

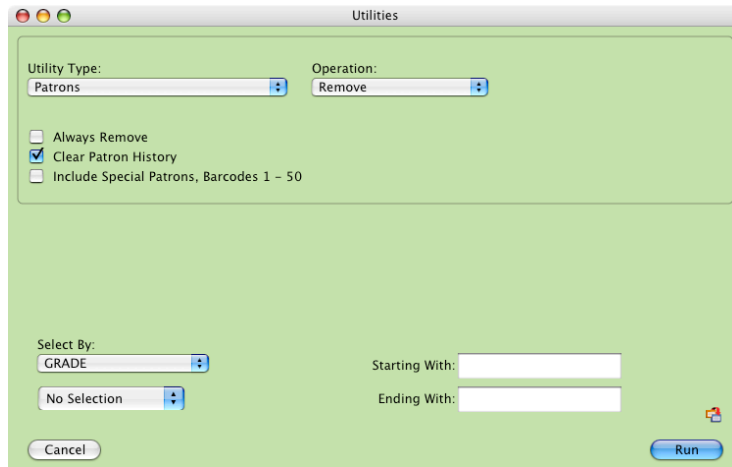
Importing Patrons into Alexandria

Josh Burkner | josh_burkner@misd.wednet.edu
September 2005 | Updated September 2007

This process will import a group of patrons into the Alexandria database. The process for updating the database with students at the beginning of the school year requires you to clear the database.

Removing Old Student Records

You need to remove student records from the database before you add new student records. From the **File** menu, select **Utilities**. Under **Utility Type** select **Patrons**. Under **Operation** select **Remove**. Under **Select By** choose **GRADE**, then specify the **Starting With** grade, K, and the **Ending With** grade, 5.



Preparing the Data for Import

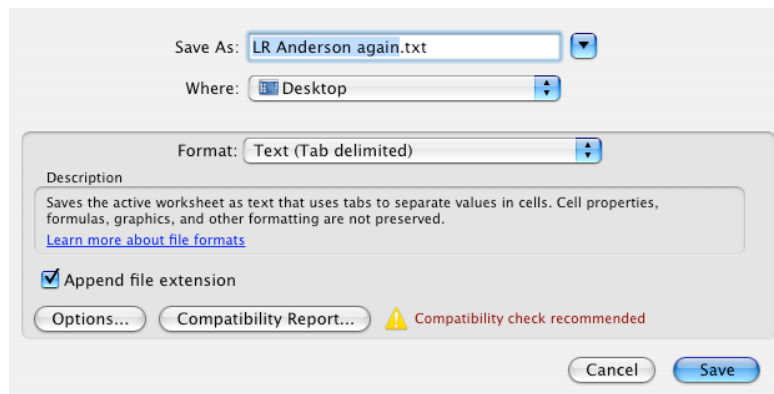
You should have already received a spreadsheet containing the list of the students that you wish to import and that also contains all the information needed by the Alexandria database: student ID, home address, phone number, etc. Open the spreadsheet. It will look similar to this:

The screenshot shows a spreadsheet application window titled "LR Anderson again.xls". The spreadsheet has columns labeled A through N. Column A is "Student ID", B is "Gr", C is "Sex", D is "Student F1", E is "Student L1", F is "F1 Address", G is "F1 City", H is "F1 State", I is "F1 Zip", J is "CY", K is "Teach", L is "Gr", M is "DOB", and N is "F1/G1". The data is organized into rows, with columns A through N visible. The spreadsheet shows a list of student records with various fields filled in, including student IDs, grades, sexes, addresses, cities, states, zip codes, and other identifiers.

The spreadsheet should contain the students for a single class; you cannot import data from a spreadsheet containing all the classes.

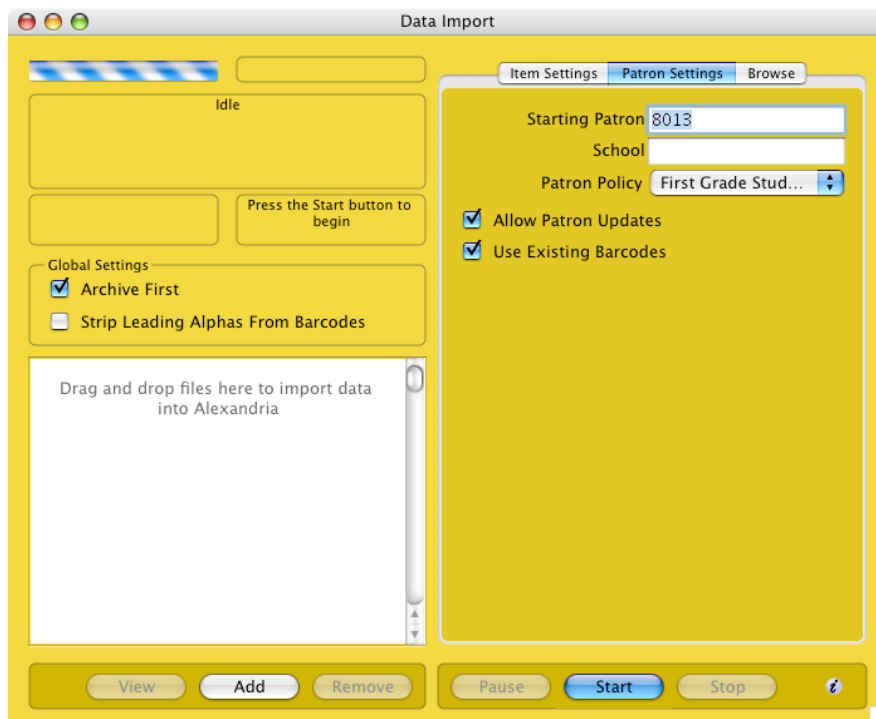
By default, this spreadsheet will contain an extra column of data that duplicates the second “B” column, the student’s grade. Click on the column header, in this case “K” and go to the **Edit** menu and select **Delete** to remove this column.

Next, go to the **File** menu and select **Save As**. Change the **Format** to **Text (Tab Delimited)**. Save the document to the Desktop.



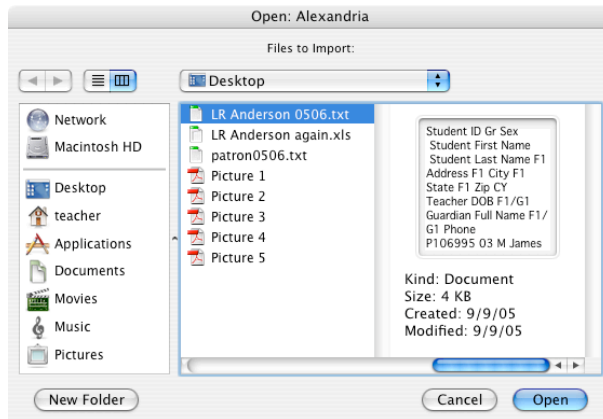
Quit Excel and open Alexandria.

In Alexandria, go to the **File** menu and select **Import**. Click on the **Patron Settings** tab at the top of the window.

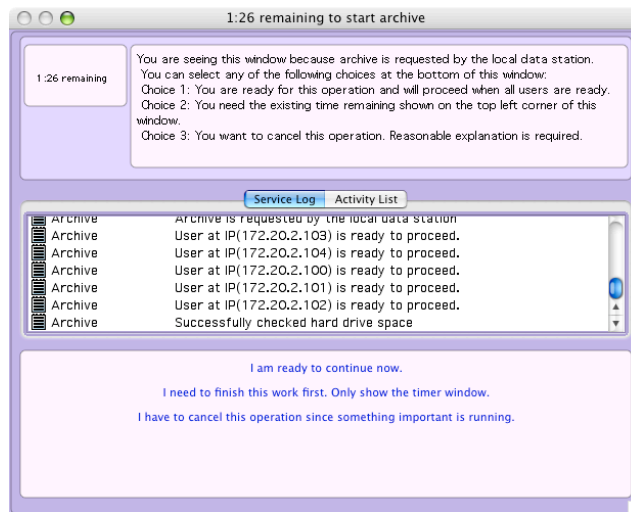


Make sure **Allow Patron Updates** and **Use Existing Barcodes** are both checked, as show above. Additionally, **Strip Leading Alphas From Barcodes** should not be checked. Also, select the appropriate grade for the class you are importing from the **Patron Policy** menu.

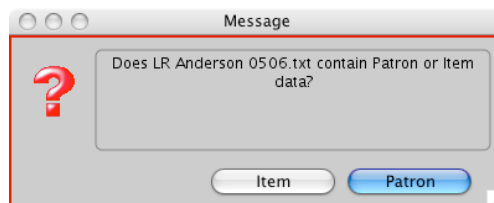
Click the **Add** button at the bottom of the window to select the spreadsheet you edited.



Click the **Open** button to add it to the list of files Alexandria is going to import. Then click the **Start** button.
You will need to click “**I am ready to continue now**” on this screen before Alexandria continues with the import:



Alexandria will want to know whether you are importing **Patron** or **Item** data; click the **Patron** button:



Finally, you must align the fields properly in the **Field Mapping** screen. The most important field is the **Barcode** field, which should be associated with the student ID from the spreadsheet. Click and drag the categories to the right to align them with the proper data on the left:



Make sure the **Initial Records to Skip** is set to **1** and click the **OK** button. The patrons will be imported.