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Import Patron Records

You are preparing for the new year, and have a patron file to import into Alexandria.

In Tools, the Import module, under Categories, select Patrons.

Once you Choose the import file, you will need to check the Field Mapping.

Match the file information on the left with the Alexandria labels on the right. Any field you mark with an X will not be imported.

If you have field headers in the file—like Barcode, First Name, Last Name—those can make it easier to map the fields.

Note you do not need Field Mapping if the import file has the required Alexandria header.

Learn More: <http://www.goalexandria.com/v7Docs/index.php/Import>

Under Settings, check the box to Archive Before Import. If you have a column header, Skip the First Record. **You do not need to do this with an Alexandria header.**

Set the Default Site, Policy, and Security Group for the import.

Next you decide if the records in the import will be limited to new records or can modify existing records. If this is a group of new patrons, select Always Create New Records on Import. If this is an import meant to update your current records, choose Allow Import to Modify Existing Records. Alexandria will only modify a record if it matches the barcode, Social Security Number, or Student ID #. Otherwise, it will create a new record.

To Assign New Barcodes, fill in your Starting Patron Barcode; otherwise select Use Barcodes in Import File.

Press Run. When the import finishes, you can view a summary in Operation Management.