and assign name for Output file.

Tip: I keep all such files in one folder on network (H:) drive.

Q: Haven't found way to change default directory.

MARC Functions and XML Functions boxes (we'll talk about this with next slide)

Results dialog (tells how many records processed or error messages)

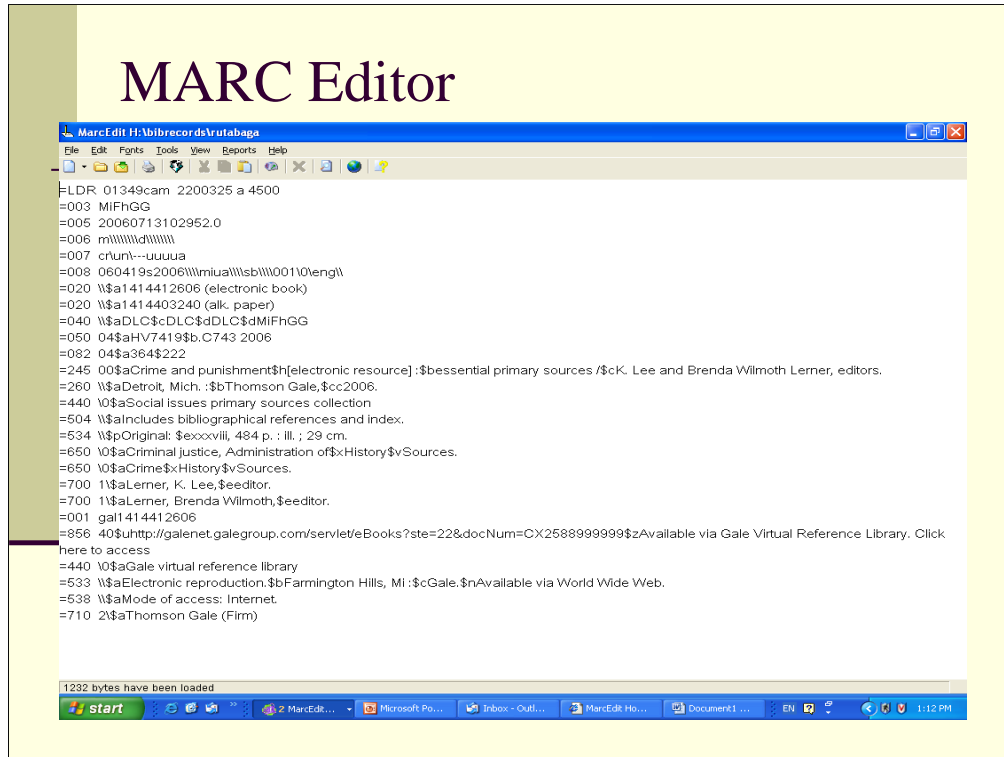
Execute, Edit Records, and Cancel buttons

MARC Tools

- MARC Breaker – turns MARC file into human-readable, editable text file
- MARC Maker – turns text file into MARC
- MARC->MARCXML conversions
- XML functions – used with MARC->MARCXML function to crosswalk data between MARC and other metadata standards

MARC Breaker – this is function I make the most use of from this menu.

MARC Editor

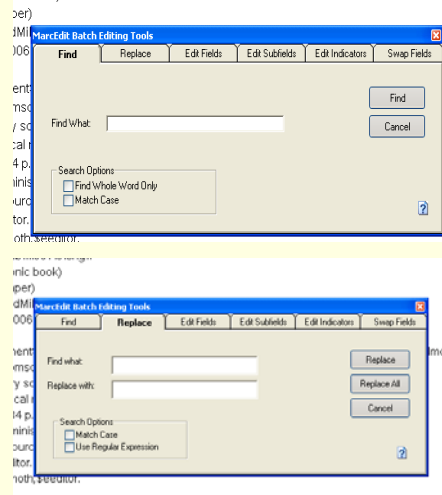


MARC Editor – typical text editor window.

Items we will look at most are in Edit and Tools menus

Batch Editing Tools: Find & Replace

- Find
Edit > Find
(Ctrl+F)
- Replace
Edit > Replace
(Ctrl+R)

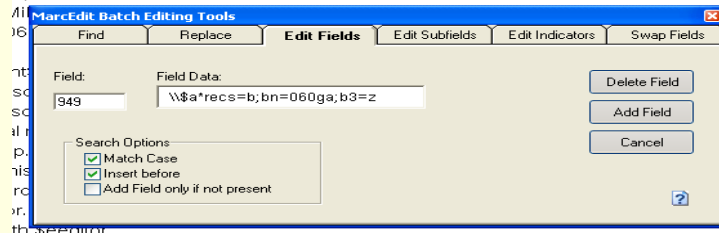


One dialog box with 5 tabs, allows you to perform most batch functions without having to constantly return to menus.

Find

Replace (includes ability to use Regular Expressions)

Batch Editing Tools: Edit Field Data



- Tools > Edit Field Data (F7)
Insert MARC field with identical content in all records,
or delete MARC field with specified content.

Edit Field Data.

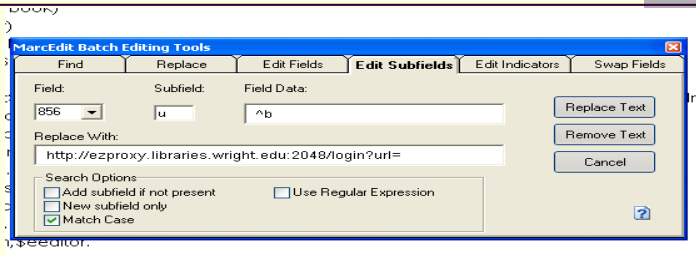
Note options:

Match case

Insert before (I often need to uncheck when adding 949s)

Add field only if not present – important exception to “all records” default.

Batch Editing Tools: Edit Subfield Data

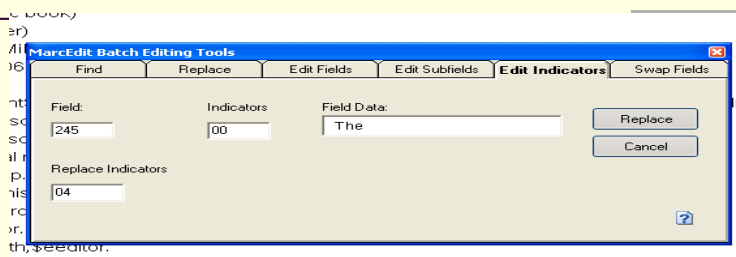


- Tools > Edit Subfield Data (F8)
Use to add subfields, find & replace within a subfield,
append/prepend to a subfield.
Can use regular expressions (Help text available)

Edit subfield data – allows sophisticated Find and Replace, appending, prepending, and insertion operations.

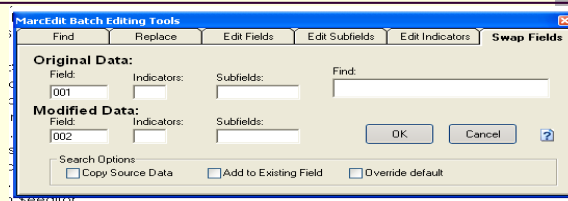
Help screen has instructions on how to add GMDs in right place in batch operation.

Batch Editing Tools: Edit Indicators



- Tools > Edit Indicators (F9)
Use to correct indicators for specific fields

Batch Editing Tools: Swap Fields



- Tools > Swap Field Data (F11)
Change fields with specified content from one MARC tag to another. Examples:
 - Changing generic 500 notes to specific 5xx
 - Changing non-OCLC 001 to 002

MARC Editor: Other notable features

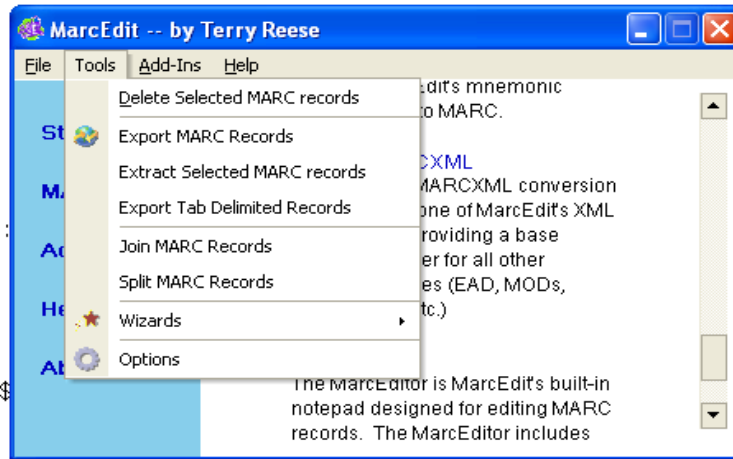
- Insert 008 (Edit menu)
Inserts template 008 for material format selected
- ALA character set (Edit menu; F12; icon)
- Sort fields (Tools menu; Ctrl+F11)
Sorts fields by MARC tag number
- Field count (Reports menu; Ctrl+F7)
Reports number of times each MARC field appears in file

MARC Editor conventions

- Subfield delimiter = \$
- Blank indicator = \
- \$a is NOT assumed
- No spaces between subfield codes and content

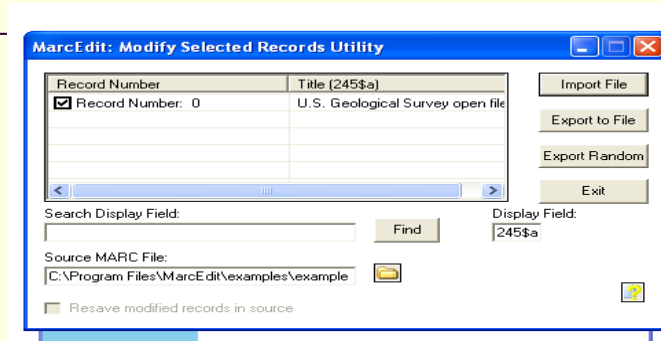
=650 \0\$aCrime\$xHistory\$vSources.

Start Window Tools Menu



Back to Start Window, look at items under Tools menu

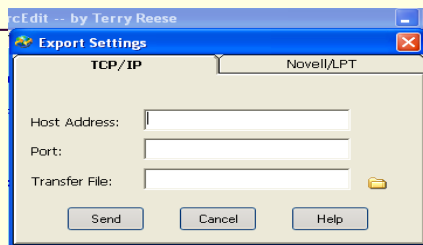
Delete/Extract Selected Records



- Open a file, select records to edit and export to separate file, or select records to delete.

Allows you to look at a single field from a given list of records, and select records visually or by search to extract or delete from the file based on that field.

Export MARC Records



- Export records from MarcEdit to your catalog, exactly like OCLC Gateway export.

OhioLINK libraries without III FTS -- take note!

OhioLINK libraries: If you locally load records for OhioLINK ebooks, streaming video, and don't have FTS, this may allow you to batch process these instead of retrieving one-by-one from OH1 save file.

Other Tools

- Export tab-delimited records
- Join MARC records
- Split MARC records
- Wizards
 - Diacritics – for adding support for diacritics not available in default MarcEdit
 - Plug-in – for adding software plug-ins to MarcEdit

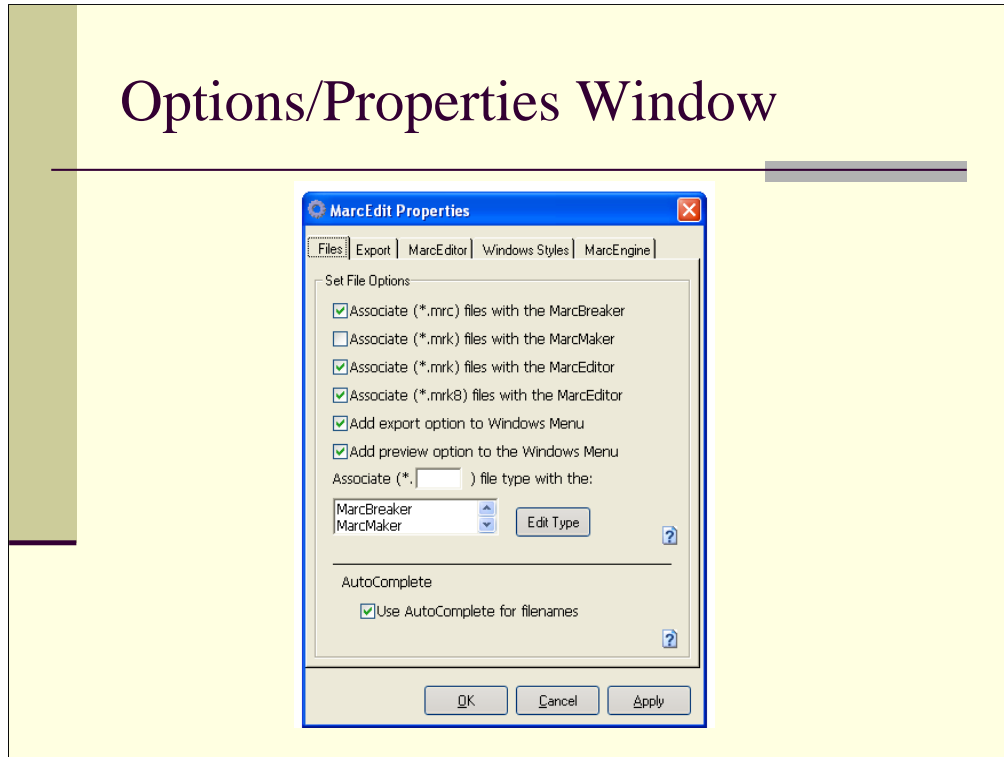
After Export, Join and Split ----

Wizards:

Diacritics: original diacritic set brought over from LC MarcBreakr; this wizard brings in diacritics added since then.

Plug-in: Users can write plug-ins for MarcEdit in Visual Basic. This wizard facilitates adding the plug-in to the program.

Options/Properties Window



Briefly describe:

Files: associations of file extensions with MarcEdit functions. Ex: III output files default to .out; could associate this with MarcBreaker.

Export: Put in OCLC Gateway export info (IP, port, timeout)

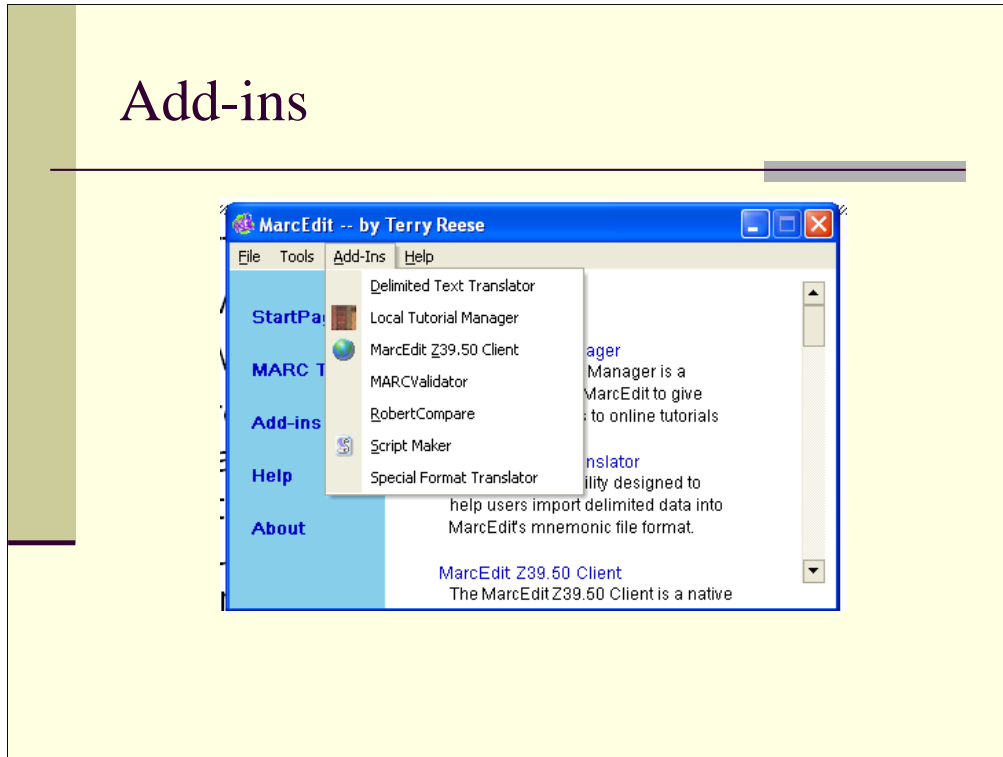
MarcEditor: Manage template files, editor defaults (font, etc.), and default character set.

Windows Styles: Classic or XP

MarcEngine: Diacritics checking, and XML options.

Refer to tutorial at Terry's website.

Add-ins



Describe these from the bottom up:

Special Format Translator: wizard for quick translations between MARC and some non-XML based bibliographic formats such as CDS-ISIS.

ScriptMaker: utility to help users create vbscripts to automate editing processes

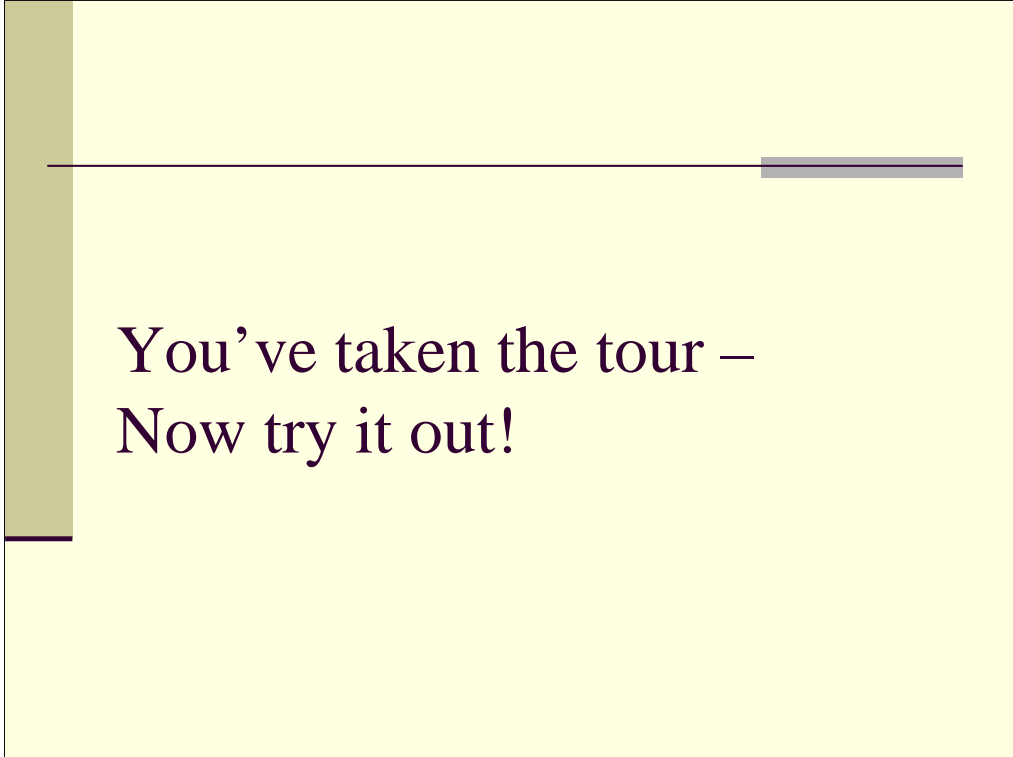
RobertCompare: allows comparisons between two iterations of a set of the same MARC records

MARCValidator: "lite-weight" MARC validator.

Z39.50 Client: allows one to search other catalogs and download records to PC

Local Tutorial Manager: if you create local MarcEdit tutorials, you can organize them here.

Delimited Text Translator: allows you to convert a delimited text file into a basic MARC file which can be opened in Marc Editor.



You've taken the tour –
Now try it out!

Example Uses

- OhioLINK streaming video records –
inserting 949 before loading to local III
- Marcive e-document records and items –
inserting 949 in records exported from III
- Gale Virtual Reference Library records –
*joining records, editing vendor-supplied
records for load to local III*

Example Uses – cont'd.

- Browsing Collection records –
creating brief bib, order and item records from Excel spreadsheet
- Music Library Service Co. records –
Creating brief bib and order records from vendor-supplied text file

OhioLINK video records

- FTP records from OhioLINK server to network drive
- Open MarcEdit "MARC Breaker" – select source and destination files
- Open resulting file in MARC Editor
- Tools > Edit Field Data: insert bib and item 949s

949 \\\$a*recs=b;bn=063ga;ct=10-23-06;b3=g

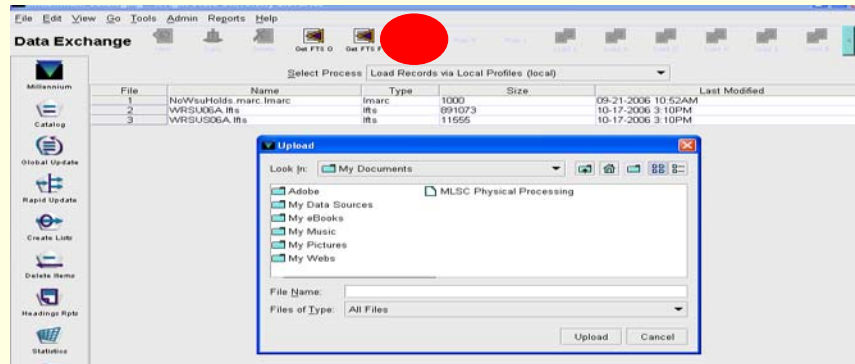
949 \1\$I06303\$t101\$s-\$rs\$cUL E-MEDIA ITEM

(These strings are saved as individual Notepad files)

- File > Make Current File into MARC

OhioLINK video records cont'd

- III – Data Exchange > Load MARC Records via Local Profiles
- Click “Get PC” icon, navigate to file on network drive
- Download file, changing file extension to .lfts
- Preprocess and load file

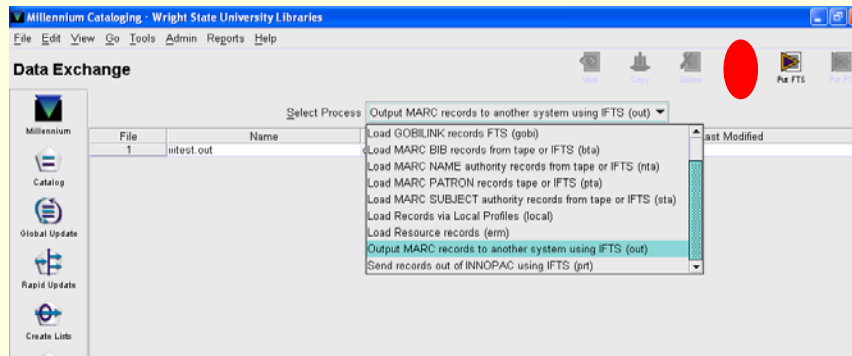


MARCIVE e-doc items

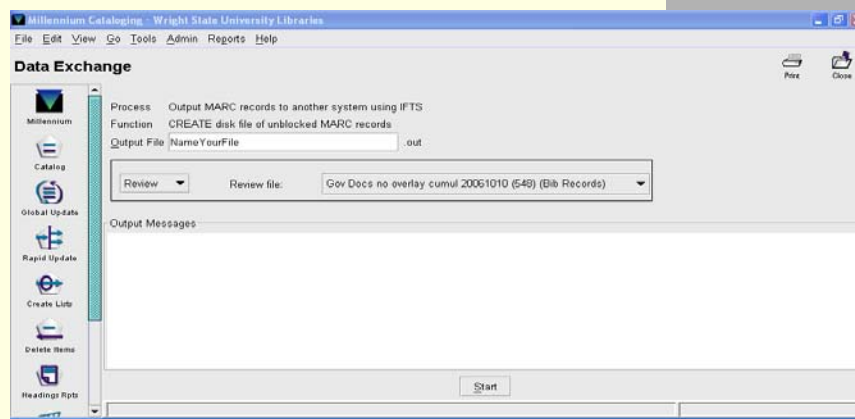
- After loading file of Online Docs records, go to Create List and create a review file using “Linked Record – does not exist – to item” as the criteria, and using the range from the Record Loading Statistics.
(You may be able to save a step by checking “Use Review Files” during record load.)

MARCIVE e-docs cont'd

- Output the review file to your network drive. (“Output” is found in Data Exchange, in the “Select Process” dropdown.)

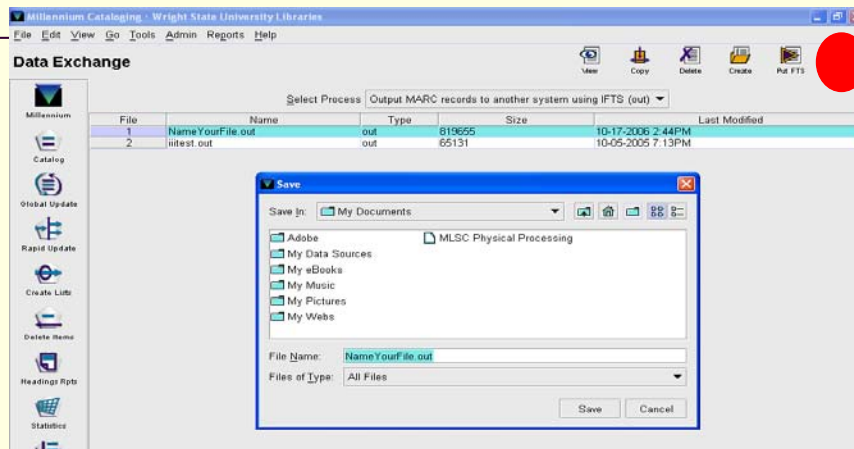


MARCIVE e-docs cont'd



- Name output file; change “Range” to “Review,” select file, and click “Start”
- After process runs, click “Close”

MARCIVE e-docs cont'd



- Highlight file, and click on “Put PC”
- Navigate to where you want to save file
- Delete file from Data Exchange

MARCIVE e-docs cont'd

- Run MarcEdit on these records to add the item 949 field:

949 \1\$I06301\$t104\$s-\$rs\$cUL E-DOCUMENT

- Reload the records

Gale Virtual Reference Library records

- Download archive file from Gale site
- Extract MARC records and save
- Use “Join MARC Records” utility in MarcEdit to gather records into one file.
(Start window, Tools menu)

GVRL records – cont'd

- Use MARC Editor to make the following changes:
 - a. Tools > Swap fields: make 001 in 002
 - b. Tools > Edit Subfield Data: add EZProxy prefix to 856
Field: 856 **Subfield:** u **Find:** ^b
Replace with:
<http://ezproxy.libraries.wright.edu:2048/login?url=>
 - c. Tools > Edit Field Data: insert 949 _1 and 949 __ lines
949 *recs=b;bn=063ga;ct=10-23-06;b3=z
(If replacing a brief record from package purchase, add
";ov=.b _____" to 949)
949 \1\$I06304\$t101\$s-\$rs\$cUL E-BOOK ITEM
 - d. Delete any self-serving 520s, look for other errors.
- 5. File > Make Current File into MARC
- 6. Load records into III.

Browsing Collection books

- Librarian purchases books at local retail outlet using procurement card, brings books and receipt to Tech Services
- Receipt goes to Acquisitions staff, who key payment on order record for “Browsing Collection, FY__”
- If spreadsheet provided by librarian, edit for obvious typos, remove initial articles, expand any abbreviated publisher names, etc. If librarian does not provide, create spreadsheet of ISBNs, authors, titles, and publishers.

Browsing Coll. cont'd

- Copy and paste ISBN, author, title and publisher columns of spreadsheet into a Word document. In Word, use Table > Convert > Table to Text, selected "tab" as delimiter.
- Save resulting document as a plain-text file. (Simply saving Excel file as tab-delimited text results in quote-marks around any field containing a comma; the Word step avoids this problem.)

Browsing Coll. cont'd

- Open MarcEdit. Under Add-Ins, select “Delimited Text Translator.”
- Select the tab-delimited text file, and map as follows
 - ISBN to 020\$a
 - Author to 100\$a set indicators to 1\
 - Title to 245\$a set indicators to 10
 - Publisher to 260\$b(This can be saved in a template within MarcEdit)
- When translation complete, go to MarcEdit start page, open MARC Editor, and select the newly-created file.

Browsing Coll. cont'd

- Select Tools > Edit Field data, and create a 949 field with the following text:

```
\\$a*recs=bo;ins=mjenkins;dflt=acqbib,mono;po=n;  
bn=060ga;br=06013;at=p;ot=r;fm=u;vd=books;fd=1brow;st=a;  
$z Paid on .oXXXXXXX, DATE MDJ
```

(.oXXXXXX represents the current "Browsing Collection" order record, DATE the month and year the item was purchased/loaded.)

- Then enter a second 949 field with the following text:

```
\1$I06013$t000$s-$rs
```

Browsing Coll. cont'd

- Go to File > Make Current File into MARC, save as a .mrc file.
- Go to Millennium, Data Exchange, load the records
- In Create List, run a review file to gather any new order records which had their status set to "1 – On Hold." These must be manually edited to "a – Fully Paid" one-by-one.

MLSC CD orders

On vendor website, selected items are listed to "Shopping Cart."
At bottom of page is "Export Shopping Cart" link.

Music Library Service Company		Online Ordering					
Shopping Cart							
QTY	Composer/Artist - Title	Label	Catalog No	PO Number	Price	Sub Total	Delete
<input type="checkbox"/>	BARTOK / MARTINU / KLEIN / ESCNEBACH / PHL CONCERTO FOR ORCHESTRA (HYBR)	ONDINE	1072	<input type="text"/>	\$17.36	\$17.36	Delete
<input type="checkbox"/>	HAGEN QUARTETT / BEETHOVEN LATE QUARTETS	DEUTSCHE GRAMMOPHON	000506302	<input type="text"/>	\$13.95	\$13.95	Delete
<input type="checkbox"/>	BERIO / HENSCHEL / ESCHENBACH / ORCHESTRE DE PARIS RENDERING STANCE	ONDINE	1059	<input type="text"/>	\$15.65	\$15.65	Delete
<input type="checkbox"/>	BERIO / ENOKSSON / GSO / EOTVOS SINFONIA EKPHRASIS (DIO)	DEUTSCHE GRAMMOPHON	000475902	<input type="text"/>	\$13.95	\$13.95	Delete
<input type="checkbox"/>	BRAHMS / SCHMITT-LEONARDY VARIATIONS FOR PIANO SOLO (HYBR)	BRILLIANT CLASSICS	92550	<input type="text"/>	\$9.09	\$9.09	Delete
Cart Total:						\$70.00	

MLSC cont'd

[Search](#)

[Browse](#)

[View Cart](#)

[Check Out](#)

[Logout](#)

Shopping Cart

In order to create a file of the shopping cart. Highlight all the lines below and use Edit/Copy and then Paste the information into the program of your choice.

QTY	ProdNo	Composer/Artist - Title	Label	Catalog No	PO Number	Price	Sub Total
1	OND1072SACD	BARTOK / MARTINU / KLEIN / ESCNEBACH / PHL - CONCERTO FOR ORCHESTRA (HYBR)	ONDINE	1072		\$17.36	\$17.36
1	DEGRB000506302	HAGEN QUARTETT / BEETHOVEN - LATE QUARTETS	DEUTSCHE GRAMMOPHON	000506302		\$13.95	\$13.95
1	OND1059	BERIO / HENSCHEL / ESCHENBACH / ORCHESTRE DE PARIS - RENDERING STANCE	ONDINE	1059		\$15.85	\$15.85
1	DEGRB000475902	BERIO / ENOKSSON / OSO / EOTVOS - SINFONIA EKPHRASIS (DIG)	DEUTSCHE GRAMMOPHON	000475902		\$13.95	\$13.95
1	BRLT92550SACD	BRAHMS / SCHMITT-LEONARDY - VARIATIONS FOR PIANO SOLO (HYBR)	BRILLIANT CLASSICS	92550		\$9.09	\$9.09

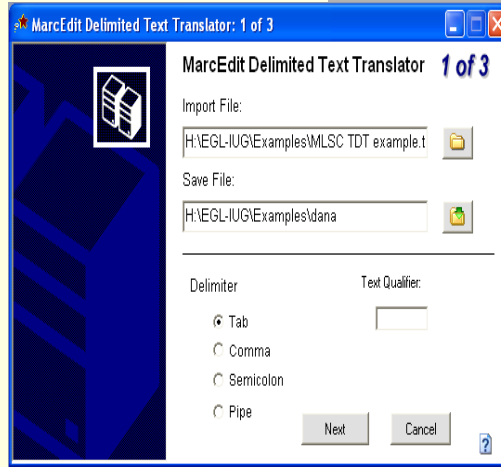
- Copy and paste this table into Excel or other program

MLSC – cont'd

	A	B	C	D	E	F	G	H
1	QTY	ProdNo	Composer/Artist - Title	Label	Catalog No	PO Number	Price	Sub Total
2	1	OND1072SACD	BARTOK / MARTINU / KLEIN / ESCNEBACH / PHL - CONCERTO FOR ORCHESTRA (HYBR)	ONDINE	1072		\$17.36	\$17.36
3	1	DEGRB000506302	HAGEN QUARTETT / BEETHOVEN - LATE QUARTETS	DEUTSCHE GRAMMOPHON	506302		\$13.95	\$13.95
4	1	OND1059	BERIO / HENSCHEL / ESCHENBACH / ORCHESTRE DE PARIS - RENDERING STANCE	ONDINE	1059		\$15.65	\$15.65
5	1	DEGRB000475902	BERIO / ENOKSSON / GSD / EOTVOS - SINFONIA EKPHRASIS (DIG)	DEUTSCHE GRAMMOPHON	475902		\$13.95	\$13.95
6	1	BRLT32550SACD	BRAHMS / SCHMITT-LEONARDY - VARIATIONS FOR PIANO SOLO (HYBR)	BRILLIANT CLASSICS	32550		\$9.09	\$9.09
7								
8								
9								
10								

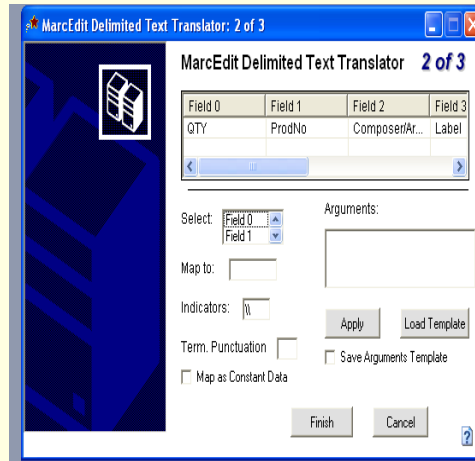
MLSC – cont'd

- Close Excel
- Open MarcEdit
- Click “Add-ins” then “Delimited Text Translator.”
- Identify input file and name output file



MLSC – cont'd

- Map fields to MARC tags as follows:
Field 1 – 028\$a
Field 2 – 245\$a
Field 3 – 260\$b
Field 6 – 500\$a
- Click “Finish”
- Open resulting file in Marc Editor



MLSC – cont'd

- Tools > Edit Field Data:

- Insert 949 for bib/order record:

- ```
\\$a*recs=bo;ins=mjenkins;dflt=acqbib,mono;po=n;
bn=031ga;br=03001;b2=j;at=p;ot=r;c2=j;fm=d;vd=musli;
fd=musre;ep= ; $z Ordered via website (www.mlscmusic.com)
```

- Cut price from 500 field, paste after ep= in 949; delete remainder of 500.

## MLSC – cont'd

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- File > Make Current File into MARC
- Millennium > Data Exchange > Load records into III. Check “Use Review Files.”
- After load, bring up review file, change orders with status=1 to status=0, and copy and paste order record numbers into “PO number” column on MLSC Shopping Cart.



Questions? Ideas?

Go forth and **PLAY!**