

## **GENLOAD HOW TO [University of North Florida]**

GenLoad is a program we will be using to load records into Aleph. Much of the routines will be familiar because they echo what we have been doing with PreWinOni and WinOni. John has provided PreGenLoad Cat and GenLoad icons in your CAT folder on the desktop.

Records that are going to Aleph through GenLoad will match on the OCLC number when one is present. If no OCLC number is present, then it will match on the NOTIS number. Once we have exhausted the materials bearing NOTIS numbers, the secondary match will be to the bib record ALEPH system number.

**NOTE:** If the cataloger uses a different OCLC record than Acquisitions selected, the cataloger will need to go into Aleph before sending the record and change the OCLC number in the Cataloging module to match the incoming record. This is the same routine we have been following in NOTIS.

There are some cautions to keep in mind about using GenLoad. Because Aleph indexes more slowly than NOTIS did, it is possible to create two records for the same title if two copies of the same OCLC record go over in the same group of records. The two records can be created before Aleph indexed the OCLC number of the first occurrence of the record. Be careful that:

- there is NEVER a duplicate copy of the same record in the same microenhancer file
- if you have any doubt about whether or not a record got included in a “print” batch on the microenhancer, DON’T “print” again! Either, wait and check the group of records in Aleph and send the record in question separately if it was not included in the original batch, OR, during the GenLoad process check the “preview recs” file after processing the records. See below for instructions on how to do “preview recs.”
- you WAIT to check records that are moved to Aleph. Loading and indexing in Aleph is not as quick as NOTIS and will be VARIABLE depending on other operations in process that we cannot know or predict.

When you have completed a group of records on the microenhancer and are ready to send them to Aleph, select Tools/Options/ then the Record Print tab and click on the “Print to a text file” box. Highlight the records

that are ready to send to Aleph. On the toolbar, click on Actions and select Print. This creates the file for PreGenLoad. Be sure to return to the Tools/Options/Record Print sequence to uncheck the "print to a text file" box.

In the CAT folder on the desktop, click on the PreGenLoad Cat icon. A program called MacroExpress will load. It will process your records as PreWinOni used to (create ticklers, strip off certain fields, etc.). When PreGenLoad is complete, you will see the familiar blue message screen about records lacking a 599 and an invitation to "press any key to continue." After you have exited PreGenLoad, click on the GenLoad icon. A sign on window will appear. You need to enter your Aleph password and you will need to do this each time. DO NOT check the save password box. Click OK.

The Screen that first appears is empty with a cursor blinking in the blank area. The blue header bar states "GenLoad AL" then the database you are connected to (like NFPROD) and your Aleph user name (like lsmith). In the lower left hand corner is a box which shows one of four options: "catmerg only," "catnew only," "catnew&merge," or, "catbibmergeonly."

Most of the time "catmerg only" is appropriate. "Catmerg only" means that when a record loads in Aleph, it is expecting to find a record to match. "Catnew Only" is appropriate when the records are loading without the expectation of finding a previous record to overlay. "Catnew&merge" is a file that contains both type of records ... some will find records to overlay and some will not. "CatBibMergeOnly" overlays the Bib records only. If you know the holdings and item records are fine, and all that is needed is a new version of the Bib record, this is a useful profile to select.

Profile summary:

Catmerg = matching on a existing Bib record = Creates holdings and item  
Catnew= No matching Bib record = Creates holdings and item  
Catnew&merge = mix of both types  
Catbibmergeonly = overlays matching Bib record only = ignores HOL and Items

Selecting the appropriate category helps prevent inappropriate overlays. For example, if all the records in your file should be matching on "in process" records and the profile is set to "catmerg only" the loader should NOT create any new records. If any incoming record does not find a matching record, that record should fail to load.

After the load type is selected, click on File and select "Open a data file" This contains the batch file you prepared during PreGenLoad. [NOTE:

The records you are sending are on the C: drive of your computer. If, for some reason, you are not immediately pointed to your data file (as described in the next sentence) click on the file folder at the top and click to select C:/myfiles/genload.] The file of PreGenLoad processed records will always be called "EXPCAT.RDY" Double click on the file name to open or click once to highlight, then click "open." Click on the "process recs" button. In the lower left of the window, it will say "processing complete." After the records process, you can preview the processed records by clicking on the "preview recs" button. Checking "preview recs" allows you to check to see if holdings and item records have been created. Clicking on the arrow keys on the slide box at the bottom of the screen will move you back and forth in the list of records as you preview. Click to close. Click on the "send recs" button to load the records into Aleph. While the records are moving to Aleph you can watch the processing totals at the bottom of the window. When loading is complete, a message box will appear: "Load complete, no errors sending BIB records." To close GenLoad, click on the X.

If all your records did not load, you will get a message indicating how many records were skipped. This message also tells you where the skipped records can be viewed. Click OK to close the message. To view the load failures log, click on File and "View log file." This will show why a record was skipped. For example, if you choose the profile CatMergeOnly but GenLoad can't find a matching record in Aleph, it will skip the record and have a log file message: "(date) (time) Record 1 skipped - No matches found."

If you are sending a number of records and some were skipped, look in the skip.err file to see which records were skipped. Click on FILE, Open data file, and double click on EXPCAT.RDY\_skip.err. This will display the records that were skipped. Once you have discovered the error, go back to the microenhancer, make a correction if necessary, Print, PreGenLoad Cat, GenLoad and to go through the load process for the skipped records.

There may be times when you send a record to Aleph and then want to overlay that record. When you send the record a second time, you will get the message the record was sent incomplete unless you remember to select "catbibmergeonly." Here's the reason you get that serious sounding message. When a record is LOADED into Aleph, GenLoad creates a bib record, holdings record, and item record. But GenLoad can only overlay a bib record. So when you overlay a bib record that already has a holdings and item record created, GenLoad considers this to be an incomplete load (because it hasn't created a holdings and item record). In the log file, it will say Hol's and Items failed because of existing records. This is not an

error and can be ignored. Better yet, select "catbibmergeonly" as your load profile when all you want to do is overlay a bib record.

Any report files which are created during the process of sending records to Aleph will be wiped out when the next batch of records is sent through PreGenLoad Cat and GenLoad. With each batch of records you should see only the new EXPCAT.RDY file.

#### SAMPLE LOAD REPORT:

NFTEST Load

6/3/2004 9:26:00 AM Sending 3 records.

NFTEST Load

6/3/2004 9:29:18 AM Sending 3 records.

6/3/2004 9:29:18 AM Record 1 skipped - No matches found.

6/3/2004 9:29:20 AM Record 2 sent incomplete. 000075748 (merge)

6/3/2004 9:29:21 AM Record 3 skipped - No matches found.

Sending complete. Time = 0m , 2s. 24.80941 recs/min.

0 record(s) failed.

0 record(s) sent.

2 record(s) skipped.

1 record(s) sent incomplete.

HOL's failed for the following records:

000075748 BIB record has existing HOL record.

ITEMS failed for the following records:

Record 2 000075748 HOL 1, ITEM 1 - Existing ITEM found

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TO.doc**