



Getting Started with



MARC Magician

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You will also find detailed information about how to use MARC Magician Professional in the Help section of the program, by selecting Help from the menu and then Help Topics.

This tutorial requires a basic knowledge of how to use Windows and Windows based products, including opening and closing windows, minimizing and maximizing windows, and using menus and search boxes.

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This booklet has instructions for installing and starting MARC Magician Professional as well as a brief overview of its functions. It assumes a basic knowledge of Windows and Windows-based functions, including opening and closing programs, minimizing and maximizing windows and the use of menus and search boxes.

You will also find detailed information about how to use MARC Magician Professional in the Help section of the program, by selecting Help from the menu and then Help Topics.

What is MARC Magician Professional?

Powerful tools make a powerful impact on your work and Mitinet's MARC Magician™ is the most powerful tool on the market today for MARC record creation and maintenance.

NOTE: See the MARC Magician Professional Help Topics for detailed information about the program, including import and export instructions and a Cataloger's Reference Guide. You can also look at the Tutorials in the Support section of our web site, www.mitinet.com, for step-by-step examples.

Here are just some of the benefits of MARC Magician:

Edit your data faster

- Fix inconsistencies in your call numbers
- Use built in MARC codes & rules to catalog or fix records, such as AACR2
- Set up the fields you want to edit in a few steps with our Global Editing, and let MARC Magician do the rest
- Maximize the value and discoverability of your library's materials

Find & Fix Errors Easier

- Use our customizable **Active Error Checking** to find missing information, punctuation and non-filing indicators and other common errors.
- Record errors are clearly flagged and MARC Magician even points out the error type, saving you time in corrections

Features

Global editing

A fast and powerful way to clean up MARC records, **MARC Magician Professional** provides global editing commands for:

- Checking spelling (American, British, French, and Spanish dictionaries)
- Finding and replacing text
- Changing the material type (for example, changing books to videos)
- Deleting fields and subfields
- Converting uppercase fields to correct capitalization

Active Error Checking

Active Error Checking™ helps you spot potential problems with your records by flagging records that don't meet certain criteria and showing you what you need to do to fix them. Use the program options to define the types of mistakes and omissions that should be considered errors.

Easy cataloging

- Create quality MARC records without learning complicated MARC rules.
- Information panels provide real-life examples, cataloging tips, and AACR2 rule numbers for most subfields. The **Active Error Checking** panel lets you know if the record you create meets the cataloging standards you specify.
- Spellcheck your records using American, British, French, and Spanish dictionaries.
- Set non-filing indicators and insert the correct ISBD punctuation, automatically.
- Standard templates cover every type of library material you catalog. Add often-used fields to all standard templates at once or create your own custom templates.
- The **Cataloger's Reference** (found in the **Help Topics**) provides in-depth information and examples for most MARC fields and subfields.

Other features

- The **MARC Magician Professional Help Topics** contain detailed program information in an organized, easy-to-use format. Topics include specific instructions on importing and exporting your records, and a **Cataloger's Reference** with detailed cataloging information.
- The **Record Viewer** lets you browse through a large number of records quickly.
- Easily check your records before exporting or printing them.
- Automatic record repair automatically checks imported records for structural accuracy and corrects ISBD punctuation, non-filing indicators, GMD, invalid indicators, and invalid control fields.

Installing & Starting the Program

The Startup Wizard helps you to choose some of the options that you need when you work with MARC Magician Professional. To use the Startup Wizard (Magician rolling out a red carpet) enter the access key you received in your introductory email. Follow the Startup Wizard instructions on your screen.

To start MARC Magician, double-click the icon on your desktop.

Using MARC Magician Professional to Create, Edit, and Organize Records

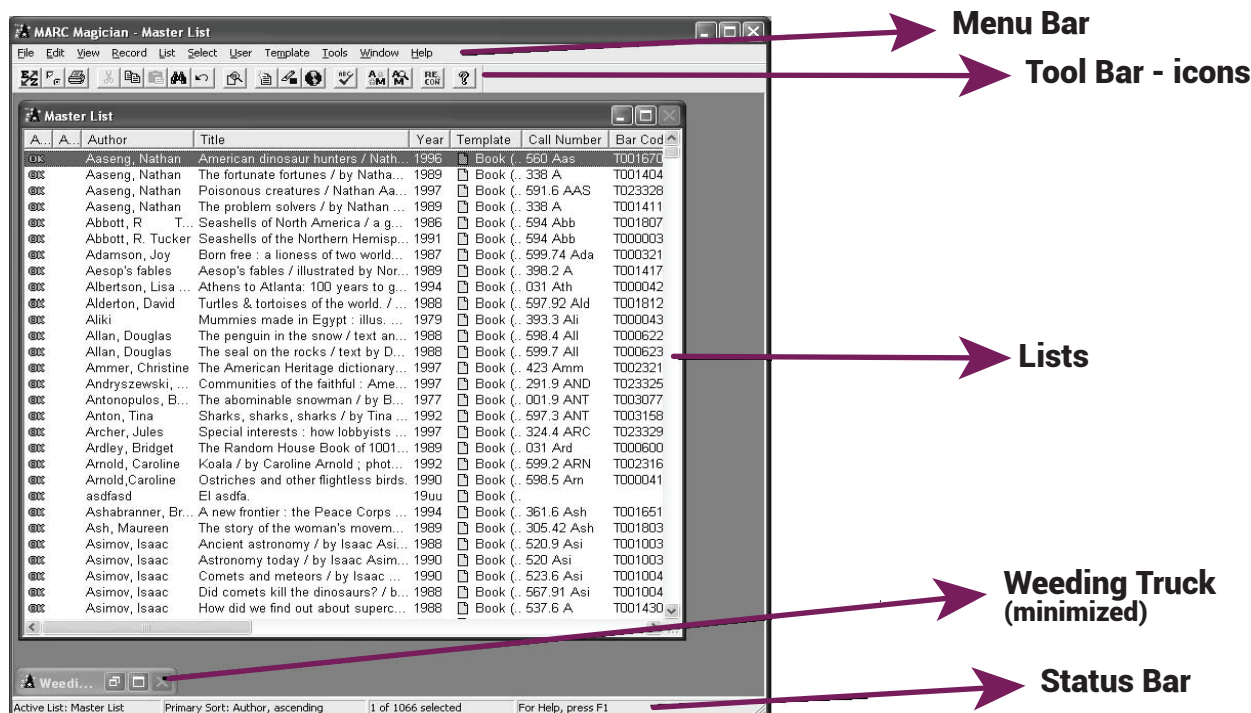
MARC Magician Professional has four essential parts: the Main Window, Cataloger, Record Viewer, and the Help system.

The Main Window

The Main Window is present whenever the program is running and it's where you begin and end all of your tasks in MARC Magician Professional. When you close the Main Window, you exit the program.

Like most Windows programs, MARC Magician Professional has a row of menus (File, Edit, View, etc.) and a toolbar with buttons for commonly used commands. The status bar appears at the very bottom of the Main Window and shows how many records you have and how they are sorted.

Sections of the Main Window



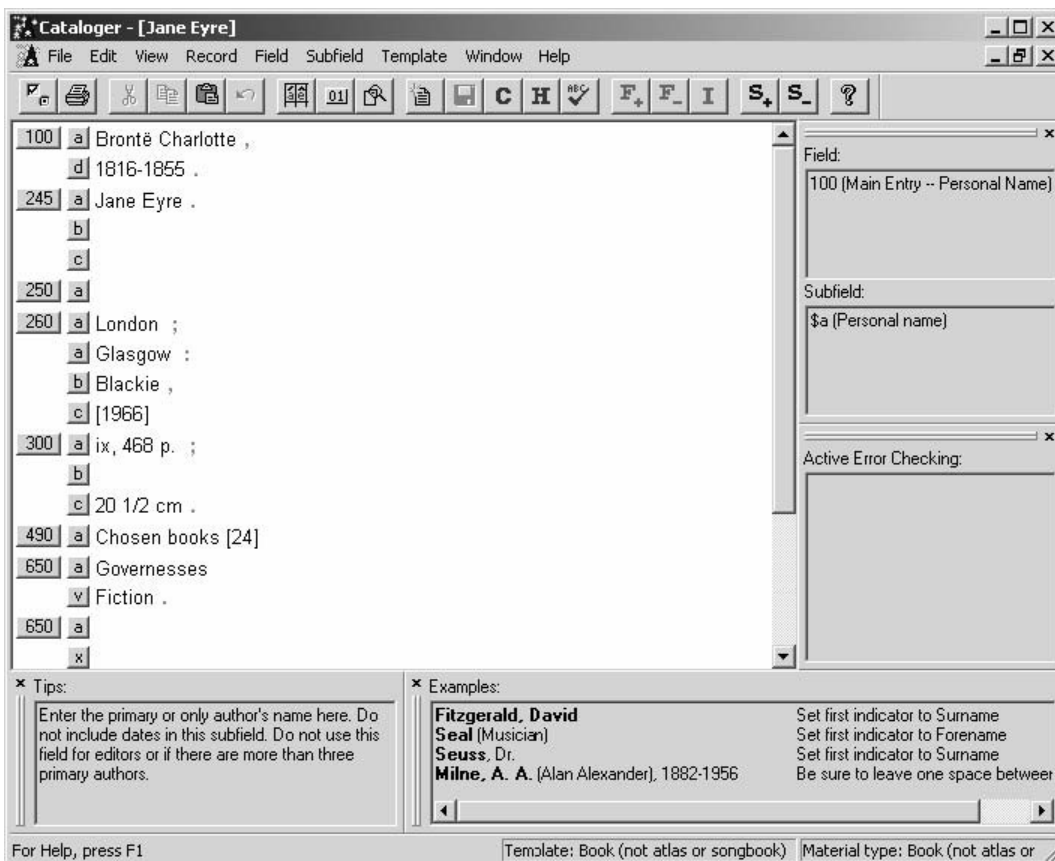
Lists

Lists occupy most of the **Main Window**. A list is a group of records, organized in rows and columns. Each record takes up one row, and each column shows a particular aspect of the record, such as the author or title. Each list is a separate window inside the **Main Window**. These windows can be resized but they can't be closed, so the close button is dimmed.

MARC Magician Professional always has at least two lists: the **Master List** and the **Weeding Truck**. The **Master List** is the complete list of records in the MARC Magician Professional database. The **Weeding Truck** is like the Recycle Bin: when you delete records from the **Master List**, they go into the **Weeding Truck**.

To switch between lists, open the **List** menu (or the **Window** menu) and click the list you want.

The Cataloger



Cataloger is where you create and edit MARC records. Double click on a record in the **Master List** to open it in **Cataloger**. In **Cataloger** you can have a maximum of 10 pages open at a time.

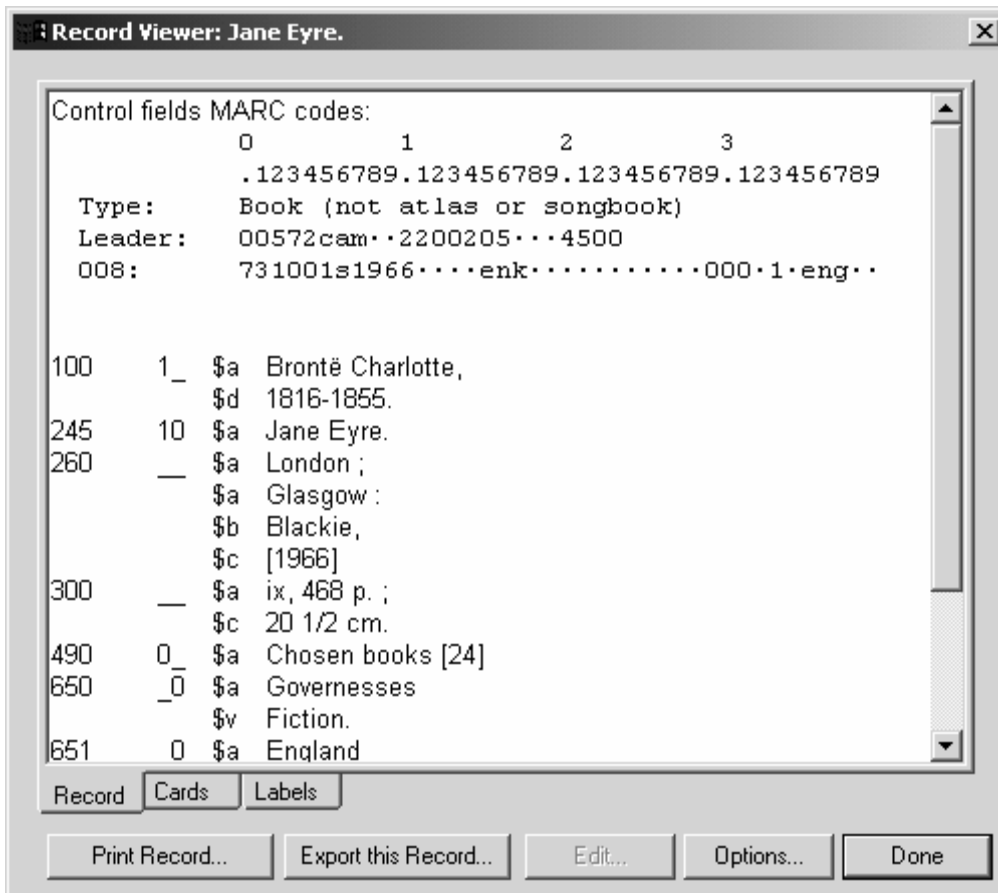
Like the **Main Window**, **Cataloger** has menus, a toolbar, and a status bar. The record you've opened will be displayed in a separate window inside **Cataloger**.

The buttons with the numbers and letters on the left side of the window are the MARC field tags and subfield codes. Click these to display a menu of the commands available for that field or subfield. When you put the insertion point (cursor) in an empty field, MARC Magician Professional displays a prompt that tells you what information is needed.

The boxes that appear alongside the record window are information panels. The text in most panels changes when you move the cursor (or insertion point) to a different subfield. If you don't need a panel, close it by clicking the close button in the top right or left corner of the panel. To reopen a panel, click the **View** menu and then select the panel you want to display. When you close the **Cataloger**, you return to the Main Window.

For a step-by-step cataloging exercise, see *Cataloging Basics*, in the tutorial section of this manual.

Record Viewer



Use **Record Viewer** to check your records. In **Record Viewer**, you can quickly page from one record to the next, and maintain an unlimited number of open records. To open **Record Viewer**, select the records you want to view in the **Master List**, and then click **Record Viewer** on the toolbar.

While working in **Record Viewer**, you can print records, open a record in **Cataloger** for editing, and export records. For a step-by-step **Record Viewer** exercise, see *Working with the Record Viewer*, in the tutorial section of this manual.

The Help system

The Help system contains thorough and up-to-date information about how to use **MARC Magician Professional**, displayed directly on your computer screen. It has complete instructions for working with the program as well as general cataloging advice and detailed explanations of MARC fields and subfields.

There are three basic parts to Help:

- **General help topics:** Including overviews, step-by-step instructions, and a glossary of technical and cataloging terms. Find topics using the **table of contents**, the **index**, or a full-text search. To get to general help topics, click the **Help** button on the toolbar, or press the F1 key on your keyboard.
- **Dialog box help:** Most dialog boxes have a **Help** button in the lower right corner. With the dialog box open, click the **Help** button or press the F1 key for an explanation on how to use the dialog box.
- **Cataloger's Reference:** Gives general cataloging advice and details about most MARC fields, including examples and information about subfields and indicators. To open the **Cataloger's Reference** topic for a specific field, click the tag of that field and then click the **Help** button.

Bringing records into MARC Magician Professional





Before you can clean up or customize existing records using **MARC Magician Professional**, you have to import them into **MARC Magician Professional**. Imported records are added to the **Master List** along with the records already there. Once you have imported them, you can work with them in all the same ways that you work with records you create.

How you transfer records depends on where the records are located:

- **In your library automation system database:** These are records in your library automation system that haven't been exported yet. Bringing these records into **MARC Magician Professional** is a two step process: First, export a copy of the records from your library automation system (see your library automation system documentation or the **MARC Magician Professional Help**), then you import them using the **Import** command on the **MARC Magician Professional File** menu.
- **In a file on your computer:** These are records downloaded from the Internet (such as the Library of Congress or a state database), or already exported from your library automation system and saved on the hard disk of your computer or another computer on the same network. To bring these records into **MARC Magician Professional**, use the **Import** command on the **File** menu.
- **On a CD or thumbdrive:** These may be records from a vendor or already exported from your library automation system and saved on a CD or thumbdrive. To import these records, use the **Import** command on the **File** menu.
- **In Mandarin:** Use the **EZ Transfer** feature built into both **MARC Magician Professional** and **Mandarin** to transfer your records. It's a two-step process, with **EZ Transfer** to get records out of **Mandarin** and **EZ Retrieve** to bring them in to **MARC Magician**. You'll find complete instructions in the **Help Topics**.

Editing Individual Records Using Cataloger

In **Cataloger**, you can edit subfield text using your keyboard as you would in a word processing program. You can also add, delete, and change fields and subfields.

To...	Do this...
Add a field 	Click the Add Field button on the toolbar, and then select the field you want.
Add a subfield 	Put the insertion point anywhere in the field where you want the new subfield. Click the Add Subfield button on the toolbar and then select the subfield you want to add.
Delete a field 	Put the insertion point anywhere in the field you want to delete, and then click the Delete Field button on the toolbar.
Delete a subfield 	Put the insertion point in the subfield you want to delete, and then click the Delete Subfield button on the toolbar.
Duplicate a field or subfield	Click the field tag or subfield code, and then click Duplicate .
Change a field or subfield	Click the field tag or subfield code, and then click Change . Select the field or subfield you want to change to.

For a step-by-step cataloging exercise, see *Editing Records*, in the Tutorial section of this manual.

Editing Several Records at a Time (Global Editing)

MARC Magician Professional provides several commands to make global changes to your records, including adding a field, finding and replacing text, fixing capitalization, and much more. This document only provides a very basic outline of the global editing procedure. For more detailed information, see MARC Magician Professional Help.

Basic procedure for global editing

1. Select the records you want to work on (see table below).

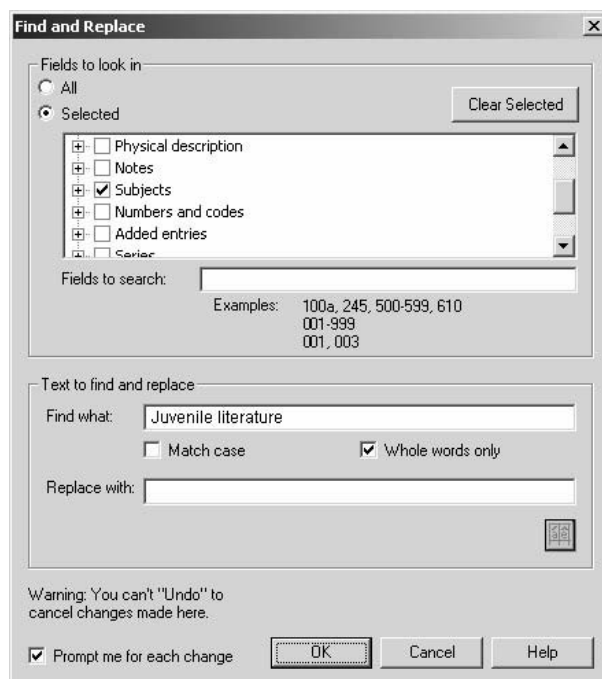
To...	Do this...
Select a single record	Click the record
Select all records in the list	On the Select menu, click All Records .
Select a block of consecutive records	Click the first record in the block, and then press the Shift key and hold it down. Click the last record in the block, and then release the Shift key.
Select multiple nonconsecutive records	Press the Ctrl key and hold it down. One by one, click each record you want to select, and then release the Ctrl key.
Select records that fulfill certain criteria	On the Select menu, click the command you want. In some cases a dialog box will appear, prompting for more information. Previous selections will be removed.
Deselect all records	Click somewhere else in the list. The record you click on will be selected, but all other records that were previously selected will no longer be selected.
Deselect a single record	Press the Ctrl key and hold it down. Click the record you want to deselect, and then release the Ctrl key.

2. Select **Global Editing** from the toolbar, and then the command you want. (The example shows a **Find & Replace** command to remove Juvenile Literature from your Subject Headings.)

3. Enter the information about the change you want to make, and then click **OK**.

The **Make Change** dialog box appears for each potential change. This allows you to see how each record will change before it's actually made. You should always review at least the first few changes. Once you're satisfied with the way the command is working, click **Change All** to make the change in all of the selected records, without further prompting.

For step-by-step Global Editing exercises, see **Global Editing Basics**, and **Advanced Global Editing**, in the tutorial section of this manual.



Find and Replace

Fields to look in:

☐ All

☒ Selected Clear Selected

☐ Physical description

☐ Notes

☒ Subjects

☐ Numbers and codes

☐ Added entries

☐ Series

Fields to search:

Examples: 100a, 245, 500-599, 610
001-999
001, 003

Text to find and replace:

Find what:

☐ Match case ☒ Whole words only

Replace with:

Warning: You can't "Undo" to cancel changes made here.

☒ Prompt me for each change OK Cancel Help

Important Note: Global editing is powerful. It's possible to fix a lot of errors in a very short time – but you can also do a lot of damage. It's good to develop a habit of making a backup of your records before you do any global editing task. To do this, click on the File menu and then Backup Database. With a backup, if you do make a mistake, you can easily restore the database to its previous condition by clicking File and then clicking Restore Database.

Remember that you are editing records in MARC Magician Professional, not in your library automation system's database. Changes made to records won't reflect in your library system's database until you transfer them back into your library system.

Creating Original MARC Records

Every record in MARC Magician Professional is based on a template that corresponds to the type of material (book, videocassette, etc.).

To create a new record:

From the Record menu, click **New Record**. The **Select Template** dialog box appears.

Select the template you want, and then click **OK**.

The **Cataloger** opens, displaying a blank record. The buttons with the numbers and letters on the left side of the window are the MARC field tags and subfield codes.

The blinking vertical line is the cursor, or insertion point, showing where the characters you type appear on the screen. Next to that is the cataloging prompt, which tells you what information belongs in the current subfield.

Enter the main entry, (title, publication information, etc.) in the appropriate fields and subfields.

Enter holdings information (call number, bar code, location, price, etc.) as follows:

If you use **Easy Entry** holdings, select **Holdings**  from the toolbar to enter holdings information.

If you use **Custom** holdings, the holdings field (usually 852) appears in the record window along with the rest of the fields. Enter the holdings information as you would in any other field.

Save the record by clicking the **Save** button on the toolbar.

To close the record, click the close button in the upper right corner of the record window.

Unless you want to catalog another item, it's usually a good idea to close the **Cataloger** and return to the **Main Window**.

Transferring Records from MARC Magician Professional to Your Library Automation System

When you're finished creating original records or cleaning up existing records with MARC Magician Professional, you'll need to export and then import them into your library automation system.

For Mandarin

If you use Mandarin, use the two-step EZ Transfer feature built into MARC Magician Professional and Mandarin to transfer your records to your library system. EZ Transfer gets records out of MARC Magician Professional and EZ Retrieve to bring them into Mandarin. There are step-by-step instructions on the EZ Transfer process in the [Help Topics](#).

Exporting Records for other library systems

Select the records you want to export.

Under **File**, select **Export Records**.

If any of the records you selected contain export errors, a dialog box will appear, asking whether you want to export all records or only those without export errors. After you make your choice and click **OK**, the **Export** dialog box appears.

Specify a file name and location for the records, and then click **OK**.

A copy of the records is then saved to a file, which you can now import into your library automation system. The records also remain in MARC Magician Professional. You can delete them from the MARC Magician Professional database if you are finished with them.

Import the file into your library automation system.

For detailed instructions, see the documentation that came with your system.

The MARC Magician Professional [Help](#) also contains import instructions for many systems.

MARC Magician Tutorials

Here's a brief overview of the tutorials:

Cataloging Basics

- Create new records.
- Enter cataloging information in fields and subfields.
- Enter holdings information.

Editing Records

- Add, delete, and change fields and subfields.
- Check spelling.

Building Your Own Templates

- Create a new custom template

Working with Lists

- Sort and select records.
- Find specific records in the list.
- Create your own record lists.

Working with the Record Viewer

- Open, Browse, and Print your records.

Finding Potential Problems – Active Error Checking

- Set Active Error Checking options and see how to monitor your records.

Global Editing Basics

- Find and replace text in a group of records.
- Add a field to a group of records.
- Fix the capitalization of fields or subfields that are all in upper case.

Advanced Global Editing

- Globally change a field.
- Use the “get text” feature to copy text from another part of the record.

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Using These Tutorials

These tutorials will give you a basic understanding of the features and functions of MARC Magician. Some of the tutorials require you to import sample records to work on, and it's recommended that you always delete the sample records when you're done with the tutorial.

Using the tutorials also requires a basic knowledge of how to use Windows and Windows based products, including opening, minimizing, maximizing and closing windows, and using menus, search and dialog boxes.

The tutorials don't need to be completed in any particular order, but some of the exercises do flow logically from one to the next. At the end of each section, we'll give you suggestions for exercises you can do to practice that tutorial's topic further.

Good luck and have fun.

Moving From the Tutorials to Working on Your Own Records

Once you've completed any tutorial and you want to get to work on your own records, you'll need to delete any practice records you've made:

1. Click **Select**, and then click **All Records**.
2. Click **Record**, and then click **Delete from All Lists**. The **Master List** should now be empty.

Section 2 - Cataloging Basics

Today, you have a wide variety of places to find MARC records, including MARC on Demand™, vendor disks, union catalogs, and the Internet. But there will always be some materials with no MARC record at all.

To follow the exercises in this tutorial, first imagine you find a grimy old box outside your office door one morning. Gingerly, you open it. It's full of books – weird and wonderful books you've never heard of before. One catches your eye, a book of poetry titled *The Wee Book of Muskrats*, by Amanda Reckonwith, published in 1931 by the now defunct Pennypouch Press in Little Rock, Arkansas.

Today, you will rescue this little book from eternal obscurity by adding it to your catalog.

In this tutorial you'll learn how to:

- Create new records.
- Enter cataloging information in fields and subfields.
- Type special characters.
- Enter holdings information.
- Save records.

Creating new records

Every record in MARC Magician is based on a template that corresponds to the type of material (book, DVD, etc.). The template guides you as you catalog, because it contains the fields and subfields you are most likely to use for each type of material. MARC Magician comes with standard templates that cover the different kinds of materials you catalog.

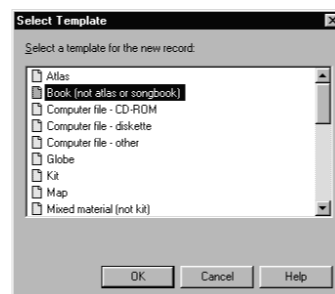
Create a new record for a book



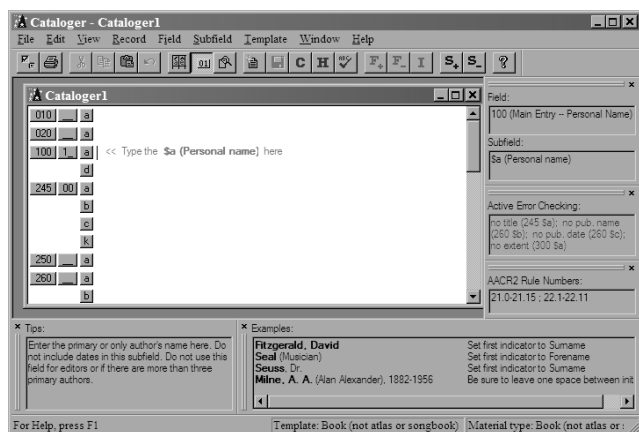
1. Select New Record from the toolbar.

For books, deciding on a template is easy. There is only one standard template for regular books, with the exception of atlases and songbooks.

2. Click Book (not atlas or songbook), and then OK.



The Cataloger opens, displaying a blank record:



The buttons with the numbers and letters on the left side of the window are the MARC field tags and subfield codes.

The blinking vertical line that appears next to **100 a** is the insertion point or cursor. Next to the cursor is the cataloging prompt, describing what information belongs in the current subfield.

The Tips and Examples panels help if you're unsure about the purpose of a subfield or the correct form of entry. The information changes every time you move to a different subfield.

You may find it helpful to maximize **Record Window** to see more of the record on your screen. You can also maximize **Cataloger** window to fill your whole screen. To move the cursor to different subfields, either press **Enter** or **Tab** to move down one subfield. The arrow keys can be used to move up and down. Notice that the cataloging prompt changes as you move from one subfield to the next, as does the text in the information panels.

Entering descriptive information

Now that you've opened a template for a new record, the next step is to fill in the blank fields and subfields with information describing the book.

Enter main entry information

The first piece of information to add is the main entry, the primary entry that represents an item in a catalog. Each record should have exactly one main entry.

For books authored by a person, the main entry is the author's name. The main entry goes in **100 (Main Entry: Personal Name)**, the first field in this record.

1. Move the cursor to subfield **100 a**, enter *Reckonwith, Amanda* and then press **Enter** to move to the next subfield. The cataloging prompt disappears as soon as you begin to type.

Subfield **d** is for the author's birth and death dates and distinguishes between two or more authors with the same name. Skip this subfield. Even if you had more than one Amanda Reckonwith in your catalog, you don't have the dates of her birth or death.

2. Press **Enter** to skip subfield **d** and move on to the next field.

Enter title information

The **245 (Title Statement)** field is where the title proper, other title information, and the statement of responsibility is entered. For most books, our example included, this information is on the title page.

1. In subfield **a**, type *The wee book of muskrats* and then press **Enter**. Note the capitalization – only the first word and proper names in titles should be capitalized.
2. Subfield **b** is for other title information such as a subtitle or parallel title. No subtitle appears on the title page, so skip this subfield. Press **Enter** to move to subfield **c**.
3. Subfield **c** is for the statement(s) of responsibility. The title page of our book shows two: Amanda Reckonwith, the author, and James DuPré, the illustrator. Enter *by Amanda Reckonwith ; illustrations by James DuPré*

Note: To type in special characters, like the accent in *DuPré* click the **Special Characters** button on the toolbar.



Select the character you want to insert from the table of special characters. Make sure your cursor is where you want the character inserted into the record. Press **Enter** to move to the next subfield.

Notice the gray punctuation marks following your entries. This is International Standard Bibliographic Description (ISBD) punctuation. MARC Magician automatically adds the correct ISBD punctuation (., /: +) as needed.

á	À	á	À	à	À	ä	Ä								
é	É	é	É	è	È	ê	Ê								
í	Í	í	Í	ì	Ì	ï	Ï								
ó	Ó	ó	Ó	ô	Ô	õ	Õ								
ú	Ú	ú	Ú	û	Û	ü	Ü								
ç	Ç	ñ	Ñ												
ˆ	ˆ	ˆ	ˆ	ˆ	ˆ	ˆ	ˆ	ˆ	ˆ	ˆ	ˆ	ˆ	ˆ	ˆ	ˆ
˜	˜	˜	˜	˜	˜	˜	˜	˜	˜	˜	˜	˜	˜	˜	˜
æ	Æ	À	α	'	'	ß	ε	⊗	đ	Đ	'	'	ˆ	ˆ	ˆ
ı	ı	ı	ı	ı	ı	ı	ı	ı	ı	ı	ı	ı	ı	ı	ı
ı	ı	ı	ı	ı	ı	ı	ı	ı	ı	ı	ı	ı	ı	ı	ı
ı	ı	ı	ı	ı	ı	ı	ı	ı	ı	ı	ı	ı	ı	ı	ı
ı	ı	ı	ı	ı	ı	ı	ı	ı	ı	ı	ı	ı	ı	ı	ı

Enter edition information

The **250 (Edition Statement)** field is for the edition information that appears on the title page.

In subfield **a**, type **2nd ed.** and press Enter.

Enter publisher information (imprint)

The **260 (Publication, Distribution, Etc.)** field is for information about the publisher and the date of publication.

1. In subfield **a**, type **Little Rock, Ark.** and press Enter. Remember to type the period after the state abbreviation!
2. In subfield **b**, type **Pennypouch Press** and press Enter.
3. In subfield **c**, type **1931** and press Enter.

Enter the physical description

The **300 (Physical Description)** field is for the physical description of the item.

1. The first subfield in this field is for the extent. For books, that means the number of pages. In subfield **a**, type **75 pages** and press Enter.
2. Subfield **b** is for other physical details. In subfield **b**, type **illustration** and press Enter.
3. Subfield **c** is for the dimensions of the book. In subfield **c**, type **24 cm** and press Enter.

So far, your record should look something like this.

Tip: Look at the Tips and Examples panels for guidance in the correct style, capitalization, and punctuation.

The screenshot shows a MARC record for the book "The wee book of muskrats". The record is displayed in a window titled "The wee book of muskrats". The fields are as follows:

- 100 **a** Reckonwith, Amanda .
d
- 245 **a** The wee book of muskrats /
b
c by Amanda Reckonwith ; illustrations by James DuPré .
- 250 **a** 2nd ed.
- 260 **a** Little Rock, Ark :
b Pennypouch Press ,
c 1931 .
- 300 **a** 75 p :
b ill ;
c 24 cm .
- 650 **a**
x
- 650 **a**
x

Entering subject headings

Now that you've completed the descriptive part of the record, it's time to create some subject headings. Because many library patrons search for material according to subjects, subject headings are among the most important parts of a MARC record.

As you can see on your screen, the template includes a number of **650 (Subject Added Entry - Topical Term)** fields. A topical subject heading is just that: topical.

In other words, this is the place for general terms that describe what the book is about.

So what is this book about? It's a book of poetry about muskrats.

1. Subfield **a** is for a topical term. Type **Muskrats** and press Enter.
2. The next subfield is **x (General subdivision)**. For this heading, a general subdivision is not needed, but suppose you want to enter a subdivision for the genre of the book – namely, poetry. Technically speaking, this information belongs in the **v (Form subdivision)** subfield. For now, you'll deliberately enter the genre in the wrong subfield. You'll fix this in the next tutorial. In **650 x**, type **Poetry**.

Entering holdings data

Holdings data includes copy information and other information needed for local processing and maintenance of library materials. Some examples are bar code, call number, location, and price.

Part of the initial MARC Magician program setup during installation involved choosing a holdings type. This setting ensures that the holdings data you enter using MARC Magician are compatible with your library automation system and consistent with the existing records in your catalog.

Check your holdings type



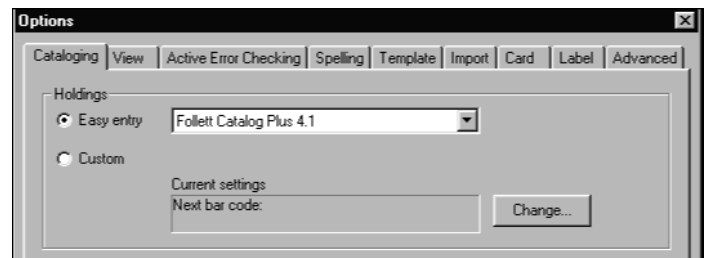
Before you enter holdings information, you need to know whether the holdings type in MARC Magician is set to easy entry or custom.

1. Click the Options button on the toolbar.

In the Options dialog box, Under Holdings, either Easy Entry or Custom will be selected.

If Easy Entry is selected, you'll see an additional setting that shows:

your library automation system,
852 with 1 part call number, or
852 with 4 part call number.



If Custom is selected, the MARC fields and subfields to be used for holdings are displayed under Current Settings.

2. Make a note of your holdings settings and click OK to close the Options dialog box.

Using Easy Entry holdings

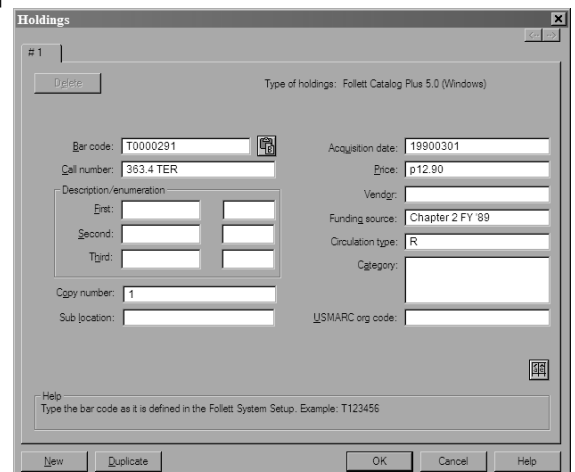


If you use Easy Entry holdings, you enter holdings information in a special dialog box that contains the same holdings fields as your library automation system.

Select Holdings from the toolbar.

This example shows the Holdings dialog box for one library automation system. If you use a different system, the dialog box you see on your screen will look slightly different, but the basic idea is the same.

You'll see different fields in the Holdings dialog box on your screen, depending on the holdings type you selected. Try moving the cursor to different fields and note that the help text at the bottom of the dialog box changes as you move from one field to the next.



Practice entering holdings information now if you like.

Note: You can't use the Enter key to move from one field to another in the Holdings dialog box. Pressing Enter is the equivalent of clicking OK - it closes the dialog box and accepts any changes you've made.

Here's a brief explanation of the buttons at the bottom of the dialog box:

Use the **New** and **Duplicate** buttons to add holdings information for another copy of the book. Each time you add a copy, a new tab is added to the dialog box. The tabs are labeled #1, #2, etc. Click on a different tab to switch to it.

The **New** button creates all blank fields on the tab. The **Duplicate** button fills the new tab with the same information as the current tab, except the bar code. You can enter holdings information for up to 99 copies.

As in all dialog boxes in the program, **OK** saves your entries and closes the dialog box, **Cancel** closes the box without saving any changes, and **Help** displays a help topic about the box.

Click **OK** to close and save your changes.

Since you use Easy Entry holdings, you can skip the Custom Holdings section and go to the next exercise, **Checking Control Fields**.

Using Custom Holdings

If you use Custom Holdings, the holdings fields and subfields defined in **Options** have been added to the cataloging templates, and should appear in the **Record Window** along with the bibliographic fields.

Type information in this field just as you would in any other field. With Custom Holdings, **MARC Magician** doesn't know what information belongs in each subfield - you have to keep track of that yourself. It's a good idea to make a list of the fields and subfields you use for holdings and refer to it when you catalog.

Saving your record

Now that you have completed your record, save it by clicking the **Save** button on the toolbar.

Tip: Another way to save your record is simply to close the **Cataloger**. If your record has unsaved changes, the program will ask you whether you want to save the record, including the latest changes.

Close the Cataloger

When you are finished cataloging, close the **Cataloger** and return to the main window.

Under **File**, click **Exit**, or click the close button in the top right corner of the **Cataloger** window. You return to the main program window. Notice that the record you created now appears in the **Master List**.

Review & Practice

Some suggestions for practicing on your own

Create some more records. Try using some of the other cataloging templates. For example, try cataloging a sound recording or a videocassette.

Notice the different fields and subfields in other templates. Take the time to read the Examples and Tips panels for unfamiliar subfields.

Go to the next tutorial

Section 3 - Editing Records has more cataloging exercises for the record you created in this tutorial.

If you'd like to jump right in to the next tutorial, stay where you are in the main window. You're all set to begin the next tutorial. Remember that you can do most of the tutorials in any order you'd like.

Section 3 - Editing Records

To complete the exercises in this tutorial, you'll need to have completed Section 2, the basics of creating new MARC records, as those records are used as examples for this tutorial.


In this tutorial you'll learn how to:

- Add, delete, and change fields and subfields.
- Add fields to all standard templates.
- Reverse your last action with Undo.
- Display detailed information about specific fields.
- Check spelling.
- Add words to your user dictionary.

Open a record

The first thing you should do is open the record you created in the first tutorial – *The wee book of muskrats*.

There are several ways to open a record. You can:

- Double-click the record.
- Click the record once to select it, and then click the Edit button  on the toolbar.
- Click the record once to select it, and then press Enter.

The record is now open in Cataloger.

Adding fields and subfields

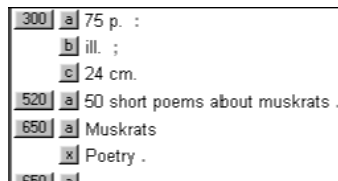
As you learned in the first tutorial, the template determines which fields and subfields are displayed by default in the Cataloger. But what if the template doesn't include a field you want to use?

In this exercise, you'll learn how to add fields by adding a summary note to your record.

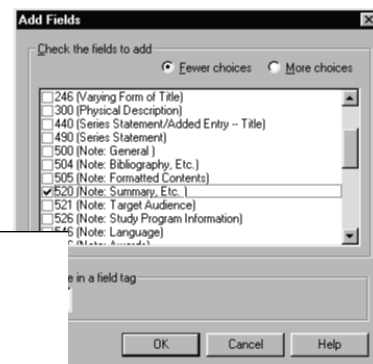
Add a field



1. Click Add Field on the toolbar.
2. Under Check the fields to add, select the **520 (Note: Summary)** check box, or type **520** in the box underneath.
3. Click OK to add the field.
4. In **520 a**, type **50 short poems about muskrats**.



300 a 75 p. :
b ill. ;
c 24 cm.
520 a 50 short poems about muskrats .
650 a Muskrats
x Poetry .



Add a subfield

You use a similar procedure to add subfields to your record. Although you won't add a subfield in this tutorial, here's how you would do it:

1. Put the cursor in the field where you want to add a subfield.



2. Click the **Add Subfield** button on the toolbar.

3. In the **Add Subfields** dialog box, select the subfield you want, and then click **OK**.

The subfield you selected is added to the field directly after the subfield that had the cursor. If you want to move the subfield to a different location within the field, drag the subfield code with your mouse.

Adding fields to all standard templates

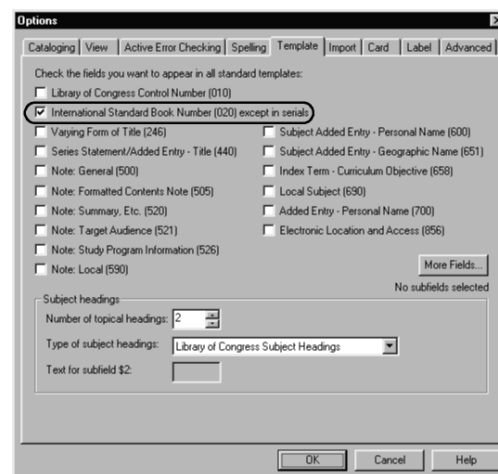
In the last exercise you learned how to add a field to a single record. Now suppose you want to use this field in all of the records you create. In MARC Magician, you have the option to add fields to all standard templates, so that you don't have to add them every time you create a new record.

In this exercise, you'll add an International Standard Book Number (ISBN) field to all standard templates.

1. Under **Template**, click **Add Fields to Standard Templates**. The **Options** dialog box appears with the **Template** tab in front:
2. Select the **International Standard Book Number (020)** check box, and then click **OK**.

Note: Add as many fields as you like. If the field you want isn't in the dialog box, use the **More Fields** button to select from the full list of MARC fields.

Also: Notice that the ISBN field you just added doesn't appear in *The Wee Book of Muskrats*. That's because records that are currently open in the **Cataloger** aren't updated right away. If you closed the record and then opened it again, you would see the ISBN field.



Create a new record



Let's see if the field shows up when you create a new record:

1. Click the **New Record** button on the toolbar.
2. In the **Select Template** dialog box, choose the **Book (not atlas or songbook)** template, and then click **OK**. The **020 (ISBN)** field should now be the first field in the record.
3. Close the record without saving it.

Deleting fields and subfields

You can remove a field or subfield from your record in a couple of different ways. One way is to delete all of the text in the field or subfield. When you do this, you still see the blank field or subfield in the record window, but it does not become a part of the MARC record.

Note: Empty fields and subfields are never saved with the record when you export it from MARC Magician – so there is no need to remove them from your records.

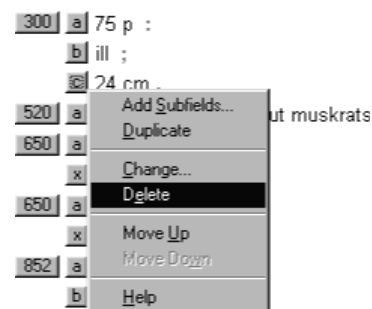
Delete a subfield

A quick way to remove a subfield is to click directly on the subfield you want to remove. Let's try it.

Click the **300 c** subfield code button. Click the Delete option on the menu to remove the subfield from the record.



Or, another method is to put your cursor in the subfield and click the Delete Subfield button on the toolbar.



Oops! – Undoing your last action



Use the Undo button to reverse the last action you performed in the Cataloger. Since the last thing you did in this tutorial was delete a subfield, you will “undelete” the subfield so that it is back in the record.

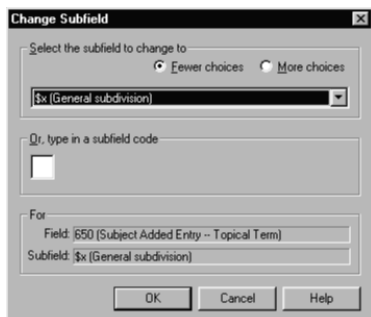
Click the Undo button on the toolbar. The **300 c** subfield should now be back in your record.

Changing fields and subfields

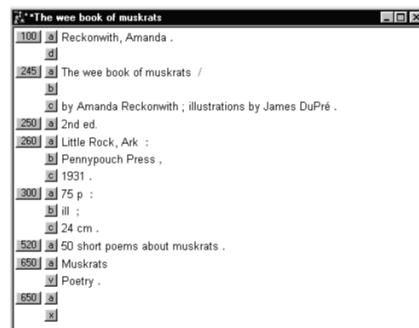
If some of the information in your record is in the wrong field or subfield, it's easy to change the incorrect field or subfield into the correct one. In the last tutorial, you entered the genre **Poetry** in the **650 x (General subdivision)** subfield.

The correct subfield for this information is **650 v (Form subdivision)**. In this exercise you'll change the **650 x** into a **650 v** so that your information is in the right place.

1. Click the **650 x** subfield code button.
2. In the menu, click Change.



3. From the Change Subfield dialog box select **\$v (Form subdivision)**, or type the letter **v** in the box, and click OK. You should now see a **v** instead of an **x** in the subject field.



Displaying Help for a field

If the Tips and Examples panels don't give enough information about a particular field or subfield, use the Cataloger's Reference to find out more about any of the fields you see in Cataloger.

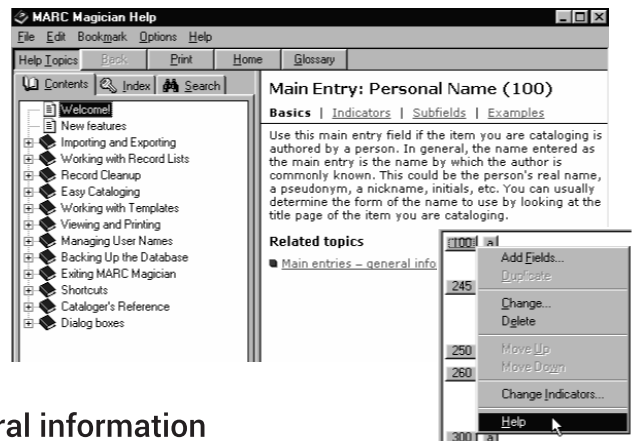
The Cataloger's Reference provides in-depth information about each MARC field and subfield right on your screen. In this exercise you'll display the Cataloger's Reference for the **100 (Main Entry: Personal Name)** field.

Open Cataloger's Reference

1. Click the **100** field tag button and select **Help** from the menu to bring up the Cataloger's Reference topic for this field. There are four subheadings below the main heading: **Basics**, **Indicators**, **Subfields**, and **Examples**.

The Basics topic is displayed at the moment, so the "Basics" subheading appears in black. Click on the other subheadings to switch to the corresponding topics.

Notice that the Basics topic also provides a link to general information about main entries.



Spell Check



In the last exercise in this tutorial, you'll check the spelling of your record, learn how to start Spell Check and correct misspelled words. If you're already familiar with Spell Check you can skip this exercise.

1. First, make a record with some spelling errors in it. Under **Record, New Record**, select the **Book** template.
2. To make it easy to follow the tutorial, fill in the subfields as shown in this example.

You'll have to add the **490 (Series Statement/Added Entry)** field to get your record to look like this one. See "Adding Fields and Subfields" if you need help.

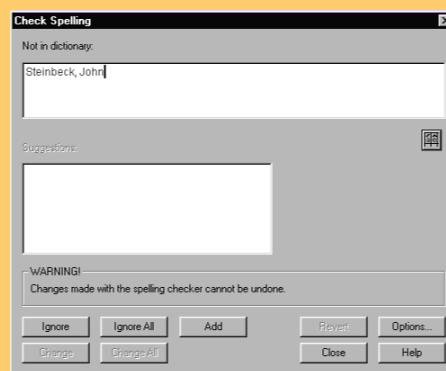


Start Spell Check

Select **Check Spelling** from the toolbar.

Spell Check starts with the first field in the record. Any unrecognized words appear in a dialog box, highlighted in red. In this case, the red word is **Steinbeck, John**. As you've probably already experienced with Spell Check, it sometimes stops on a word that's spelled correctly because that word isn't in the spelling dictionary. This is especially likely to happen with proper names.

Note: You may also be wondering why the program seems to think that Steinbeck, John is one word, when it's obviously two. Spell Check is currently set to treat personal name fields as whole words. There are many options available to determine how your Spell Check works. To find out more, click **Options**. Options aren't covered in this tutorial, but you can get more information from the **Help** button.



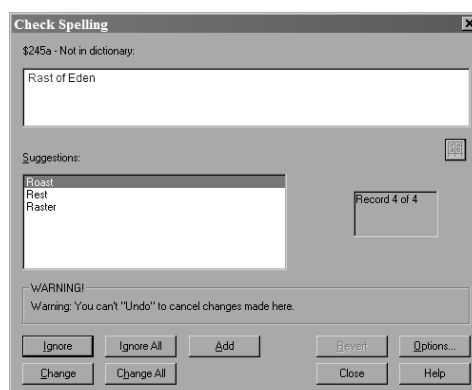
Ignore a word for the entire record

Because the name is spelled correctly, you can ignore it and move on. Author's names often appear in the record more than once. By selecting **Ignore All**, you can avoid multiple stops within the record. **Steinbeck, John** will now be ignored for this record.

Type in a correction

This word really is spelled wrong. You'll need to correct it. When none of the suggested words shown is the one you want you must type in the correction:

1. Click at the beginning of the red word.
2. Delete the **R** and type an **E** in its place.
3. Click **Change** to continue the spell check.



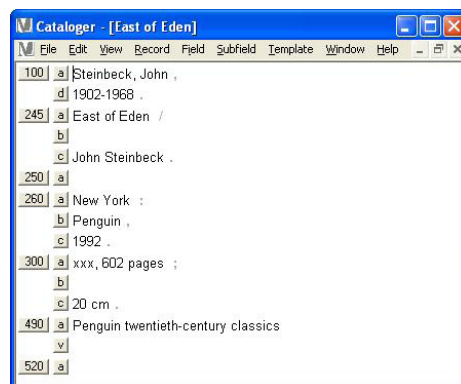
Choose an alternate word

It stops on the word **Penguin** next.

Under suggestions, click the word **Penguin** and then click **Change**. Spell Check replaces the misspelled word with the alternate word you selected, and continues checking.

Ignore a word

The next unrecognized word is the Roman numeral in the **Physical Description** field. This word is correct, so don't change it. Instead, just click **Ignore**.



Add a word to your user dictionary

Next up is the word **twentieth-century**. No spelling error here - the dictionary simply doesn't recognize it. Click **Add** to add this word to your user dictionary. After you have gone through the whole record, you see the record window again, with the correct spelling.

When you're finished with this exercise, close **Cataloger** and return to the main window.

Review & practice

Here are some suggestions for practicing on your own:

- Practice adding, removing, and changing fields.
- Think about what additional fields you might like to include in the standard templates.
- Try out some of the other commands on the menu that appears when you click a field tag or subfield code (Duplicate, Move Up, Move Down).
- Open the Cataloger's Reference for some other fields and read more about them.

Go to the next tutorial

If you'd like to jump right in to the next tutorial, stay where you are in the main window. You're all set to begin the next tutorial.

Section 4 - Building Your Own Templates

This tutorial shows you how to make your cataloging work faster and more efficient by building your own custom templates.

In this tutorial you will learn how to:

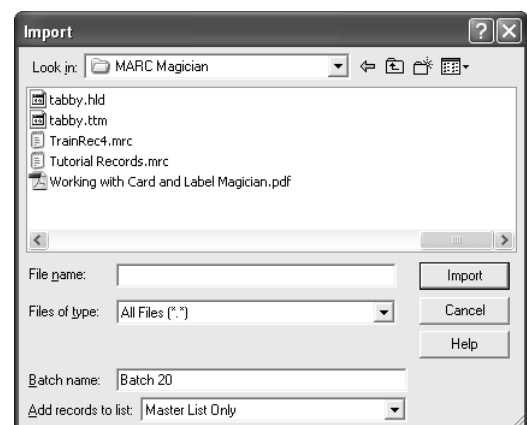
- Import records
- Create a new custom template.
- Create a custom template from an existing record.
- Export custom templates.
- Delete custom templates.
- Import custom templates.

Import records

The first step in working with this tutorial is to import records into MARC Magician.

Import the tutorial records

1. Open MARC Magician.
2. Select File and then Import.
3. In the Import box, click the down-arrow to the right of the Look in box, and select C:. In the area underneath the Look in box, double-click the Program Files folder, double-click the MARC Magician folder, and then Tutorial Records.mrc.
4. Click Import. When the import is done, a summary box displays the number of records imported and a count of the automatic cleanups completed.



What are custom templates?

Custom templates are cataloging templates that you design yourself. MARC Magician standard templates are sufficient for most basic cataloging, but you may find that making your own templates saves you time and reduces cataloging errors. Here are some more reasons to make your own templates:

- You want to include specific fields or subfields.
- You want to weed out fields or subfields that you don't use.
- You want to have text already entered in subfields.
- You want to have control fields already set.

Important: If all you want to do is include fields that don't appear by default in the standard templates (such as ISBN and Note fields), you don't need a custom template. Instead, use the Add Fields to Standard Templates option on the Template menu.

Creating custom templates

For this tutorial, imagine you have to catalog a box of over fifty short educational videos for high school students produced by a company called VideoMaven. The videocassettes have many characteristics in common: they were all produced and distributed by the same company, and they all have the same playing time as well as other physical characteristics.

In the template you create, you'll fill in the subfields that are the same for all of the videos. You'll also weed out some fields and subfields that you don't use, add some that you do, and set the control fields correctly.

Create a new template

1. On the Template menu, click New Template.

When you create a new template, you have to select a template to base it on, just as you do when you create new records.

2. Select Videorecording - VHS or Beta.
3. Under New template name, type **VideoMaven**, and then click OK.

The new template appears in the Cataloger. The bright blue background on your screen indicates that you're working on a template instead of a record. You can now edit the template the same way you edit records.

Enter standard text

The next step is to enter the standard text that will be the same for all of the video records.

The first field in this template is the **028 (Publisher Number)** field. Subfield **b** will be the same for all of the records, so you should fill this in now.

In **028 b**, type **VideoMaven**.

Next fill in **260 (Publication, Distribution, Etc.)** field.

In **260 a**, type **Swarthmore, Pa.** Remember to type the period after the state abbreviation!

In **260 b**, type **VideoMaven**.

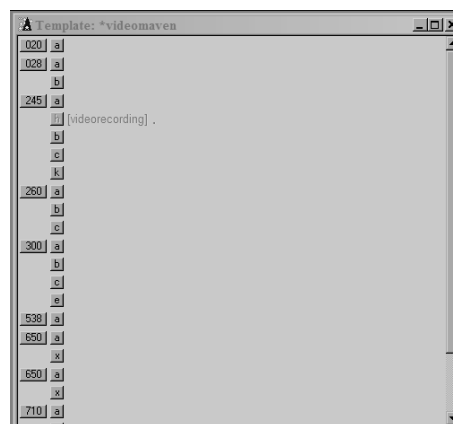
The videos were not all published in the same year, so leave the **260 c (Date of publication, distribution, etc.)** subfield blank.

The next field with the same information in all records is the **300 (Physical Description)** field. All the videos are 35 minutes long, so in **300 a**, type **1 videocassette (35 min.)**.

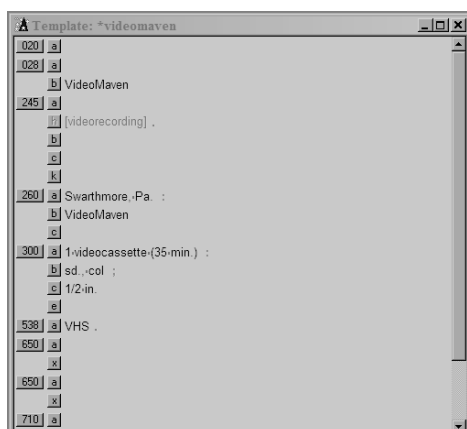
All videos have both sound and color. In **300 b**, enter **sound, color**

All have the standard measurement for videocassettes. In **300 c**, type **1/2 in.**

The last field you'll fill in for this template is the **538 (System Details)** field. In **538 a**, enter **VHS**.



Your template should now look like this:



Delete a subfield

You don't need the **300 e (Accompanying material)** subfield for this template, so you can delete it now.

1. Click the **300 e** subfield code button.
2. Click Delete.

Save and close the template

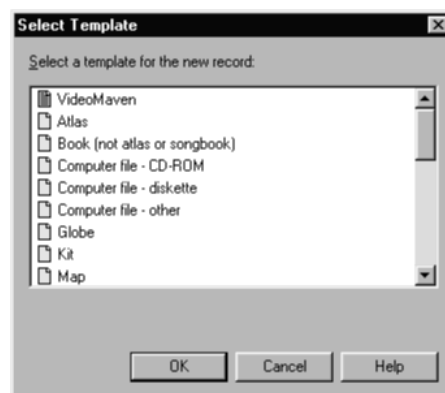
The Close button is located in the top right corner of the template window. When the dialog box appears, asking if you want to save your template, click Yes.

Your template is now saved. The next time you create a new record, your template will be listed along with the others in the Select Template dialog box.

Create a new record

To make sure that you've created a working template, start a new record based on the template you just made.

1. Under Record, select New Record. Your new template should appear at the top of the list in the Select Template box. Don't create a new record now. Now you know where to find your custom templates.
2. Click Cancel to close the dialog box.



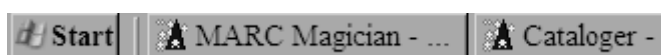
Creating Templates from Existing Records

In this exercise, you'll learn how to create a custom template based on an existing record.

The scenario: You have to catalog a dozen books from the Nancy Drew series by Carolyn Keene that were recently published in large print. After cataloging one book, you realize that the records for the other books will be almost identical, except for the title, number of pages, summary note, and a subject heading or two.

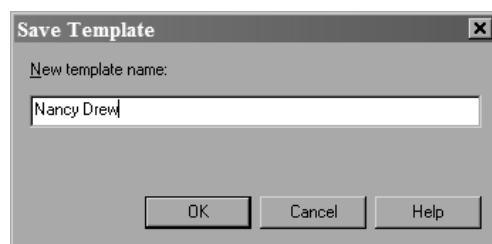
Open the record you want to use for the template

1. Switch to the main window by clicking the MARC Magician button on the Windows taskbar (usually at the very bottom of your screen, next to the Start button).
2. Double-click the record titled *Deadly intent, by Carolyn Keene*. Return to Cataloger, where the record you selected is now displayed in a new window:



Create a template from the record

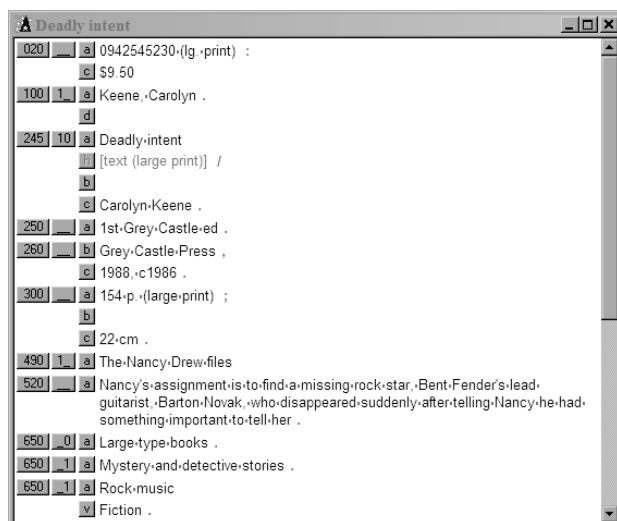
1. On the Record menu, click Create Template from Record.
2. When the Save Template dialog box appears, type **Nancy Drew**, and then click OK. Your new template appears in the Cataloger. Apart from the light blue background, it should look just like the record on which it was based.



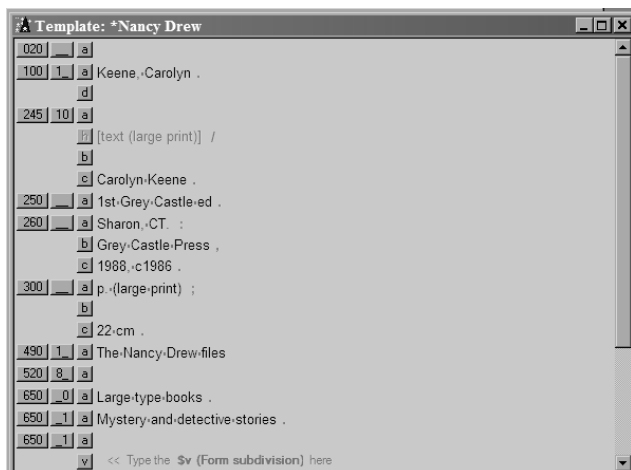
Delete subfield text

Next, remove some text from the template, leaving only the information that is the same for all of the books in the series.

1. Delete the ISBN text from the **020** field. Each book has a different ISBN, of course, so we don't want to have this information in the template.
2. Delete **Deadly intent** from the **245 a** subfield. Each book has a different title, so we don't need this information either.
3. The number of pages also varies for each book, so remove **154** from the **300 a** subfield.
4. Leave **pages (large print)** in the template, because that part will be the same for all records.
5. The next text to remove is the Summary note from the **520 a** subfield.
6. The last thing to remove is a subject heading specific to this particular book, in this case, **Rock music and Fiction** from the **650** field.



Your template now looks like this:



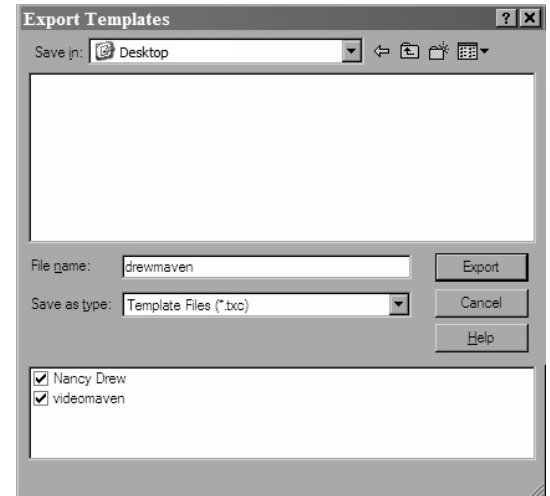
Save and close the template. Remember to click Yes in the dialog box asking if you want to save your template. This template will be listed along with the others in the Select Template dialog box, when you next go to create a new record.

Exporting Templates

It is possible to share your templates with others who use MARC Magician, by exporting them out of the program. When you export, the templates are saved to a file on your computer, a network drive, or thumbdrive. Anyone can then import this file and use the templates you created.

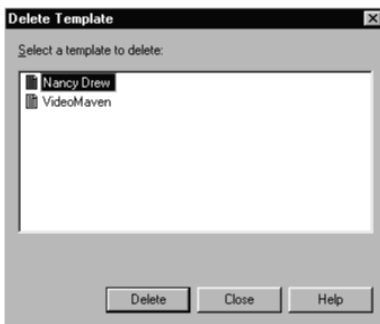
Export templates

1. Under **Template**, select **Export**.
2. Next, decide where to save the template file.
In this exercise we'll save the templates to the Desktop. In the **Save in** box of the **Export Templates** dialog box, select Desktop.
3. In the **File name** box, enter a short name for the template file. Note that the extension **.txc** is automatically appended to the template name when you export.
4. At the bottom of the **Export Templates** dialog box, select the check box for each template, and then click **Export**.



A dialog box appears, confirming that the templates were exported successfully. The templates are now saved on the Desktop.

Deleting templates



In this exercise you'll delete the two templates you just created. You'll still have the copy you saved on the Desktop. Deleting these now allows you to import the templates from your desktop in the next exercise.

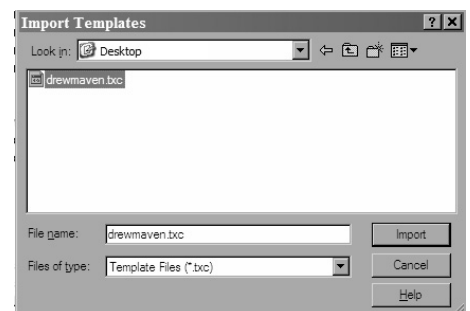
1. On the **Template** menu, click **Delete**.
2. From the **Delete Template** dialog box, select one of the templates, and click **Delete**.
3. Now do the same for the other template.

Importing templates

In this exercise, you'll import the templates you just deleted back into MARC Magician.

1. Under **Template**, select **Import**.
2. In the **Import Templates** box, under **Look in**, select **Desktop**.
3. Click the template file, and then **Import**.

The templates are now back in the **MARC Magician** database and can be used to create new records.



Review & practice

Now you can take a break, practice some more on your own, go right on to the next tutorial, or get to work on your own records. To take a break, click Exit on the File menu. Your work will be saved.

Here are some suggestions for practicing on your own:

- Create some more templates and practice adding and removing fields and subfields, setting control fields, and adding text.
- Create some more templates based on existing records.
- Try out some of the other commands on the **Template** menu, such as **Rename** and **Edit**.

Remember to use Help if you have questions!

Go to the next tutorial

If you'd like to jump right in to the next tutorial, stay where you are in the main window. You're all set to begin the next tutorial. Remember that you can do most of the tutorials in any order you'd like.

Section 5 - Working with Record Lists

In this tutorial you will learn how to:

- Import records.
- Sort records.
- Find specific records in the list.
- Move and resize record list columns.
- Show and hide record list columns.
- Select records.
- Delete records and restore deleted records.
- Create your own record lists.

Import records

If you haven't imported the Tutorial Records, you'll need to do so for this exercise. Instructions for how to do this are on page 27.

Sorting records

The quickest way to sort the record list is to click the column header of the column you want to sort by. Reverse the sort order by clicking it again.

To sort by Title click the Title column header. The records should now be sorted alphabetically by title. Notice that the current sort order is displayed on the status bar at the bottom of the window:



Note: Some records may have multiple entries in the bar code, call number, and subject columns. For example, most records have two or more subject headings, so the Subject column usually displays several entries for each record. For this reason, when you sort the records by subject, records with multiple subject headings will appear more than once in the list.

Moving and resizing columns

In this lesson you'll change the look of record lists by rearranging columns and changing their size.

Move a column

Because there are too many columns to display all at once on your screen, you may want to change the order in which the columns appear, so that the ones you use the most are always visible. You change the column order by dragging the column headers with the mouse.

Before: Author column before Title column

A..	Author	Title	Yea
001	Tolstoy, Leo	Anna Karenina. / T...	1948
001	Dürrenmatt, Frie...	Der Besuch der alt...	1960
001	Christie, Agatha	The body in the libr...	1988
001	Bugs / [videorecor...	Bugs / [videorecor...	
001	Cricket / a Sall	Cricket	1973

After: Title column before Author column


A..	Title	Author	Yea
001	Anna Karenina. / T...	Tolstoy, Leo	1948
001	Der Besuch der alt...	Dürrenmatt, Frie...	1960
001	The body in the libr...	Christie, Agatha	1988
001	Bugs / [videorecor...		
001	Cricket	Cricket / a Sall	1973

1. Put the cursor on the Title column header.
2. Press the mouse button and hold it down.
3. While holding down the mouse button, drag the Title column header to the left of the Author column header and release it when the column is the size you want.

Resize a column

You can change the width of record list columns. For example, you may want to widen a narrow column to show all of the text in it, or make columns narrower so more columns fit on your screen.

split line



Before: narrower Title column

A..	Title	Author
001	Anna Karenina. / T...	Tolstoy, Leo
001	Der Besuch der alt...	Dürrenmatt, Frie...
001	The body in the libr...	Christie, Agatha
001	Bugs / [videorecor...	

After: wider Title column

A..	Title	Author
001	Anna Karenina. / Tr. from the Russian by ...	Tolstoy, Leo
001	Der Besuch der alten Dame; : eine tragisc...	Dürrenmatt, Frie
001	The body in the library / Agatha Christie.	Christie, Agatha
001	Bugs / [videorecording] GPM/Nebraska ET	

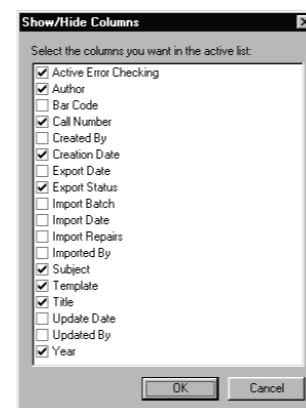
1. Put your cursor on the split line to the right of the Title column header.
2. When the cursor becomes a |, hold down the mouse button and drag the mouse to the right.
3. When the column is the size you want, release the mouse button.

Showing and hiding columns

Another way to customize lists is to hide the columns that you don't need. In this exercise you'll hide some columns in the Master List.

1. Under List, select Show/Hide Columns. The Show/Hide dialog box shows all the possible columns.
2. Clear the check boxes for Bar Code, Created By, Export Date, Import Batch, Import Date, Import Repairs, Imported By, Update Date, and Updated By as shown in the figure.
3. Click OK to close the dialog box and save your changes.

The Master List now shows only the columns you selected. Show the hidden columns again by opening Show/Hide Columns again and selecting the columns you want to see.



Finding records

Use the Find command to locate a specific record in the list. This is particularly useful when you have a lot of records in your database. In this exercise you'll find the record titled **Almayer's Folly and Other Stories** by Joseph Conrad.

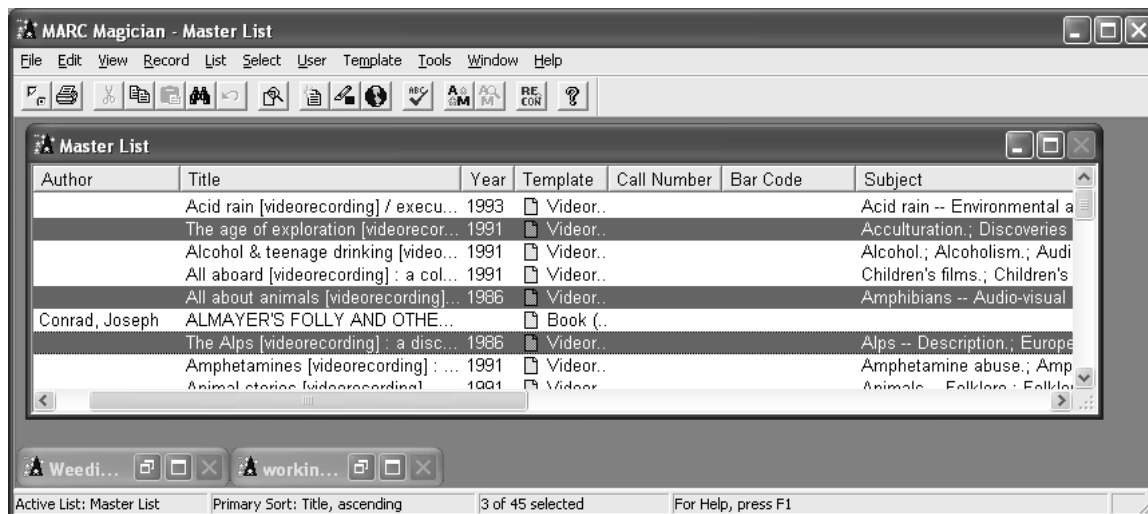
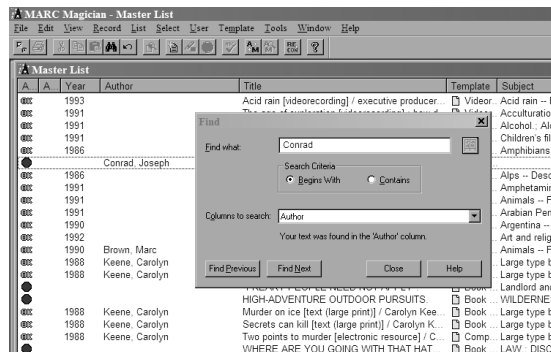
Find a record

1. Select Find on the toolbar.
2. In the Find what box, enter **Conrad**.
3. To choose whether the program should find the word if it appears anywhere in a column, or only if it appears at the beginning, under Search Criteria, click Contains.

The Columns to Search list contains all of the columns in the record list. This allows you to narrow the search.

4. To further limit your search criteria, you can limit the search to just the **Author** column, if, for example, you only want to find books written by Conrad, but not books about Conrad. To do that, select the **Author** column, and then Find Next.

The program finds the record and outlines it in the list. It also scrolls to the column in which the text was found. Note that the record is outlined - not selected. You'll learn how to select records next.



Selecting records

In MARC Magician, knowing how to select records is very important. Before you can perform any operation on your records (like global editing, exporting, or printing), you have to select the records you want. When you select a record, it appears highlighted in the record list.

Note: To remove a selection (or "deselect" records): just click somewhere else in the list. The record you click on is selected, and all previously selected records are no longer selected. Deselect a single record by clicking it while holding down the Ctrl key.

Selecting a single record

Select one record in the list, which should now be highlighted. Now Select a different record. Notice that the first record you selected is no longer highlighted.

Selecting several non-consecutive records

Next, you'll select several records that don't appear next to each other in the list.

1. Select a record.
2. Press the **Ctrl** key and hold it down.
3. One by one, click each additional record you want to select. (If you accidentally click a record you don't want, click it again to deselect it.)
4. Release the **Ctrl** key. The records you selected should appear highlighted.

Selecting a block of consecutive records

1. To select several records that appear next to each other in the list, or a block, click on the first record in the block.
2. Press the **Shift** key and hold it down.
3. Click the last record in the block.
4. Release the **Shift** key. The block of records you selected should appear highlighted.

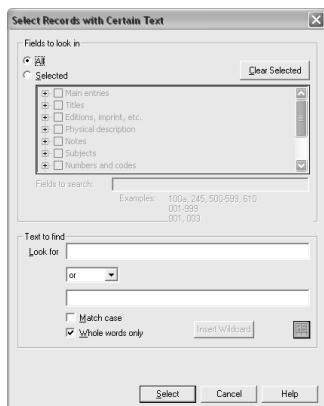
Tip: Use this keyboard shortcut as a quick way to select all records: Press the **Ctrl** key and hold it down. Press the **A** key, and then release the **Ctrl** key.

Selecting all records

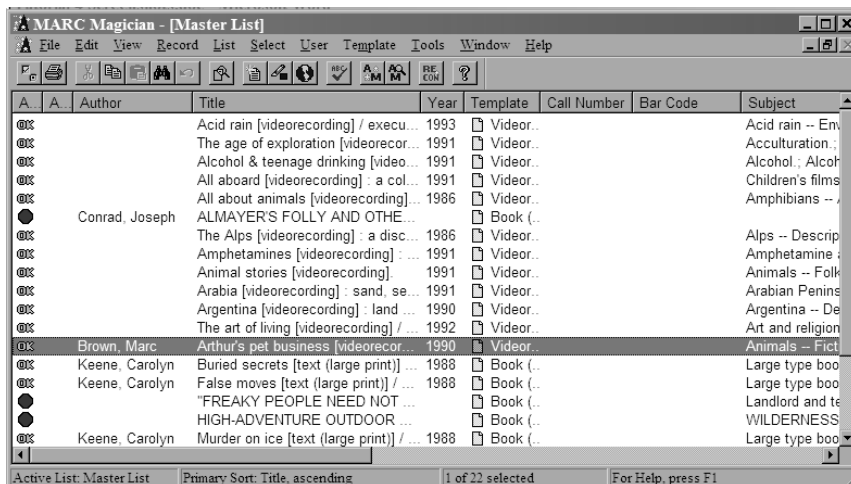
On the **Select** menu, click **All Records**.

Select records that contain a certain word or phrase

You can also select records using the commands on the **Select** menu. These commands let you select records based on whether they fulfill certain criteria. Whenever you use these commands to select records, any previous selection is removed. Only the records that meet the criteria you specify are selected. In this example you'll use the **Records with Certain Text** command to select records that contain a word or phrase that you specify.



1. On the **Select** menu, click **Records with Certain Text**.
2. Under **Fields to look in**, choose whether the program should search the whole record or only certain fields or subfields. In this example, you'll search the whole record by clicking **All**.
3. Under **Text to find**, in the **Look for** box, enter **Brown** and **Select** to begin searching. In this case, there will be only one record containing the word **"Brown"**. The status bar shows how many records are currently selected.



Note: If you select the Match case check box, the program only searches for text that is capitalized exactly as you entered it. If you select the Whole words only check box, the program only searches for the whole word you typed (For example, if you type "monster" the program won't find "monsters").

Deleting records

When you delete a record from the Master List, it goes into the Weeding Truck. The Weeding Truck is like the Recycle Bin. You can restore a record to the Master List from the Weeding Truck as long as you haven't emptied it. Once you empty the Weeding Truck, those records are gone permanently.

Delete a few records

1. Select a couple of records in the Master List.
2. Under Record, select Delete from All Lists. The selected records will disappear from the Master List. They've moved to the Weeding Truck, where they stay until you delete them permanently by emptying the Weeding Truck.

Tip: Use this keyboard shortcut to delete records: Select the records you want to delete. Press the Ctrl key and hold it down. Press Delete, and then release the Ctrl key.

Restoring deleted records

If you decide that you want to keep the records you deleted after all, you can restore them to the Master List.

1. Select Weeding Truck from the Windows menu. It now appears in the foreground and becomes the active list.
2. Select Edit, Select All.
3. Under Record, click Move to Master List. The records should disappear from the Weeding Truck and will now be in the Master List again.

What are custom lists?

Custom lists help organize records into groups, by separating records from the **Master List**, making it easier to carry out global editing tasks or export them in a single batch.

Custom lists contain a subset of the records in the **Master List**. Every record in a custom list is also always in the Master List. If you edit a record in a custom list, the changes to the record are reflected in the **Master List** (and any other custom lists that contain the record).

You can create as many custom lists as you wish, and, unlike the **Master List** and the **Weeding Truck**, you can delete and rename custom lists.

Creating custom lists

There are a couple of ways to go about creating a new list. You can first create an empty list, and then add records to it, or you can select the records you want in the list first, and then add them to a new list. In this exercise you'll use the second method to create a list for all your video recordings. You also get a chance to use a different command on the **Select** menu.

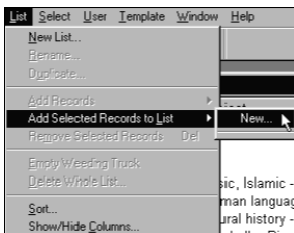
Select the records for your list

1. Select all of the video recordings by using the **Select** menu, and clicking **Records that Use a Certain Template**.
2. Select the **Videorecording - VHS or Beta** template, and then **Select**. All of the videocassettes should now be selected.



Adding the records to a new list

1. Under **List**, select **Add Selected Records to List**, and **New**.



2. In the **New List** dialog box, enter a name for your list, and click **OK**. The videocassettes are now added to the new list, which appears in a separate window inside the main window. The name of the list appears on the title bar.

Removing records from your list

Select a record or two, and press **Delete**. The records are removed from your list, but are still on the **Master List**.



Deleting your list

When you delete a list, you have to decide what to do with the records in it. You can leave them in the Master List, or delete them from all lists and move them to the Weeding Truck.

1. Under List, click **Delete Whole List**.
2. In the dialog box, select **Keep them in the Master List** (and other lists), and then click **Delete List**. A message will ask if you're quite, quite sure.
3. Click **Delete List** again and you're back in the Master List.

Tip: To delete records from all lists (i.e., move them to the Weeding Truck), press the Ctrl key and hold it down. Press the Delete key, and then release the Ctrl key.

Review & practice

Here are some suggestions for practicing on your own:

- Practice selecting records using the mouse together with the Shift and Ctrl keys.
- Try out some of the other commands on the Select menu.
- Explore the other commands on the List menu.
- Create some more custom lists and practice adding and removing records.

As always, refer to Help when you have questions.

Go to the next tutorial

If you'd like to jump right in to the next tutorial, stay where you are in the main window. You're all set to begin the next tutorial. Remember that you can do most of the tutorials in any order you'd like.

Section 6 - Working with Record Viewer

Record Viewer is a special window for browsing records in your database. It can also be used to produce cards and labels (which we won't cover in this tutorial). For instructions on working with cards and labels, see the Help Topics in MARC Magician.

In this tutorial you'll learn how to:

- Open records in the Record Viewer
- Browse through your records
- Set Record Viewer options
- Print records

What is Record Viewer?

The Record Viewer shows the field and subfield data as it appears in the raw MARC record, including the field tags and subfield codes. You can have several records open in Record Viewer at a time and quickly page from one record to the next. Record Viewer also allows you to do a quick visual check of your records before exporting or printing them.

Record Viewer is more convenient than Cataloger for checking records because of the ability to quickly page between records. It also allows you to have an unlimited number of records open at one time, whereas Cataloger only allows 10 open records at a time.

Record Viewer also shows detailed information that doesn't appear anywhere else in the program, including:

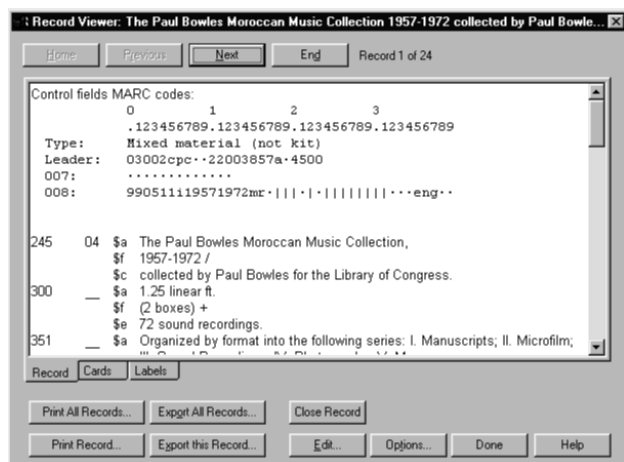
- Control field settings in "English"
- Leader and 007 and 008 control field MARC codes
- Additional materials data in "English" and MARC codes (006 and 007 control fields)
- Holdings data in "English"
- List of errors and warnings in the record (as defined by your Active Error Checking settings)
- Import repair log (list of things that were repaired when the record was imported)

Opening Record Viewer

1. Under Select, click **All Records**, to select all records in the Master List.
2. Click **Record Viewer** on the toolbar, to open the selected records. To see more information on your screen at once, you may want to resize the Record Viewer. Record Viewer will remember its last size and position, so you won't have to resize it again.

Browse through the records

Use the row of buttons at the top of the Record Viewer to move from one record to the next. They are only available when more than one record is open in Record Viewer.



Close a record

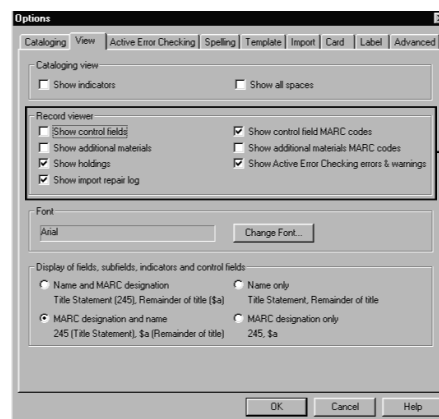
Use the Close Record button to close a single record. This button is only available when you have more than one record open. When you close a record, it is also removed from the group of selected records in the Main Window.

Setting Record Viewer Options

In this exercise you'll learn how to set the Record Viewer options to display only the information you need. At the top of the record workspace, under the heading "Control Fields MARC Codes", notice that the current view shows the coded leader and control fields. This is useful if you're familiar with MARC and know how to interpret these codes. Otherwise, you may prefer to hide this information to leave more room on the screen for the bibliographic data.

Hide control field codes

1. Click Options to bring up the Options dialog box, with the View tab in front. These check boxes determine what information is displayed in the Record Viewer.
2. Clear the Show control field MARC codes check box.
3. Click OK to close the box and save your settings. The control fields will no longer be displayed in the Record Viewer.



Editing from Record Viewer

As you browse through your records, you may notice a mistake you'd like to fix. Although you can't make changes from Record Viewer, you can open the record in Cataloger and edit it there.

To open a record in Cataloger for editing, select Edit at the bottom of the Record Viewer screen.

The current record is now displayed in the Cataloger. You can now edit text, add or remove fields and subfields or change control field values. When you save the record and exit Cataloger, the changes are shown right away in Record Viewer and you can continue checking records.

Printing from Record Viewer

When you print from **Record Viewer**, the printout shows all the data as it appears on your screen. You can print just the current record or all of the records currently open in **Record Viewer**.

1. To print the current record, click **Print Record**, or to print all records, click **Print All**.
2. From the **Print** dialog box, choose the printer you want to use and then **OK**. For this tutorial, don't print anything now.

NOTE: You can also print single records directly from **Cataloger** without opening **Record Viewer** at all, by going to **File**, and clicking **Print**. The printout is identical to what you would get if you printed from **Record Viewer**.

Closing Record Viewer

When you're done reviewing records, close **Record Viewer** by clicking **Done** or the **Close** button in the top right corner of the window.

Review & Practice

Some suggestions for practicing on your own

- Select records and view them in **Record Viewer**.
- Open the **Options** dialog box again and change the **View** options to show other information. The **Help** button gives more information about your options.
- Look at the **Cards** and **Labels** tabs.

Go to the next tutorial

If you'd like to jump right in to the next tutorial, stay where you are in the main window. You're all set to begin the next tutorial. Remember that you can do most of the tutorials in any order you'd like.

Section 7 - Active Error Checking

Every library has different standards and requirements for its MARC records. The **Active Error Checking** feature helps you identify which of your records meet your standards and which still need cleanup work. If you haven't previously imported the exercise files, you'll need to do that now. You can find instructions for this on page 27.

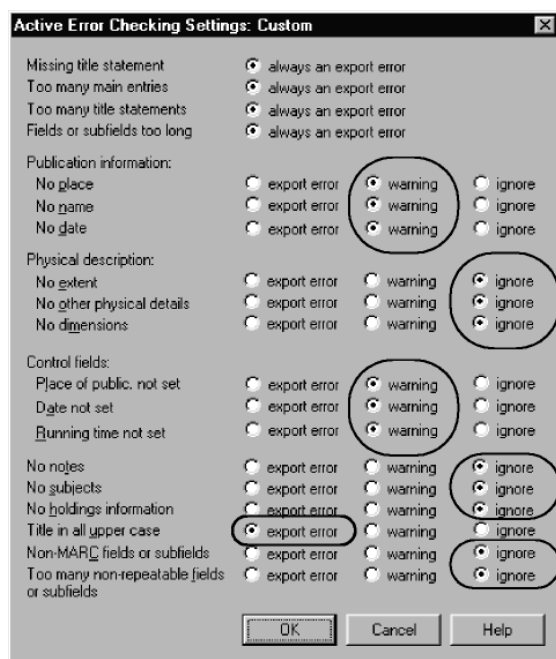
In this tutorial you'll learn how to:

- Set Active Error Checking options.
- Use the Active Error Checking column in the main window.
- Use the Active Error Checking panel in Cataloger.
- View Active Error Checking details in Record Viewer.

Setting Active Error Checking options

With your Active Error Checking options, you define which issues you want to be notified about and which issues you want to ignore.

1. Click the **Options** button on the toolbar.
2. In the **Options** dialog box, select **Active Error Checking**.
3. There are three levels of error checking: **Basic**, **Texas Library Connection**, and **Custom**. For this exercise, select **Custom**.



If you are curious about **Basic** and **Texas Library Connection**, select one, and then click **Show Settings**.

The **Active Error Checking Settings** dialog box shows all of the possible issues that the program can flag.

For most issues, choose one of three options: **export error**, **warning**, or **ignore**. There is no notification for issues that are set to **ignore**. Warnings and export errors are distinguished in various ways in the main window, the **Cataloger**, and the **Record Viewer**. You'll learn more about that later in this tutorial.

Notice that some issues are always export errors. These are serious problems that should always be corrected. How you set the other issues is up to you.

For this tutorial, make your settings as they appear above, and then click **OK** to return to the **Active Error Checking** tab. Click **OK** again to close the **Options** dialog box and save your settings.

The column - Active Error Checking and the main window

To see if the records meet our criteria look at the **Active Error Checking** column. Unless you moved it, this is the first column of the record list. (You might see just the letter A... on the column header, but if you resize the column you'll see the whole title.)

This column displays a yellow triangle for records with warnings and a red stop sign for records with export errors. The column displays a green OK for records with no errors or warnings.

Sort the records by errors and warnings

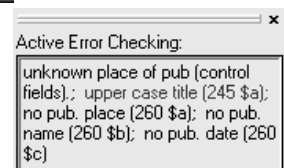
1. Click on the **Active Error Checking** column header to put the records that have export errors and warnings next to each other in the list.
2. Click the column header a second time to make the records with errors and warnings appear at the top of the list.

Note: A red stop sign displays if a record has issues defined as errors.
A yellow triangle denotes warnings.

The panel - Active Error Checking and Cataloger

How to find errors with the Active Error Checking panel in Cataloger.

1. Select a record in the Master List, *Freaky People Need Not Apply*.
2. Click the Edit button on the toolbar to open the record you selected in Cataloger.
3. Take a look at the **Active Error Checking** panel for the record. It should look something like this:



If you don't see the **Active Error Checking** panel, it may be turned off. Turn it on by opening the View menu and clicking **Active Error Checking Panel**.

In this example, the panel says that the place of publication control field hasn't been set, there is no place of publication in subfield **260 a**, no publisher name in **260 b**, no publication date in **260 c**, and the title is in upper case. Notice that some of the text is black and some is red. The black text means that we defined this particular omission as a warning. The red text indicates that we set an upper case title to be shown as an export error.

4. To fix the title, move your cursor to subfield **245 a**, delete the title and retype *Freaky people need not apply*, this time with correct capitalization. Notice that the text in the **Active Error Checking** panel disappears as you type.
5. To fix the place of publication, move the cursor to subfield **260 a** and type *New York*. Notice that the unknown place of publication (control field) disappears after you type the "k" in New York. We set that field automatically when we recognize it!
6. To fix the publisher name, press the Enter key and type *Hamster Dance Books* in **260 b**.
7. To fix the publication date, press the Enter key and type *1965* in **260 c**.
8. Save the record and close Cataloger. When you return to the main window, the record you corrected now no longer displays an export error in the **Active Error Checking** column.

The details - Active Error Checking and Record Viewer

This exercise explains how to view detailed information about Active Error Checking issues in the Record Viewer.

Select records with errors or warnings

1. Under **Select**, click **Records with Errors or Warnings**. This command gives you several options. For this exercise select just records that have errors or warnings.
2. In the **Select Records with Errors or Warnings** box, click **Either errors or warnings**, and then **Select**.

All records with errors or warnings should now be selected in the list.



Open the records in Record Viewer



Click **Record Viewer** on the toolbar to see how **Active Error Checking** looks in **Record Viewer**.

Set Record Viewer options

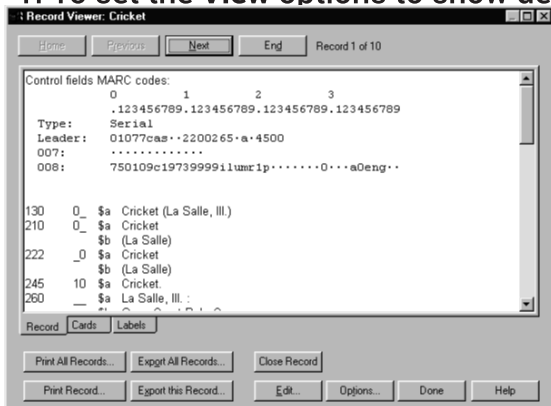
1. To set the **View** options to show details about the errors

and warnings, select **Options**.

The **Options** dialog box appears with the **View** tab in front displaying the **Record Viewer** options.

2. For the **Record Viewer** to display the **Active Error Checking** details, the **Show Active Error Checking errors and warnings** check box must be selected.

This check box may already be selected, but if not, select it now, and click **OK**.

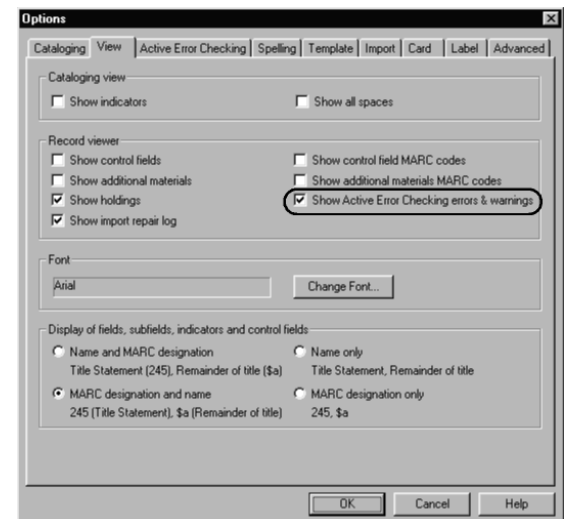


Details about the errors and warnings for each record are at the bottom of each record. For example, here's what is displayed for the record titled *High-adventure Outdoor Pursuits*.

If you wanted to edit this record, you would open it in **Cataloger** by clicking **Edit**.

Take a look at the **Active Error Checking** details for the other records. When you're finished, close **Record Viewer** by clicking **Done**.

Active Error Checking	
Warning:	Unknown place of publication in control fields. Enter the city name of the place of publication. You can enter [S.I.] if no information is available.
Export error:	The title in this record is all upper case (245 \$a). Reenter the title in upper and lower case.
Warning:	No publisher's name (260 \$b). You can enter [S.n.] if no information is available.
Warning:	No date of publication (260 \$c).



Important: While Active Error Checking is tremendously helpful in locating potential problems, it isn't a foolproof way to determine the quality of your records. Records showing an OK may have other problems (such as improper cataloging) that the program doesn't flag, and records that show export errors or warnings may actually be correct.

For example, if you have Active Error Checking set to flag a missing publication date, your serials (which usually aren't supposed to have this subfield) will show errors or warnings even though they are actually correct.

Review & practice

Here are some suggestions for practicing on your own:

- Play around with different Active Error Checking options.
- View errors and warnings in the Cataloger and the Record Viewer.

Go to the next tutorial

If you'd like to jump right in to the next tutorial, stay where you are in the main window. You're all set to begin the next tutorial. Remember that you can do most of the tutorials in any order you'd like.

Section 8 - Global Editing Basics

In this tutorial you'll see the power and flexibility of MARC Magician's many global editing features.

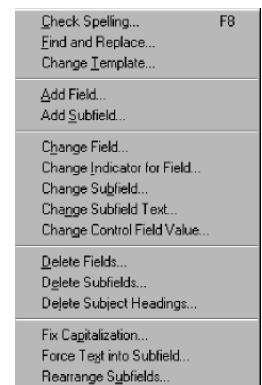
In this tutorial you'll learn how to:

- Import records into MARC Magician.
- Back up the database.
- Find and replace text in a group of records.
- Add a field to a group of records.
- Fix the capitalization of fields or subfields that are all in upper case.
- Restore the database from a backup.

What is global editing?

Global editing means editing several records at a time. MARC Magician gives you several global editing commands you can use to clean up your records:

It's unlikely that you'll need to use all of these commands on your own records. You'll probably find that you can get your global editing tasks done using just two or three of these. In this tutorial you'll learn how to do some basic global editing, as well as some best practices and warnings.

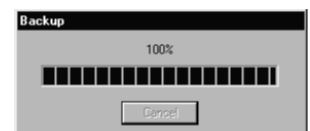


Backing up the database

By default, MARC Magician automatically backs up the database every time you exit the program. When you are doing global editing, it's usually a good idea to back up the database more frequently. In fact, you should get in the habit of backing up the database before every global edit.

In this exercise you'll back up the database so that if anything goes wrong with the global editing you do in the next exercises, you can restore the backup.

1. Select File, Backup Database. Whenever you do a backup, this progress dialog box appears. Depending on how many records are in your database, backup can take anywhere from less than a second to several minutes.



Tip: Use this keyboard shortcut to backup your database quickly: Press the Ctrl key and hold it down. Press the B key, and then release the Ctrl key.

Finding and replacing text

In this exercise, you'll use the Find and Replace global editing command to search the subject headings for an incorrect term and replace it with the correct one. You've discovered that some of the records in your catalog have "Large type books" as a subject heading. According to the subject heading authority you use, the preferred term is "Large print books." Perfectionist that you are, you'd like to fix these records.

Find and replace subfield text

1. Go to Select, All Records. All of the records in the Master List should now be highlighted.
2. Select Global Editing from the toolbar, and then Find and Replace.
3. Under Fields to look in, choose Selected. You'll use the top part of this dialog box (Fields to look in) to restrict the search to only the subject fields. You could search all fields, but by restricting the search you ensure that correct text in other parts of the record won't accidentally be replaced.
4. Since you only want to find and replace text in subject fields, select the check box next to Subjects.
5. In the Find what box, enter **Large type books**.
6. In the Replace with box, enter **Large print books**, and then OK.



When the program finds a record containing the text you specified, the **Make Change** dialog box appears, with highlighted text meeting your criteria in the **650\$a** subject heading. Under **Highlighted text will be changed to**, is the phrase intended to replace the existing text.

7. Click **Change** to change the text in the current record and continue searching. To change all the records at once, click **Change All**. This makes the change in every record without any further prompting.

Adding a field

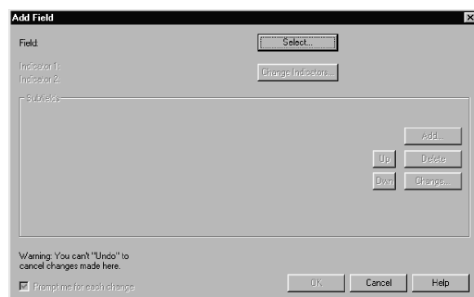
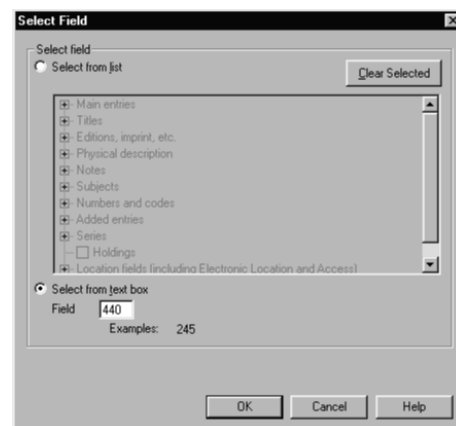
In this exercise, you'll add a series statement field (**490**) to a group of books belonging to Carolyn Keene's series **The Nancy Drew files**.

1. First select the all records with **Keene, Carolyn** as a main entry, by going to Select, Records with Certain Text.
2. Under Fields to look in, click Selected.
3. Click the Main Entries check box.
4. In the Look for box, enter **Keene, Carolyn**, and click **Select**. All of the Nancy Drew books should now be selected.

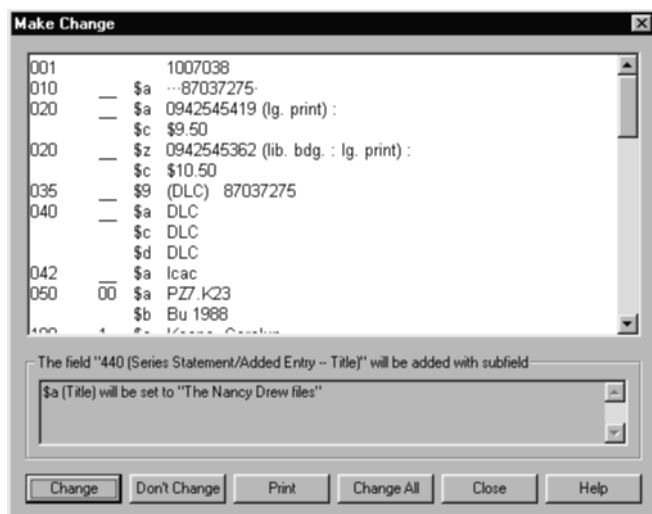
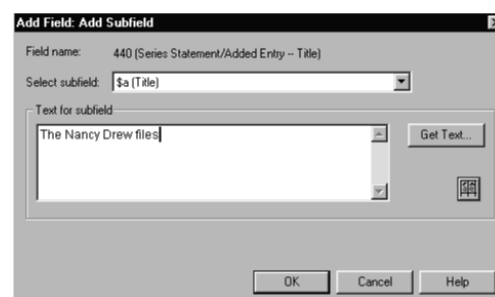
Adding the field

Next you'll add a **490 (Series Statement/Added Entry -- Title)** field to the selected records.

1. Select Global Editing from the toolbar, and then Add Field.
The global editing dialog boxes always "remember" the last settings used, so if the Add Field command was used before, the dialog box on your screen will look different.
2. Click Select to bring up the Select Field dialog box. Like some of the other dialog boxes in this tutorial, this one allows you to choose the field in one of two ways: select from the list, or enter the field tag directly in the box. You know the MARC tag of the field you want to add, so type it in the box rather than selecting from the tree.
3. Click Select from text box, type **490** in the box, and then OK.
In the Add Field dialog box the Subfields area now has a white background, and the Add button is no longer dimmed. Use this button to choose the subfield (and text) to put into the field.



4. Click Add.
5. Select the **\$a (Title)** subfield.
6. Under Text for subfield, type **The Nancy Drew files**, and then click OK.



You've made all the settings you need, so click OK to begin global editing.

7. When the Make Change dialog box appears, the top shows the record as it is now, and the bottom part shows the change that will be made.
8. Click Change to add the field in the current record and continue searching. Each time the program finds the specified text, the Make Change dialog box reappears.
9. Review a few more changes to make sure the command is working as intended, and then select Change All to change the rest of the selected records.

When the program is finished editing, the Completed Add Field dialog box tells you how many changes were made in the selected records. Click OK to close this dialog box.

Fixing Capitalization

In this exercise, you'll use the **Fix Capitalization** command. Using this command isn't perfect, but it does allow you to minimize the number of corrections you have to do by hand. You've discovered that some of your records were typed in all upper case letters. You want to contribute these records to a union database, but they don't accept records with improper capitalization.

Select records

1. Under **Select**, click **Records with Errors or Warnings**, to select all the records you want to edit.
2. Choose **Title in all upper case**, and then **Select**.



Add selected records to list

Because you will have to correct some capitalization by hand after you do the global edit, it's a good idea to put these records into a list so you can keep better track of them.

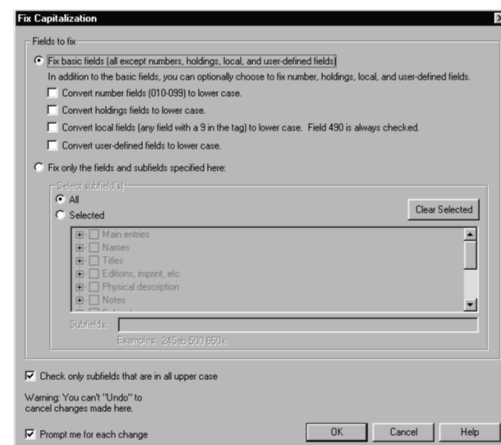
1. Under **List**, select **Add Selected Records to List**, and then **New**.
2. In the **New List** dialog box, give your list a name, and then click **OK**. Your new list contains just the upper case records.

Fix capitalization

Now you are ready to do the global edit.



1. Under **Select**, click **All Records**.
2. Select **Global Editing**, and then **Fix Capitalization**. The **Fix Capitalization** dialog box defines precisely which fields the program should fix. In this example, just fix the basic fields.
3. Click **Fix basic fields** (all except numbers, holdings, local and custom, fields). Near the bottom of the dialog box, there is a check box labeled **Check only subfields that are in all upper case**. Make sure this check box is selected. (You don't want to fix anything that isn't broke.)
4. Click **OK** to start the edit. Notice in the **Make Change** dialog box that the program often suggests the correct capitalization - but not always. In this example, it is most efficient to allow the program to fix all of the capitalization, and then visually check the records in **Record Viewer**. You can correct the remaining mistakes by hand.
5. Click **Change All** to make the change in all of the selected records, without further prompting.



Review changes in Record Viewer

To review the changes in Record Viewer.



1. Select **Record Viewer** on the toolbar.
2. If you see any errors that need to be fixed, click **Edit** to open **Cataloger** for the current record. When you're finished, exit **Cataloger** to return to **Record Viewer** and continue scanning records.
3. When you're finished checking the records, close **Record Viewer**.

Delete the list

You don't need to keep these records separate from the rest of the records in the **Master List** anymore, so you can delete the custom list you created.

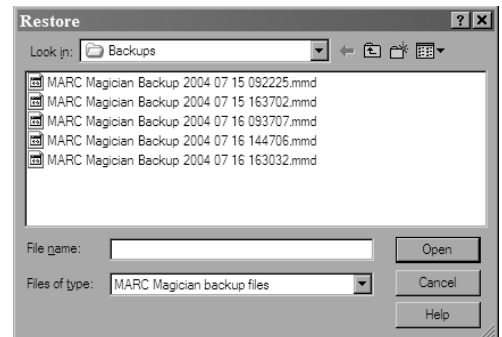
1. Under **List**, click **Delete Whole List**. When the **Delete Whole List** dialog box appears remember that the edited records should remain in the **Master List**. You only want to delete your temporary list.
2. Click **Keep them in the Master List (and other lists)**, and then click **Delete List** twice.

Restoring the database

In this last exercise you'll restore the database from a backup. When you do this, you'll reverse all of the changes you made in this tutorial.

1. Go to **File, Restore Database**. Notice that the **Restore Database** dialog box shows a number of backup files. By default, a backup file is created automatically every time you exit the program. Choose the one you created at the beginning of this tutorial. The name of the backup file shows the date and time it was created, with the following syntax:

"MARC Magician Backup" followed by the 4-digit year, 2-digit month, 2-digit day, and 6-digit time (hour, minute, and second, using a 24-hour clock).



2. Select the most recent backup, (it should be at the bottom of the list) and click **Open**. Your database is now restored to the way it was at the beginning of this tutorial.

Caveat Editor!

Global editing is powerful stuff. You can fix a lot of errors in a very short time, but you can also do a lot of damage. Global editing can't be reversed with the **Undo** command, so don't use global editing on your own records until you fully understand how it works.

Here are some ways to "hedge your bets:"

- Practice the command a few times on the practice records before working with your own records.
- Try the command on a single record first.
- Always review at least the first four or five changes in the **Make Change** dialog box before changing all of the selected records.
- Before you do a global editing procedure, click on **File, Backup Database**. If something goes wrong, use **Restore Database** to go restore the records to what they were.

Review & practice

Here are some suggestions for practicing on your own

- Practice the global editing commands you learned in this tutorial.
- Try out some different global editing commands.
- Look up importing and exporting in Help.

Go to the next tutorial

If you'd like to jump right in to the next tutorial, stay where you are in the main window. You're all set to begin the next tutorial. Remember that you can do most of the tutorials in any order you'd like.

Section 9 - Advanced Global Editing

This tutorial covers two new global editing commands: Change Field and Force Text into Subfield. You'll also be using some advanced features: "only when" to make a change only when a certain condition is present, and "get text" to copy text from elsewhere in the record. If you didn't import records in the previous tutorial, follow the instructions on page 27 to import the practice records into your database.

In this tutorial you'll learn how to:

- Globally change a field.
- Use the "only when" feature to make changes only when a certain condition is present.
- Globally "force text" into a subfield.
- Use the "get text" feature to copy text from another part of the record.

Changing a field & "only when"

In this exercise, you'll use the Change Field global editing command to fix a number of records all with the same error by using the advanced "only when" feature to ensure that only the records you want to change are changed.

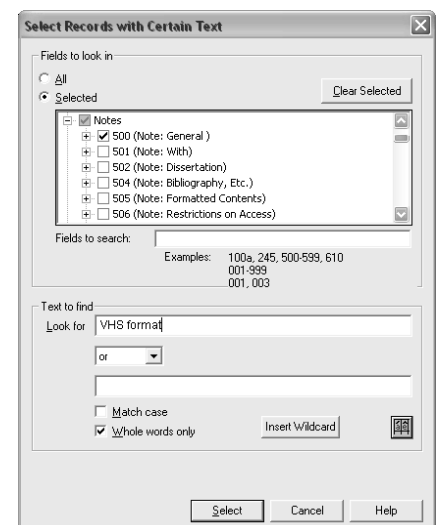
The scenario: Some of your video records have the words **"VHS format"** in the **500 (General Note)** field. The proper field for this information is **538 (System Details)**. Because these records also contain other 500 fields that are correct, you can't change all of the 500's to 538's - you'll have to see to it that only the incorrect fields get changed.

Select records with certain text

The first thing to do is select all the records that have **"VHS format"** in the **500 (General Note)** field.

1. Go to Select, Records with Certain Text.
2. You may notice that parts of the Select Records with Certain Text dialog box are filled in already, because we've used this function in previous tutorials. Under Fields to look in, click Clear Selected to clear the previous setting.
3. Click the plus sign next to the Notes category to expand it, and then select **500 (Note: General)**, or type **500** in the Fields to search box.
4. Under Text to find, in the Look for box, delete any existing text and type **VHS format**.
5. Click Select.

The records should now be selected in the Master List. Look at the status bar at the bottom of the main window to see how many are selected.



Add selected records to list

Next add the selected records to a custom list. This step isn't required but creating a separate list helps to keep track of the records being changed following the global edit.

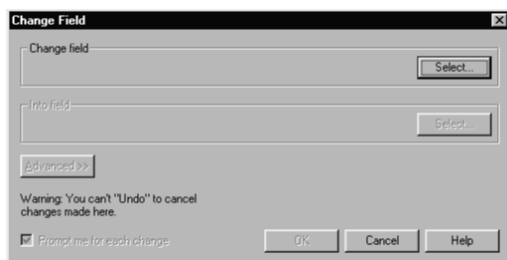
1. Go to List, Add Selected Records to List, and then New.
2. In the New List dialog box, name your list, and then click OK. The new list should contain the twelve records with "*VHS format*" in the **500** field.

Change field

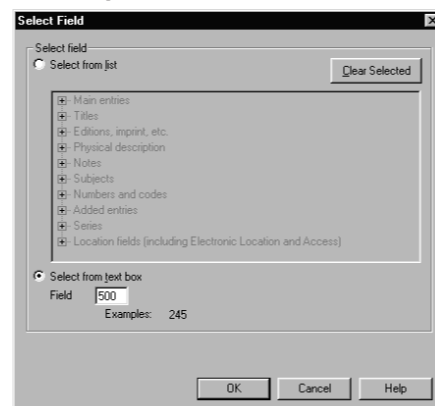
Now you're ready to do the global edit.



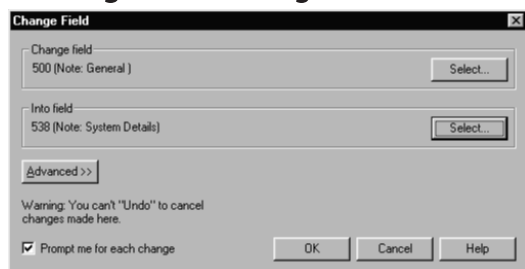
1. Go to Select, All Records.
2. Click Global Editing from the toolbar, and then Change Field.
3. Under Change Field, click Select to choose the field to change.



4. Use Select from text, and enter **500**, and then OK. This returns you to the Change Field dialog box.
5. To choose the field you want to change, go to Into field, and click Select.
6. In this Select Field dialog box, choose **538 (Note: System Details)** or type in **538**, and then OK.



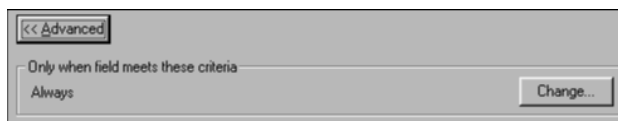
The Change Field dialog box should now look like this:



Always is displayed under **Only when** field meets these criteria.

For this example you don't always want to change the **500** to a **538** _ you only want to change it when it contains the words "*VHS format*," so this setting must change.

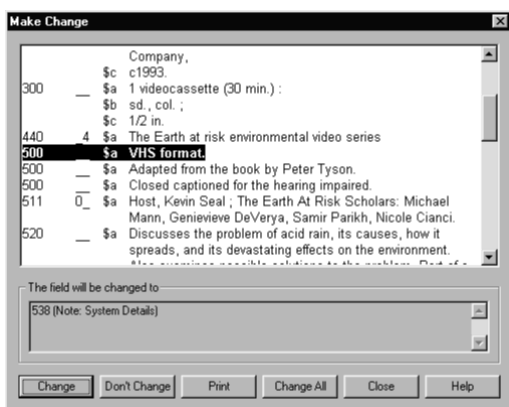
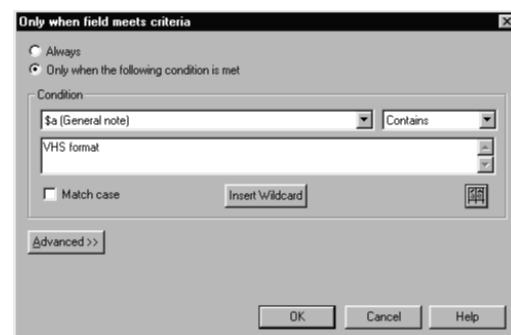
8. Click Change to bring up the Only when field meets criteria dialog box.
9. Click **Only when the following condition is met**, choose a specific subfield in the **500** field and specify what text it must contain in order for the field to be changed into a **538**.
10. Under Condition, select **\$a (General note)**. Next to that, you should see the word "Contains" displayed in the list.



11. Enter **VHS format** in the box as shown.

Your Only When box should look like this:

12. Click OK to save your settings and return to Change Field where the new criteria should now be displayed under Advanced:



13. Review your settings in the Change Field dialog box, and then click OK which brings up the Make Change dialog box, now showing the first record.

The field to be changed is highlighted and at the bottom of the dialog box, you see what the new field will be.

14. Click Change to change the field and continue the global edit. The Make Change dialog box appears for every potential change.

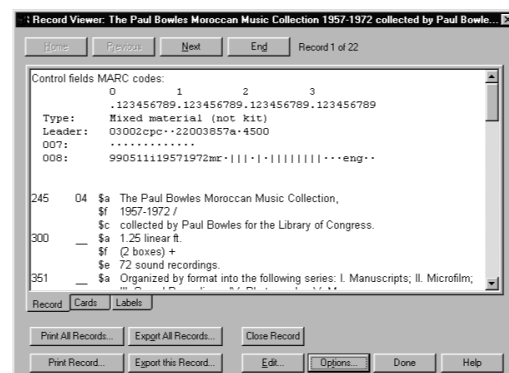
Remember to review at least three or four changes, clicking Change each time, before using Change All to complete the global edit without further prompting. When the global edit is done, the Completed Change Field dialog box tells you how many changes were made.

Review changes in Record Viewer



Verify that the global edit worked properly with a quick visual check of the records in Record Viewer.

1. All of the records in your list should still be selected, but if not, go to Select, All Records.
2. Open Record Viewer from the toolbar. When Record Viewer opens in a new window, check the first record. It should have **"VHS format"** in the **538** field.
3. Click Next to move to the next record and quickly scan the rest of the records. When you've checked all the revised records, close Record Viewer.



Delete the list

Once you're sure that the records have been properly edited, delete the custom list you created, remembering to retain the edited records in the Master List.

1. Go to List, Delete Whole List, Keep them in the Master List (and other lists). Select Delete List twice.

Forcing subfield text & “get text”

The Force Text into Subfield global edit helps when you have information that you’ve downloaded and you want to copy into some of your records, but you don’t want to have to edit each individual record by hand. This function allows you to add the text in a variety of ways.

- If the subfield you are forcing text into isn’t in the record, it’s added with the specified text.
- If the subfield you are forcing text into is in a field that isn’t in the record, the field is added with the single subfield and the specified text.
- If the subfield you are forcing text into is already in the record, the existing text is removed and replaced with the specified text.
- If there is more than one of that subfield in a single field, duplicates are removed.

For this exercise, the situation is that you’ve downloaded records from the internet that have the classification number part of the call number in the **082 (Dewey Decimal Call Number)** field. You want to copy this information into the correct holdings subfield so your library automation system can use it.

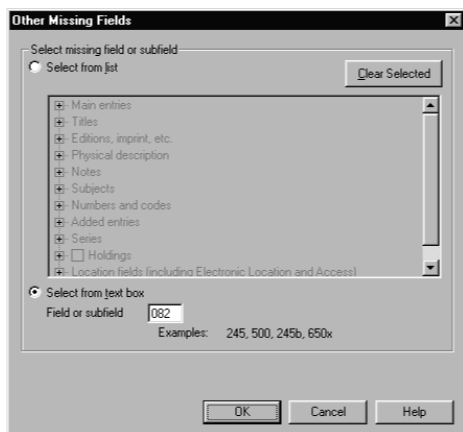
Rather than opening each record in the Cataloger and copying the call number by hand, you’ll use the Force Text into Subfield global editing command to “get” the information from the **082** field and put it into your holdings.

Note: Force Text into Subfield is the best global editing command for adding holdings information, because it adds the information to the existing holdings rather than adding a new one. A new holding is only added when there are none.

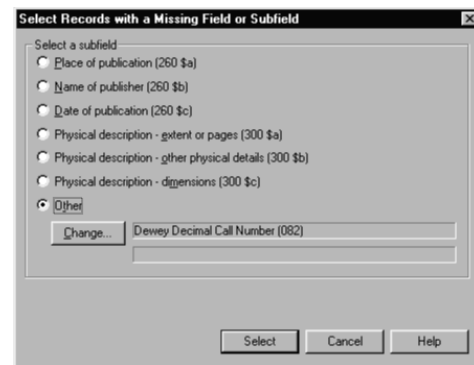
Select records with an 082 field

Before you begin global editing, select only those records that have an **082** field. To do this, first select all of the records that don’t have this field, and then use the Invert Selection command to select only the records that do.

1. Go to Select, Records with a Missing Field or Subfield.
2. In the Select Records with a Missing Field or Subfield dialog box, click Other, and then Change.
3. In the Other Missing Fields dialog box, click Select from text box, type **082** in the box, and click OK.



4. Click OK again in the Select Records with a Missing Field or Subfield dialog box. The records with a missing **082** field are now selected in the Master List.



5. Go to Select, Invert Selection to find only the records that have the **082** field and put them in the Master List.

Now you’re ready to begin the global edit.

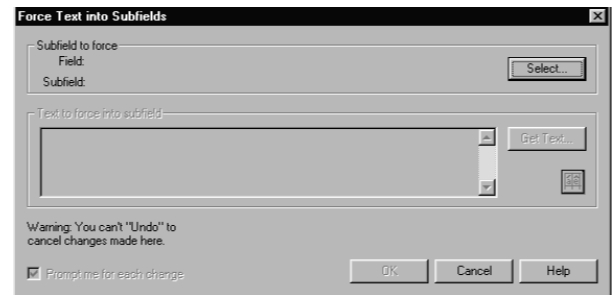
Force text into subfield

1. Select Global Editing from the toolbar, and then Force Text into Subfield.

2. In the Force Text into Subfield dialog box, first you need to select the holdings subfield where you want to copy the new information.

What you do next depends on your holdings type:

3. If you use Easy Entry holdings, click the plus sign next to the Holdings category, and then select the holdings element as follows:



With this holdings type...

Alexandria V

Athena

Dynix

Follett Catalog Plus

Library Pro

LibraryWorld

Winnebago Spectrum CIRC/CAT

852 with 4 part call number

852 with 1 part call number

Choose...

Title Call #

Call no. - Main

Call number

Call number

Circ call

Circ call

Local call number

Classification number

Call number

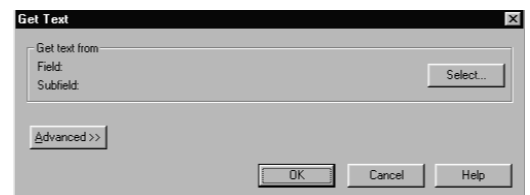
4. If you use Custom holdings, use **Select from text box**, and then enter the holdings field tag and subfield code you use for the call # or classification # in the box.

5. Click OK to return to the Force Text into Subfield dialog box.

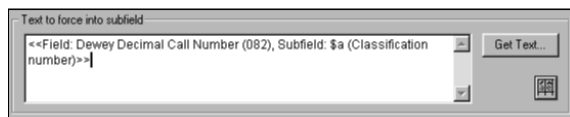
The holdings element or subfield you selected should now be displayed under Subfield to force.

Get text

This step specifies the text you want to force into the subfield you just selected. In this example, the information comes from subfield **082 a**, and you'll use the "get text" feature to copy the text from this subfield.



1. Put the cursor in the white box under Text to force into subfield by clicking anywhere in the box and select Get Text.

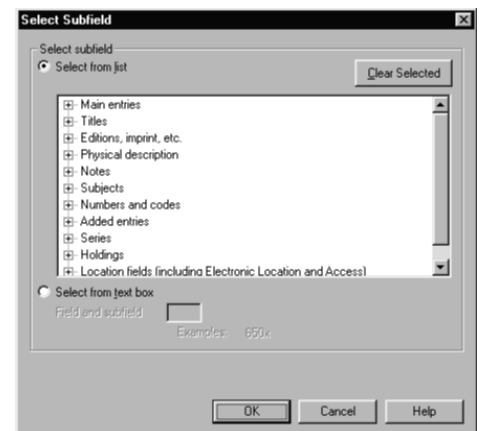


2. In the Get Text dialog box, click Select.

3. In the Select Subfield dialog box, choose **Select from text box**, enter **082a**, and click OK to return to the Get Text dialog box.

4. Click OK again to return to the Force Text into Subfield dialog box, where you should now see this:

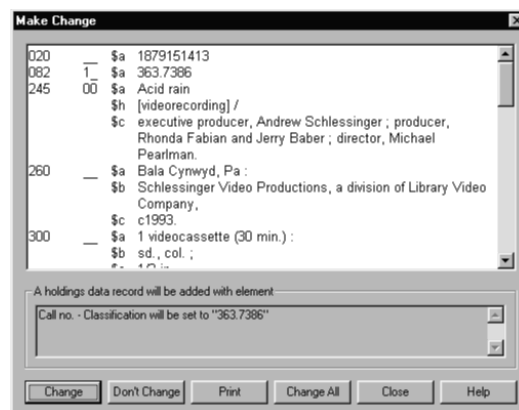
6. Click OK to begin global editing.



As with other global editing commands, the **Make Change** dialog box gives you the chance to review each potential change before it is made:

7. As always, check the first few changes to make sure everything is working properly. After reviewing three or four records, use **Change All** to change the rest of the selected records, without further prompting.

When the program is finished editing the records, the **Completed Force Text into Subfield** box appears, showing how many changes were made.



Review changes in Record Viewer

The records should still be selected in the **Master List**. If you like, you can review the changes in **Record Viewer** as you did in the first exercise, on page 44.

Review & practice

Congratulations! You just completed the last tutorial. We hope these have been helpful.

Practice some more

Here are some suggestions for practicing on your own:

- Try some other global editing commands such as **Change Control Field Value**, **Delete Fields**, and **Change Subfield**. Can you think of a scenario where these would be useful in your library?
- Use the “only when” and “get text” features in different contexts.

As always, refer to **Help** when you have questions.