

Building Your Own Templates

MARC Magician Professional

Tutorial 3



For Efficiency Experts – Building Your Own Templates

This tutorial teaches you some ways 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.

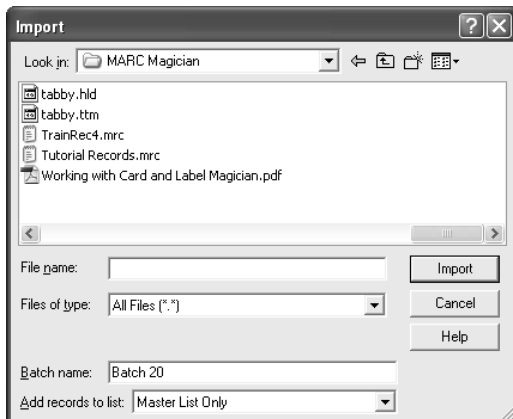
Import records


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

Import the tutorial records

1. Open MARC Magician.
2. Click **File** and then select **Import**.

The Import box appears:



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 click **Tutorial Records.mrc**.

3. Click **Import**.

The import starts. When it is finished, a summary box is displayed with the number of records imported and a count of the automatic cleanups that were done.

What are custom templates?

Custom templates are cataloging templates that you design yourself. The standard templates that come with MARC Magician are sufficient for most basic cataloging, but you may find that making your own templates can save you time and reduce cataloging errors. Here are some 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 do not appear by default in the standard templates (such as ISBN and Note fields), there is no need to create custom templates to do this. Instead, you can use the Add Fields to Standard Templates command on the Template menu.

Creating custom templates

In this exercise, you'll create your first custom template.

The scenario: 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 and 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**.

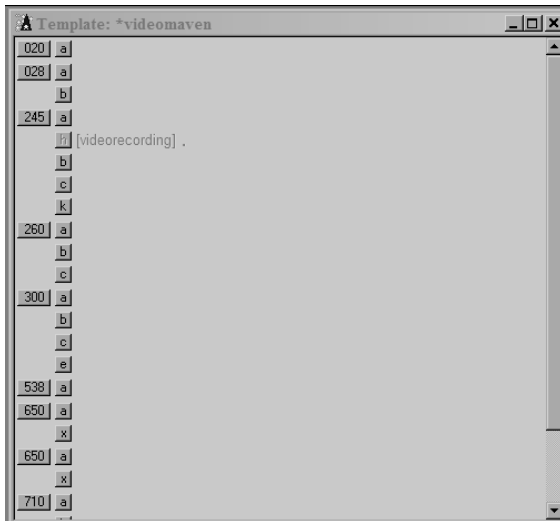
The New Template dialog box appears.



When you create a new template, you have to select the 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:



Notice the bright blue background on your screen - this lets you know that you are 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.

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

The next field that needs to get filled in is the 260 (Publication, Distribution, Etc.) field.

2. In **260 a**, type **Swarthmore, Pa.**

Don't forget to type the period after the state abbreviation!

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

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

The next field that will have the same information in all records is the 300 (Physical Description) field.

All of the videos are 35 minutes long, so:

4. In **300 a**, type **1 videocassette (35 min.)**.

All videos have both sound and color.

5. In **300 b**, type **sd. , col.**

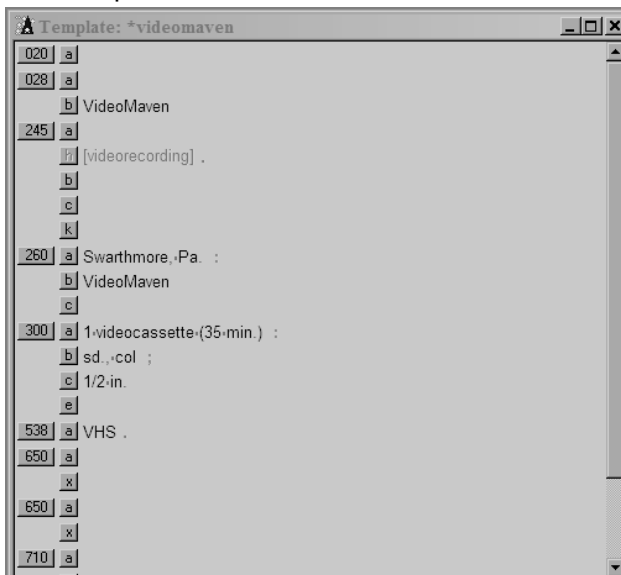
All have the standard measurement for videocassettes.

6. In **300 c**, type **1/2 in.**

The last field you'll fill in for this template is the 538 (System Details) field.

7. In **538 a**, type **VHS**.

Your template should now look like this:



Delete a subfield

The template has a subfield that you don't need for these videos, so you'll weed it out now. You'll eliminate the 300 e (Accompanying material) subfield.

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

A menu appears.

2. Click **Delete**.

The subfield is deleted from the template.

Save and close the template

You're all finished, so you can close your template now:

1. Click the Close button  in the top right corner of the template window.

A dialog box appears, asking if you want **to save your template**.

2. Click **Yes**.

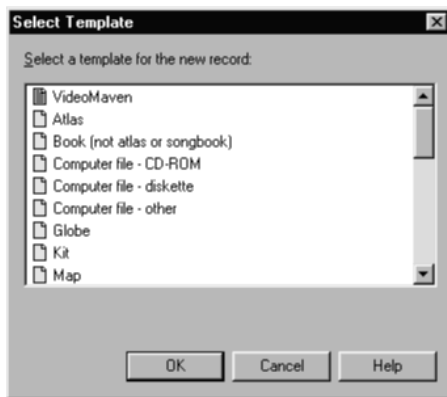
Your template is now saved. The next time you create a new record, your template will be listed along with the others in the Select Template dialog box.

Create a new record

Just to make sure that everything turned out alright, start a new record based on the template you just made.

1. On the **Record** menu, click **New Record**.

The Select Template dialog box appears:



Your new template appears at the top of the list. You won't actually create a new record now, but now you know that the template will be there when you need it.

2. Click **Cancel** to close the dialog box without creating a new record.

Creating templates from existing records

In this exercise, you'll learn a different way to create custom templates – 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.

You decide to save some time by creating a template based on the record you already have.

Open the record

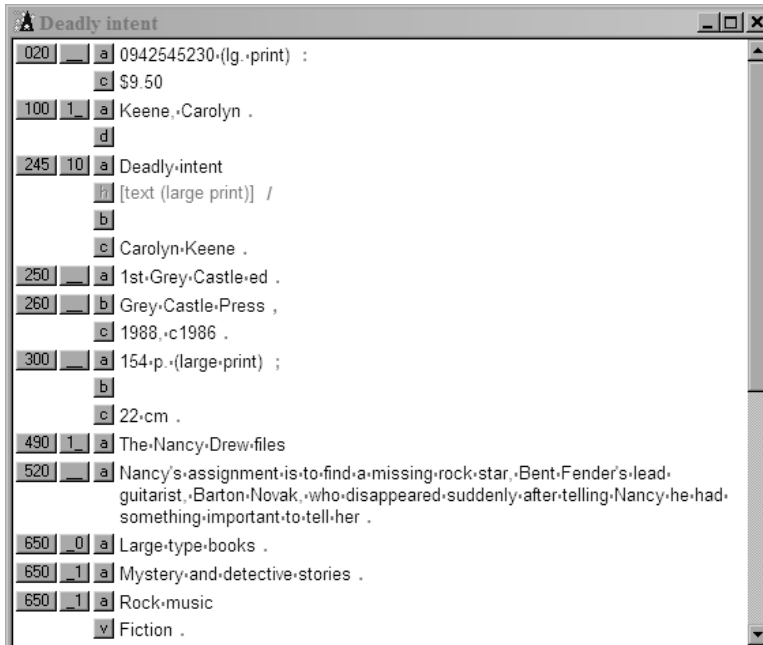
The first thing you'll do in this exercise is open the record on which your template will be based.

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.

You return to Cataloger, and the record you selected is displayed in a new window:

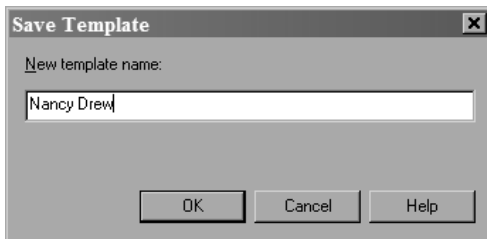


Create a template from the record

Next, you'll make a new template based on this record.

1. On the **Record** menu, click **Create Template from Record**.

The Save Template dialog box appears:



2. 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

The next thing you'll do is remove some text from the template, leaving only the information that is the same for all of the books in the series.

Each book has a different ISBN, of course, so we don't want to have this information in the template:

1. Delete the ISBN text from the **020** field.

Each book has a different title, we don't need this information either:

2. Delete **Deadly intent** from the **245 a** subfield.

The number of pages also varies for each book, so remove the number of pages.
MARC Magician Tutorial 3 - Building Your Own Templates

3. Delete **154** from the **300 a** subfield.

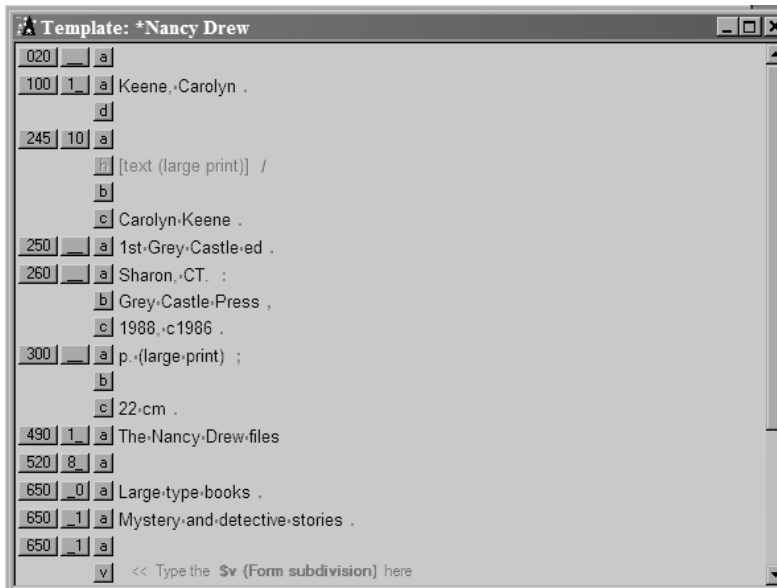
You might as well leave **p. (large print)** in the template, because that part will be the same for all records. The next text to remove is the Summary note.

4. Delete all of the text in the **520 a** subfield.

The last thing you are going to remove is a subject heading that is specific to this particular book.


5. Delete **Rock music** and **Fiction** from the **650** field.

Your template now looks like this:



Save and close the template

Done! You can save and close your template now.

1. Click the Close button  in the top right corner of the window.

A dialog box appears, asking if you want to save your template.

2. 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.

Exporting templates

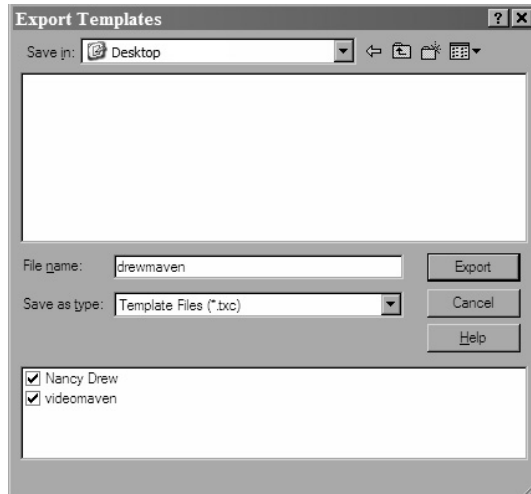
If you'd like to share your templates with colleagues or friends who use MARC Magician, you can export them out of the program. When you export, the templates are saved to a file on your computer, a network drive, or on a floppy disk. Your friends can then import this file and use the templates you created.

In this exercise you'll export the two templates you just created.

Export templates

1. On the **Template** menu, click **Export**.

The Export Templates dialog box appears:



Next you have to decide where to save the template file. In this exercise we'll save the templates to the Desktop.

2. In the **Save in** box, select **Desktop**.
3. In the **File name** box, type a short name for the template file.

The extension .txc will automatically be appended to the 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**.

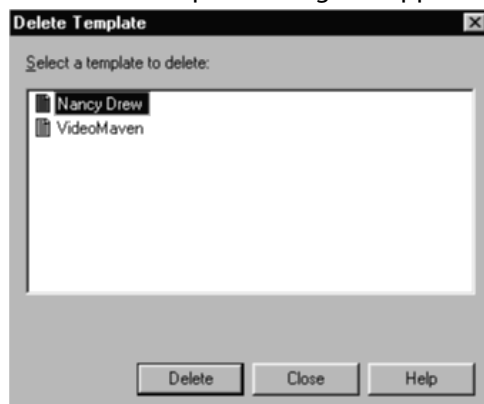
A dialog box appears, confirming that the templates were exported successfully. The templates are now saved on the Desktop.

Deleting templates

In this exercise you'll delete the two templates you just created. Don't worry – your work has not been in vain, because you still have the copy you saved on the Desktop. Deleting them now will allow you to import them in the next exercise.

1. On the **Template** menu, click **Delete**.

The Delete Template dialog box appears:



2. Select one of the templates, and then click **Delete**.
3. Select the other template, and then click **Delete**.

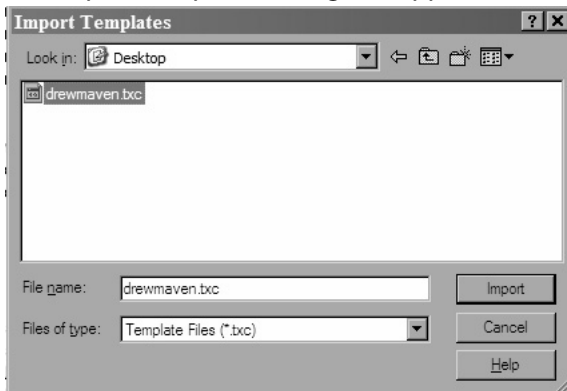
Both templates are now deleted.

Importing templates

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

1. On the **Template** menu, click **Import**.

The Import Templates dialog box appears:



2. In the **Look in** box, select **Desktop**.
3. Click the template file, and then click **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.

Take a break

If you'd like to take a break, on the **File** menu, click **Exit**.

Practice some more

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.

Get to work on your own records

If you feel like you don't need any more practice and want to get to work on your own records, you just need to delete any practice records you've made and you're ready to go:

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.

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