

Import

Operations

Import

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Import

Last Updated: `$action.dateFormatter.formatDateTime($content.get_lastModificationDate())`



this page has moved to <https://support.goalexandria.com/operations/import/>

There are times when you'll want to add (or import) information to Alexandria from outside sources, such as MARC records, book vendors, or patron information from a central database. The Imports interface places everything you need to quickly find, modify, and run an import of patron, item, and transaction command information. You can also create and schedule your own custom imports.

The Imports interface uses the familiar three-panel layout found in most Alexandria management interfaces.

- **Categories.** The left-hand side of the window is home to the Categories pane, which contains your default import types. Select a category to view its import options and settings to the right.
- **Import Selection pane.** The upper-right section of the window contains the Import Selection pane, which dynamically changes depending on whether you have the Quick or Saved tab selected.
- **Selected Import pane.** The Selected Import pane—the bottom-right area of the window—contains settings for the currently selected import in various tabs.



Archive Before Import is no longer an option. Here's why:

In the past, we have suggested that users run an archive prior to importing a large set of data. This archive would act as a fallback solution in case anything went catastrophically wrong. However, Alexandria now runs daily archives as part of its normal operations, so as long as you follow our suggested [Backup Procedures](#), you will have a backup from the day before.

Why wouldn't you want to use an Archive as a way to 'undo' a large import or utility? Because you might not be the only person working in Alexandria. Other librarians might be cataloging, patrons might be placing holds—all things that are hard to control and almost impossible to track down if you restore from an Archive and effectively erase all those transactions.

We highly encourage you to run potentially dangerous operations, like imports, during low usage periods. Choose your import options scrupulously and review the log for errors immediately following the operation!

Categories

The first step in performing an import is picking the correct import type. The Categories pane on the left-hand side of the window is where you choose the import whose settings appear in the Import Selection pane on the right; the contents of the Import Selection pane change depending on whether you have the Quick or Saved tab selected.

For example, if you want to import a file containing new (or updated) patron records, you would select Patrons from the Categories pane.

- **Patrons.** Import new or update existing patron records.
- **Items.** Import new or update existing item records.
- **Circulation Groups.** Import circulation group-based data not covered by the other import types.



Circulation Groups were discontinued in [20.7](#).

- **Images.** Import new or update existing patron pictures and/or item cover art.
- **Special.** Import data conversion and enhancement files from Mitinet or other authorized partners.

Import Selection Pane

The larger, right-side of the Import interface is dedicated to the selected import type and contains all of the import's configurable settings and options.

Directly below the control strip is the Import Selection pane; this pane changes dynamically depending on whether you have the Quick or Saved tab selected. Remember, the information that appears in this pane relates directly to the import type selected from the Categories pane; if you have the Saved import tab selected, you'll see an Imports list with an associated Filter bar.

Quick Imports

When the Quick tab is selected, the Import Selection pane allows you to choose files for import. These defaults do not store custom selection settings; they are used for performing instant imports or as a foundation for custom Saved imports.

Selecting an import type from the Categories pane means the Selected Import pane will only import records of that type. For example, if you select Patrons from the Categories pane, you will only be able to import patron records.

Selecting an import type automatically populates the bottom portion of the window (i.e. the Selected Import pane) which contains import information in the Settings and Options tabs. These tabs contain different settings depending on the category you've selected.

Imports run from the Quick tab are considered "one-off"; any modifications made to the Settings and Options tabs are discarded immediately after switching to another import category. For example, if you have the Patrons import type selected and then click on the Items category, all information that you may have modified or provided to the Patrons import will be lost; even if you were to immediately return, you would find all your settings wiped.



Drag and drop

Drag an import file from your computer and drop it in the Imports pane for a quick and easy import!

Saved Imports

A significant amount of time can be spent manually adding new patrons throughout the school year. Computer technicians and librarians often require time-saving procedures when it comes to importing patron (or item) information. Using the Saved pane, operators can automatically update your patron/item information using files from the SIS (School Information System). Although our software is SIF (School Interoperability Framework) Certified, schools that don't yet have SIF capabilities—or have no plans to implement SIF software or hardware—can use this as an alternative solution to facilitate the flow of patron and item information.

The Saved pane facilitates automatic data import functionality and allows operators to simply schedule recurrent imports; only requiring a small amount of initial setup time—changing the frequency of imports is quick and easy. Imagine new patrons added and existing patron records updated monthly, weekly, or even daily if required. No further need to request downloadable import files from the office or technical support staff. No more reports to prepare for the office staff; manual entry of fines and overdue statistics become a thing of the past.

The Saved tab stores the selection criteria that was used to create the custom import. The results in the Saved Imports list reflect the import type selected from the Categories pane and can be further refined by the Filter bar. For example, if you select Patrons from the import Categories pane, the Import Selection pane will only display Saved patron imports.

Selecting a Saved import from the Import Selection pane automatically populates the Selected Import pane, which contains import settings that are essential to what and how information is imported. Once a Saved import has been selected, it can then be performed, modified, duplicated, or removed.

- **Saved Imports Filter Bar.** The Filter bar is used to filter the results of the Saved Import Selection pane based on the category you've selected. The Filter bar is only available in the Saved tab.
- **Create Saved Import.** Creates a new Saved import based on the category you've selected.
 - For example, clicking the Create Saved Import button with the Items category selected will create a new items import.

Related Links

- [Import Field Mapping](#)
- [Field Mapping: Item Fields by Field Number](#)