24th Annual

Innovative Users Group Conference
March 15th – 18th 2016

IUG 2016

SAN FRANCISCO

Using a load table, Excel, and MarcEdit to batch change email address in patron records
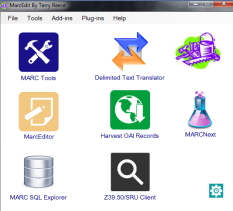
MELVYN YABUT
MOUNTAIN VIEW PUBLIC LIBRARY

Mountain View Public Library is located in the City of Mountain View, in Santa Clara County at the heart of Silicon Valley.

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Goal of this Session: Show an example of a workflow that can be used in changing a single field on a big batch of records without overwriting other fields in the record.

Assumption: You have gone through Load Profile Training.

A Problem of CASE

Placing a hold on an Overdrive title in Encore has a bug. Email address in UPPER CASE will result in an invalid email message.

The Cairo affair [electronic resource]
Olen Steinhauer
Steinhauer, Olen,
Downloadable Audiobook | 2014
Not Available (0 of 2 copies available; 0 on hold)

The chance [electronic resource] /
Carr
Carr, Robyn,
Ebook: Downloadable | 2014
Available online (1 of 3 copies available; 1 on ho

Place Hold

Please provide an email address for hold notifications.

Email address:
*Please input a valid email.

MELVYN.YABUT@MOUNTAINVIEW.GOV

Place Hold   Cancel

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SOLUTION

1. Export patron records and use **Excel** to change the case from upper to lower.

2. Use **MarcEdit** to convert the file into MARC format and map the data into the corresponding field in the patron record.

3. Import the MARC file using a **modified load table** that will match on the patron record # and protect all fixed and variable fields, except the email address.

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Preparing the Load Profile

```
#email proj email to all lower case my april2015
#for convpat (no maps)
|||0|0|   |0|n|G|0|@main="p"
|||0|0|   |0|n|G|0|@marc="p"
|||0|0|   |0|n|G|0|@msg="Patron records will be overlayed"
999||z|0|10|  |  |0|n|G|0|#com="recs"@recs="pemail"
999||x|0|1|   |  |0|n|G|0|#com="clsi"@clsi="n"
999||w|0|1|   |  |0|n|N|0|#com="test"@test="n"
999||v|0|1|   |  |0|n|N|0|#com="init"@init="n"
999||u|0|1|   |  |0|n|N|0|#com="disp"@disp="n"
/^999||o|0|20|  |  |0|n|G|0|#com="dflt"@dflt=""
999||t|0|10|  |  |0|n|G|0|#com="ov"@ov_tag=" "
|||0|0|   |0|n|G|0|@ov_action="u"
|||0|0|   |0|n|G|0|
@ov_protect="p=F43-56,83,95-96,99,101-105,122-126,160,163,263,268V=cr4!'8dena
htpumbvg"
|||0|0|   |0|n|G|0|@holdsymb=""
|||0|0|   |0|n|G|0|@bldmarc=""
|||0|0|   |0|n|G|0|@callnum="nynnn"
|||0|0|   |0|n|G|0|@dlac=""
|||0|0|   |0|n|G|0|@ldx="907"
```

@ov_protect to protect the fields. You have to make sure all the fields are protected.
@ov_action="u" Reject 0, or 2. Overlay if match 1 record (use in tandem with @ldx)
@ldx="907" Match on the record #. Overlays on the record # if stored in a MARC tag.

@ov_protect="p=F43-56,83,95-96,99,101-105, 122-126,160,163,263,268V=cr4!'8denahtpumbxg

Protect Patron records
"p=

Protects Fixed-length fields
F43-56,83,95-96,99,101-105,122-126,160,163,263,268

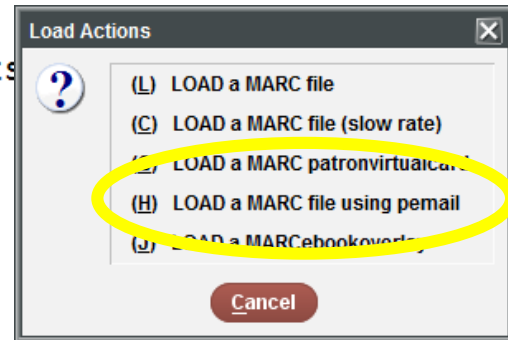## Protects Variable-length fields
V=cr4!'8denahtpumbxg

Go to Edit .MARCLOAD.LOCAL file to create the load button.

```
@HEADER=Load records via locally-created load profiles
@MAXFILES=50
@MAXBYTES=1000000000
@DIRNAME=marc
F > Get MARC records using FTS||xftp get %S.lfts
P > PREPROCESS records loaded via FTS||marccopy -u -i%#.lfts -o%%.lmarc
L > LOAD a MARC file||marc2inn -HL -x -fzzz -I -i -so %#.lmarc
C > LOAD a MARC file (slow rate)||marc2inn -H"1,0,0" -I -x -fzzz -i -so
%#.lmarc
G > LOAD a MARC patronvirtualcard||marc2inn -HL -x -fpvirtualcard -I -i -so
%#.lmarc
H > LOAD a MARC file using pemail||marc2inn -HL -x -fpemail -I -i -so %#.lmarc
J > LOAD a MARCebookoverlay||marc2inn -HL -x -febookoverlay -I -i -so %#.lmarc
M > View MESSAGE log||review -c marc2inn.log
V > VIEW a MARC file||marcview %#.lmarc
U > View an UNPROCESSED MARC file||marcview -u %#.lfts
Q > QUIT||
```

H > LOAD a MARC file using pemail | |marc2inn -HL -x -fpemail -I -i -so %#.lmarc

Load Actions

(?)

(L) LOAD a MARC file
(C) LOAD a MARC file (slow rate)
(G) LOAD a MARC patronvirtualcard
(H) LOAD a MARC file using pemail
(J) LOAD a MARCebookoverlay

Cancel

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Preparing the patron records.

1. Change only "active" records. Accounts less than 6 months expired and newer.

2. Clean up records - Fix email address that don't have an @ sign, or the "z" tag used for other data.

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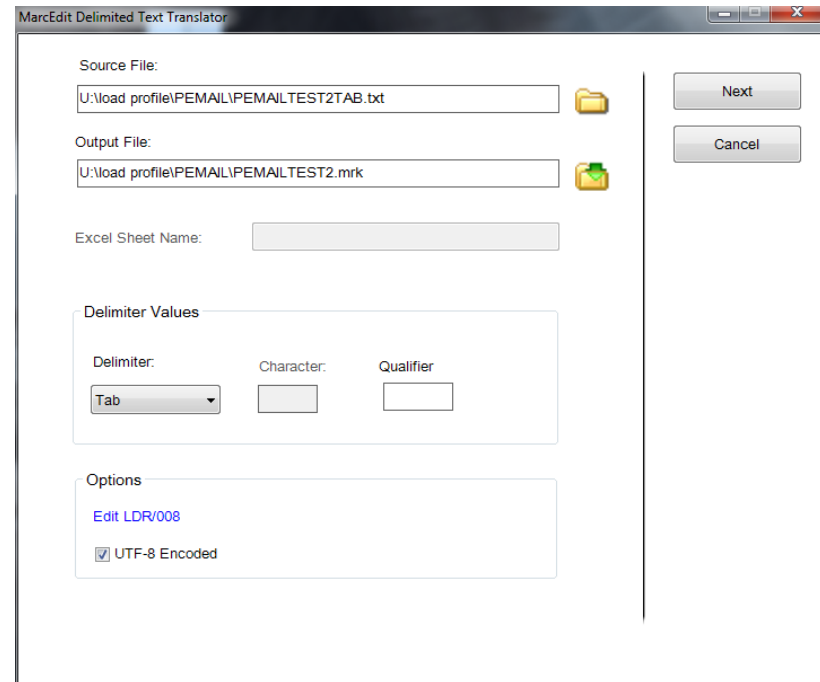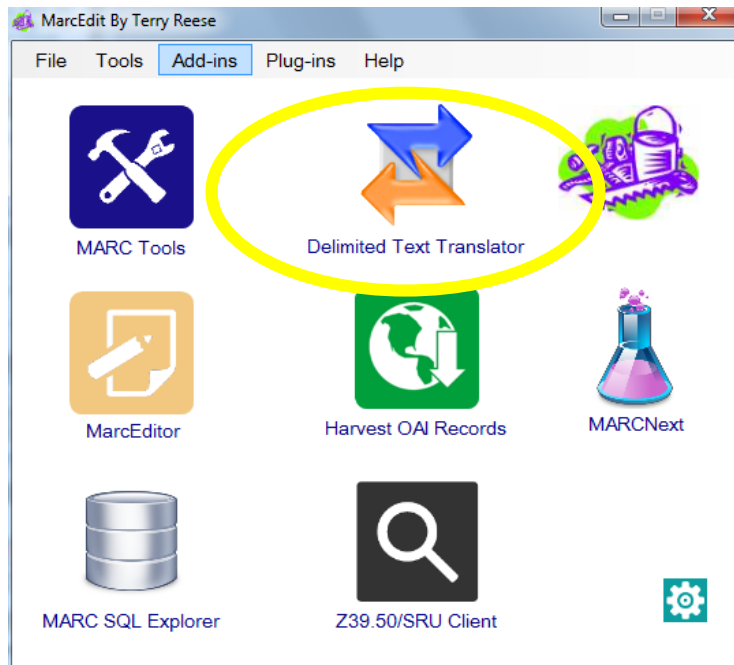# Use Excel to change the data

Excel Functions:

1. **Exact** – to sort by case – use this formula
   =MIN(--EXACT(A1:A25,LOWER(A1:A25)))=0

2. **Concatenate** – to add "." before the pXXXXX

3. **Lower** – to change email address from UPPERCASE to lowercase

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Use MarcEdit |Tab Delimited text to change the text file to .mrk file.

Map the two fields.

Then use MARCEDIT | MARCMaker to change .mrk file into a .mrc file.

- **Patron record # to 907$a**
- **Patron email to 550$a**

Use DATA EXCHANGE | *Load records via locally-created profiles* to load the .mrc file using *Get PC*.

Load the revised file

Load Actions

?
(L) LOAD a MARC file
(C) LOAD a MARC file (slow rate)
(G) LOAD a MARC patronvirtualcard
(H) LOAD a MARC file using pemail
(J) LOAD a MARCebookoverlay

Cancel

Process	Load records via locally-created load profiles
Function	(H) LOAD a MARC file using pemail
Input File	PEMAILTEST2.mrc.lmarc (1,536 bytes)
Start Block	1
Stop Block	5
Maximum Records to Load	1000000

☐ Use Review Files

Output Messages

```
Patron records will be overlayed
   REC  BLOCK  PATRON                    RESULT        MATCHES
    1     1                              OVERLAY p12100067

    2     2                              OVERLAY p11625004

    3     3                              OVERLAY p12350102

    4     4                              OVERLAY p11494554

    5     5                              OVERLAY p10495629


               RECORD LOADING STATISTICS
Input file  - PEMAILTEST2.mrc.lmar    Start date - November 19 06:48PM
Error file  - PEMAILTEST2.mrc.errlog    End date  - November 19 06:48PM
m2btab file - m2btab.pemail
Number of input records - 5
Number of errors        - 0
```

	NEW RECORDS CREATED	REC #S ASSIGNED START	STOP	EXISTING RECORDS OVERLAYED	INPUT RECORDS REJECTED	TOTAL RECORDS READ
PATRON	0			5	0	5

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Best Practices

1. Modify a Load Table if you've had Load Profile Training.
2. Test! Use old or expired records before working on active records.
3. Check fields before and after a load. Get a sample and print it out.

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THANK YOU!

QUESTIONS?
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