Library Resource Management Systems, Inc.

Automated Patron/Student/Teacher Profile Updating

This program was implemented in 2016

How this process functions and your responsibilities

When Student and Teacher files are Updated by this process:

1. You will receive a confirming email each time this process is implemented an emailed is sent to each school library staff persons email address listed within the G4 System-wide settings Library E-Mail of the G4 Advanced Settings. This contact email address must be kept current, otherwise our confirmation email will not be delivered to the current person in charge of the library.
   - Your source will send to the designated FTP site two files: (Students) G4Stud.csv and (Teachers) g4Teach.csv at a prescribed time of day for AM processing.
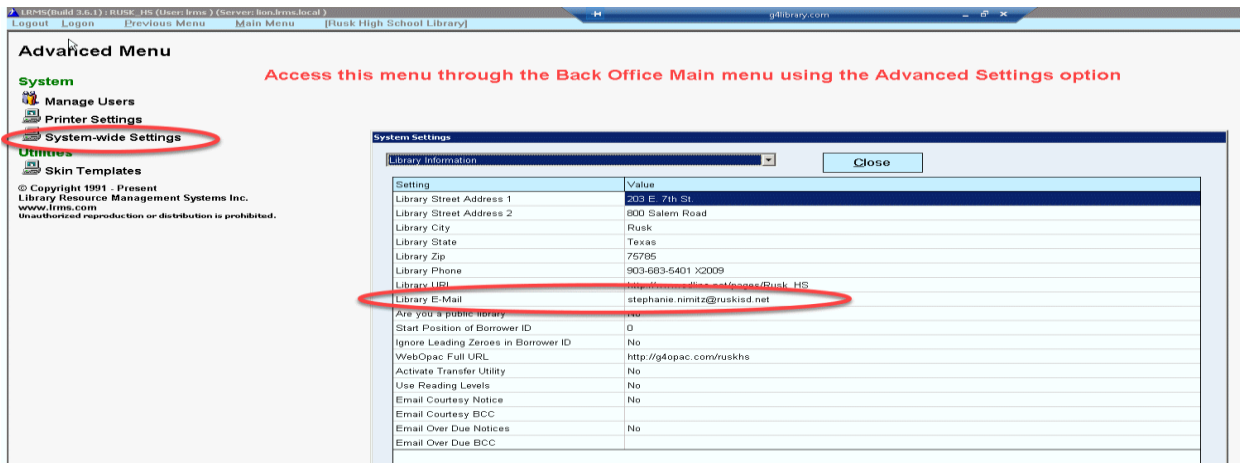
Each delivered email has multiple descriptions fields listed within its form.

When additions or exceptions are noted, individual Borrower ID's will be listed within this column. This will expand the report results from this brief summary to a lengthier report.

Category	Borrower ID	Information	
Students - Totals		Total Records:291	Total of students submitted by District
Students - Totals		Total Added:0	New students added
Students - Totals		Total Changed:291	Total number of students updated
Students - Totals		Total Deleted:0	Total students removed from borrowers that were not within the new file
Students - Totals		Total Errors:0	*Total of students to be removed having open circulation
Teachers - Totals		Total Records:36	Total of teachers submitted by District
Teachers - Totals		Total Added:0	New teachers added
Teachers - Totals		Total Changed:36	Total number of teachers updated
Teachers - Totals		Total Deleted:0	Total teachers removed from borrowers that were not within the new file
Teachers - Totals		Total Errors:0	*Total of teachers to be removed having open circulation

*NOTE: Students and Teachers counts when listed within the Total Errors field indicates that LRMS would not delete anyone having Open circulation, these individual have been moved to a "Special Group known as To Be Removed". This was created to allow staff to manually adjust these accounts appropriately.

2. Based upon the planned frequency of submission (Daily, weekly of this information to LRMS you should no longer need to add new students or teachers during the course of the school year.
3. **Teachers ID numbers** have been assigned within the Parent/Teacher ID field of specific student groups to each student where appropriate to help facilitate open circulation reporting to the teacher in charge of the student. Teachers email address has been added: having an email within the teacher information profile will allow for sending reporting to a teacher.
4. **Student Birth Dates** have been added to the Student Information, if a student visits the library and uses circulation on their Birthday G4 will make you aware.
5. An additional option "**G4 Courtesy Item Due Back Notice and OverDue Notice email**" (depending upon your policy) this service can be turned on to automatically send a brief email of items Due back and OverDue to the library to the email address listed within the Student or teacher borrower information.
6. **New Year start-up**, current year students and teachers will be available at the beginning of school. No need to promote Groups at the end or beginning of the school year.
7. **Library Group addition**: There is a requirement to frequently address any member placed into the **"To Be Removed Group"** to avoid any accumulation or aging of anyone listed in this group.
    - **LRMS will not delete** members within this group as they may owe the library materials that have been checked out to them. You should have a policy to manage open circulation for these Group members.
    - **If these members** have moved to another campus and the materials have not been returned, contact the other library about any open circulated items.