

Helpful hints: Before you begin, you will need [MarcEdit](#) installed on your computer. Most files for MARC records are saved in the default .mrc format. When you click to open a file, MarcEdit will convert it to a .mrk file. When you've finished, you will convert the .mrk back to a .mrc file.

MarcJoin / MarcSplit

These tools are useful for joining multiple MARC files together or splitting a large file (10,000 records or more) into smaller ones before processing. Note: joining multiple MARC files together may result in some duplication of records.

Special Note: Please see the instructions at the end of this file BEFORE loading multiple collections from the same vendor (e.g., JSTOR records)

To begin:

1. Launch MarcEdit, click on Marc Tools, click on the little yellow folder next to input file, then navigate to the file to edit. You will also need to designate an output file for the record by clicking on the yellow folder with green arrow and navigating to where you want the output file located.
2. Click "Execute." In the results window (lower left), note the number of records processed.
3. Click "Edit" to open the converted file and begin editing.

Batch editing

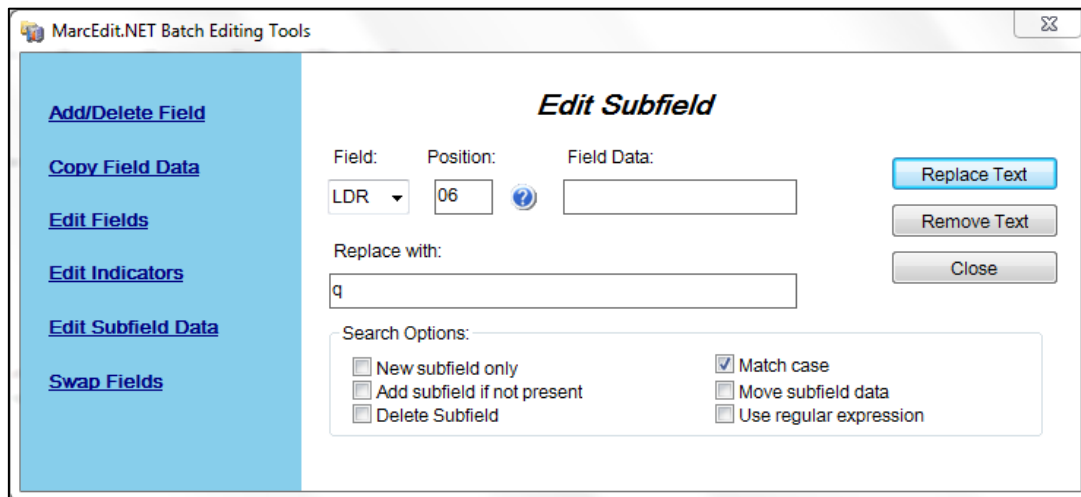
For almost all record changes, use F7 to pull up the edit screen.

Fields to Edit:

Leader: Need to change the default mattype to the letter that represents a mattype of "ebook" for your institution. In the example below, we change it to q (lowercase Q, indicates ebook in the HAL consortium)

1. Select "Edit Subfield Data" from the left menu.
2. Change Field: LDR, Position: 06, Field Data: (leave blank), Replace with: q (or your letter)
3. Click "Replace Text"

nam >> nqm = (new ___ monograph) >> (new ebook monograph)
cam >> cqm = (corrected ___ monograph) >> (corrected ebook monograph)



Batch Cataloging eBooks with MarcEdit -- Detailed

001: When loading record sets for databases, add a prefix for the collection name to all records regardless of the source of the records (see table later in this document). This will prevent bib records for one collection from being overlaid with records for another collection. We don't want to have 856 links for different collections in the same bib record as it makes it more difficult to delete records if we ever get rid of one collection. *Before you begin, scan the first few records' 001 fields to see if there is already a prefix (for example, OCLC records come with an ocn, on, or ocm prefix; ACLS Humanities EBook records come with a KOHA or MIU prefix). If there isn't a prefix supplied, read the To PREPEND note below the steps.*

1. Select "Edit Fields" from the left menu.
2. Field: 001, Find: [here is where you put the prefix you noted during your scan], Replace: [use 001 prefix from table].
3. Click Process. If you do not get 100% of records updated, scan for why not. For instance, most batches from OCLC have ocm, ocn, and on-prefix records, so we have to run this operation three times. Keep a calculator handy!

To PREPEND: if the 001 field does not have a prefix you can find/ replace, use the "Edit Subfield" function. In the Field Data field, put the characters **^b**. This will prepend your Replace: field prefix to the 001 already there. (You can use this prepend code for any field.)

003 *Use only if there is no 003 already.* This is the MARC code for the agency whose system control number is contained in field 001 (OCLC, Redo, Gale, etc.). Use [MARC Code List for Organizations](#) if you do not know the code.

049 Delete if present. (The bibliographic record location will pull from the item or check-in record overnight).
1. Select "Add/Delete Field," Field: 049, Field Data: leave blank
2. Click "Delete Field."

For JSTOR MARCs and other very detailed MARCs, HAL also deletes these fields: **019, 029, 035, 072, 590** (will add later), and **938**. These all junk up the records. Use [OCLC's Bibliographic Formats and Standards](#) to determine if certain fields are necessary.

590 This is a local note field. In it, we put the name of the collection and date added (refer to table later in this document for this). Consortial partners, think consortially – agree on terminology ahead of time; don't use acronyms only you understand.

Spot check to see if the 590 field is supplied by the vendor. If it isn't, use the directions below. If it is, delete the field first or edit it. If you do not, following the instructions below will simply add another 590.

1. Select "Add/ Delete Field," Field: 590, Field Data: `\\$aCollectionName and Date`

[You must add the indicators and tags.](#)

[Example: `\\$aJSTORDDA 01/15/16` or `\\$aGVRL 05/12/11`]

2. Click "Add Field."

690 This is a local subject field. In it, we indicate this is an Online resource.
1. Select "Add/ Delete Field," Field:690, Field Data: `\\$aOnline resource.`
[You must add the indicators and tags.](#)
2. Click "Add Field."

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710 This is a corporate name added entry. Frequently, this will already be in one of the 700 fields of the MARC record – so look around to be sure that you have the correct name. Also consider the way that previous ebook collections from the same publisher have been entered into HAL. Refer to the [table later in this document](#) for consistency.

1. Select “Add/ Delete Field,” Field: 710, Field Data: **2\5a**Company name (Alt Author)
[Example: **2\0a**JSTOR (Organization) or **2\5a**Gale Group]
You must add the indicators and tags. Note the “2” as the first indicator.
2. Click “Add Field.”

830 This is a series added note, and it is repeatable (so if it already exists in the records, simply add another 830 field). In this field, we put the title of the collection. Refer to the [table later in this document](#) for consistency.

1. Select “Add/Delete Field,” Field: 830, Field Data: **\?5a**Collection title (Series)
[Example: **\0a**JSTOR Books or **\5a**This Example]
You must add the indicators and tags. The second indicator depends on collection title. Check note below for indicators.

<i>First Indicator</i>	<i>Second Indicator</i>
<i>Undefined</i>	<i>Nonfiling characters</i>
<i># - Undefined</i>	<i>0 - No nonfiling characters</i>
	<i>1-9 - Number of nonfiling characters</i>
2. Click “Add Field.”

856 This is the URL field. If you are entering a **load for one location**, use these steps:

1. Select “Edit Subfield Data”
2. Field: 856, Subfield: **u**, Field Data: **^b** (to prepend),
 - a. Put your proxy information in the “replace with” field.
For example, King would replace with: <http://ezproxy.king.edu/login?url=>
 - b. Click Replace Text.
3. Select “Edit Subfield Data” again.
4. Field 856, Subfield: **z**, Field Data: (Leave blank), Replace with: (see table for wording). If no subfield z already present, you will need to use the checkbox “Add subfield if not present” before clicking on “Replace Text.”
5. If a subfield 3 is present, select “Edit Subfield Data,” Field: 856, Subfield: 3, Field Data: [blank], Replace with: [blank]
6. Click “Remove Text.”

The end goal is for the 856 field to look like (this example is for King):

856 40\$uhttp://ezproxy.king.edu/login?url=[[vendor-supplied URL](#)]\$zaccess for King patrons

If you are entering loads for **more than one location**, you will need to follow the steps below *in order*. Our example below uses King University and Emory & Henry College. We will first modify the 856 field for Emory & Henry (b/c it is alphabetically first), copy it to an 857 field and modify it for King, then copy the 857 field back to an 856. *Note: Check vendor-provided URLs for any necessary location codes – esp. for Gale (vic_etc / tel_a_king) and work them into the steps below as needed.*

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The end goal is for the edited records to look something like this:

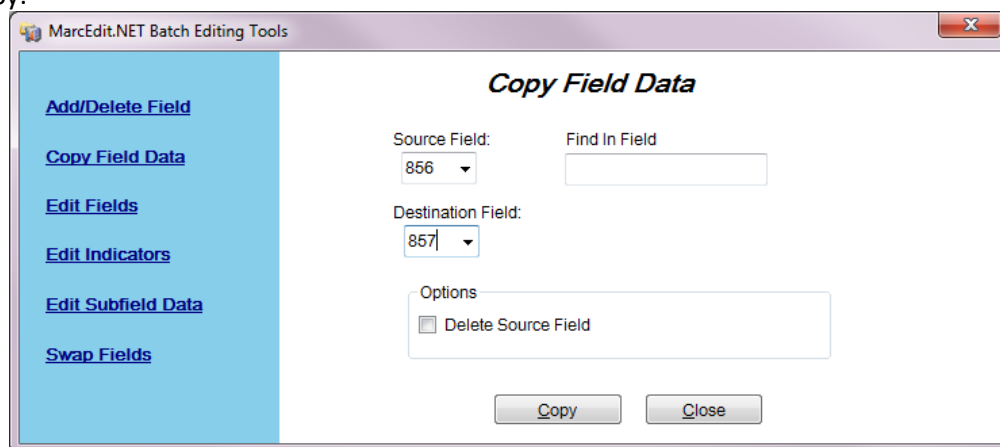
856 40\$uhttp://ezproxy.ehc.edu:2048/login?url=[vendor URL]\$zaccess for E&H patrons

856 40\$uhttp://ezproxy.king.edu/login?url=[vendor URL]\$zaccess for King patrons

1. Select "Edit Subfield Data," Field: 856, Subfield: u, Field Data: ^b (to prepend), Replace with: http://ezproxy.ehc.edu:2048/login?url=
2. Click "Replace Text"
3. Select "Edit Subfield Data," Field: 856, Subfield: z, Field Data: [blank], Replace with: access for E&H patrons [check [table later in document](#) for exact wording], and be sure under "Search Options" the checkbox for "Add subfield if not present" is checked and "Match case" is unchecked.
4. Click "Replace Text"
5. If a subfield 3 is present, select "Edit Subfield Data," Field: 856, Subfield: 3, Field Data: [blank], Replace with: [blank]
6. Click "Remove Text"

Now we have successfully updated the 856 field for Emory & Henry and need to do the same for King University. (Note, if you are doing a batch for King *only*, simply use the steps above but use King's information instead).

7. Select "Copy Field Data," Source Field: 856, Destination Field: 857.
8. Click "Copy."



9. Select "Edit Subfield Data." Field: 857, Subfield: u, Field Data: ehc.edu:2048, Replace with: king.edu
10. Click "Replace Text"
11. Select "Edit Subfield Data," Field: 857, Subfield: z, Field Data: E&H, Replace with: King. "Match case" is checked (since the field already exists).
12. Click "Replace Text"

Now, to change King's URL field back to an 856:

13. Select "Copy Field Data," Source Field: 857, Destination Field: 856, and check box for Delete Source Field.
14. Click "Copy."

938 Delete if present. (This field is for vendor-specific ordering data. When multiple vendors are listed, it junks up the record.)

949 Creates item record information. [Always end command line\(s\) with a semicolon](#) (db programming)

1. Click "Add/ Delete Field," Field: 949, Field Data: (select from A or B below)
[You must add the indicators and tags.](#)
2. Click "Add Field"

A. Adding records for 1 institution:

`\\$a*ins=(your sierra login);dflt=(item template)/loc=(item location);ct=mmddy;`

Example: `\\$a*ins=kklp;dflt=kelrs/loc=kelrs;ct=mmddy;`

B. Adding records for 2+ institutions:

`\\$a*ins=(your Sierra login); dflt=(inst #1 item template)/loc=(inst #1 item location)/ag=x(institution #1 agency code); dflt=(inst #2 item template)/loc=(inst #2 item location);ct=mmddy;`

Example: `\\$a*ins=kklp;dflt=electrs/loc=eelrs/ag=1;dflt=kelrs/loc=kelrs;ct=mmddy;`

Note: the `/ag=x` code only works if the load profile is set up to accommodate it. If the load profile isn't set up that way, you can update the agency code of the institution after loading the records into Sierra. See page 9 **To Update Agency Codes.**

This will create 2 item records for electronic resource locations for E&H and King and will make sure the E&H item record has an agency code of that institution. The cat date must be added at the end of the command string if any of the consortium libraries use SkyRiver.

Now you are finished editing the MARC records. Scan first few records for errors, then:

1. Close editing window
2. Click File→Compile File into Marc (.mrc) which is computer readable. Strongly suggested that you change the name of the file when you save it to distinguish it from—and preserve--the original. Use labels that connect the edited file to the original (vendor name, load type, file date, etc.)
3. Note the location you saved the file.

You need to do this to be able to load it in Sierra.

Then use the **Process for adding Ebook Marcs to Sierra** later in this document.

Overlaying Records (Merges, Updates, or Deletes):

Updating Records (Quick Guide): Use the detailed steps above as needed.

If you need to update records by overlaying, be sure to edit:

LDR

001 (be sure matches)

Delete all unwanted fields: 029, 035, 049, 072, **856**, 938

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590

710

830

856 (delete, so doesn't add to what's in the record)

949 IMPORTANT: you must use the overlay code below. If you use the 949 as described above, the field will not overlay existing bib records and will create duplicate item records.

If reloading the same bibs use =949 `\\$a*ins=[your Sierra login];ov=o;ct=mmddy;`

Example: `\\$a*ins=kklp;ov=o;ct=mmddy;`

Now you are finished editing the MARC records. Scan first few records for errors, then:

4. Close editing window
5. Click File→Compile File into Marc (.mrc) which is computer readable. Strongly suggested that you change the name of the file when you save it to distinguish it from—and preserve--the original. Use labels that connect the edited file to the original (vendor name, load type, file date, etc.)
6. Note the location you saved the file.

You need to do this to be able to load it in Sierra.

Then use the **Process for adding Ebook Marcs to Sierra** later in this document.

Deleting Records(Quick Guide): Use the detailed steps above as needed.

If you need to delete records, be sure to edit

001 (be sure matches)

590 `\\$aDELETEME`

949 `\\$a*ins=(your Sierra login);ov=o;ct=mmddy;`

Now you are finished editing the MARC records. Scan first few records for errors, then:

7. Close editing window
8. Click File→Compile File into Marc (.mrc) which is computer readable. Strongly suggested that you change the name of the file when you save it to distinguish it from—and preserve--the original. Use labels that connect the edited file to the original (vendor name, load type, file date, etc.)
9. Note the location you saved the file.

You need to do this to be able to load it in Sierra.

1. Load records into Sierra using the **Process for adding ebook Marcs to Sierra** (below).

Theoretically, the 001s will overlay. Sometimes they don't quite match. Scan to see what differences there might be between the older records in Sierra and the records to delete. Usually you can tell by scanning both records for one or two titles. You may need to create a separate file and run through the process again to catch the 001s that didn't match the first time.

2. After you are satisfied that you have overlaid the bibs, do a Create List function on all bibs with the 590 field of DELETEME.
3. In the Cataloging menu, select Delete Records.
4. Choose the review file to delete. Click "start"
5. On the lefthand side, select "Delete the listed bibliographic record AND all attached records"
6. Click "Delete Records"
7. When finished, Print, Email printer(send the list of deletes to your e-mail).

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Process for adding e-book MARCs into Sierra

1. Login to Sierra.
2. Choose Data Exchange (Function drop down).
3. In the center of your screen, look for the dropdown menu, "Select Process." Choose the process for your institution in the drop down. King's is "Load Records via Local Profiles (local)." Check with your Sierra Administrator if you do not know which to choose.
4. Choose Get PC (upper right).
5. Pick the .mrc file to load. Choose the proper file suffix in the drop down menu. King's is ".lfts"
6. Select/highlight your loaded file by clicking on any part of it. Click Prep. A new window opens. Click start.
7. Check for errors: make sure all records and items are tested without errors. Click close.
8. A new file has been created: filename.lmarc. Select/highlight that file.
9. Choose Load. A new window will open.
10. Select the load action for your institution. King's is "LOAD m2btab.othermarc MARC file"
11. Click Test. Look at the results screen for overlaps, errors, and bib and item counts. Make sure all your records will load without errors. (If they won't, click Print and Email Printer to email the load to yourself, where you can CTRL-F to find the record errors and check them in Sierra.)
12. Once that is complete, click Load. A report of the load will appear.
13. Before you close the window, select Print>>Email Printer. Email the file to yourself. If doing consortial loads, send a copy to the other library/ies.

To Update Agency Codes:

(This is if your Load Profile doesn't update the Agency codes automatically)

After you've successfully loaded the records in Sierra,

1. In Sierra, choose "Create Lists" and select a suitable-sized file. Name the file a distinct label.
2. Do an item search using the following (example is as though were loading from King for Emory & Henry):

Type	Field	Condition	Value
Item	Created (83)	= (equals)	mmddy(cat date of records loaded)
Item	location (79)	h (has)	eelrs (E&H's item loc)
Item	agency (127)	! (not equal to)	1 (E&H's agency code)

The list then generated should equal exactly half the item records uploaded in the batch.

3. Now choose "Rapid Update" from the upper righthand drop down menu.
4. Record type to modify: Item
5. Choose correct list # and name you just created.
6. In the middle of the page, choose Field=127 (agency), Value=X (where X is the correct agency code), tab out, then click "start" (upper right). This should update all of X institution's items in the batch to their correct agency code.

Special Instructions for JSTOR ebook files:

MARC records for JSTOR EBA, DDA, Purchased, and Open Access Books come in groups of four for each set: new, merges, updates, and deletes files. You should always load the files by date and in order: new, merged, updated, deleted. Always load EBA records first (EBA New, EBA Merged, EBA Merged/Updated, EBA Deleted); DDA records second (DDA New, DDA Merged, DDA Merged/Updated, DDA Deleted); add JSTOR Purchased records third (Purchased New, Purchased Updated, Purchased Deleted); add JSTOR OAB books last (OAB New, OAB Merged, OAB Merged/Updated, OAB Deleted).

New: process as described in previous pages.

Merged BEFORE LOAD, manually update 001 in Sierra. Then MARCJoin with corresponding Updated file and edit.

Updated: process as described in previous pages. If you have issues with loading the files, see **Troubleshooting Update Files that Don't Overlay** section below.

Deleted: process as described in previous pages.

Troubleshooting Update Files that Don't Overlay

(Update 2017: Worldcat updates to record processing made the steps below mostly unnecessary, but it helps to have them, just in case.)

Keep the e-mail report generated from OCLC WorldShare for the updated file. This will help you determine a few things that need to be changed before you process the updated file's MARCs. The order of this process is important, because a regular update/ overlay will not work without updating the changed 001s and URLs first. There have also been some "new" files intermingled, which need to be created first before the updates can overlay.

1. Open the .xls spreadsheet of the updated files from OCLC.
2. In the "Action" column, apply a filter and include only "new." (If this doesn't show as an option, that means there are no new records intermingled with the updated, and you can skip to the next section.)
3. You will need to open the Updates MARC file to extract these records.

To extract records from a batch in MarcEdit:

1. Double click to open "update" file via MarcEdit
2. Click "execute" button
3. Click "edit records" button
4. Under "file" drop-down menu, select "select individual record(s) to make"
5. Click "import file" button
6. Check the "retain checked items" box
7. Enter each title (or part thereof) into search box and click <enter>
8. Click "ok" button to pop-up indicator of # of records found (ideally would be 1)
9. Repeat steps 7 & 8 for each title to put in new file
10. When finished, click "export selected" button

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11. Click "ok" to "selected records have been extracted" pop-up
 12. Under "file" drop-down, select "compile file into marc" option
 13. Name and save file
- Exit from MARCedit

In that newly created file, use the F7 feature to delete any Ebsco 856s in the new file (if they are there). [King had received intermingled records for Ebsco and JSTORDDA for a while.]

Prepare and upload the new-as-updated MARCs to Sierra as you would new files.

4. Updated 001s and 856s (urls): back in the .xls from OCLC, filter the "Update Reason" column to include all OCLC Control number (001) changes (run a search to include all 'OCLC') and the URL changes (mine says KB URL change). You will need to go through this list title-by-title and manually make the changes in Sierra. This means you will be working in both Sierra, the .xls, and the MARC file simultaneously. **NOTE: As of 8/11/17, OCLC is now generating a MERGE batch of only those records that have updated 001 fields. Follow the instructions included here, then process as you would a normal update file to catch any extra changes (or, you can use MARCjoin to join the MERGE batch to the UPDATE match and then process as normal updates).**

001: be sure to only change out the numbers after the JSTORDDA in the field. This will ensure proper overlay.

856: be sure to change in both 856 fields (E&H and King). Usually just need to change the ending number.

After making these changes manually, proceed to process the update file as indicated in the previous pages. There will likely be a few new that fail to overlay and were marked as updates. You will need to extract these after the "test" run and before the "load," go back to the original MARC file and process them as new. When those have all been loaded as new, you may go back to the update file and it should overlay with no issues.