



Library Resource Management Systems, Inc.



Borrower Import

Import New or Update Borrower data from Management Systems.

Updating G4 Borrowers by use of Borrower Import:

PROCESS:

Using G4's Borrower Import along with having the newly supplied Patron spreadsheet file located on a flash/thumb drive. Provides an opportunity to update and promote student borrowers, clean up student roles to match your roster and purge unwanted data that has aged and is no longer relevant.

- Access this file by Browsing for the file on the flash drive for Import by the G4 program.
- Import Screen: (Review attached Video).
 - Locate the import file and set it up for Import options
 - Select: **Always Update on Matching ID**
 - Borrower Tags:
 - Select: **Clear Borrower Tags before Starting Import**
 - *This will avoid any conflict*
 - Select: **Tag Borrowers Not Created or Updated**
 - This is a simple process and should be double checked as shown in the video to assure accuracy.
 - When ready, select the **Start** button
 - Use **Tab Delimited**
 - Select **"Skip First Row"** if the spreadsheet, 1st. row contains column headers description.
 - The spreadsheet columns of detailed information will become visible, Use the horizontal bar to begin identifying each column to the G4 program for import.
 - Select and identify each column (Ex: First name to First name)
 - Double check your choices
 - Select **"Import"**
 - **Green Highlighted lines** represent Tagging of Borrowers not updated.
- [Video Import Link](#) (no sound)

IMPORT RESULTS: Example

- 289 students were imported into their various Groups within G4 along with their appropriate communication email school address for library use.
- Using the matching of Student ID numbers 229 students were not updated and are located in the Group named "Not Updated".



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- Group 07 was not updated and remained at 109 students and probably would not represent the JH/HS Group 07 very well due to the aging of the data.
- No Teachers were included within the new file and as a result the FC Group for Teachers stayed the Same. Teachers can be added to the import file to allow updating. Teachers can also be assigned within the spreadsheet file as the primary teacher for a group of students. This would allow the library to communicate with the teacher by email or paper report what their student are to bring to the library.

View of Updated information from this Import

- The existing data prior to the import of a new student file was inaccurate. The importing of this file added the correct student information and identified the bad data during the import by Tagging those ID Numbers not within the incoming file.

File Action Previous Menu Main Menu

Display Active Statistics (will slow display)

Group	Circ Calendar	Calendar Last Day	Circ Limit	Promote Group To	Promote Order	Transfer Group from other Campus	Borrowers	First Circ Trans	Last Circ Trans	Circ Count	Active First	Active Last	Active Count	Dupls	Send Auto OD Notices	First Notice	Second Notice	Third Notice	Auto Restrict Account
01	DEFAULT	05/16/2024	1	02	6		38	08/30/2009	05/09/2023	15582	NIA	NIA	NIA		No	0	0	0	No
02	DEFAULT	05/16/2024	1	03	5		39	08/31/2009	05/09/2023	12164	NIA	NIA	NIA		No	0	0	0	No
03	DEFAULT	05/16/2024	2	04	4		42	09/01/2009	05/08/2023	21448	NIA	NIA	NIA		No	0	0	0	No
04	DEFAULT	05/16/2024	2	05	3		36	09/03/2009	05/08/2023	18789	NIA	NIA	NIA		No	0	0	0	No
05	DEFAULT	05/16/2024	2	06	2		39	09/02/2009	05/08/2023	13669	NIA	NIA	NIA		No	0	0	0	No
06	DEFAULT	05/16/2024	2	07	1		32	09/01/2009	05/08/2023	10049	NIA	NIA	NIA		No	0	0	0	No
07	DEFAULT	05/16/2024	0				109	08/22/2011	08/28/2012	14	NIA	NIA	NIA		No	0	0	0	No
FC	DEFAULT	05/16/2024	12				66	09/03/2009	09/21/2022	4143	NIA	NIA	NIA		No	0	0	0	No
K	DEFAULT	05/16/2024	1	01	7		37	09/02/2009	05/08/2023	4022	NIA	NIA	NIA		No	0	0	0	No
Not Updated	DEFAULT	05/16/2024	0				229			0	NIA	NIA	NIA		No	0	0	0	No
PK	DEFAULT	05/16/2024	1	K	8		25	09/09/2009	04/12/2023	1280	NIA	NIA	NIA		No	0	0	0	No
X GRADS	DEFAULT	05/16/2024	0				0			0	NIA	NIA	NIA		No	0	0	0	No

The Not Updated Group was added to allow placing these borrowers to be reviewed for deletion, this can be accomplished by Highlighting this Group within Manage Groups and using the "Action" Tab "Purge Group Members" to remove them.