

## ezMARC

ezMARC is designed to help you import and export records from MARC 21 to PastPerfect and from PastPerfect to MARC 21. MARC (Machine-Readable Cataloging) was developed at the Library of Congress in the 1960's. MARC formats have been an important factor in the growth of library automation throughout the world. However, a host of national and international MARC variations have developed during the past 40 years. These MARC formats are all based on the International Organization for Standardization (ISO) 2709 standard, but have national and local variations in content and coding features. The MARC 21 format is a widely used standard for the representation and exchange of authority, bibliographic, classification, community information, and holdings data in machine-readable form.

It is important to keep in mind that MARC was developed specifically for bibliographic cataloging. It is best used for books, maps, serials and other published materials. Although it has been expanded to accommodate archival and graphical materials, MARC has not been successfully applied to the cataloging of museum artifact and decorative arts collections.

PastPerfect allows you to import and export records from MARC 21 using ezMARC. You may import and export records from any of the four PastPerfect catalogs, including Archives, Objects, Photographs, and Library. ezMARC allows you to create your own data map for each catalog. In this chapter you will find detailed instructions for using ezMARC.

## INSTALLING EZMARC

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To install ezMARC you will need to purchase the ezMARC upgrade. For pricing and information visit our web site at <http://www.museumsoftware.com>.

To start the installation select **Import** from the Utilities fly-up menu. Next press the **Install MARC Import/Export** command and follow the instructions on the screen. You will be asked to insert the ezMARC Upgrade disk to complete the installation. You will need to return to the PastPerfect main menu for the installation to be finalized.

Now when you select **Import** on the Utilities fly-up menu you will have a new command button, **Import MARC data**.

## EXPORTING DATA TO MARC

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ezMARC allows you to export data from the Library, Objects, Photos, or Archives catalog to a standard MARC21 data file. You can export all or selected catalog records and all or selected data fields. You can also make decisions about how the data will appear in the MARC record. These decisions are detailed in the Export to MARC data map. To start the export process, press **Export** on the Utilities fly-up menu.

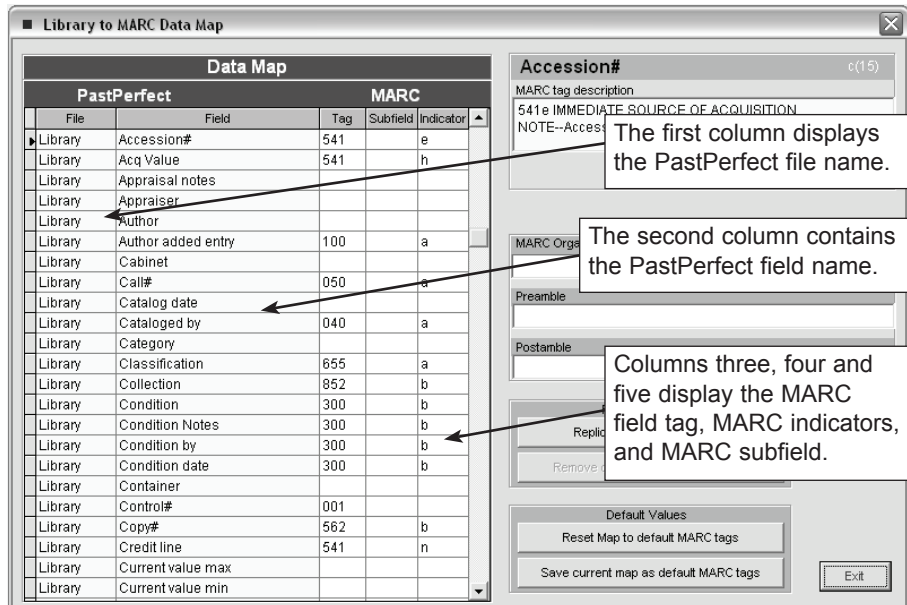
This will open the Export data screen where you can select which PastPerfect file you want to export, Objects, Photos, Archives, or Library. Also on this screen, you can input the name and location of the MARC file you want to create as well as modify or create a data map.

## CREATING A DATA MAP

The first step when exporting to MARC is to create a data map. This map tells the computer how you want each field to appear in the MARC record. You can select which PastPerfect fields you want to export and the MARC tag, or field name, that you want to use for each. There is a separate data map for Library, Objects, Photos, and Archives. To view or modify a data map, first select the desired catalog, Objects, Photos, Archives, or Library at the top of the Export

data screen, then press the **Modify MARC data map** command at the bottom of the Export data screen. This will open the MARC Data Map screen for that catalog:

Figure 22-1  
Library to  
MARC Data  
Map



## Assigning MARC Tags

To create a data map, you must enter a MARC field tag and subfield to the right of each PastPerfect data field that you wish to export. In some cases you may also include an indicator. You will notice that some of the fields have already been assigned MARC tags, this is just to help you get started. You can assign and change any tags that you like.

Except for library and possibly archival materials, there is no real standard for assigning tags. MARC was not designed to catalog historical or art objects so you will have to be creative when exporting data from the Objects and Photos catalog.

You can press the command button **View all MARC tag descriptions** in the upper right-hand corner of the screen to view a list of possible MARC tags and names. These are the MARC tags according to the Library of Congress 1999 edition with updates in October 2000 and October 2001. The LC is constantly updating the standard, so you may also wish to visit the Library of Congress web site <http://>

[www.loc.gov/marc/](http://www.loc.gov/marc/) for the latest field list or for more information about MARC cataloging. Since the list of MARC tags will be changing over time, PastPerfect does not restrict you to using only the codes on the 1999 list.

Figure 22-2  
View all  
MARC Tags  
screen

Tag	Name
000	LEADER
001	CONTROL NUMBER
003	CONTROL NUMBER IDENTIFIER
005	DATE AND TIME OF LATEST TRANSACTION
006	FIXED LENGTH DATA ELEMENTS--ADDITIONAL MATERIAL
007	PHYSICAL DESCRIPTION FIXED FIELDS--GENERAL INFORMATION
008	FIXED-LENGTH DATA EMENTS--GENERAL INFORMATION
010 a	LIBRARY OF CONGRESS CONTROL NUMBER--LC Control Number
010 b	LIBRARY OF CONGRESS CONTROL NUMBER--NUMC control number
010 z	LIBRARY OF CONGRESS CONTROL NUMBER--Cancelled/invalid LC control number
013 a	PATENT CONTROL INFORMATION--Number
013 b	PATENT CONTROL INFORMATION--Country
013 c	PATENT CONTROL INFORMATION--Type of number
013 d	PATENT CONTROL INFORMATION--Date
013 e	PATENT CONTROL INFORMATION--Status information
013 f	PATENT CONTROL INFORMATION--Party to document
015 a	NATIONAL BIBLIOGRAPHY NUMBER--National Bibliography Number
016 a	NATIONAL BIBLIOGRAPHIC AGENCY CONTROL NUMBER--Record Control Number
016 z	NATIONAL BIBLIOGRAPHIC AGENCY CONTROL NUMBER--Cancelled or invalid record control number
017 a	COPYRIGHT OR LEGAL DEPOSIT NUMBER--Copyright registration number
017 b	COPYRIGHT OR LEGAL DEPOSIT NUMBER--Assigning agency
018 a	COPYRIGHT ARTICLE--FEE CODE--Copyright article--Fee code
020 a	INTERNATIONAL STANDARD BOOK NUMBER--International Standard Book Number
020 c	INTERNATIONAL STANDARD BOOK NUMBER--Terms of availability
020 z	INTERNATIONAL STANDARD BOOK NUMBER--Cancelled/invalid ISBN

The MARC field list can be sorted by tag or name by selecting the radio button at the bottom of the screen. You can also narrow the list with the Search option which is also at the bottom of the screen.

## Leader and Control Fields

You don't need to worry about mapping data for the MARC record leader or control fields. PastPerfect will automatically create the information for fields 000-Leader, 001-Control Number, 005-Date and Time of Latest Transaction, and 008-Fixed-Length Data Elements.

MARC field 003-Control Number Identifier contains a MARC organization code that identifies the source of the MARC record. The Library of Congress assigns the MARC organization code for all US organizations and for many foreign countries. PastPerfect does not require that you have a MARC organization code to create a

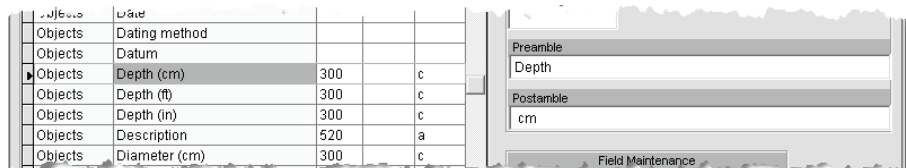
MARC file, but it is recommended if you are going to be sharing the file outside your organization. If you don't already have an official MARC organization code, you can request one online at the following address <http://www.loc.gov/marc/organizations/>. MARC codes are assigned free of charge to anyone who needs one. It takes about one week to receive your code. To create MARC records with your code enter it on the data map in the box labeled "MARC Organization Code (Field 003)".

## Preambles & Postambles

Since MARC does not provide fields that clearly match those of PastPerfect, you may want to include a Preamble or Postamble with the exported data to help identify it in the MARC record. For example MARC does not have separate fields for dimensions like height, width, and length. The closest MARC field is 300c PHYSICAL DESCRIPTION-Dimensions. If you just place the dimensions in this field it might look like "12.5 4.25 13.75" which could be confusing.

However if you use the Preambles, "Height", "Width", and "Length" and the Postamble "in.", the resulting MARC field would be "Height 12.5in. Width 4.25in. Length 13.75in." To enter a Preamble or Postamble, first select the field in the map and then enter the text in the Preamble or Postamble box at the right.

Figure 22-3  
Preamble &  
Postamble



## Field Maintenance

There may be occasions where you wish to map the data from a single PastPerfect field to multiple MARC fields. Since each PastPerfect field on the data map can be mapped to only one MARC field, you will need to add duplicate PastPerfect fields to the data map. To do this, first select the PastPerfect field on the data map that you wish to duplicate, then press the command **Replicate field (fieldname)**. This will update the data map to include the duplicate field.

If you wish to remove a duplicate field, select the field on the map then press the command **Remove duplicate field (fieldname)**.

## Default Data Map

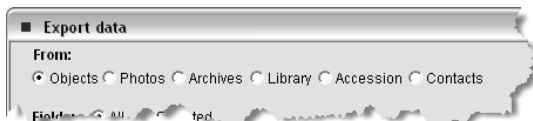
From time to time you may wish to save all the settings on the current data map. To do this press the command **Save current map as default MARC tags**. This saved data map can be later retrieved by pressing the command **Restore MAP to default MARC tags**.

Only one default export map can be saved for each of the four catalogs, Library, Objects, Photos, and Archives.

## EXPORT DATA

Once you have created your data map, you are ready to export to MARC. To do this, return to the Export Screen. Be sure to select the correct catalog, Objects, Photos, Archives, or Library at the top of the screen.

Figure 22-4  
Select Export  
Source



Then select MARC21 as the Output.

Figure 22-5  
Select Output  
Type



A default file name for the resulting MARC file will be displayed in the Output file name field. You can change the name and path as you like. When you are ready, press the **Export Now** command at the top of the screen. The MARC file will be created with the name you specified.

## Exporting selected catalog records

By default, all records from the selected catalog will be exported. However, you can choose to export only selected records by pressing the “Selected” button rather than “All” next to Records. In the box below you can enter any valid Boolean statement that will produce the subset. For example, if you only want to export the items with Accession# 1999.1, you would enter the following filter statement: [Accessno="1999.1"].

Figure 22-6  
Selected  
records filter  
statement

The screenshot shows a window titled "Records" with two radio buttons: "All" (unselected) and "Selected" (selected). Below the buttons is a text input field labeled "Filter statement" containing the text "Accessno="1999.1".

Filter statements must use the actual data field name which is not always the same name that appears on the catalog screen. To find the actual field name you can print the Field Description reports from the Reports menu. Multiple conditions may be included in a filter statement linked with the word "and" or the word "or". For example, you could enter the statement [accessno>"1995" and accessno<"2000"] to export all catalog records for accessions within the years 1995-1999. Or you may enter the statement [homeloc="Storage Room #1" or homeloc="Storage Room#5"] to export only catalog records with Home locations of Storage Room #1 or #5.

Filter statements are case sensitive. Therefore, in the above example a statement of [homeloc="Storage ROOM#1"] would not produce the same results. If you want to avoid the case sensitivity use the special UPPER command. For example, the statement [UPPER(homeloc)="STORAGE ROOM#1"] will export all records in that Home location regardless of the case of the entry.

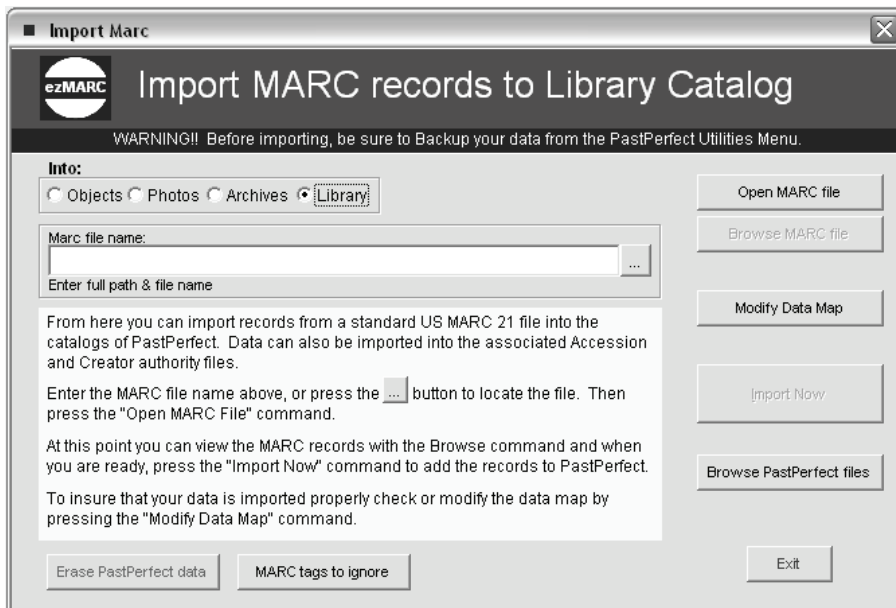
Finally, when you are ready, press the **Export Now** command at the top of the screen. The MARC file will be created with the name you specified.

## IMPORTING DATA FROM MARC

ezMARC allows you to import data from standard MARC21 data files into the PastPerfect Library, Objects, Photos, or Archives catalogs. Data can also be imported into the associated Accession and Creator authority file. You can make decisions about which MARC data fields to import and where the data for each MARC field will appear in PastPerfect. These decisions are detailed on the Import from MARC data map.

To start the import process, press the **Import** command button on the Utilities fly-up menu. This will open the Import data screen. Then press the **Import MARC data** command which will open the Import MARC screen. On this screen you should select which PastPerfect catalog you want to import data into.

Figure 22-7  
The Import  
MARC screen



## OPENING THE MARC FILE

The next step is to open the MARC data file. To do this, first enter the MARC file name including the full path in the box labeled “MARC file name” or press the button to the right of this field to search your computer or network for the file. Then press the **Open MARC file** command at the top right of the screen.

## BROWSING THE MARC FILE

Once the MARC file is open it is ready to import. However, you may want to first preview the MARC file to be sure that all the fields it contains have been mapped and that it has been mapped correctly based on the actual data it contains.

To browse the MARC file press the command **Browse MARC file**. The Browse MARC file screen is shown in figure 22-8.

## CREATING A DATA MAP

Before you import the MARC data you must first ensure that data from each MARC field is placed in the desired PastPerfect data field. To do this you must



Figure 22-8  
The Browse  
MARC screen

M_000	M_300a0	M_500a0	M_520a0	M_035a0	M_045c0	M_100a0
01191nnc	220000x a 4500	1		Triangular stemmed bifacial projectile c	1997.002.0001	
01149nnc	220000x a 4500	1		Projectile point made of gray banded ch	1997.002.0002	
01732nnc	220000x a 4500			This large oil painting, in the Impressio	1998.001.0001	Farr, Rs
01734nnc	220000x a 4500			This woodblock watercolor monoprint d	1998.001.0003	Oliver, J
01111nnc	220000x a 4500		Spout or tube part of funnel measures 4.2 cm.	Handmade copper funnel. The funnel c	1999.001.0011	
01120nnc	220000x a 4500			Tin flour sifter with painted green exteri	1999.001.0012	
01133nnc	220000x a 4500	1		Gaming piece or 'ulumalka. The periph	1998.017.0001	
01895nnc	220000x a 4500	1	The longitudinal groove is 1 cm in width.	This sinker is elliptical in shape, with an	1998.017.0002	
01553nnc	220000x a 4500	1		Small red stone bowl with convex botto	1998.017.0003	
01456nnc	220000x a 4500	1	The shaft is 8.8 cm. long, the blade is 16.2 cm. lo	A black basalt blade, narrow at the haft	1998.017.0004	
01554nnc	220000x a 4500	1	The handle or ring of the pounder is 4 cm. wide in	A ring pounder formed of vesicular bas	1998.017.0005	
01505nnc	220000x a 4500	1	The top knob of the pounder is 1.5 cm. high. The	A knobbed pounder formed of close gra	1998.017.0006	
01508nnc	220000x a 4500		02/22/1998 - In an oral history interview with Erne	Cast bronze figural candlestick in the fo	1999.001.0013	
01368nnc	220000x a 4500			Hand sewn patchwork quilt made by Lu	1999.001.0014	
00728nnc	220000x a 4500	1		Toy tow truck with rubber tires. Body of	L2000.001.0001	
00721nnc	220000x a 4500	1		Toy pickup truck with green painted sur	L2000.001.0002	
00940nnc	220000x a 4500	1		Commemorative plate depicting Hopali	L1998.001.0001	
01073nnc	220000x a 4500			Fossilized herring in sandstone matrix.	1998.002.0001	Adult Eocene Cenoz
01025nnc	220000x a 4500	1		Raccoon skull without mandible.	1998.002.0002	Adult
01008nnc	220000x a 4500			Amethyst quartz crystal from broken ggc	1998.002.0003	
01218nnc	220000x a 4500			Strombus pugillus shell is coiled and h	1998.002.0004	Unknown
09853nnc	220000x a 4500		The following two articles from the Encyclopaedia	Human skull with mandible.	1997.003.0001	20-30
01076nnc	220000x a 4500			Serigraph of a sailboat race. The print is	L1997.001.0001	Oregg, I
01070nnc	220000x a 4500			Anthracite coal is a sedimentary rock th	1997.006.0001	Paleozoic
00864nnc	220000x a 4500			Pink granite is the commonest of all int	1997.006.0002	
00794nnc	220000x a 4500			Pyrite forms as cubic or octahedral crys	1997.006.0003	
01130nnc	220000x a 4500			Quartz crystal also called rock crystal in	1997.006.0005	
02279nnc	220000x a 4500		The original wooden frame, made by the artist, ac	Surrounded by the slums of Port-au Pri	1998.001.0002	Yes, Js

create a data map. This data map will match MARC fields to PastPerfect fields. There is a separate data map for Library, Objects, Photos, and Archives. To view or modify a data map, first select the desired catalog, Objects, Photos, Archives, or Library at the top of the Import MARC screen, and then press the **Modify Data Map** command. This will open the Import MARC Data Map screen.

Figure 22-9  
MARC to  
Library Data  
Map

**MARC to Library Data Map**

Data Map		MARC	
File	Field	Tag	Subfield   Indicator
Library	Accession#	541	e
Library	Acq Value	541	h
Library	Appraisal notes		
Library	Appraiser		
Library	Author		
Library	Author added entry		
Library	Cabinet		
Library	Call#	050	a
Library	Catalog date	005	
Library	Cataloged by	040	a
Library	Category		
Library	Classification	655	a
Library	Collection	852	b
Library	Condition		
Library	Condition Notes	300	b
Library	Condition by		
Library	Condition date		
Library	Container		
Library	Control#	001	
Library	Copy#	562	b
Library	Credit line	541	n
Library	Current value max		
Library	Current value min		

**MARC**

Accession# 541 e IMMEDIATE NOTE--Accession#

Callouts:

- The first column displays the PastPerfect file name.
- The second column contains the PastPerfect field name.
- Columns three, four and five display the MARC field tag, MARC indicators, and MARC subfield.

## Mapping Fields

To create a data map, you must enter a MARC field tag and subfield to the right of each PastPerfect data field into which you want to import data. In some cases you may also include an indicator. You will notice that some of the fields have already been assigned MARC tags; this is just to help you get started. You can assign and change any tags that you like.

Except for library and possibly archival materials there is no real standard for assigning tags. MARC was not designed to catalog historical or art objects so there is no consistent standard for where certain types of data may appear in the MARC file. The best way to proceed is to open the MARC file and then Browse it as explained above. Then you will be able to see the type of data contained in each MARC tag. Armed with that information, you can make informed decisions about where you want the data to appear in PastPerfect.

## Multiple Entries

There may be occasions when you want data from more than one MARC field to be placed into a single PastPerfect field. To accomplish this you will need to create a duplicate PastPerfect field on the data map. This is accomplished by clicking on the field you want to duplicate and then pressing the command **Replicate field (fieldname)**. This will place a second PastPerfect field on the data map with the same name. You can then map the PastPerfect field to the second MARC field.

When placing data from multiple MARC fields into one PastPerfect field, you must select how the multiple entries are separated. Make your choice of separators for each multiple field from the options at the right side of the screen. Options are space, forward slash, semi colon, new line, or nothing.

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**TIP** When importing multiple fields to the PastPerfect People and Search Terms fields, you should always use the carriage return separator.

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## Fixed Entries

There may be occasions where you want to place data in a PastPerfect field that is not contained in the MARC record. For example, if you are importing a set of books that you just purchased from one source, you may want to use the same Source name and Accession# for all of the records. To do this, do not map the PastPerfect fields to a MARC field, but instead select the PastPerfect field and then enter the Source name or Accession# under "Fixed entry in field".

## Preambles

Text entered in the Preamble field will be added in front of the MARC data before it is placed into the PastPerfect field.

## Data conversion

There may be occasions when you want to modify the MARC field data before it is placed into PastPerfect. You may be able to achieve these modifications by entering a formula in the "Data conversion function field".

For example, if your MARC record contains the object ID# but not accession# and you want the first 8 characters of the object ID# to be placed in the accession# field, you could map that MARC field to both the PastPerfect object ID# and accession#. For the accession# you would enter this conversion function: `substr(x,1,8)`. In the function always use "x" to represent the MARC data. The above function would place eight characters of the MARC field starting at character one into the accession field.

Another example would be date conversion. Many MARC dates are stored as `yyyymmdd`, while strict date field in PastPerfect, such as catalog date are `mmddyyyy`. The conversion function for this would be: `substr(x,6,2)+" / "+substr(x,9,2)+" / "+substr(x,1,4)`.

## Default Data Map

From time to time you may wish to save all the settings on the current data map. To do this, press the command **Save current map as default MARC tags**. This saved data map can be removed later by pressing the command **Reset Map to default MARC tags**. Only one default import map can be saved for each of the four catalogs, Library, Objects, Photos, and Archives.

## IMPORTING DATA

Once you have created your data map, you are ready to import the MARC records. To do this, return to the Import MARC screen and press the **Import Now** command. This will complete the import.

## BROWSE PASTPERFECT FILES

This option has been added to make it easy for you to view the PastPerfect catalogs, before or after importing data. Of course you can always return to the main catalog screens to view the full catalog records.

## ERASE PASTPERFECT FILES

This option has been added to make it easy for you to erase all data in a PastPerfect catalog. This should obviously be used with caution, but can be quite helpful if you want to remove all data in a PastPerfect catalog and rerun the Import function.

**Remember erase can not be undone**, so be sure to make backups of your data before using this function and before importing data.

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**NOTE** While there is no limit on the number of catalog records that can be imported from a single MARC file, ezMARC is limited to importing a maximum of 254 fields of information about each catalog record. While this seems like a wealth of data about an individual item, some MARC21 files contain a greater number of fields.

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If you try to import from a MARC file that contains more than 254 fields, you will receive a warning message. To overcome this problem you may wish to have ezMARC skip some of the redundant and unimportant fields of information contained in the MARC file. To accomplish this press the **MARC tags to ignore** command at the bottom of the Import MARC screen. This will open a screen which will allow you to add or edit MARC tags that can be ignored. The format for entries is critical. It should be m\_ followed by the MARC tag and optionally followed by the MARC subfield and/or indicator. Entering a Description of the tag in the right column is optional.