Borrower Management – Borrower Import
IMPORTING G4-G3 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 G4-G3 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 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 G4-G3's Universal Importer. This information can be updated using these ID Numbers without interfering with carry-over circulation statistics.

Optionally; A SECONDARY 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 G4-G3 borrower record. (See descriptions below for details)

Column (Spreadsheet Tab or csv file) Format:
Create one column for each category 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 (G4-G3 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 (Not SSN)
6. Teacher ID/ Staff to Borrower ID .... *Optional
o Group designation **must be FC** for Faculty
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 important 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 Teacher reports and notices can be sent as a paperless transaction using the built-in E-mail system within G4-G3.
7. Secondary ID......................................*Optional (Driver's License, CDC number or other.)

Class Period........................... *usually required for Secondary Grades (Periods 1 - 8)
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

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 Nice option for elementary aged youngsters as G4-G3 will notify the librarian at circulation of Students Birthday. (Format 00/00/0000)

Living Address or location .... * Optional
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. G4-G3 will automatically add this information to your Overdue and Fine Notices this information prints on your notice form ready for mailing or to be placed into a No 9 or 10 envelopes.

Additional Field Information:
  Phone 1 and Phone 2, Care of, Secondary ID Number and Secondary ID description
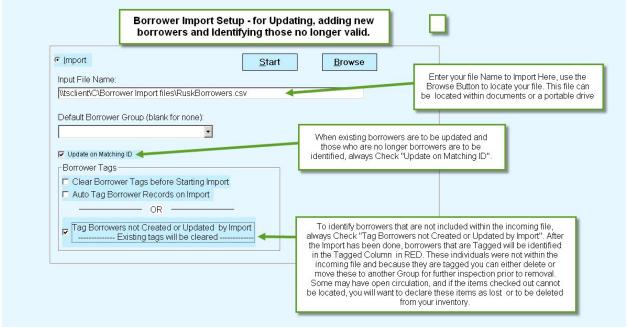
How this works: G4-G3's Borrower Import feature:

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 and any other desirable information that is essential within the borrower information profile.
   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. G4-G3 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. G4-G3 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. G4-G3 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.
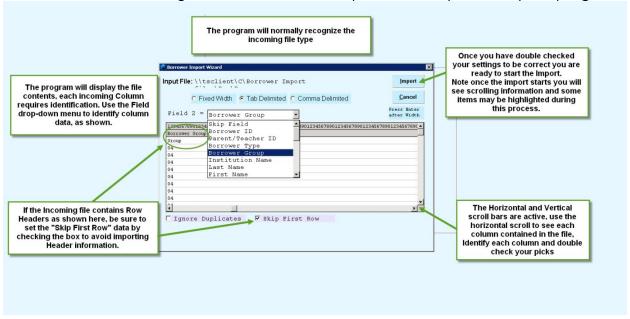
2. Spreadsheet File Minimal Data Example:

	A	B	C	D	E	F
1	Other ID	Student Last Name	Student First Name	I	Gr	
2	13524	ABHULIMEN	DESTINY	O	09	
3	10125	ADDINGTON	ETHAN	W	09	
4	10127	ANDERSON	TUCKER	T	09	
5	10362	ARMSTRONG	MATTHEW	B	09	
6	10990	ASH	MATTHEW	D	09	
7	14725	AUTHEMENT	DAKOTA	R	09	
8	10128	AVARD	ALYSSA	R	09	
9	9864	AWUAH	BRANDON		09	
10	10129	BEAN	DANIELLE	L	09	
11	10130	BECK	EMMA	G	09	
12	13491	BINGHAM	QUINN	R	09	
13	13490	BINGHAM	REID	T	09	
14	13416	BISHOP	KIRA	E	09	
15	10132	BLAIN	COE	N	09	
16	13981	BLEVINS	MADISON	Z	09	
17	14519	BOWMAN	KADIE	G	09	
18	10133	BRADLEY	AUSTIN	J	09	
19	10365	BRADSHAW	SAMUEL	F	09	
20	10139	BRANCH	ROBERT	J	09	
21	15052	BROWN	O'MARRION	K	09	
22	11759	BROWN	TARLON	D	09	
23	14833	BRUNER	LANDRY	R	09	
24	10134	BUCK	ROBERT	R	09	
25	12091	BURNSIDE	CALEY	A	09	
26	9960	BURRIS	MARCUS	D	09	
27	13021	BURROW	MASON	B	09	
28	14176	BURT	JONAH	E	09	

Format the Group/Grade Column as Text so the lower grades are classified as PK, K, (leading zero) 01, 02, 03, 04, 05, 06, 07, 08, 09 or to match the Group descriptions within the G4 Library system for your library.

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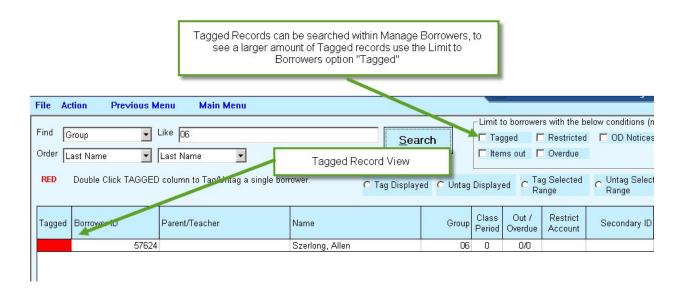   a. This set-up example will create Tagged Borrowers that are no longer valid.

Borrower Import Setup - for Updating, adding new borrowers and Identifying those no longer valid.

Enter your file Name to Import Here, use the Browse Button to locate your file. This file can be located within documents or a portable drive

When existing borrowers are to be updated and those who are no longer borrowers are to be identified, always Check "Update on Matching ID".

To identify borrowers that are not included within the incoming file, always Check "Tag Borrowers not Created or Updated by Import". After the Import has been done, borrowers that are Tagged will be identified in the Tagged Column in RED. These individuals were not within the incoming file and because they are tagged you can either delete or move these to another Group for further inspection prior to removal. Some may have open circulation, and if the items checked out cannot be located, you will want to declare these items as lost or to be deleted from your inventory.

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

The program will normally recognize the incoming file type

The program will display the file contents, each incoming Column requires identification. Use the Field drop-down menu to identify column data, as shown.

If the Incoming file contains Row Headers as shown here, be sure to set the "Skip First Row" data by checking the box to avoid importing Header information.

Once you have double checked your settings to be correct you are ready to start the Import.
Note once the import starts you will see scrolling information and some items may be highlighted during this process.

The Horizontal and Vertical scroll bars are active, use the horizontal scroll to see each column contained in the file, Identify each column and double check your picks

5. Tagged Record, Borrower not updated

Tagged Records can be searched within Manage Borrowers, to see a larger amount of Tagged records use the Limit to Borrowers option "Tagged"

Tagged Record View

Please feel free to contact LRMS with any questions and we would be pleased to help you.