**TRAIL (Technical Report Archive & Image Library) collection**

**WorldCat Collection Manager MARC Record Loading**

**See the General Procedure document for how to load collection**

This README addresses the particulars of working with UWTRA records from OCLC.

Collection: UWTRA

Load Code: umtra

NOTE: These records come from a Query collection that searches for a uniform title of TRAIL. This captures records for both print and electronic resources. It is necessary to tease out the electronic and then deal with those records for import. There are also a number of URLs that result in an error. Some of these have been verified but once the final for final processing is created, it is worth checking the urls just in case before import. The cleanup takes a conservative approach. If over 30% of urls were found to result in an error, that pattern was deleted.

Files go through a multistep process.

1. Run the 1st managed task TRAIL
2. Delete records with no 856
3. Run 2nd managed task Trail\_Step2

The files uses the assigned tasks TRAIL & TRAIL\_Step2 that do the following:

TRAIL

1. Deletes 856s fields that have been found to result in errors (Univ of North Texas, Nist, Limited view from Hathi, Oregon state, Bibpurl form OCLC, GPO catalog, geology usgs, erdc.

2. Deletes any 856s that are not 40.

3. Deletes all 856 subfield 3 and z

4. Adds subfield z for UMass: Link to Resource

TRAIL\_Step2

1. Replicates many of the WCKB processes for 035, 655, etc.
2. Removes any "; target="\_blank.
3. Deletes duplicate 856s
4. Adds the load code umtra
5. Changes 337 from unmediated to computer
6. Changes 338 from volume to online resource

Step 1:

1. Check field counts and material type report
2. Run the TRAIL task
3. Save file. Note: This will be a temp file so use a temp file name.
4. Close file and go to main screen in MarcEdit.
5. Select Tools/Select Marc Records/Delete Selected Records
6. Browse for temp source file just saved.
7. Change display field to 856
8. Import file
9. Search for “Display field not found” and click “Delete Selected”
10. Delete selected records from that temp mrk file and save to new mrk file. Note: use file naming convention umtraDATE\_Type.

Step 2:

Once you get to the smaller file after deleting records with no 856s (saved mrk file from step 1):

1. Check field count to ensure that number of records match those with 856 in previous file
2. Ensure that all records have a 001, 035, 949
   1. There should be just 1 field per record. Check the field count to verify.
3. Run the assigned task TRAIL\_Step2
4. Save file

Step 3:

There is still an issue of multiple 856s where there can be a proliferation of urls from google books. When there is a Hathi Trust record, it is really not necessary to have other records.

1. Check field counts and make sure there is no 999 field
2. Add a 999 \\$aDELETE field only when there is a 856.+hathitrust.+
3. Save file
4. Select records to edit
5. Display the 999
6. Search for DELETE
7. Export these selected records
8. Remove 856s with books.google, purl, pubs
9. Save file
10. You should get a message that this is saved into original file. MarcEdit might close or bring you back to original file.
11. Open file again if necessary
12. Check field count and 856s
13. Remember to check urls just in case

Step 4:

1. It is necessary to remove all continuing resources (serials). Use the delete in MarcEdit and \d{5}[s,i].+. Check this regex to be sure.

4. Tips:

a. Removing records in MarcEdit: This has to be done through the main menu rather than in Select Records for Edit.

b. Detecting Duplicates: You can do a find all in MarcEdit and copy the results into an excel file. In Excel, select the cells. Click Home/Conditional Formatting/Highlight Cell Rules/Duplicate values