

Borrower Import

IMPORTING BORROWERS:

Using the Facility Management program or Roster or other information system data; the ability to export specific record data for use by your library program is a fast method of maintaining current borrower information within the program. The program has the ability to import this data (using ASCII, Fixed length, and Tab Delimited or Comma Separated Value (CSV) format. This function is through the Borrower Import menu located within the Borrower Management Main Menu selection. This file can be imported on a daily basis or as needed to maintain a current list of borrowers/patrons.

This Universal Borrower Import tool provides the interface to managing and importing borrower information from different management programs. Borrower, Student and Faculty record information: **Borrower file** information for import is provided from your records administrator. Through the creation of such a file it would be possible to Import and or Up-date borrower records using Universal Importer. This information can be updated using these ID Numbers without interfering with carry-over circulation statistics.

Optionally; <u>A SECONDARY</u> assignment of responsibility for notification such as an individual, parent, teacher or other individual (ID) for each borrower or a student can be assigned. This would allow for library circulation reporting can be accomplished by paper reports or via E-mail directly (if available) to one or many E-mail addresses listed within the borrower record. (See descriptions below for details)

Column (Spreadsheet Tab or csv file) Format:

Additional Field Information:

<u>Create one column for each category</u> that will be added through the Borrower Import process.

✓ Depending upon the type of library these Options are flexible:

Minimum Borrower Information: * minimum required	
1. Last Name*Required	
2. First name*Required	
3. Middle initial*Required (The program will truncate a Middle Name to one letter initial, James to J).	
4. Group or Grade*Required (must match Group designations within the library program)	
5. Borrower ID # *Required	
6. Teacher ID to Borrower ID*Optional	
o Reports can be created and sent to this person or location	
o When included will allow for enhanced reporting & paperless E-mail reporting	
o Good option for home room reporting by Class Period and paperless E-mail reporting, this association is especially importa	ant
for K-12's secondary students. This will allow the library to create reports by Teacher ID and Class Period for Borrowers	
associated with Parent/Teacher ID by Class Period when class period is used. When E-mail is associated to a Parent or Teach	er
reports and notices can be sent as a paperless transaction using the built-in E-mail system within the program.	
7. Secondary ID*Optional (Driver's License, CDC number or other.)	
Class Period*usually required for Secondary Grades	
o (Always used in secondary student association with the Teacher ID for use of Homeroom or as the point of contact where	
notifications are delivered or E-mailed regarding Library Overdue and Fine Notices.	
E-mail address* Optional	
o Good option for Borrower/Person of responsibility/homeroom reporting for paperless E-mail reporting and sending of libration of the control	ary
notices.	
Optional Other E-mail * Optional	
o Good option for parent notification or Staff or Principal or Coach regarding Overdue or Fines Notices.	
Telephone Number* Optional	
o Parent or Guardian telephone number, most want this as a day time contact number	
DOB* Optional	
o Good option for elementary aged youngsters as the program will Display a birthday greeting at circulation.	
(Format: 00/00/0000) M/D/Yr.	
Living Address or location* Optional Address 1 and Address 2 physical address or Housing location.	
o There are two address fields along with City, State and Zip Code, add to this information if you require Housing/mailing	
information for sending out notices. The program will automatically add this information to your Overdue and Fine Notices to	this

② Phone 1 and Phone 2, Care of, Secondary ID Number and Secondary ID description

information prints on the notice form ready for mailing or to be placed into a No 9 or 10 envelopes.



How this works: Borrower Import feature:

- 1. You must have an up-to-date Tab delimited or csv file that contains the Borrower ID, First Name, Middle name or initial, Last Name, <u>GROUP</u> designation and any other desirable information that is essential within the borrower information profile. <u>IMPORTANT When creating the CSV file Use and enclose the fields in quotation " marks. And not a single quote ' to avoid issues with the use of a single quote for the names like O'Shay.</u>
 - a. This same Universal Import method can be used for adding first time new borrowers and for updating older borrower information without losing the current borrowers Circulation statistics.
 - b. Import Borrowers is our Universal Importer that allows for new imports of data and also contains a switch setting for Updating existing data allowing the flexibility to quickly update contact information, addresses, E-mails and such of existing borrowers without interfering with their current circulation statistics.
 - c. The program looks at the individual ID numbers; matching the incoming ID's to any existing ID's with the same number, which then are updated with any new information. The program possesses the ability to easily update these files without disturbing circulation statistics, beware of duplicated ID's, if these exist within your data and another borrower has the same ID, as one being imported with the Update switch being set the existing duplicated ID member will be over-written.

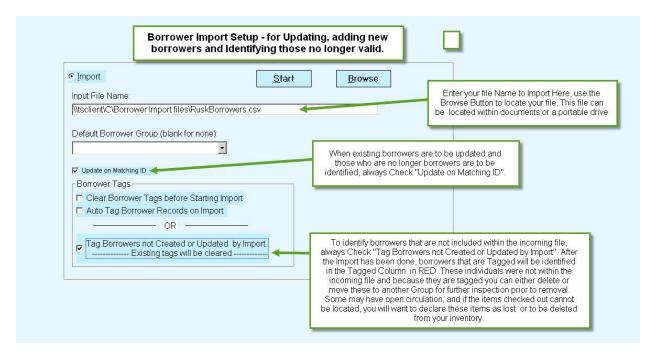
School Sample shown, Group designations can be created for the various libraries using this program.

Spreadsheet File Minimal Data Example:

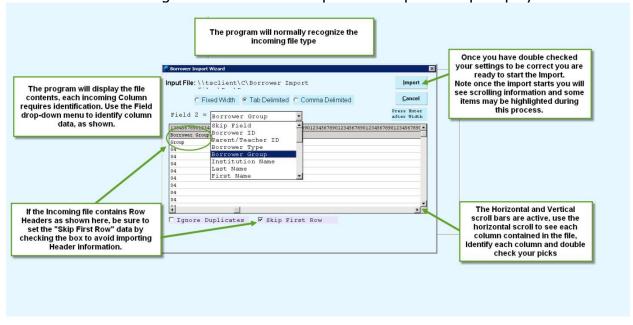
А	9	c	D		Ē	F .
OtherID	Student Last Name	Student First Name	1	Gr	_	
13	524 ABHUUMEN	DESTINY	0	09	4	
10	125 ADDINGTON	ETHAN	W	09		
10	127 ANDERSON	TUCKER	T	09		
10	362 ARMSTRONG	MATTHEW	В	09		
10	990 ASH	MATTHEW	D	09		
14	725 AUTHEMENT	DAKOTA	R	09		Format the Group/Grade Column as Text so the lower
10	128 AVARD	ALYSSA	R	09		
9	864 AWUAH	BRANDON		09		
10	129 BEAN	DANIELLE	L	09		grades are classified as PK, K,
10	130 BECK	EMMA	G	09		(leading zero) 01, 02, 03, 04,
13	491 BINGHAM	QUINN	R	09		HILL TO THE STATE OF THE STATE
13-	490 BINGHAM	REID	T	09		05, 06, 07, 08, 09 or to match the Group descriptions within
13-	416 BISHOP	KIRA	E	09		
10	132 BLAIN	COE	N	09		the CA Library autom for your
13:	981 BLEVINS	MADISON	z	09		All Import files require a
14	519 BOWMAN	KADIE	G	09		
10	133 BRADLEY	AUSTIN	j.	09		Group designation Column
10	165 BRADSHAW	SAMUEL	p.	0.9		
10:	139 BRANCH	ROBERT	1	09		
150	052 BROWN	O'MARRION	K	09		
11	759 BROWN	TARLON	D	09		
14	833 BRUNER	LANDRY	R	09		
10	134 BUCK	ROBERT	R	09		
12	91 BURNSIDE	CALEY	Д	09		
9	960 BURRIS	MARCUS	D	09		
130	021 BURROW	MASON	8	09		
14	176 BURT	JONAH	E	09		



- 2. Borrower Management Borrower Import Set-up 1st. step Display
 - a. This set-up example will create Tagged Borrowers that are no longer valid.

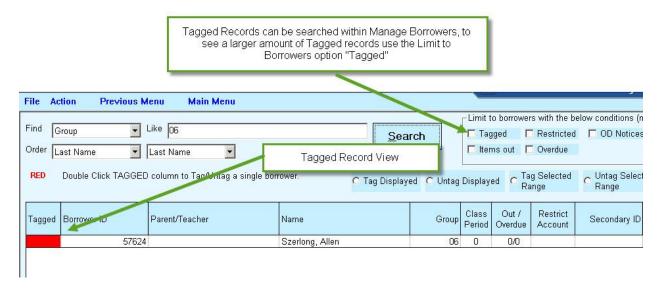


3. Borrower Management – Borrower Import - Set-up 2nd. step Display





4. Red Tagged Records, Borrower not updated:



Red Tagged borrowers can be removed or transferred. Use Borrower "Mass Update" to accomplish these tasks. Please feel free to contact LRMS with any questions and we would be pleased to help you.