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Parameter Driven Loader - p_manage_50

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Batch Loading : p_manage_50, the Parameter Driven Loader

ICAU Poster Session 2002
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This poster session describes batch dataloads, some using p_manage_50 and some not. The session includes select parameter tables that were used with various loads.

p_manage_50 Was Used to Create Holdings and Items from embedded bibl information

State Historical Society of Iowa – yes 32,000
These records were loaded in order to create a new Aleph Bibliographic Library. All records were from OCLC with 949 fields.

American Antiquarian Society Early American Imprints – yes 36,300
This collection of microfiche cataloging came from OCLC with 949 fields.

OCLC Based General Retrospective Conversion – yes 265,078
This large retrospective project was done through OCLC and utilized extensive, complex holdings data in the 949.

Congressional Information Service (U. S. Executive Branch Documents) – yes 8,500
These CIS records included basic holdings information in the 949.

Chinese, Japanese, Korean Retrospective Conversion (RLIN based) – yes 37,500
These records were loaded with holdings. The RLIN records came with 950/955 fields that were merged into a 949.

p_manage_50 was not needed to create holdings or items

U.S. Library of Congress Authority records – no 6 million
These authority records had no holdings.

NetLibrary – no 1300
These bibliographic records include links to full text. No holdings are included.

Chinese, Japanese, Korean RLIN snapshot (Pinyin) – no 21,500
These bibliographic records overlaid previous Wade Giles records. Original holdings were retained so no new holdings needed to be processed.

Aleph Programs used for Batch Loading

p_file_1 **Convert MARC records – Step 1**
Separates the input file into individual records (eg unblocks)

p_file_2 **Convert MARC records – Step 2**
Converts the separated records from MARC format into Aleph Sequential Format

p_file_08 **Modify MARC Record File (preprocessor)**
Performs a set of fixes on a file of BIB records. Fixes can either be performed <u>before</u> the records are loaded into the database (with p_file_098), or <u>while</u> the records are being loaded in, by specifying a fix section in p_manage_18. Common examples:

- Moving the vendor's number from 001 to 035
- Adding the library's OWN field to the record
- Updating the date in the 008 with the open date of the record

1. It is possible to write a customized fix script to edit a document.
2. If you want to modify the records <u>before</u> they are loaded in the database, run p_file_08 and specify the fix routine in the processing script section. If you want to modify the records <u>as</u> they are loaded in the database use p_manage_18 and specify the fix section.
3. It is possible to limit which records are loaded based on information in the fixed fields.

p_manage_18 **Load Catalog Records**
Loads BIB records into the database with two options:

- Add new records to the database

    - Records are just added without looking for duplicates.
    - Records load starting with the next DOC number.
- Updating existing records in the database provides 4 options.
    - Append fields to a record
    - Replace fields within a record
    - Delete fields in a record
    - Replace entire record
- Parameters allowed
    - Append fields, replace fields, delete fields, replace records
    - Change headings based on authority records or not
    - Partial, full or no indexing
    - Fix routine that corrects Marc21 spaces
    - Converts character sets including Unicode

The file of document numbers can be used as an input file for p_manage_50.

p_manage_50 Create Holdings and Item Records Using BIB Data

Creates Items and Holdings records based on embedded information in the BIB records in the ALEPH database. P_manage_50 has two tables.

1. Requires an input file containing a list of document numbers. You can use p_ret_01 or p_manage_18.
2. As an option to 1 above, a range of specific document numbers can be entered.
3. You can specify the ADM Library if you want holdings records.
4. Specify the HOL library if you want to create holdings.
5. Document expand code allows you to create item and holding records from a designated bibliographic field. [So far Iowa has used tab-expand]
6. The main field specifies which bibliographic field is to be used, eg 949##.
7. You may delete the main field after the HOL and ITM are created.
8. The Item creation table (called tab_hol_item_create) specifies the parameters for creating item records. Iowa has not used this yet.

   EXAMPLES

   The library can specify one of three options.

   a. CREATE-ITEM-2ND Creates based on value in 2nd indicator.
   b. CREATE-ITEM-1ST Creates based on value in 1st indicator.
   c. CREATE-ITEM-SUBFIELD Creates based on designated subfield.
9. Holdings Record Creation Mode allows three options:
   a. N creates holdings only if the bibl record doesn't have any.
   b. R deletes existing holdings and replaces them with new ones. (Iowa has used)
   c. A adds new holdings whether or not there are existing holdings.
10. Item Creation Mode allows four options.
    a. N creates items only if the bibl record doesn't have any. (Iowa has used)
    b. R deletes existing holdings and replaces them with new ones. (Iowa has used)
    c. A adds new items whether or not there are existing items.
    d. M creates items records in addition to existing items, but replaces items that match a specified barcode.
11. Adds the cataloger and cataloger level to the BIB, ADM, and HOL

A typical batch job run. (State Historical Society loader)

Anytime day/night in order to Prepare records.

```
run p_file_01 and p_file_02 to create Aleph Sequential files
   csh -f $aleph_proc/p_file_01 IOW06,hdm11214,hdm.ub,01,0,00,
   csh -f $aleph_proc/p_file_02 IOW06,hdm.ub,hdm.as,01,0,00,
Local script on Bib data to pre-check location codes
run p_file_08 for pre-edits, such as add OWN field, do editing of 049 field text
   csh -f $aleph_proc/p_file_08IOW06,hdm.cloc,hdm.pf8,hdm.pf8.rej,shs.fix,0,00,
```

Local pre-processing scripts on Bib data, such as creating additional 949 fields, doing author & title editing

when libraries are closed in order to Load records.

```
run p_manage_18 to create Bibs
   csh -f $aleph_proc/p_manage_18
   IOW06,hdm.load,hdm.mrg,NEW,RECO,N,NONE,REP,X,OCLC_TO_UTF,CONV,50,0,00,
Create list of BIB keys using p_ret_01
   csh -f $aleph_proc/p_ret_01
   IOW66,,shsbkh,000000000,999999999,,00,00000000,99999999,00000000,99999999,,AND
   ,,,,,,,,,00000000,99999999,0,00,
run p_manage_50 to create HOL and ITM recs
   csh -f $aleph_proc/p_manage_50
   IOW06,shsbk,,,IOW56,IOW66,,949##,N,shs,shsmap,R,R,N,,50,,50,,50,Y,Y,
various post-editing processes, for example :
run p_print_03 to extract BIB 994 fields using bib key list from earlier step
   csh -f $aleph_proc/p_print_03 IOW06,shsbk,Eng,994,,,,,,,,shs994,A,NONE,0,00,
run p_manage_18 to delete 994 fields in BIB recs
   csh -f $aleph_proc/p_manage_18 IOW06,shs994,shsh.mrg,OLD,,N,NONE,DEL,X,,NO-
   CAT,50,0,00,
```

Tables used in Recon loader process

"recon.fix" table in "/aleph/u54_5/iow01/tab/import" directory

```
!-!!!!!-!!-!-!!!-!!!-!!!!!-!!!!!!!!!!!!!!!!!!!!!!!!!!!!!!-
!!!!!!!!!!!!!!!!!!!>
1 005##                    DELETE-FIELD
2 019##                    DELETE-FIELD
3 049##                    DELETE-FIELD
4 069##                    DELETE-FIELD
5 096##                    DELETE-FIELD
6 994##                    DELETE-FIELD
7 LDR                      ADD-FIELD
OWN  ,L,$$aMAIN
8 880##                    DELETE-FIELD
9 100##                    DELETE-SUBFIELD                6
9 110##                    DELETE-SUBFIELD                6
9 111##                    DELETE-SUBFIELD                6
9 230##                    DELETE-SUBFIELD                6
9 240##                    DELETE-SUBFIELD                6
9 245##                    DELETE-SUBFIELD                6
9 246##                    DELETE-SUBFIELD                6
9 250##                    DELETE-SUBFIELD                6
9 260##                    DELETE-SUBFIELD                6
9 362##                    DELETE-SUBFIELD                6
9 440##                    DELETE-SUBFIELD                6
9 490##                    DELETE-SUBFIELD                6
9 500##                    DELETE-SUBFIELD                6
9 700##                    DELETE-SUBFIELD                6
```

```
9 710##                    DELETE-SUBFIELD                6
9 730##                    DELETE-SUBFIELD                6
9 740##                    DELETE-SUBFIELD                6
9 830##                    DELETE-SUBFIELD                6
```

"tab_fix" table, "RECO" section in "/aleph/u54_5/iow01/tab" directory

```
! 1                 2                            3
!!!!!-!!!!!!!!!!!!!!!!!!!!!!!!!!!!!-
!!!!!!!!!!!!!!!!!!!!!!!!!!!!!>
RECO  fix_doc_oclc_2
RECO  fix_doc_blank_char_fixed
RECO  fix_doc_notis_1_c
```

"recon" table in "/aleph/u54_5/iow01/tab" directory

```
!
1  1
!      1                    2        3   4          5   6
7   8   9   0  1
!!!!!!!!!!!!!!!!!!!!!!!!!-!!!!!!!!!!-!-!!!!!!!!!!-!!!!!-!-
!!!!!-!-!!!!!-!-!!!!!
HOL-OWN                                Y a          OWN   a
CALL-NO                   abkq9        Y hikj9
SUB-LIBRARY               l            N
COLLECTION                l            N
COPY                      c            N
Z30-ITEM-STATUS           l            N
Z30-CATALOGER             x            N
CALL-NO-TYPE              j            N
Z30-MATERIAL              z            N
```

"rcmap" table in "/aleph/u54_5/iow01/tab" directory

```
!    1                    2    3                        4
!!!!!!!!!!!!!!!!!!!!!!!!!-!-!!!!!!!!!!!!!!!!!!!!!!!!-
!!!!!!!!!
CALL-NO-TYPE              Y L                          0
CALL-NO-TYPE              Y D                          1
CALL-NO-TYPE              Y X
CALL-NO-TYPE              Y Y                          4
SUB-LIBRARY               Y bus                        BUS
SUB-LIBRARY               Y chem                       CHEM
SUB-LIBRARY               Y chem,osiz                  CHEM
SUB-LIBRARY               Y engn                       ENGN
SUB-LIBRARY               Y main                       MAIN
SUB-LIBRARY               Y main,acq                   MCPS
  (more SUB-LIBRARY entries)
COLLECTION                Y bus                        LIB
```

```
COLLECTION                Y chem                      LIB
COLLECTION                Y chem,osiz                 OSIZ
COLLECTION                Y curr                      LAB
COLLECTION                Y engn                      LIB
COLLECTION                Y geol                      LIB
COLLECTION                Y hsl,av                    AV
COLLECTION                Y hsl,micr                  MICR
  (more COLLECTION entries)
Z30-ITEM-STATUS           Y bus                       01
Z30-ITEM-STATUS           Y chem                      01
Z30-ITEM-STATUS           Y chem,osiz                 01
Z30-ITEM-STATUS           Y curr                      40
Z30-ITEM-STATUS           Y engn                      01
Z30-ITEM-STATUS           Y hsl,micr                  96
Z30-ITEM-STATUS           Y main,acq                  10
  (more Z30-ITEM-STATUS entries)
```

Tables used in State Historical Society loader process

"shs.fix" table in "/aleph/u54_5/iow06/tab/import" directory

```
!-!!!!!-!!-!-!!!-!!!-!!!!!-!!!!!!!!!!!!!!!!!!!!!!!!!!!!!-
!!!!!!!!!!!!!!!!!!!>
1 LDR                     ADD-FIELD
OWN  ,L,$$aSHSI
2 049                     REPLACE-STRING
[*]IOQA,IOQD
2 049                     REPLACE-STRING
[*]IOQD,IOQD
2 049                     REPLACE-STRING
[CENSUS]IOQA,IOQB
2 049                     REPLACE-STRING
[MANUSC.]IOQA,IOQF
2 049                     REPLACE-STRING
[MANUSC]IOQA,IOQF
2 049                     REPLACE-STRING
[MICRO.][*]IOQB,IOQI
2 049                     REPLACE-STRING
[MICRO.]IOQA,IOQI
2 049                     REPLACE-STRING
[MICRO.]IOQB,IOQI
2 049                     REPLACE-STRING
[MICRO.]IOQD,IOQI
2 049                     REPLACE-STRING
[MICRO.]IOQF,IOQI
3 994##                   DELETE-FIELD
```

“tab_fix” table, “RECO” section in “/aleph/u54_5/iow06/tab” directory

```
! 1                 2                              3
!!!!!-!!!!!!!!!!!!!!!!!!!!!!!!!!!!!-
!!!!!!!!!!!!!!!!!!!!!!!!!!!!!>
RECO  fix_doc_oclc_2
RECO  fix_doc_marc21_spaces
```

“shs” table in “/aleph/u54_5/iow06/tab” directory

```
!
1  1
!      1                    2        3   4          5   6
7   8   9   0  1
!!!!!!!!!!!!!!!!!!!!!!!!!-!!!!!!!!!!-!-!!!!!!!!!!-!!!!!-!-
!!!!!-!-!!!!!-!-!!!!!
#HOL-OWN                                Y a          OWN   a
CALL-NO                  abkq       Y hikj
SUB-LIBRARY              l          N
COLLECTION               l          N
COPY                     c          N
Z30-ITEM-STATUS          z          N
Z30-CATALOGER            z          N
CALL-NO-TYPE             j          N
Z30-MATERIAL             z          N
```

“shsmap” table in “/aleph/u54_5/iow06/tab” directory

```
!    1                    2    3                        4
!!!!!!!!!!!!!!!!!!!!!!!!!-!-!!!!!!!!!!!!!!!!!!!!!!!!-
!!!!!!!!!
SUB-LIBRARY              Y [ATLAS]IOQA               IC
SUB-LIBRARY              Y IOQI                      IC
SUB-LIBRARY              Y [*]IOQI                   IC
SUB-LIBRARY              Y [F*]HDMA                  DM
SUB-LIBRARY              Y [*][F]HDMB                DM
SUB-LIBRARY              Y NIOA                      NEWS
  (more SUB-LIBRARY entries)
COLLECTION               Y [ATLAS]IOQA               ATLAS
COLLECTION               Y [ATLAS]IOQD               ATLAS
COLLECTION               Y IOQI                      MICRO
COLLECTION               Y [*]IOQI                   MICRO
COLLECTION               Y NIOA                      ICNEW
  (more COLLECTION entries)
Z30-ITEM-STATUS          Y DEF                       01
Z30-CATALOGER            Y DEF                       CONV
Z30-MATERIAL             Y DEF                       BOOK
```