

## MARC RECORDS: Loading Serials Solutions Files into III Millennium

Files for MARC record, Coverage, and Catalog loads are available for download on or about the 14<sup>th</sup> of each month. Target timeline for finishing loading all 3 files is 3 days.

### Retrieve Files from Sharepoint

1. Files are located on the BAMS Sharepoint site under *BAMS > Shared Documents > Project\_360 Marc and Coverage loads > 360 MARC and Coverage Loads* in the “Files to be loaded” section.
2. **Save the 3 files (Deleted, Changed, & New) files to your PC.** To do so, right-click, select “Save Target As...” and save to a folder on your PC.
3. Once the files have been downloaded, **move them to the “Loaded” folder.**
  - Open the BAMS > Shared Documents > Project\_360 Marc and Coverage loads folder
  - On the far right under View, choose **Explorer View**
  - Double click on the *360 MARC Load* folder, then double click on the *To Be loaded folder*
  - Select the files, right-click and choose CUT the files from this folder
  - In the *Other Places* panel at the left, navigate back to the *360 MARC Load folder*. Double-click on the *Loaded* folder
  - Right-click and PASTE the files into this folder.

### Loading Serials Solution Files Into Millennium

*NOTE: In III text-based mode (use SecureShell), check the transaction file. If 60% or more full, prefer to wait to load files. M>, I>, F>, S>, forward to next screen. Look for “File is \_\_\_\_% full”.*

In the Acquisitions or Serials module: Go to **Import Invoices >> Data Exchange**.

1. In the **Select Process drop down box**, select “**Load records via locally-created load profiles (local)**”
2. Select the “**Get PC**” button on the toolbar at the top of the screen. The Upload box will appear.
3. **Locate the files** in the folder in your PC. **Select files to be uploaded and click the “Upload” button** in the Upload box. **When asked to rename files, just make sure the .lfts suffix is selected.**
4. In the Data Exchange function, the **files you retrieved should now be present** in the list of files in Millennium with a **.lfts suffix**. (May need to select date order to refresh the screen after each load) Select the first file you wish to load. The “Prep” button should now be visible on the upper toolbar.
5. **Select the “Prep” button** to prepare the file. This will pull up another screen. **Click on “Start”.**

6. When processing is complete, the **number of records prepared will be displayed. Verify that number matches what should be in the file.** Close the window to **return to Data Exchange.**
  - Can do steps 2-6 at this point for the other two files
  - If the number of records shown in the prep step matches, and there are no errors, do not need to print error log. If there is a problem with either, do print the log. To print, go back to Data Exchange, look for **Error Log file** – View – Statistics tab.
7. There **should now be another file with the same filename and a .lmarc suffix.** Select that file. The “Load” buttons should now be visible in the upper toolbar.
8. Click on the “**Load E**” button. This will bring up another screen. Click on the “Load” button to load the file. **WORD OF CAUTION: When loading “Delete” files, select the “Test” button first and make sure that ALL of the records overlay. If they do not all overlay, return to view the test errlog to see which record(s) will not overlay. You will have to perform a title search to determine why the record will not overlay. Usually this is just because the original record is no longer in the system. (These items are okay to load as they are coded for deletion. The problem is that they are not overlaying the record that has been targeted for deletion so we must manually determine that the record has already been deleted from Millennium.)**
9. After the files have been loaded, **delete the original files, all prepped files, and all error log files** from the list of files in Data Exchange.
10. Update Sharepoint calendar to note files loaded and the date.

### **Process the Delete File**

1. Use **Create List to pull from the system all the currently loaded MARC records with rec stat d (marked for deletion).** Use the saved search query: *MARC load delete query*. Name the file *BAMS {initials} MARC Load Deletes mo/yr*. **Change the START .b number to .b53297878**
2. Go to Rapid Receive >> **Rapid Update** multiple records, and locate the review file of deletes just created .
3. Set Rapid Update to **change the BCODE3 [field #31] in the bib record fixed field to “N”** (Suppression)

**Create Master Review File** for use in the ERM Catalog Load process.

Once the file of deleted records is suppressed, a Master file is created to complete the Coverage Load process. The file is created under *Create List*, using the *Retrieved Saved Query* file # is 38: bams sdj coverage load master file.

**Send note to Betsy Redman with the number of the review file of suppressed “deleted” records for review.**

## Mark records for deletion

1. When review is completed, use **Rapid Update to change the BCODE3 in the bib record fixed field to "D" (Deleted)**.
2. **Send Julie Benzer a note** with the name and number of the review file of deletes, and the date the code was changed to "D". She will delete the bibs and any attached records.

Through the SS Client Center, download the current report file and upload to Sharepoint archive.

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Example of Saved Search query for MARC load delete

Store Record Type: **BIBLIOGRAPHIC b** ▼

Range ▼ Start  Stop

Term	Operator	Type	Field	Condition	Value A	Value B
1	(	BIBLIOGR...	OCLC #	starts with	ssib	
2	OR	BIBLIOGR...	OCLC #	starts with	ssj	)
3	AND	BIBLIOGR...	REC STAT	equal to	d	
4	AND	BIBLIOGR...	BCODE3	not equal to	d	

(BIBLIOGRAPHIC OCLC # starts with "ssib" OR BIBLIOGRAPHIC OCLC # starts with "ssj") AND BIBLIOGRAPHIC REC STAT equal to "d" AND BIBLIOGRAPHIC BCODE3 not equal to "d"

Group  
Ungroup  
Insert Line  
Append Line

When using the query, change the START .b number to .b53297878