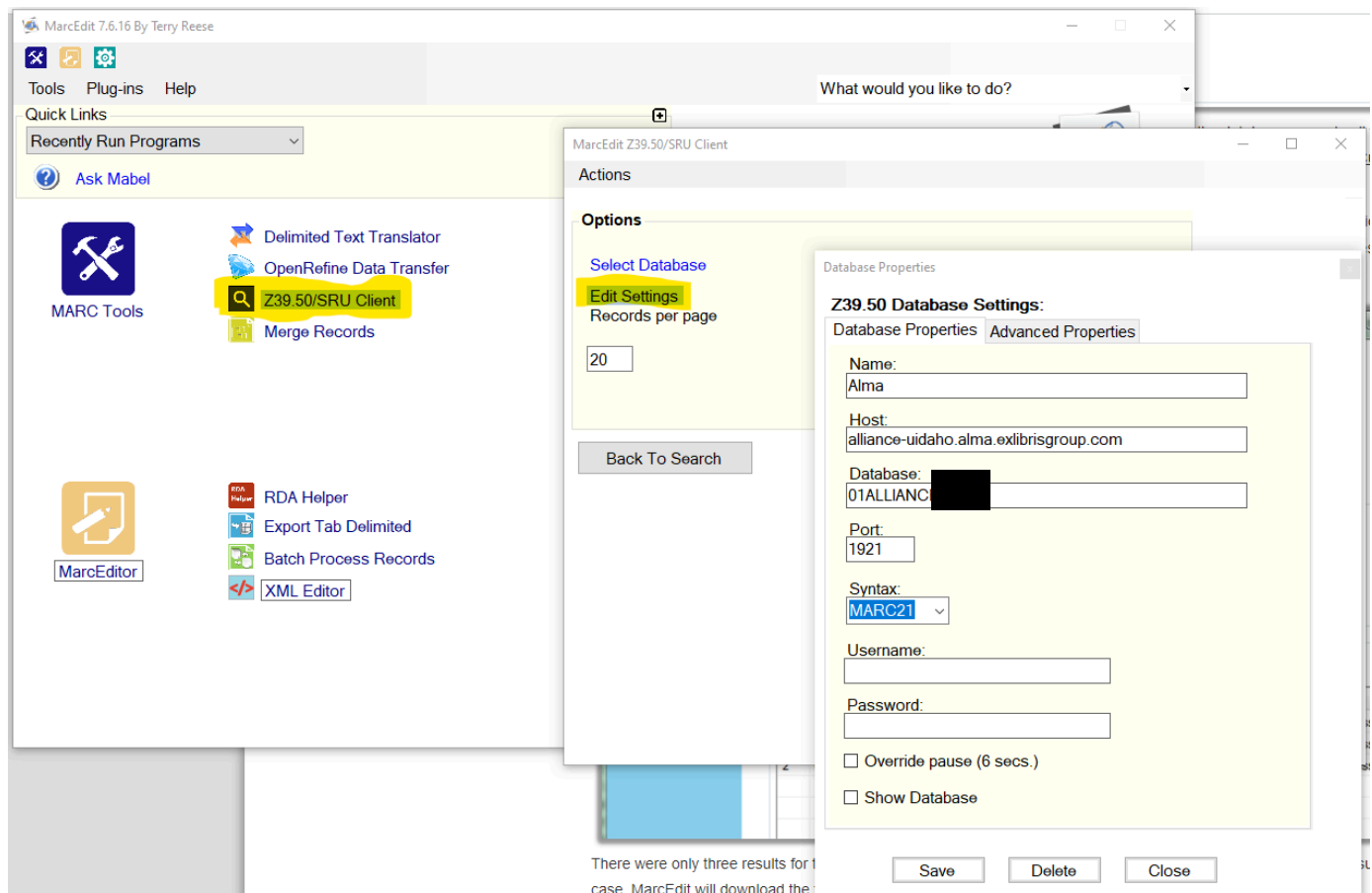


# ALMA Holdings Extraction Using MARCedit for WEST Members

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## MARCEdit Setup

- Install/Update MARCEdit if needed: <https://marcedit.reeset.net/downloads>
- Follow MarcEdit/Alma Integration instructions written by SUNY. Start at the “Configuring the MARCEdit/Alma Integration” step. Note that the directions may be meant for an earlier version of MARCEdit, and/or you’ll need to adapt for your institution’s specific settings:  
<https://sunyolis.libguides.com/c.php?g=986218&p=8444627>
- Set up Z39.50 server. Note that you’ll need to use your own institution’s specific input:  
Click Z39.50 SRU/Client  
Click Actions  
Click Add New Z39.50 Server



Name: Alma  
Host: [YourAlma].alma.exlibrisgroup.com  
Database: [YourAlmaCode]  
Post: 1921

Syntax: MARC21

No username and password if you're using the API. \*Be careful with a UN/PW if your Z39.5 connection is also used for consortia resource sharing. Check to see if this will impact anything.\*  
Click Save and close

- Add API key:

Select the gear from the main screen  
Click ILS Integration  
Click New

ILS Integration: Profile Editor

**ILS Profile Information**

Name:

Type:

**Connection Settings**

Host:

Username:

Alma Token:  ☒ Show

☐ Use System Proxy

☒ Ignore SSL Certificate Errors

**Search Settings**

☒ Use Z39.50/SRU

Alma

[Select Server Settings](#)

Save

Close

Click Select Server Settings  
Click Create New and New Z39.50 Server  
Fill the form out as above

Get your API Key (Alma Token) from the [Ex Libris Developer Network](#).

Click Save  
Select the name of the Z39.50 Server  
Click Save and OK

## Extracting Holdings Data from ALMA


- Create a .txt file containing your WEST commitment OCLC numbers using a text editor like NotePad+.
- Using MARCEdit, following set-up, extract data from ALMA:
  - OPTIONAL: Extract bib data from ALMA – you will only need to do this if your holdings records do not contain all required fields. Bib level data will be merged into holdings records at a later step:
    - In the MarcEditor, select the Alma tab>Search
    - Make sure the search dropdown reads Record Number
    - Check the Batch Search box, and upload your OCLC number .txt file
    - Upon clicking “Search”, you’ll be asked if you want to load the results directly into the MarcEditor. Select YES.
    - This will load all of the matching bibliographic records to MarcEditor.
    - Save this file. Something with the word BIB in the file name will be helpful.
  - Extract holdings data from ALMA:
    - In the MarcEditor, select the Alma tab>Search
    - Check the Batch Search box, and upload your OCLC number .txt file
    - Upon clicking “Search”, you’ll be asked if you want to load the results directly into the MarcEditor. **Select NO.**
    - When the records have loaded in the Z39.50/SRU Client, click Download All Holdings.
    - You will be asked if you want to create a new holdings record if one isn’t present. **Select NO.**

MarcEdit Z39.50/SRU Client

**Actions**

**Query Database:**  
Alma

Search:

Record Num:  

☒ Batch Search  Modifier:

[Set Search Options](#)

**Results**

1 records were located -- 1 were retrieved.

Position	Main Entry	Database	Zone
0	UIA international architect /\$cinter...	IZ	
1	Field notes /\$cForest Service, U....	IZ	
2	Journal of the Optical Society of ...	IZ	
3	Journal of the Optical Society of ...	IZ	
4	Simulation.	IZ	
5	Annual survey of manufactures :\$	IZ	

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

- This will load all of the holdings records to MarcEditor.
  - Download All Holdings.
  - Save this file. (Something with the word HOLDINGS in the file name will be helpful).
- OPTIONAL: Prepare holdings file for merge – this step is only needed if you need to merge bibliographic data into holdings records:
    - The bibliographic file and holdings file need to have a common field for MARCEdit to use as a match point. You can use the MMS ID#, which should be present in the bib records as an 001 and in the holdings records as a 999b. You'll need to copy the 999b into an 001 in the holdings file for matching purposes.
    - In the holdings file, copy the 999\$b to an 001 field using Tools>Swap Field Data
    - Make sure to check "Copy Source" in Search Options.

MarcEdit.NET Batch Editing Tools

[Add/Delete Field](#)  
[Copy Field Data](#)  
[Edit Fields](#)  
[Edit Indicators](#)  
[Edit Subfield Data](#)  
[Swap Fields](#)

### Swap Field Utility

**Original Data:**

Field	Indicators	Subfields	Find:
999		b	

☐ Match All Subfields

**Modified Data:**

Field	Indicators	Subfields	Find: <input type="checkbox"/> Treat as Regular Expression
001			

[Copy Task](#)

**Search Options**

<input checked="" type="checkbox"/> Copy Source	<input type="checkbox"/> Process one field per swap
<input type="checkbox"/> Add to existing field	<input checked="" type="checkbox"/> Sort Modified Field
<input type="checkbox"/> Add to existing/create new	


Process


Close


- Click Process.
  - The 001 in all holdings records should now match up with an 001 from a record in the bib file.
  - SAVE the file again, and close the window.
- OPTIONAL: Merge records – this step is only needed if you need to merge bibliographic data with holdings data:
  - From the main MarcEdit screen, select Tools>MARC Processing Tools>Merge Records.
  - Add your holdings file as the source file.
  - Add your bib file as the merge file.
  - (The example has “merge” added to the file name in the “save file” destination.)
  - Leave the “record identifier” as 001.


**Merge MARC Records**

**Merge Record Data**

**Source File:**  
 

**Merge File:**  
 

**Save File:**  
 

**Record Identifier:**  



☐ Unicode Encoded

- o Click Next
- o Select the 035, for example, and/or any other fields that should be moved from the bibliographic to the holdings record:

**Merge MARC Records**

**Merge Record Data: Select Fields**

**Select Field:**

**Merge Fields:**  
[Clear](#)

☐ Overlay Existing Items  
☐ Merge Unique Items

**Confidence Value:**

[Settings...](#)

- Click Next
- Click Edit Records
- OPTIONAL: Edit your new, merged records file as needed – Only needed if you’ve had to merge bibliographic data with holdings data:
  - Remove the remnant bibliographic 001 field – the bibliographic record number should be in the 999\$b, which is perfectly fine for WEST’s purposes.
    - Tools>Add/Delete Field
    - Enter 001 into Field.
    - Click Delete Field.
  - Remove duplicate 035s if needed
    - Tools>Add/Delete Field
    - Enter 035 into Field.
    - Check Remove Duplicate Data from Delete Field Options
    - Click Delete Field.
  - Remove any extra 035 fields you may not need.
  - Add a 561 with your OCLC Symbol if needed.
  - Check for 022 ISSN numbers and add if needed. (You could probably add these with the merge method, too, if you have them in the bib records, but not the holdings. Just make sure to keep your 001 field in the holdings for the merge process until you’re done.)
  - SAVE file.

*NOTE: NTD who authored these instructions, noticed that if you have two (or more) different holdings records for a bib record (split holdings), the 035 containing the OCLC number will only be added to the first holdings record. Where 035s are lacking, you’ll need to manually copy and paste the 035 from the first record to any subsequent records with the same bibliographic ID number if lacking.*

- Upload your merged and saved .mrc file to AGUA