

Using a load table, MarcEdit, and Excel to batch change email address in Patron Records

ISSUE: When you place a hold on an Overdrive title in Encore, an *invalid email message* will display if the email address is in UPPERCASE.

SOLUTION: Export patron records, use Excel to change the case from upper to lower, then use MarcEdit to convert the file into MARC format. 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.

Create the modified load table

1. Use Putty to go to your Load Profiles | Edit m2btab and m2bmaps to create copy of your default patron record load table. (name the copy m2btab.pemail)
2. Edit the copy to match on patron record # and protect all fixed and variable fields, except the email address:
 - Use **@ov_protect** to protect the fields. You have to make sure all the fields are protected.
 - Use **@ov_action="u"** Reject 0, or 2 or match. Overlay if match 1 record (use in tandem with @ldx)
 - Use **@ldx="907"** Match on the record #. Overlays on the record # if stored in a MARC tag.

```
#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 overlaid"
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
htpumbxg"
|||0|0| | |0|n|G|0|@holdsymb=""
|||0|0| | |0|n|G|0|@bldmarc=""
|||0|0| | |0|n|G|0|@callnum="nyynn"
|||0|0| | |0|n|G|0|@diac=""
|||0|0| | |0|n|G|0|@ldx="907"
```

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

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

Use Excel to change the case

4. Use Create List to create a review file of patron records – limit the file to active records and patrons with email address (z is not equal to blank).

5. Export the patron record number and the email address.
6. Use EXCEL to open the file.
7. Sort the list using email address, according to case – use the EXACT formula to sort by case. Use this **=MIN(--EXACT(A1:A25,LOWER(A1:A25)))=0**.
8. Remove records that already have email address in lower case.
9. Insert a new column (name it concatenate) to the right of the record number and use Excel's **CONCATENATE** function to add "." to the beginning of the patron record number. You need to add the "." You are doing an exact match on the record number when you load the records. Delete the column record number.
10. Create another column to the right of the column concatenate (name it P#) and copy and *paste using value* and delete column concatenate.
11. Insert a new column to the right of the email address (name it lower) and use Excel's **LOWER** function to change the case to all lowercase. Delete the column email address.
12. Create another column to the right of the column lower (name it patron email) and copy and *paste using value* and delete column lower.
13. You now have two columns: P# and patron email. The P# column should have a .pXXXXX format and patron email should have email address in lowercase.

Use MarcEdit to convert the review file into a MARC file

14. Save the file as a Tab Delimited Text.
15. Use MARCEDIT | Tab Delimited Text Translator to translate the tab delimited text file to a .mrk file.
16. Map the two fields:
 - a. Patron record # to 907\$a
 - b. Patron email to 550\$a
17. Use MARCEDIT | MARCMaker to change .mrk file into a .mrc file.
18. Use **DATA EXCHANGE** | *Load records via locally-created profiles* to load the .mrc file using *Get PC*.
19. Change the suffix to .lfts.
20. Use Prep to preprocess the file.
21. Click Start to create the .lmarc file. Check that the number of records is equal to the number of records you exported earlier.
22. Click Load.
23. Select **Load a MARC file using PEMAIL** button.
24. Click Test. Check that all records overlaid.
25. Click Load to load the revised file.
26. Spot check records.

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