

EXCEL-Lent Patron Data

**Creating patron records from
spreadsheet applications**

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Demonstration overview

- **Import data into Excel**
- **Analyze data structure**
- **Perform field modifications in Excel**
- **Create MARC records in MarcEdit**
- **Load records**

Import data into Excel

- **Know your data format!**
- **“Easy” file extensions**
 - .txt, .csv, .prn
- **Direct download from data sources**

Analyze data structure

- **What fields:**
 - are in the file?
 - should be kept, deleted, combined?
 - aren't in the file?

- **What are the field formats?**
 - Numeric? Text? Date?
 - Preserve leading zeros with “Text” column data format

Perform field modifications in Excel

- **Delete unwanted fields (optional)**
- **Remove extra characters as necessary**
 - TRIM function (for extra spaces)
 - Find/Replace for others
- **Combine fields as necessary**
 - CONCATENATE function
- **Be sure to delete header row!**

Perform field modifications in Excel

- **Comments**

- Use of {dollar}

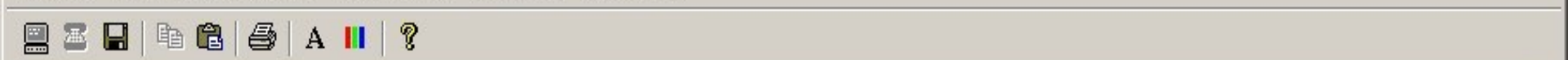
- Enclose additional **CONCATENATE** text in double quotes

- Keep columns referenced in **CONCATENATE** in file

- **Save completed file as tab-delimited file with .txt extension**

Create MARC records in MarcEdit

- “Delimited Text Translator” add-in
- Double quote as text qualifier
- How were MARC tags identified?
 - Character-based system:
 - M → I → C → M → [PATRON record]
 - MANAGEMENT Information
 - INFORMATION about the system
 - CODES used
 - MARC load tables



PATRON record (m2btab.p)

RECORD	TYPE	FIELD NAME	MARC TAG	SUBFIELDS
01	> PATRON	<EXP DATE>	078	a
02	> PATRON	<SCHOOL>	081	a
03	> PATRON	<DEGREE STA>	082	a
04	> PATRON	<PCODE3>	083	a
05	> PATRON	<P TYPE>	084	a
06	> PATRON	<HOME LIBR>	085	a
07	> PATRON	<MBLOCK>	086	a
08	> PATRON	<PMESSAGE>	087	a
09	> PATRON	UNIU ID(u)	020	ALL
10	> PATRON	P BARCODE(b)	030	ALL
11	> PATRON	PATAN NAME(n)	100	ALL
12	> PATRON	ADDRESS(a)	220	ALL
13	> PATRON	TELEPHONE(t)	225	ALL
14	> PATRON	ADDRESS2(h)	230	ALL
15	> PATRON	TELEPHONE2(p)	235	ALL
16	> PATRON	DEPT(d)	302	ALL
17	> PATRON	NOTE(x)	500	ALL
18	> PATRON	EMAIL ADDR(z)	550	ALL

S > SORT P > PRINT Q > QUIT D > DATA not overlaid
 Choose one (S,P,Q,D) █

Create MARC records in MarcEdit

- Final review of records
- File → Compile File into MARC
- Save .mrk (working) file

- What about PTYPE?

- What about Exp Date (and others?)

Patron record template

PATRON template: flintp: UM-Flint borrowers

File Edit View Tools Help

Insert Save Print Prompt Close

Fixed-length field prompts

Patron Type

Move Up
Move Down

Expiration Date	01-01-2009	Current Checkouts		Reserves Checked Out	
School/College	2 UM-FLINT	Home Library	flint UM Flint	Serials Checked Out	
Degree Status		Patron Message		Photocopy Use	
Patron Code 3		Manual Block	-	Overdue Penalty	
Patron Type		Claims Returned		Last Activity	- -
Total Checkouts		Money Owed	\$0.00	Notice Preference	z EMAIL
Total Renewals		Block Until	- -		

Edit Mode (OVR)

Load records

- **Data Exchange, of course!**
- **Mapping table to determine PTYPE**
 - **Invoked at record load**

Record view (as imported)

File Name: flintload.mrc.lfts (1,967,162 bytes) Offset: 0 Record: 1

Plain

Hex

Verified Hex

LEADER 00272nam 2200109la 45e0

DIRECTORY

008004100000 020001300041 084000900054 100001700063 220004200080
225001700122 550002300139

TAGS

1	000	00272nam 2200109la 45e0@
2	008	080916s9999 xx 000 0 und d@
3	020	la00000001@
4	084	laGRAD@
5	100	laTaylor,Tammy@
6	220	la1109 East Vernon Drive\$Flint,MI 48503@
7	225	la(810)4249721@
8	550	latammyt@umflint.edu@

The final product

Edit Patron Record · p1538214 [X]

File Edit View

Insert Save/Cl... Delete Print Close

p1538214 Last Updated: 08-08-2008 Created: 01-30-2007 Revisions: 6

Expiration Date	p1-01-2009	Current Checkouts	0	Reserves Checked Out	0
School/College	2 UM-FLINT	Home Library	flint UM Flint	Serials Checked Out	0
Degree Status		Patron Message		Photocopy Use	0
Patron Code 3	0	Manual Block	-	Overdue Penalty	0
Patron Type	24 UM Master	Claims Returned	0	Last Activity	- -
Total Checkouts	0	Money Owed	\$0.00	Notice Preference	z EMAIL
Total Renewals	0	Block Until	- -		

Patron Name Taylor, Tammy

Local Address

Street	1109 East Vernon Drive
City/State/ZIP	Flint, MI 48503

Local Telephone (810)4249721

8-Digit UMID 00000001

E-mail Address tammyt@umflint.edu

Edit Mode (INS)

Any Questions?



Thank you!

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