

# AFO 441 – Import borrower data

## 441.1 Introduction (importing borrower records)

The system offers the option to import, update and delete borrower records through file import.

The importing and loading of borrower records is a five step process:

- Step 1: import of data from a file into the Vubis Smart database (but not yet in the borrower file – via AFO 441
- Step 2: loading the imported records into the borrower file – via AFO 442
- Step 3: the optional extra of looking at an errors and exceptions report – via AFO 443
- Step 4: rebuild the borrower name index – via AFO 444
- Step 5: check the reports - via AFO446

Loading can be three different things:

- Loading new records
- Updating of existing records
- Deletion of existing records.

### Note

The import file must be stored on the Vubis server.

## 441.2 Technical documentation

Please consult the document "[Borrower Conversion \(Import\) Software](#)" for a detailed description of the input file lay-out. See paragraph 441.5 for an overview of data fields that can be loaded.

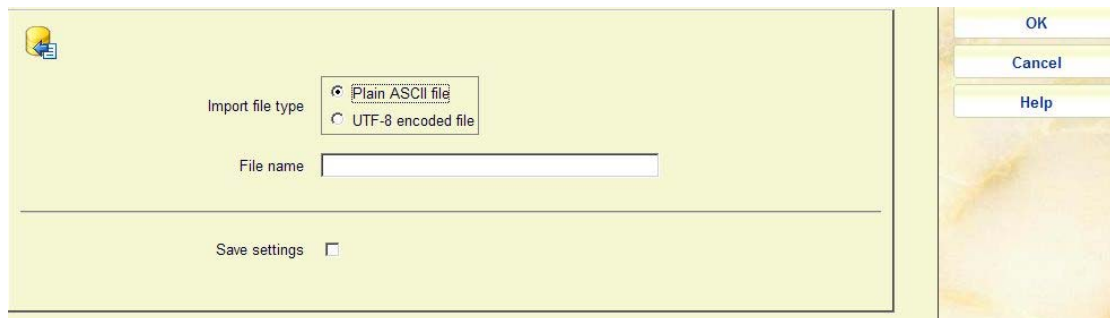
## 441.3 Loading authority controlled data

When loading data in an authority controlled field (see AFO 482 – Borrower Authority Lists) and the imported field contains a code that does not exist in the Authority List, then the loading process will create this code in the list.

Please note this, because it can lead to contamination of your database.

## 441.4 Procedure

After choosing this AFO an input form will be displayed:



The image shows a dialog box for importing a file. The dialog has a light green background and a title bar with a yellow icon. The main area contains the following elements:

- Import file type:** A group box containing two radio buttons. The first is labeled "Plain ASCII file" and is selected. The second is labeled "UTF-8 encoded file".
- File name:** A text input field with a white background and a thin border.
- Save settings:** A checkbox that is currently unchecked.

On the right side of the dialog, there is a vertical stack of three buttons: "OK", "Cancel", and "Help". The "OK" button is at the top, "Cancel" is in the middle, and "Help" is at the bottom. The buttons have a light green background and a thin border.

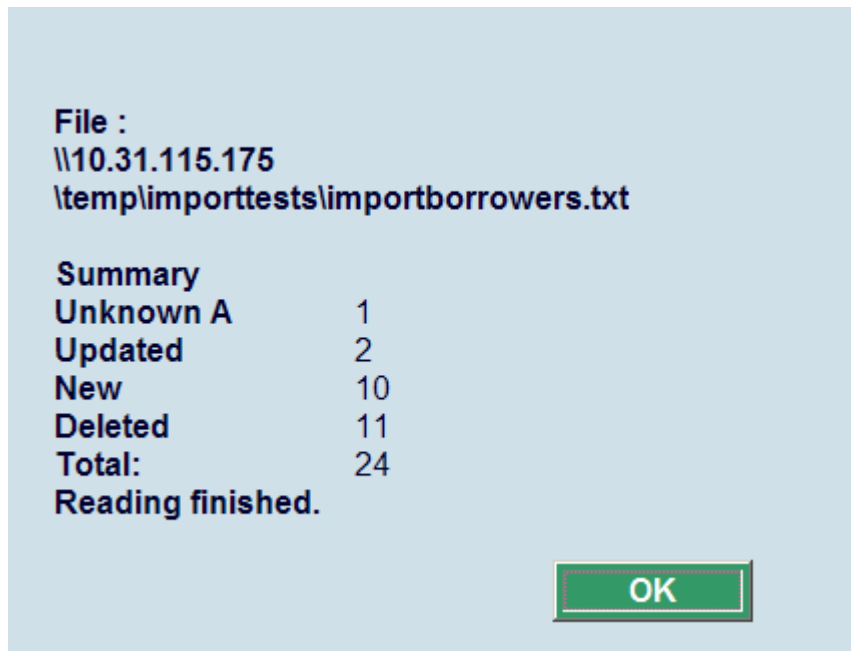
**Import file type:** Select the correct file type.

**File name:** Enter the the full path as well the name of the file to be imported.

### Note

The file must be stored on the Vubis server.

After importing the data, the system will show a message to that effect.



- First line shows: path and filename of the Import.
- Summary
  - Unknown A. Shows the number of unknown record types in the import. The 'A' is the unknown record type.
  - Updated. Shows the number of record type 'M's in the import.
  - New. Shows the number of record type 'N's in the import.
  - Deleted. Shows the number of record type 'S' in the import.
  - Total. Shows the total number of records in the import.

After you have acknowledged this message, the system will return to the main AFO screen. You can now load the imported records via AFO 442.

## 441.5 Data elements that can be loaded

The import module is now able to load the following data elements:

Field #	Field id
1.	Record Type
2.	Original ID Number
3.	Registration Library/Location
4.	Surname
5.	Initial(s) and/or Given Name(s)
6.	Middle Name
7.	Gender
8.	Date of Birth
9.	1st Address : Street Name and Number
10.	1st Address : Post Code
11.	1st Address : Town/City
12.	1st Address : Country
13.	1st Address : Telephone Country Code
14.	1st Address : Telephone Number
15.	1st Address : Department/Subject
16.	Borrower Category

17.	Cost Code
18.	3rd Address : Street Name and Number
19.	3rd Address : Post Code
20.	3rd Address : Town/City
21.	3rd Address : Phone Number
22.	2nd Address : Street Name and Number
23.	2nd Address : Post Code
24.	2nd Address : Town/City
25.	2nd Address : Phone Number
26.	Actual ID Number
27.	E-mail Address
28.	Borrower Card Expiry Date
29.	Giro Number
30.	Bank Account Number
31.	1st Address : Suburb (District)
32.	1st Address : Street Number
33.	1st Address : County/State/Province

34.	1st Address : Discipline
35.	1st Address : Mobile phone
36.	1st Address : Fax
37.	1st Address : Correspondence medium
38.	1st Address : External/Internal address
39.	1st Address : Use from (date)
40.	1st Address : Use Until (date)
41.	1st Address : Note (free text)
42.	1st Address : Free form address
43.	2nd Address : Street Number
44.	2nd Address : Suburb (District)
45.	2nd Address : County/State/Province
46.	2nd Address : Country
47.	2nd Address : Department
48.	2nd Address : Discipline
49.	2nd Address : Mobile phone
50.	2nd Address : Fax

51.	2nd Address : Email address
52.	2nd Address : Correspondence medium
53.	2nd Address : External/Internal address
54.	2nd Address : Use from (date)
55.	2nd Address : Use Until (date)
56.	2nd Address : Note (free text)
57.	2nd Address : Free form address
58.	3rd Address : Street Number
59.	3rd Address : Suburb (District)
60.	3rd Address : County/State/Province
61.	3rd Address : Country
62.	3rd Address : Department
63.	3rd Address : Discipline
64.	3rd Address : Mobile phone
65.	3rd Address : Fax
66.	3rd Address : Email address
67.	3rd Address : Correspondence medium

68.	3rd Address : External/Internal address
69.	3rd Address : Use from (date)
70.	3rd Address : Use Until (date)
71.	3rd Address : Note (free text)
72.	3rd Address : Free form address
73.	Preferences & Categories – Reading form
74.	Preferences & Categories – Interest topics
75.	Preferences & Categories – Disability
76.	Preferences & Categories – Ethnic origin
77.	Preferences & Categories – Religion
78.	Preferences & Categories – Occupation
79.	Preferences & Categories – Store loans history
80.	Preferences & Categories – Customer type
81.	Preferences & Categories – Peripheral hardware
82.	Preferences & Categories – Statistical category
83.	Preferences & Categories – Qualifiers
84.	Preferences & Categories – Housebound



85.	Preferences & Categories – Method of delivery
86.	Preferences & Categories – Housebound budget code
87.	Preferences & Categories – Correspondence - Preferred medium
88.	Preferences and Categories – Correspondence - Possible medium
89.	Preferences and Categories – Correspondence – Braille allowed (Yes/No)
90.	Branch – other locations
91.	Branch – note (free text)
92.	Last name prefix (van)
93.	Name initials (R.P.K.M)
94.	Prefix / title (Mr., Miss, etc)
95.	Suffix / title (III, jr., etc)
96.	Type (0=person; 1=corporation)
97.	Identification Id 1
98.	Identification Id 2
99.	Identification Id 3
100.	Identification Id 4
101.	Identification Id 5

102.	Contact person
103.	Nationality
104.	Department
105.	Language (“eng”, “dut” or “fre”)
106.	Proof of identity
107.	Proof of identity registered by
108.	Identity note
109.	Local fields – optional field 1
110.	Local fields – optional field 2
111.	Local fields – optional field 3
112.	Local fields – optional field 4
113.	Local fields – optional field 5
114.	Local fields – optional field 6
115.	Local fields – optional field 7
116.	Local fields – optional field 8
117.	Local fields – optional field 9
118.	Local fields – optional field 10

119.	Local fields – optional field 11
120.	Local fields – optional field 12
121.	Local fields – optional field 13
122.	Local fields – optional field 14
123.	Local fields – optional field 15
124.	Local fields – optional field 16
125.	Local fields – optional field 17
126.	Local fields – optional field 18
127.	Local fields – optional field 19
128.	Local fields – optional field 20
129.	Subscription – reason
130.	Subscription – motivation
131.	Subscription –end subscription reason
132.	Subscription – end subscription motivation
133.	Subscription – temporary stop start (date)
134.	Subscription – temporary stop end (date)
135.	Subscription – note

136.	Automatic Invoicing - (1/0)
140.	4th Address : Street Name
141.	4th Address : Street Number
142.	4th Address : Post Code
143.	4th Address : Town/City
144.	4th Address : Suburb (District)
145.	4th Address : County/State/Province
146.	4th Address : Country
147.	4th Address : Department
148.	4th Address : Discipline
149.	4th Address : Phone Number
150.	4th Address : Mobile phone
151.	4th Address : Fax
152.	4th Address : Email address
153.	4th Address : Correspondence medium
154.	4th Address : External/Internal address
155.	4th Address : Use from (date)

156.	4th Address : Use Until (date)
157.	4th Address : Note (free text)
158.	4th Address : Free form address
159.	Free
160.	5th Address : Street Name
161.	5th Address : Street Number
162.	5th Address : Post Code
163.	5th Address : Town/City
164.	5th Address : Suburb (District)
165.	5th Address : County/State/Province
166.	5th Address : Country
167.	5th Address : Department
168.	5th Address : Discipline
169.	5th Address : Phone Number
170.	5th Address : Mobile phone
171.	5th Address : Fax
172.	5th Address : Email address

173.	5th Address : Correspondence medium
174.	5th Address : External/Internal address
175.	5th Address : Use from (date)
176.	5th Address : Use Until (date)
177.	5th Address : Note (free text)
178.	5th Address : Free form address
179.	Free
180.	6th Address : Street Name
181.	6th Address : Street Number
182.	6th Address : Post Code
183.	6th Address : Town/City
184.	6th Address : Suburb (District)
185.	6th Address : County/State/Province
186.	6th Address : Country
187.	6th Address : Department
188.	6th Address : Discipline
189.	6th Address : Phone Number

190.	6th Address : Mobile phone
191.	6th Address : Fax
192.	6th Address : Email address
193.	6th Address : Correspondence medium
194.	6th Address : External/Internal address
195.	6th Address : Use from (date)
196.	6th Address : Use Until (date)
197.	6th Address : Note (free text)
198.	6th Address : Free form address
199.	Free
200.	7th Address : Street Name
201.	7th Address : Street Number
202.	7th Address : Post Code
203.	7th Address : Town/City
204.	7th Address : Suburb (District)
205.	7th Address : County/State/Province
206.	7th Address : Country

207.	7th Address : Department
208.	7th Address : Discipline
209.	7th Address : Phone Number
210.	7th Address : Mobile phone
211.	7th Address : Fax
212.	7th Address : Email address
213.	7th Address : Correspondence medium
214.	7th Address : External/Internal address
215.	7th Address : Use from (date)
216.	7th Address : Use Until (date)
217.	7th Address : Note (free text)
218.	7th Address : Free form address
219.	Free
220.	8th Address : Street Name
221.	8th Address : Street Number
222.	8th Address : Post Code
223.	8th Address : Town/City



224.	8th Address : Suburb (District)
225.	8th Address : County/State/Province
226.	8th Address : Country
227.	8th Address : Department
228.	8th Address : Discipline
229.	8th Address : Phone Number
230.	8th Address : Mobile phone
231.	8th Address : Fax
232.	8th Address : Email address
233.	8th Address : Correspondence medium
234.	8th Address : External/Internal address
235.	8th Address : Use from (date)
236.	8th Address : Use Until (date)
237.	8th Address : Note (free text)
238.	8th Address : Free form address
239.	Free
240.	9th Address : Street Name

241.	9th Address : Street Number
242.	9th Address : Post Code
243.	9th Address : Town/City
244.	9th Address : Suburb (District)
245.	9th Address : County/State/Province
246.	9th Address : Country
247.	9th Address : Department
248.	9th Address : Discipline
249.	9th Address : Phone Number
250.	9th Address : Mobile phone
251.	9th Address : Fax
252.	9th Address : Email address
253.	9th Address : Correspondence medium
254.	9th Address : External/Internal address
255.	9th Address : Use from (date)
256.	9th Address : Use Until (date)
257.	9th Address : Note (free text)

258.	9th Address : Free form address
259.	Free
260.	10th Address : Street Name
261.	10th Address : Street Number
262.	10th Address : Post Code
263.	10th Address : Town/City
264.	10th Address : Suburb (District)
265.	10th Address : County/State/Province
266.	10th Address : Country
267.	10th Address : Department
268.	10th Address : Discipline
269.	10th Address : Phone Number
270.	10th Address : Mobile phone
271.	10th Address : Fax
272.	10th Address : Email address
273.	10th Address : Correspondence medium
274.	10th Address : External/Internal address

275.	10th Address : Use from (date)
276.	10th Address : Use Until (date)
277.	10th Address : Note (free text)
278.	10th Address : Free form address
279.	Free

- **Document control - Change History**

<b>Version</b>	<b>Date</b>	<b>Change description</b>	<b>Author</b>
1.0	June 2008	creation	
2.0	June 2009	amended terminology part of 2.0 updates	
3.0	August 2010	Clarification of path and file part of 2.0.06 updates	
4.0	March 2011	Handling of UTF-8 records part of 2.5 updates	