

## MARCEdit Instructions for Orbis Cascade Alliance (Alma libraries) : WEST Cycle 5 (2014) File Conversion and Cleanup

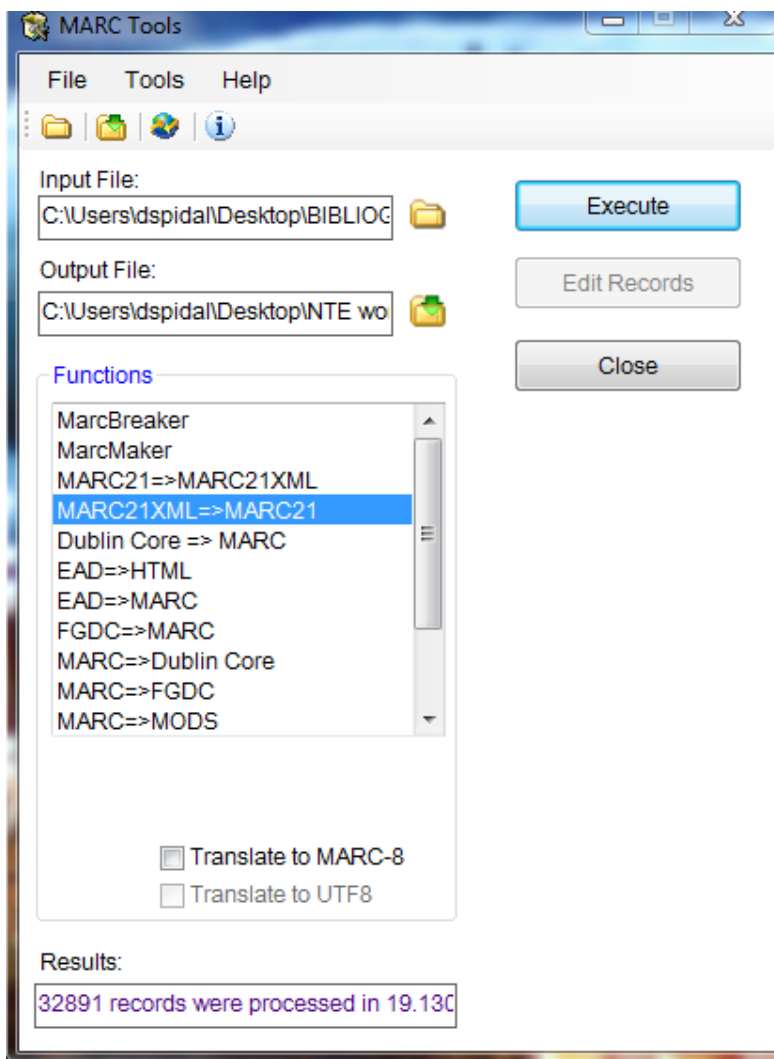
October 14, 2014

### File cleanup

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1. Use MARCEdit to convert the XML file to binary.

- Open MARCEdit
- Select the MARC Tools icon (not the pull-down “Tools”).
- Select MARC21 XML=>MARC21 from the functions list.
- Input File > select your .xml
- Output File > name your .mrc file
- Execute
- Close when finished



The results record number should match the record number exported from Alma.

Now convert the file to readable .mrk format.

- Open MARCEdit
- Select MarcEditor
- File > Open > Select your .mrc file

It should open in .mrk format. If your file is large you may see a link Load entire file and will want to do so before proceeding with cleanup.

Use the pull-down Reports > Field Count to again verify all records are in your file. Close the .mrk file.

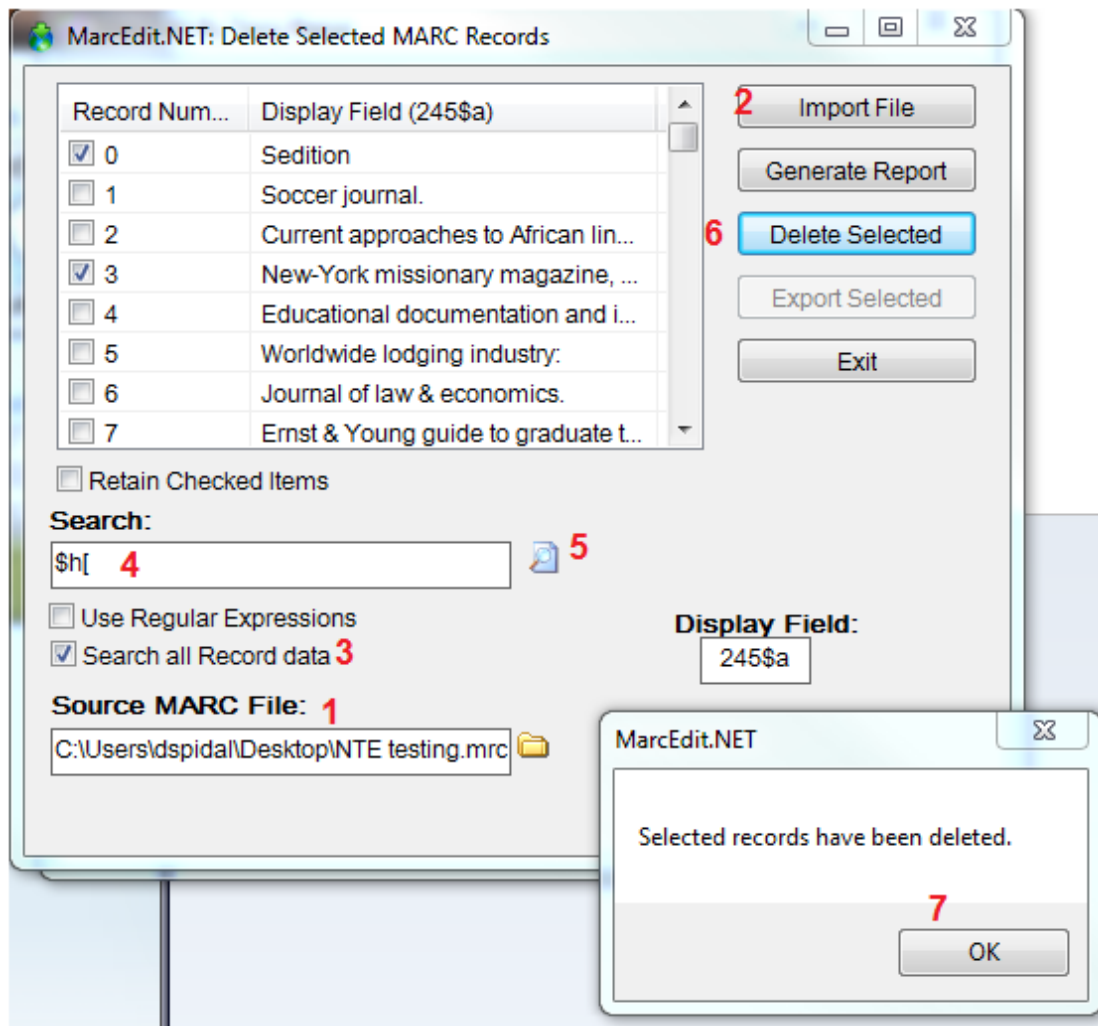
2. Use MARCEdit to search and remove additional non-print records.



- Go back to main MARCEdit Screen.
- Select the pull-down Tools > Select MARC Records > Delete selected records

1. Source MARC file > Select your file (.mrc is the default, you will need to change that to .mrk to find your working file.)

2. Import file
3. Check the box “Search all record data”
4. Search box > enter criteria (I used \$h[ ) and begin search [Choosing which criteria to use and how to do it, especially if you need to use regular expressions, will be the biggest challenge in this process.]
5. Delete selected > follow prompts (this will be your new working file, name it appropriately)
6. Exit

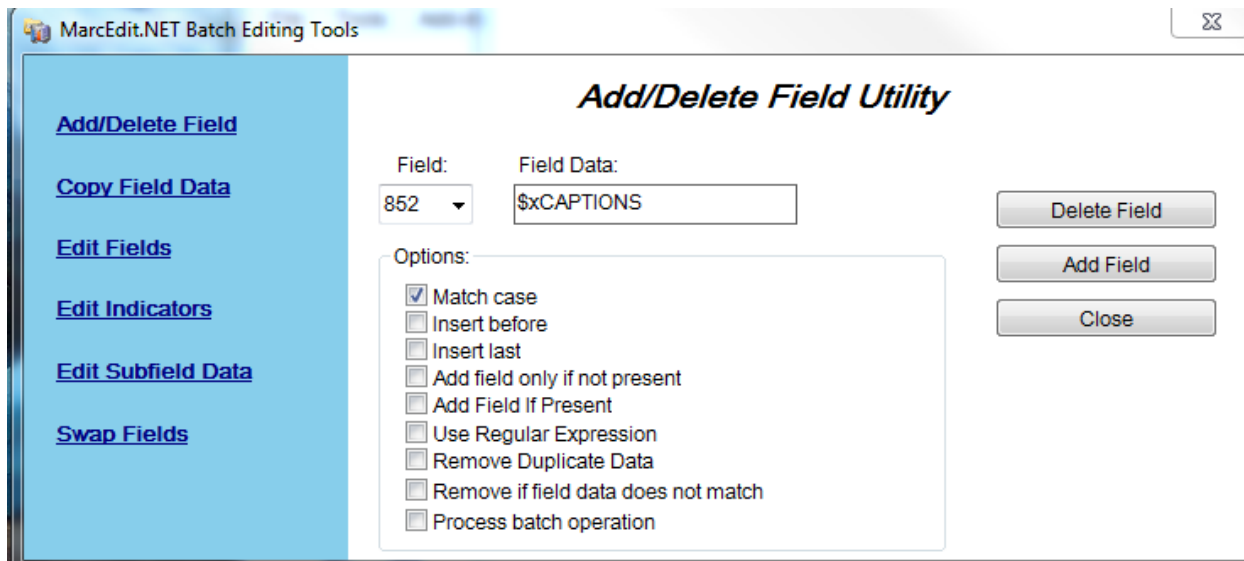


3. Open your latest .mrk file, and use MARCEdit to search and remove government documents (074 present in bibliographic record) using the same Delete Selected Records tool.

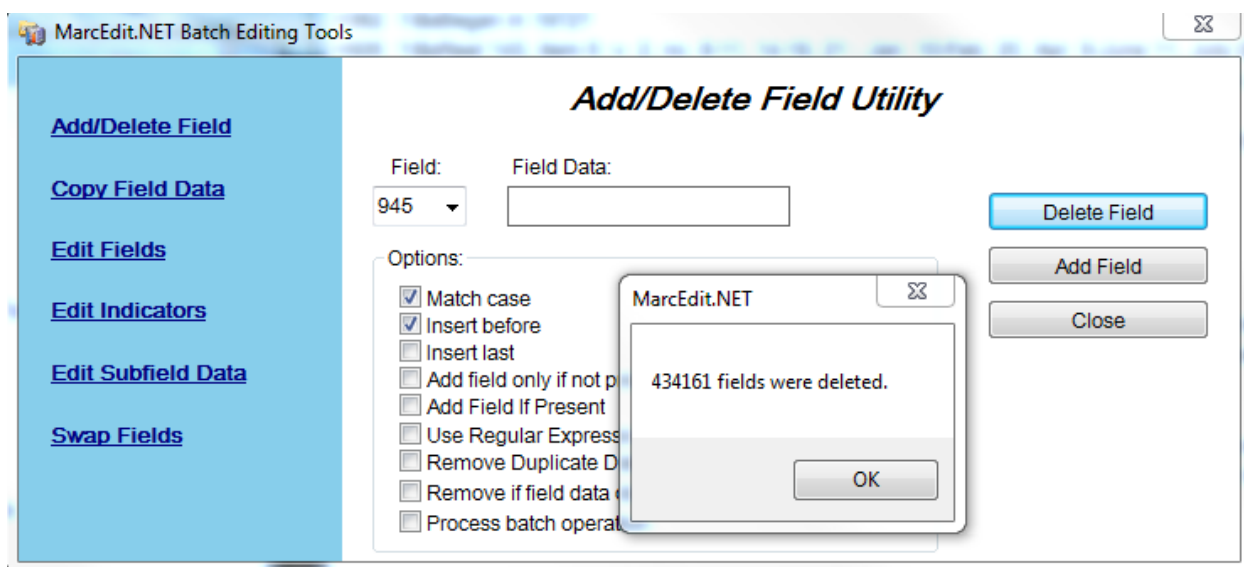
Follow instructions above using appropriate search criteria for your institution such as locations or presence of MARC tag 074

4. Use MARCEdit to remove the second 852 generated during migration to store checkin record notes.

- Open the latest version of .mark file in MarcEditor
- Use the pull down Tools > Add/Delete Field Utility
- Enter criteria appropriate for your institutions data, below is an example.



I also chose to remove all 945 fields that were added during migration with item data as being extraneous.



5. Use MARCEdit to compile file when you are satisfied that it meets WEST requirement

- File > compile file into MARC

Compile will change file from .mrk to .mrc This is the file you will submit to WEST

All Holdings records linked to a bibliographic record are exported during this process. Exclusion or inclusion is at the Bibliographic record level not the Holdings record level. WEST is aware of this issue and has asked that we follow the instructions for completing the WEST Holdings Data Spreadsheet very carefully to identify locations in the files that should be ignored.

Follow WEST instructions for naming and submission of the files and the accompanying Holdings Data Spreadsheets.