qt51
Clean up Your Records with Patron Imports

You are ready to run an import to update your patron records in preparation for the new school year. But some students may have left during the summer. There is an easy way you can weed these records out.

After you advance your student grades, the plan is this: run a utility that will change all the patrons to the homeroom GONE; run your import, which will put the returning students in the correct homeroom; any student left in the homeroom GONE is, well, gone.

Open Utilities, in the Patrons category select General, and click on the Change Patron Location utility.

Make a selection for something like Policy that will identify students.

Under Options, fill the "Change Location to" field with GONE. Press Run.

If you are ready to modify all your student records, click on YES.

Now your patrons are all in the homeroom GONE. It feels lonely.

Open Imports, click on Patrons, and choose your import file.

Note: all imports that do not have an Alexandria header will need Field Mapping. This means simply that you match the fields in the import with the Alexandria fields on the right.
Learn More About Headers: http://www.goalexandria.com/v7Docs/index.php/Import

Select Archive Before Import, and if there is a header than the Alexandria Header, Skip the First Record. Under Patron Updates, Allow Import to Modify Existing Records.

Under Barcode Handling, select Use Barcodes in Import File.

Run the import.

When the import is finished, you can view a summary in Operation Management.

The import will restore your patrons to the correct homerooms. You can keep the GONE patrons in case they return in the future, or you can run a utility to remove them.

In Utilities, Patrons, the Remove Patrons utility, selecting Patrons from the Homeroom GONE.

Under Options, you can choose to Remove them even if they have items checked out or if they have fines. Leave this option unchecked to *keep* the records for *those* patrons.

Run the utility and confirm the removal. View the summary in Operation Management.