

Batch Processing with MarcEdit

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MarcEdit is a **freeware** program developed by Terry Reese of Oregon State University. It's primary purpose is to facilitate batch processing of records that is not possible within many ILS systems.

The MarcEdit home page is: <http://oregonstate.edu/~reese/marcedit/html/index.php>
Here you can find:

- The software for download
- Tutorials
- Detailed Help screens
- Plug-ins
- Known issues
- Forms for Bug reporting, Suggestions, and other Talkback
- “What’s new with MarcEdit”

“Macro”-level outline of typical use of MarcEdit

1. Gather a group of records for batch processing
 - File from an outside source
 - Records output from III
2. Run MarcEdit “MARC Breaker” to convert MARC file into human-readable text file
3. Open MARC Editor and edit records
 - Use Batch Editing Tools to make changes to all records in file
 - Make any edits needed in individual records by typing directly in the records
4. Make file into MARC
5. Load records into III.

MARC Editor conventions:

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

Example:

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

Notable Special Features

Delimited Text Translator – allows user to convert a tab-delimited text file into a basic MARC file which can be opened in the MARC Editor

Export MARC Records – allows user to export records directly into ILS, using same protocol as OCLC Gateway Export

Z39.50 Client – allows user to query other library systems and download records

Tools to Join, Split, Extract and Delete MARC records

Uses of MarcEdit at Wright State

1. Addition of 949 \ and 949 \1 lines to incoming OhioLINK supplied records. (Streaming video; ABC-Clio, Safari and netLibrary e-books)
2. Addition of 949 \1 lines to records exported from III catalog. (Monthly MARCIVE full bibs for online government documents which did not overlay an existing record.)
3. Vendor-supplied e-book records: joining single records into one file, adding EZproxy prefix to URL in 856, adding 949 lines, single-record editing as needed. (Gale Virtual Reference Library)
4. Creating brief bib records from Excel files and adding 949s for orders and/or items. (Browsing Collection books, orders from vendor websites, Music Department methods class instruments.)
5. Potential project: copying LC Classification numbers from bib records into item records for e-resources.

Examples of detailed procedures from Wright State.

Loading OhioLINK streaming video records

1. FTP records down from olc2.ohiolink.edu to H:drive
2. Open MarcEdit
 - Run MARC Breaker on file of records
 - Open Marc Editor
 - Use Edit Field Data to add bib and item 949s
 - 949 \ \$a*recs=b;bn=063ga;ct=mm-dd-yy;b3=g
 - 949 \1 \$l06303 \$t101 \$s-\$rs \$cUL E-MEDIA ITEM
 - (These strings are saved as Notepad files in the “bibrecords” folder on the H: drive; remember to change “mm-dd-yy” to today’s date.)
 - Make records into MARC
3. III – Data Exchange > Load MARC Records via Local Profiles
 - Get file from H: drive
 - Preprocess file
 - Load using TechPro loader
 - Print out loading stats screen

Excerpt from Monthly Gov Docs Load procedure involving MarcEdit

11. After load is complete, go to Create List, and create a review file of “New Records Created” during the load of Online docs records (WRSUOyym). Use “Linked Record – does not exist to – item” as the criteria, and set the range to search using the range from the Record Loading Statistics screen.
12. Output the review file. (“Output” is found in Date Exchange, on the Select Process dropdown, as “Output records to another system using IFTS.”)
13. Run MarcEdit on these records to add the 949 field for the item record:
949 \1\$106301\$t104s-\$rs\$cUL E-DOCUMENT
14. Reload these records

GVRL Bib Record Loading

1. Download archive file from Gale site; extract MARC records and save
2. Use “Join MARC Records” utility in MarcEdit to gather records into one file.
3. Use MARC Editor to make the following changes:
 - a. “Swap fields” to make 001 in 002
 - b. Use “Find and replace” to add EZProxy prefix to 856
Field: 856 Subfield: u Find: ^b
Replace with: http://ezproxy.libraries.wright.edu:2048/login?url=
 - c. Insert 949 _1 and 949 __ lines
949 __ *recs=b;bn=063ga;ct=mm-dd-yy;b3=z
(change “mm=dd=yy” to today’s date)
949 _1\$1 06304\$t101\$s-\$rs\$cUL E-BOOK ITEM
 - d. If replacing a brief record from package purchase, add “ov=.b_____” to 949
 - e. Delete any self-serving 520s, look for other errors.
4. Make file into MARC
5. Load into III using Local profiles, TechPro loader.

Browsing Collection procedures

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

Browsing Collection – cont'd.

4. 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.)

5. Open MARCedit. Under Add-Ins, select “delimited text translator.”

6. 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 1\
Publisher to 260\$b

(This information can be saved in a template within MARCedit)

7. When translation complete, go to MARCedit start page, open MARC editor, and select the newly-created file.

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

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

(This will create the item record, filling in Location, ITYPE, status and suppression)

Then enter a second 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
```

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

(These strings may be stored in Notepad files and pasted into MARCedit.)

9. Go to File > Make Current File into MARC, save as a .mrc file.

10. Go to Millennium, Data Exchange, and choose “Load Records via Local Profiles.”

11. Select “Get PC,” navigate to .mrc file, click Upload, and select file extension .lfts

12. Preprocess file and load using Loader T “Convert a PromptCat file .pcat”

13. 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.

14. Send books to processing staff to add barcodes, genre and filing labels, and unsuppress item records.

Kansas State University has also made basic MarcEdit instructions available on the web at:
<http://www.lib.ksu.edu/depts/techserv/manual/general/marcedit.html>