Keep @ Downsview Metadata Matching Instructions
August 20, 2019

Start with clean data files for WL and UTL.
- OCLC and ISBN numbers must be on individual rows, extraneous data removed
- clear leading, trailing and excessive spaces from ISBN and OCLC columns
- clear formats from ISBN and OCLC columns

Prepare a spreadsheet with the following information

Filename/filepath: U:\\...2-Metadata Matching in Progress\\...WL-UTLdata.xlsx

Sheetname - WL-ISBN (Clean WL data) Headings: CALLNUM-WL, BIBNUM, BARCODE, ITEMNUM, TITLE-WL, OCLC-WL, ISBN
Sheetname - WL-OCLC (clean WL data) Headings: CALLNUM-WL, BIBNUM, BARCODE, ITEMNUM, TITLE-WL, OCLC, ISBN-WL
Sheetname - UTL-ISBN (clean UTL data) Headings: UTLLIB, CATKEY, CALLNUM-UTL, CALLNUM2-UTL, TITLE-UTL, OCLC-WL, ISBN   • remove any rows that do not contain ISBNs
Sheetname - UTL-OCLC (clean UTL data) Headings: UTLLIB, CATKEY, CALLNUM-UTL, CALLNUM2-UTL, TITLE-UTL, OCLC, ISBN-WL   • remove any rows that do not contain OCLC numbers

Run the Python script

Download DVmatch.py
Open IDLE. file > open > DVmatch.py
Within the script, change file paths to locate your file. Save
        Example: 'U:\\...\\WL-UTL data.xlsx'
On this file: run > run module

Open and clean up WL-UTL data.xlsx file

Sheetname – OCLC (This sheet contains all matches based on OCLC numbers)
Sheetname - ISBN (This sheet contains all matches based on ISBN numbers)

Sheetname – COMBINED (This sheet contains matches on OCLC and ISBN data combined)
    • Remove all duplicates
[Match on:BIBNUM, BARCODE, ITEMNUM, TITLE-WL, UTLLIB, CATKEY, TITLE-WL]
    • Conditional formatting to highlight duplicates in the ITEMNUM column, then custom sort ITEMNUM by colour on top & ITEMNUM by A-Z
    • Manually remove remaining duplicates, favouring downsview locations
    • Doublecheck that TITLE-WL and TITLE-UTL match. If not, remove row

Sheetname - UNMATCHED
This sheet contains all items from the original WL CLEAN file.
    • Matched items need to be removed manually:
         ○ Filter the results to delete all rows with CATKEY information
    • Move item numbers to individual rows

Quality Check

Ensure ITEMNUM from COMBINED and UNMATCHED align with original pull list.
- Remove any ITEMNUM not in original pull list
- Compare ITEMNUM in COMBINED and UNMATCHED to the original pull list
- Volumning from item records can be added to this data (Export from Sierra)

Create file to use as pull list, sorted into streams

Filename: [original file name](K@D by stream).xlsx

Sheetname: DISCARD STREAM • Copy WL-UTL Matches,UNMATCHED sheet to STREAM 2 - NO UTL
Sheetname: STREAM 1 - UTL RECORD • Filter WL-UTL Matches, COMBINED sheet on UTLLIB 'contains Downsview' • Copy to DISCARD STREAM
Sheetname: STREAM 2 - NO UTL • Filter WL-UTL Matches, COMBINED sheet on UTLLIB 'does not contain Downsview' • Copy to STREAM 1 - UTL RECORD