

Import of addresses

All libraries managing loans must enter the data about their readers. But some libraries can save this effort by importing these data already entered in another software. For instance, school libraries could import the pupils from the school system database.

The BiblioMaker software contains several import templates. This document describes only the «Simple» import template that best matches the above described needs.

Contents

Import preparation	2
1.1 <i>Exporting data</i>	2
1.2 <i>Data editing</i>	2
1.3 «Simple» import template description	3
2. Import of addresses records	6
2.1 <i>Name of the addresses file to import</i>	6
2.2 <i>Importing the file in BiblioMaker</i>	6
2.2.1 <i>Import codes</i>	7
2.2.2 <i>Import types</i>	7
2.2.3 <i>Address type choice</i>	7
2.2.4 <i>Import file</i>	8
2.2.5 <i>Encoding</i>	8
2.3 <i>Import and result</i>	8
2.4 <i>Editing the imported records</i>	8

1. Import preparation

The «Simple» import template in the BiblioMaker Addresses file is pre-defined, i.e. it cannot be edited. This is why you have to customise your data so that they correspond to what BiblioMaker expects during the import.

The «Simple» import template is described at the chapter 1.3 of this document.

1.1 Exporting data

Addresses records you want to import in BiblioMaker must first be exported from your software managing the records (for instance pupils or teachers in your school system).

As all address records management systems are different, this document cannot describe how you export these records from your system. Ideally, the export template should be «CSV», i.e. each address record should be exported on a single line and each field should be separated by a tab character. Such an export file can be opened by a spreadsheet software such as Microsoft Excel® or LibreOffice/OpenOffice Calc® in order to be edited.

As BiblioMaker expects the address fields to be in a certain order, the export order should be as much as possible in the same order, so the editing process of the data should be easier and quicker. Some database systems such as FileMaker Pro® let you save the export order in so-called «macros» or «scripts», so don't hesitate to use this function in order to save time for the next export.

1.2 Data editing

It is not so frequent that two address management software to exactly have the same fields. Indeed, BiblioMaker manages reader records and uses specialised fields for this goal (for instance there is a field for the maximum number of loans allowed). Obviously, a school system would not have such a field. Therefore, it is necessary to edit the intermediary file containing the exported records before importing them in BiblioMaker.

The easiest tool for editing records is a spreadsheet software such as Microsoft Excel® or LibreOffice/OpenOffice Calc®. Such software are able to open text files with tabulators between records and to display the data in a comfortable way : each record is displayed on a line and each column is a field.

It is extremely important to define the order of the columns exactly as in the table at chapter 1.3. One single difference would create a gap and the data would then be imported in the wrong BiblioMaker fields.

One of the frequent modifications is to exchange columns positions so they are in the same order as what BiblioMaker expects. It could be also necessary to insert empty columns if BiblioMaker expects a field that does not exist in the original database.

Tip : you can make this editing process easier by using a model : export some addresses from BiblioMaker using the «Simple» export template and open the export text file with your spreadsheet software : data are displayed exactly in the order expected by BiblioMaker. Keep this file open when you edit your import file and compare them both.

Please read your spreadsheet user guide or the online help in order to learn how to open a text file and edit your data.

Once the editing process is over, save the file as a text file with a tab as separator between columns. Don't save it as a «native» spreadsheet (for instance, BiblioMaker cannot open an Excel file with the «.xls» or «.xlsx» extension). If necessary, use the **File>Save as...** command in your spreadsheet and you will get a choice between several file types.

1.3 «Simple» import template description

The file containing the address records to import must be a text file (file extension «.txt») and use one of the following four encodings :

- Unicode (UTF-8)
- Macintosh (Mac OS Roman)
- Windows (ISO-8859-1)
- Windows (1252)

The separation character between fields is a tab and between records a carriage return.

The columns order is the following one. The letter gives the column's name in a spreadsheet.

Column	Field	Remark	Example
A	Code	Unique identification code for the address record. In a school, this should be the pupil's code in order to allow a future synchronization.	ABC123
B	Title		Misses
C	First name		Olga
D	Surname		Smith
E	Address 1	First line of an address	Kensington Avenue
F	Address 2	Second line of an address	P.O. Box
G	Post code		1000
H	Town		Lausanne
I	Region		Lausanne West
J	Private phone		021 123 45 67
K	Category	Used for instance for statistics	Pupil
L	Status	Code with from 1 up to 5 characters	N
M	Sex	1 = Man, 2 = Woman	2
N	Date of birth		30.12.1980
O	Authorisation	Max. number of simultaneous loans	5
P	Country		Switzerland
Q	Free 1		
R	Free 2		
S	Free 3		

Column	Field	Remark	Example
T	Free 4		
U	Language	Language for correspondence	English
V	Telefax		021 123 45 67
W	Canton		VD
X	E-Mail		olga.smith@gmail.com
Y	Web page		http:// www.olgasmith.com
Z	Remarks		
AA	Notes		
AB	Last loan		20.05.2015
AC	Loans forbidden	0 = no, 1 = yes	0
AD	Client Nr	Client number by the supplier	
AE	Reference person	Reference person by the supplier	
AF	Currency	Supplier currency	
AG	Outstanding	Fee owed by the reader	
AH	Revenue	Revenue by the supplier	
AI	Period/delivery	Supplier's delivery period	
AJ	Period/reminders	Delay between reminders sent to the supplier	
AK	Type	Address type	
AL	Subscriber since	Date of the first reader subscription	16.11.2010
AM	Subscription expired on	End date of a reader subscription	17.10.2016
AN	End date return of loans	Date when the reader must return all his loans	14.11.2017
AO	Number of authorised reservations	Max. number of simultaneous reservations	5
AP	LDAP ID	Unique identification code in a central database that can be queried with the LDAP protocol (for instance an Active Directory)	
AQ	Correspondence	0 = by post, 1 = by e-mail	1

Column	Field	Remark	Example
AR	Allow displaying of past loans	0 = no, 1 = yes	0
AS	Mobile phone		079 123 45 67
AT	Professional phone		021 123 45 67

2. Import of addresses records

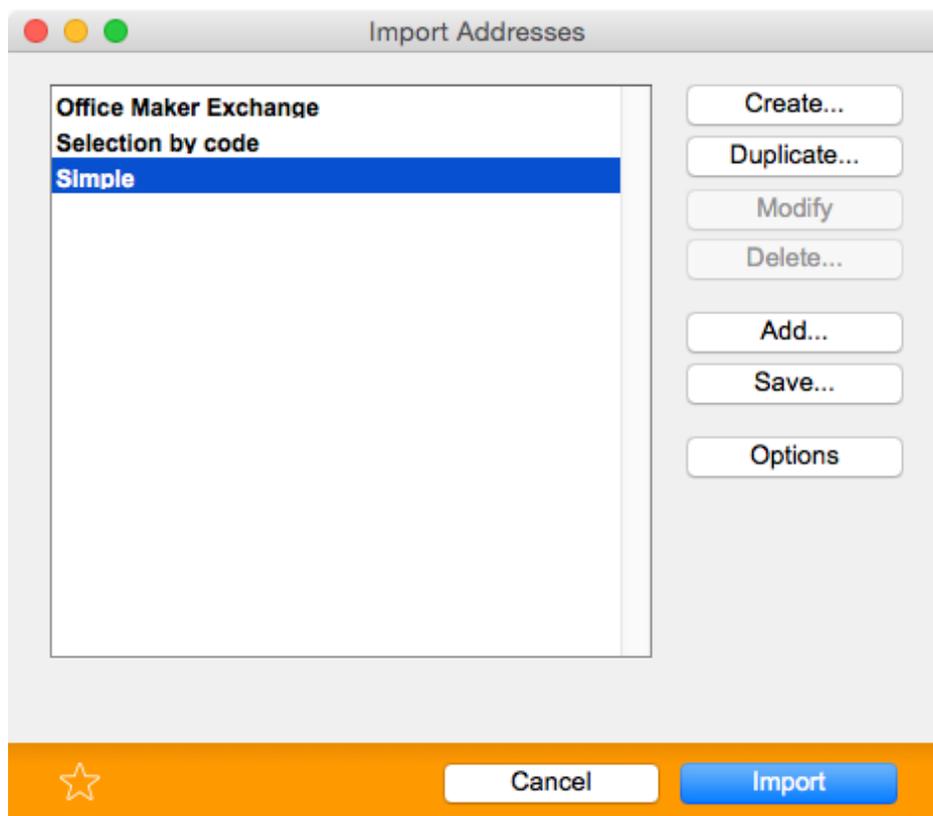
2.1 Name of the addresses file to import

The name of the file should end with *.txt*. If this extension lacks, please add it to the file name before importing the addresses.

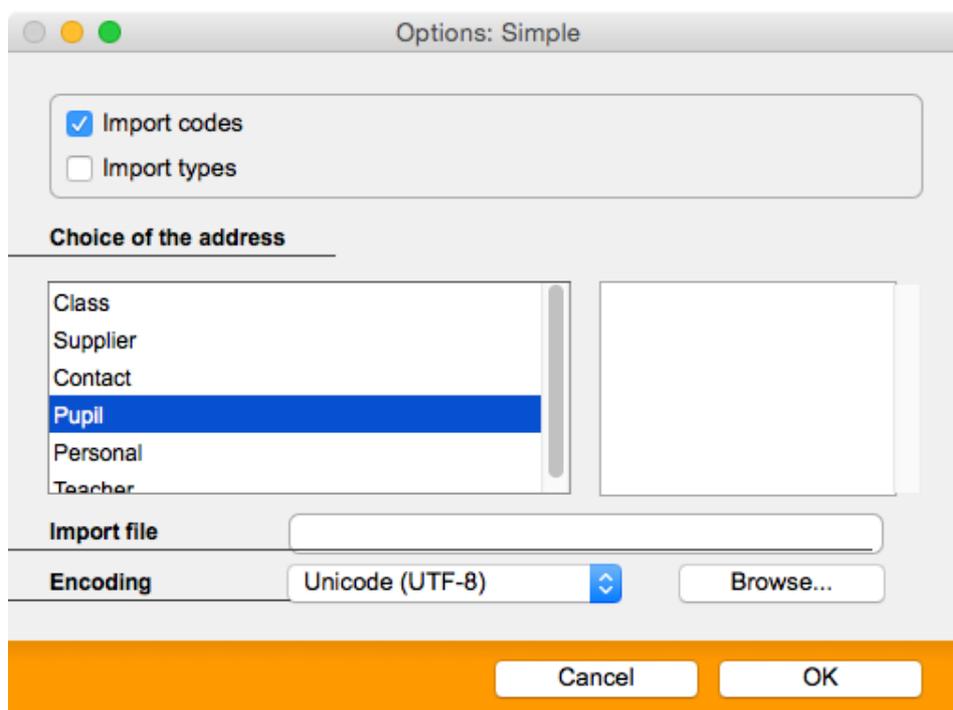
There is no other constraint with the file name.

2.2 Importing the file in BiblioMaker

When you display the Addresses file in BiblioMaker, call the **Import** command in the **File** menu and choose the **Simple** import template. Click on the **Import** button in order to validate your choice.



The options dialog box is then displayed :



2.2.1 Import codes

Check the **Import codes** box if the first column of the import text file contains a unique code identifying each reader.

BiblioMaker has a mechanism for synchronizing two address databases : if you use the same unique identification code for addresses between the original database and the BiblioMaker database and if you import the codes, BiblioMaker will use it in order to detect if the imported record is a new address or for an existing record. If the code of the imported record does not exist in the BiblioMaker database, the system adds a new record to the database, otherwise updates the existing record. With this mechanism, a school can import all pupil records once, no question if some pupils are new and other ones were already registered the previous year.

If you don't check the **Import codes** box, the software will attribute to each imported record a unique code composed of letters and numbers.

2.2.2 Import types

Check the **Import types** box if the import file contains values in the **AK** column (for instance «Pupil» or «Teacher»).

If you import types and the imported values don't correspond to any available type in the database, BiblioMaker will create new types. You manage these types in the **Options** of the **Addresses** file.

2.2.3 Address type choice

If you don't check the **Import types** box, please select in the list which address type the software must give to the imported records. As you can choose only one type, it could be

necessary to segment the import in several files if you want to import addresses of several types.

2.2.4 Import file

You can define the path of the text file to import with the **Browse...** button. But you can also leave this field empty : in this case, after you have validated this dialog box, you will be asked to choose the file to import.

2.2.5 Encoding

Choose in this pop-up menu the encoding used in the import file. If you choose the wrong encoding, some characters in the import file will be wrong.

2.3 Import and result

Validate the options dialog box and if necessary, choose on the disk the text file containing the address records to import. The import begins and lasts for from several seconds to minutes, depending on the number of imported records. When the import is finished, an import report is displayed, informing about the number of imported records and the created post codes and types. Validate this dialog and then you can see the imported records.

2.4 Editing the imported records

After the address records have been imported, it could be necessary to edit some records. With the **Action>Apply** command, you can change several records at once.