



SL

Alma and MarcEdit

Karen Stone
Manager, Description Services
State Library of Queensland

MarcEdit

- A metadata editing software suite used primarily to create and manipulate MARC records.
- Originally developed by Terry Reese in 1999 for a major database clean-up project at Oregon State University
- Is available for use on MacOS (10.8+), Linux, and Windows (XP+)
- Active User Community
 - Windows Users: ~20,000
 - MacOS Users: ~1,000
 - Linux Users: ~150



MarcEdit – an intro

Includes

- Global editing functions
- Full regular expression and UTF-8 support
- Ability to utilize any character set supported by the operating system.



MarcEdit – an intro

Functions -

- Globally Add/Delete Fields
- Edit Subfields
- Edit Indicators
- Swap/Copy/Find/Replace Field Data
- Build Records & Fields
- Generate Call Numbers & Cutters
- Validate Records & Headings
- Build linked records
- Convert AACR2 to RDA
- Dedup batches



MarcEdit – an intro

And...

- Direct Integration with Supported ILS system
- Macro support
- Task Support
- Delimited Text Translator
- Export tab Delimited
- OAI Harvest
- XML Translations
- Character set conversion
- MARC SQL Explorer



Alma interoperability

- Allows users to search, create, and update Alma records from within MarcEdit
- Instructions can be found at <http://blog.reeset.net/archives/1950>
- Configuration is simple but requires some 'prerequisites'



Alma interoperability - Prerequisites

- Requires an Alma API key that supports the Bib API and the User Api.
 - Must have read/write on the bib API
- Z39.50 access enabled in Alma

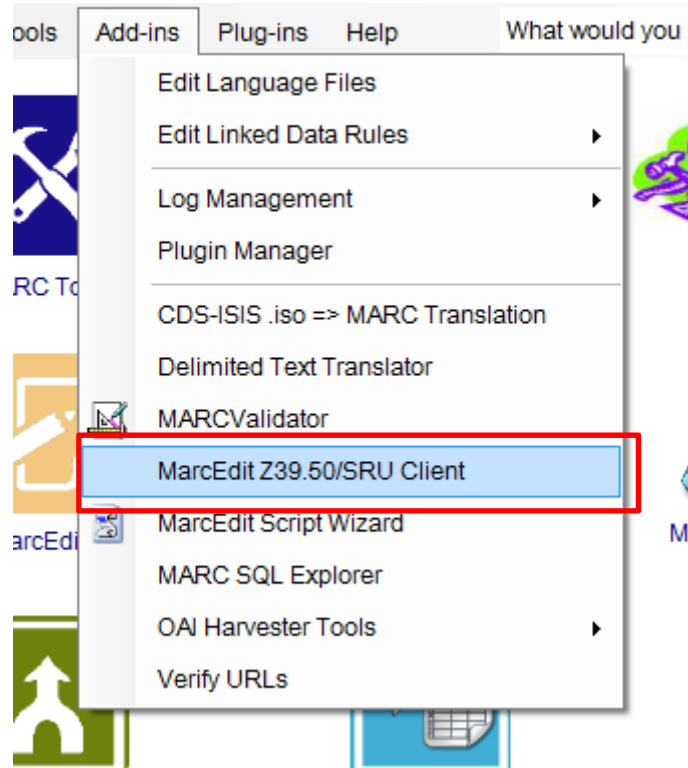



Alma interoperability - MarcEdit

- Z39.50 connection to your Alma Instance
 - Open the Z39.50 Client
 - Select Modify Databases



dit By Terry Reese



 MarcEdit Z39.50 Client


Search Mode

Batch Mode

**Modify
Databases**

Set Options

About Client

 MarcEdit Z39.50 Client

Search Mode

Batch Mode

**Modify
Databases**

Set Options

About Client

Select Database:

ID	Name	Type
1	Library of Congress	Z39.50
2	Oregon State University (INNOPAC)	Z39.50
3	OCLC Cataloging Service	Z39.50
4	Alma	Z39.50

Options

Add Database

Delete Database

Modify Database

Close

Database Properties

Database Properties Advanced Properties

Name:
Alma

Host:
ap01.alma.exlibrisgroup.com

Database:
61SLQ_INST

Port:
1921

Syntax:
MARC21

Username:

Password:

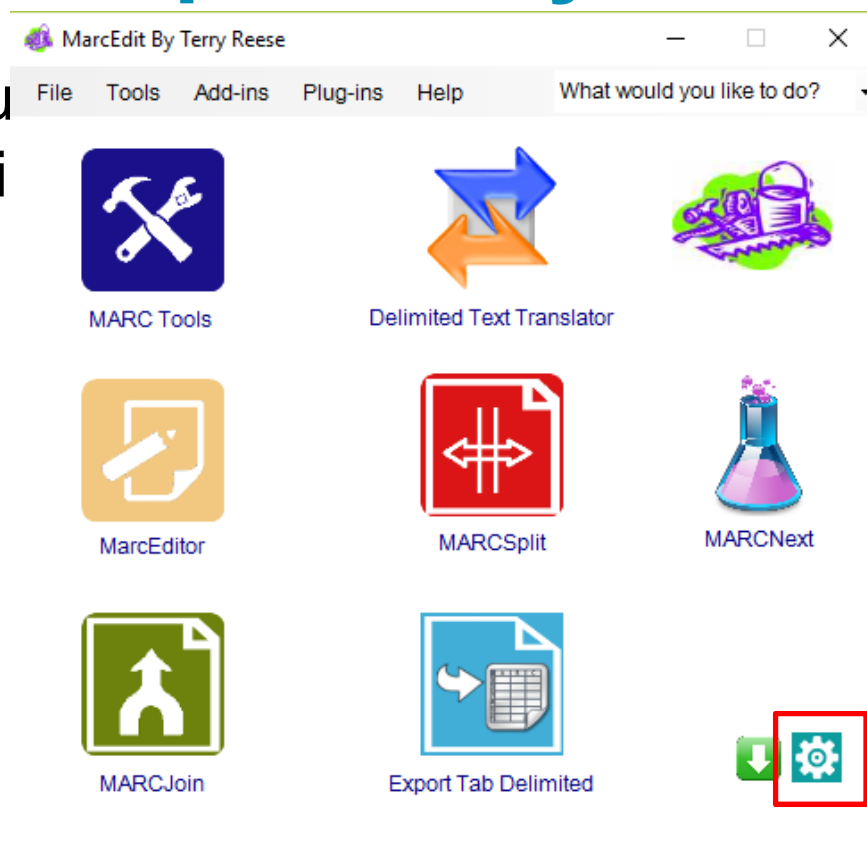
Override pause (6 secs.)

Show Database

Save Close

Alma interoperability - MarcEdit

- Setting up
- Starting



MarcEdit Preferences: Main Window Settings

Main Window

MarcEditor

Language

Export

MARCEngine

Updates

File Associations











Locations

Other

ILS Integration

OCLC API

Set Default Programs

-  Delimited Text Translator
-  MARC SQL Explorer
-  Harvest OAI Records
-  Z39.50/SRU Client
-  MARCJoin
-  MARCSplit
-  Merge Records
-  RDA Helper
-  MARCValidator
-  Export To Delimited

OK

Close

Apply

MarcEdit Preferences: ILS Integration

Main Window
MarcEditor
Language
Export
MARCEngine
Updates
File Associations
Locations
Other
ILS Integration
OCLC API

Select System:
Alma
Koha

Host Name:
https://api-ap.hosted.exlibrisgroup.com/

Username:
[Empty]

Password:
[Masked]

Ignore SSL Certificate Errors

Use Z39.50 Settings

[Select](#) | [Edit](#) | [Delete](#)

Enable ILS Options

Profiles:
default
Alma

[Add](#) | [Delete](#)

OK Close Apply

Main Window

MarcEditor

Language

Export

MARCEngine

Updates

File Associations

Locations

Other

ILS Integration

OCLC API

Select ILS

- Library of Congress
- Oregon State University (INNOPAC)
- OCLC Cataloging Service
- Alma

Select

s:
t

Delete

OK

Close

Apply

Alma interoperability

Editing batches

- From the MarcEdit menu
 - Select Alma
 - Select Search
- Select 'Batch search'
- Choose your match point – Record number for MMS ID
- Browse to your text file containing only a list of MMS IDs
- Click on the green arrow to search
- Select 'Download all items'




Hints

- Don't navigate away from the page



Z39.50 Capture

Query Database:
Alma

Search:
O:\Description Services\Projec  Record Numb  

Limit Batch Search

Options

[Select Database](#)

Retrieve Unicode
Server Character set

Results

Position	Title	Zone
0	Moreton 40 Chain map, sheet 12 south \$f...	IZ
1	Moreton 40 Chain map, sheet 12 south \$f...	IZ
2	Moreton 40 Chain map, sheet 11 south \$f...	IZ
3	Moreton 40 Chain map, sheet 11 south \$f...	IZ

[Download All Items](#) [Download All Holdings](#)

Alma interoperability

Editing batches

- Edit records as required
- From the MarcEdit menu
 - Select Alma
 - Select Update/Create

Hint

- Don't navigate away from the page



Alma interoperability

Editing Holdings

- Retrieve records in same way as for Bibliographic records
- Once batch is found
 - Select 'Download all holdings'



Alma interoperability

Editing a single record

- From the MarcEdit menu
 - Select Alma
 - Select Search
- Enter your search term
- Choose your match point
- Click on the green arrow to search
- Double click the search result to download the record



Alma interoperability

Editing more than one but not a batch?

- Search for second/subsequent records
- Double click to download.
- Accept the message 'Append to existing data in the MarcEditor'
- Edit as a batch

Hint

- Choosing no will delete the current record/s from the MarcEditor.
Any changes will be lost.



Alma interoperability

Large batches

- Time taken to search and update not conducive to large sets

Hint

- Export from Alma
- Edit in Marc Edit
- Reimport to Alma using MMS ID match & 'overlay' profile



Creating records

- Create basic record with unique data using CSV file
- Use Delimited Text Translator to create brief records
- Add default fields using MarcEdit tasks

Edit Task List

Task List Name:

Description:

Tasks:

SUBFIELD_EDIT	LDR	22:1	e	0	0 0
ADD	006	m#####d#####		100	
ADD	007	cr#mn#--auuuu		100	
SUBFIELD_EDIT	008	11:29	\\lqea s##### l 0 eng#d		0 0
ADD	040	\$aQSL\$beng\$cQSL\$dserda\$dQSL			101
INDICATOR	110	2	Council	1	
INDICATOR	110	2	Department		1
INDICATOR	245	0	\$c	1	
INDICATOR	245	00	\$aThe	04	
INDICATOR	245	10	\$aThe	14	
INDICATOR	245	00	\$aAn	03	
INDICATOR	245	10	\$aAn	13	
INDICATOR	245	00	\$aA	02	
INDICATOR	245	10	\$aA	12	
EDITFIELD	245	.\$b	1	.\$b	
EDITFIELD	245	.\$c	0	./\$c	
EDITFIELD	264	.\$b	0	.\$b	
EDITFIELD	264	.\$c	1	.\$c	
ADD	300	\$aonline resource (1 volume)		100	
ADD	336	\$atext\$2rdacontent		100	
ADD	337	\$acomputer\$2rdamedia		100	
ADD	338	\$aonline resource\$2rdacarrier		100	
ADD	347	\$atext file\$bPDF\$2rda		100	
ADD	500	\$aTitle from PDF cover page		100	
EDITFIELD	538	Onsite	0	Available online at the State Library of Queensland for onsite users only	
EDITFIELD	538	Open	1	Available online at the State Library of Queensland	
ADD	593	\$z	100		
SUBFIELD_EDIT	593	\$z		A copy of this item has been lodged as\$uhttp://www.siq.qld.gov.au/info/pw/legdep\$ylegal deposit	0 1
EDITFIELD	593	\$z	0	\\\$z	
INDICATOR	710	2	\$bCouncil	1	
INDICATOR	710	2	\$bDepartment	1	
ADD	852	8\$bEBOOKQM\$hinternet access		100	
ADD	856	40\$uhttp://hdl.handle.net/10462/pdf/XXXX\$zSLQ		100	
REPLACE	\$a	\\\$a	0	1	

Actions:

Save Close

Creating records

Then either -

- 'Send' to Alma using Z39.50
 - No items or holdings created
 - Cannot apply normalisation rules
 - Cannot suppress

Or

- Compile into Marc
- Import to Alma using normal import profile



Creating 'stub' records

Aim – add new fields to existing Alma records

- Merge with existing Alma records
- Import using MMS ID match and 'merge' profile



MarcEditor: 40chain-Moreton stub.mrk

File Edit Fonts Reports Tools Alma OCLC WorldCat Plug-ins Help



```
=LDR 0000nam 2200000la 45e0
=001 99183367189602061
=008 170502s9999\\bxl\\000\\0\\und\\d
=095 \\$a10462/deriv/448267
=245 \\$aMap of east & west Moreton embracing the watershed of the Brisbane River and of the Logan and Albert Rivers &c.
=856 \\$uhttp://hdl.handle.net/10462/deriv/448406$zView the map.
```

```
=LDR 0000nam 2200000la 45e0
=001 99183378416302061
=008 170502s9999\\bxl\\000\\0\\und\\d
=095 \\$a10462/deriv/448268
=245 \\$a"Moreton 40 Chain map, sheet 13a south"
=856 \\$uhttp://hdl.handle.net/10462/deriv/448409$zView the map.
```

```
=LDR 0000nam 2200000la 45e0
=001 99183378416402061
=008 170502s9999\\bxl\\000\\0\\und\\d
=095 \\$a10462/deriv/448269
=245 \\$a"Moreton 40 Chain map, sheet 13 south"
=856 \\$uhttp://hdl.handle.net/10462/deriv/448410$zView the map.
```

```
=LDR 0000nam 2200000la 45e0
=001 99183378416502061
=008 170502s9999\\bxl\\000\\0\\und\\d
=095 \\$a10462/deriv/448270
=245 \\$a"Moreton 40 Chain map, sheet 13 north"
=856 \\$uhttp://hdl.handle.net/10462/deriv/448411$zView the map.
```

Add 856/095

```
rule "Merge 856/095"
  when
    merge
  then
    add MARC."095"
    add MARC."856"
end
```

Pre Ingest Processing

Edit records prior to import to Alma

- Vendor MARC records
 - eBook bulk
 - EOD data - unique order numbers
- Use preset 'tasks' to speed up processing



More help?

- MarcEdit context sensitive help
- Terry's Worklog (<http://blog.reeset.net/>)
- YouTube Tutorials
- MarcEdit list



Thank you!

Karen Stone
e: karen.stone@slq.qld.gov.au





Queensland
Government

all yours