Introduction to MarcEdit, from first run to philosophy

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Schedule

- 9:30 am – 9:45 am  Welcoming messages and logistics
- 9:45 am – 10:30 am  Session I (Introduction to MarcEdit)
- 10:30 am – 10:45 am  Break
- 10:45 am – 12:30 am  Session II (Working with MARC Tools)
- 12:30 am – 1:30 pm  Lunch
- 1:30 pm – 3:30 pm  Session III (Editing Records in the MarcEditor)
- 3:30 pm – 3:45 pm  Break
- 3:45 pm - 4:30 pm  Session IV (Beyond MARC) / Questions
1. Sample Data Files
   • Sample MARC records need to be downloaded.
   • Get them from: http://marcedit.reeset.net/anonymous/session_data.zip
   • Unzip the data to the Desktop
     • Right click, Extract all to Desktop.
   • When you start MarcEdit for the first time, it will ask you to update. Don’t. Tell it no – then we’ll turn off the automated update checker.
   • We’ll use this information later.
Keypoints

- What is MarcEdit?
  - Background
  - System Requirements
- Understanding the Application Settings
  - Accessibility Settings
  - Configuring the Main Window
  - MARCEngine Settings
  - Automatic Updates
  - Other Settings
- Accessing Application Data
- MarcEdit Infrastructure
- Getting Help
- Questions
What is MarcEdit?

- Started development in 1999
  - Originally coded in 3 programming languages: Assembler (libraries), Visual Basic (UI) and Delphi (COM).
  - Initially designed as a replacement for LC’s DOS-based MARCBreakr/MARCMakr software
What is MarcEdit?

• Today:
  • Written in C#
  • Continues to be freely available
  • Supports both UTF/MARC8 character sets
  • MARC Neutral
  • XML aware
Important notes

• Installation notes
  • As a C# application, it requires the installation of the .NET 4+ framework and MDAC 2.8 components.
  • If Using a previous version (prior to January 2009) you should *uninstall* then reinstall MarcEdit

• System Requirements
  • Any version of Windows that supports .NET
  • Fully supported on Linux (using Mono)
  • Fully supported on Mac (using Mono)

• Upgrade/Support
  • No regular update cycle -- but generally, at least one update per month
  • I answer nearly every question I get about MarcEdit.
  • MarcEdit Listserv (http://metis3.gmu.edu/cgi-bin/wa?A0=MARCEDIT-L) is available for questions.
Installing MarcEdit

- Windows:
  - Installing from the Windows Installer
    - 32-bit version: http://marcedit.reeset.net/software/MarcEdit_Setup.msi
    - 64-bit version: http://marcedit.reeset.net/software/MarcEdit_Setup64.msi
  - Installing using a Zip file:
    - http://marcedit.reeset.net/software/marcedit_other.zip
Installing from Linux

• http://www.youtube.com/watch?v=N65IHRiRby8
Installing on a Mac

- http://www.youtube.com/watch?v=1QppOih-2zg
Setting up MarcEdit

- On first run, MarcEdit will ask you to confirm some settings.
MarcEdit Program Settings

- MarcEdit allows you to customize the most widely used programs onto the front page.
MarcEdit Language Preferences

- MarcEdit allows you to set your preferred font for use with the User Interface.
- MarcEdit allows you to set your preferred font size for use within the program.
MarcEdit Export Properties

- Defines MARC import
- Can capture port output from record input (much in the same way OCLC’s Connexion can)
MARCEngine Settings

• Of Note:
  • Use Diacritics turns mnemonics on and off
  • MARCXML XSLT determines how data moves between MarcEdit’s mnemonic format and MARCXML
  • XSLT Engine
    • Saxon.net supports XSLT 2.0
    • MSXML supports XSLT 1.0, but is orders of magnitude faster
  • Unicode Normalization
    • New feature designed to allow international users to break away from MARC21’s preferred KD normalization
MarcEdit – Miscellaneous properties

- Properties that affect sorting, notification, file storage.
MarcEdit Automated Updates

- MarcEdit includes options for Automatic updates
  - Update Notifications
  - Auto updates as administrative users
    - Only works on Professional/Enterprise/Ultimate versions of Windows (requires domain information)
Application Data

- Three classes
  - Application Data: configuration data, rules data, etc.
  - XSLT Data: XSLT files used to create MarcEdit’s XSLT/XML Conversions
  - Language Data: Access to the Language Data files.
Accessing Application Data
Updating MarcEdit

- Automatic Updating introduced in June 2010
- Can be controlled through the Preferences
- Automatically determines proper version to update (32 v 64 bit)
Sharing Application Settings

- MarcEdit includes functions to provide the ability to:
  - Export Settings
  - Import Settings

- General Rules:
  - Export Settings gives you granularity for exporting

- Import Rules:
  - Imported data overwrites existing data
Exporting Settings

Select Files to Share:

- Configuration Options
  - Exports all data in the user config directory. This includes the following files:
    - Configuration data
    - XSLT function list
    - MarcValidator rules files
    - 239.50 database files

- XSLT Functions
  - Export the defined XSLT stylesheets

- Defined Macros and Tasks
  - Export all defined Macros and Tasks, including shortcut settings

- Defined MarcEditor Templates
  - Export all defined MarcEditor templates. These are templates defined for individual material types.

Export  Close
Debugging Tools: MARCSpy
Troubleshooting

• Occasionally, errors can occur during install or with the configuration file.
  • If configuration settings are not being saved, you can reset your configuration data.
Troubleshooting

- Installation issues:
  - Sometimes, the windows installer can get stuck making it so you cannot install or uninstall the program.
  - Use the MSI Cleaner: http://marcedit.reeset.net/software/msi_cleaner.zip
Getting Help

- Youtube videos (just search for marcedit)
- You can ask me: reese.2179@osu.edu or reeset@gmail.com
- MarcEdit Website: http://marcedit.reeset.net
- Questions