

Back-to-School Workshop

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this page has been moved to <https://support.goalexandria.com/knowledge-base/beginning-of-year-procedures/#video>

Frequently Asked Questions

Start by exporting the necessary data from your student information system (SIS) in a tab-delimited text format. This file can be imported into Alexandria Librarian to add new patron records and update any existing patron records simultaneously.

[Patron imports](#) can be used to change any field in patron records except for the Barcode field.

Patron information can be changed by editing individual patron records in Patron Management.

You can also update specific information in multiple records using [Utilities](#). In the Selections tab, choose which patron records will be updated by selecting common piece of information, such as Grade or Security Group, or choose **Show Additional Selections** to set a barcode range or enter a list of specific patron barcodes. Then specify what will be changed in the Options tab.

Teachers are listed in the Homeroom (Primary Location) field. To permanently remove a teacher from Alexandria, first make sure that there is NOT a patron record for that specific person. If there is, be sure to remove it. Next, go to [Tools > Authority Control](#). In the Category pane on the left, expand



Patrons and select Homeroom. Locate and select the teacher on the right, then go to the **Actions** menu to remove them. If a patron's information is updated with an import file, all of their historical information will remain on the record as-is. Historical data is only removed from a patron record if the individual patron is completely removed from the system.

This means that if you're recycling barcode numbers, you'll need to permanently remove the record of the patron who was previously assigned the barcode *before* you assign that barcode to another patron record.

Everyone updates their patron records differently. Advancing patron grades may already be taken care of if you use imports or a SIS integration.

If not, go to your [Grade Table Preferences](#) and click **Advance All Grades** once. Check a patron record to make sure it worked properly.



Advancing grades *does not* also change policies. If your patron policies match grade levels, see our [Patron Imports Best Practices](#) for instructions on updating those.

No, the Advance Patron Grade utility will only update the Grade (Level) field. All other information, including homerooms, will need to be updated manually, with a utility, or with an import file.

While [importing items](#), look at the **Barcode Handling** section on the **Settings** tab. Add a **Starting Item Barcode** and select **Always Assign New Barcodes**.

Ensure that your [import file](#) has the correct site code for each copy. If a copy's status unexpectedly changes to In Transit when bookdropped (checked in) instead of Available, it may be assigned to the wrong site.

You'll need to create a saved import. Go to the import you want and click **Create Saved Import** at the bottom of the window. Then you'll need to enter a name and fill out the **Settings** tab with your preferences. Lastly, go to the **File Source** tab and select FTP or FTPS from the **Protocol** dropdown.

Enter your FTP/FTPS server's information. (If you don't have your own server, COMPanion offers secure and private folders on [our FTP server!](#)) Want to check if it works? Click **Test FTP Connection**. From there, you can run the import whenever necessary.



We recommend using FTP imports for larger files like patron pictures and BestMARC imports.