

AFO 442 – Process imported borrower data

442.1 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.

See the Help for AFO 441 for more information on the data elements that can be imported.

442.2 Procedure

Do not process the records during circulation activities, because this can lead to disruptions. When you choose AFO 442, the system shows a warning to that effect:

Only start process if circulation is not running for institution PNB

OK

Next the system asks if you want to start the process.

Start process?

OK

Cancel

Once you have acknowledged this message, the system will process the records. At the end a summary is shown:

Summary

Updated	4
New	9
Deleted	9
Delete not found:	2
Total:	24

OK

- Summary of the statistics
 - Updated. Shows the number of update records processed.
 - New. Shows the number of new records processed.
 - Deleted. Shows the number of records deleted processed.
 - Update not found. Shows the number of borrower updates that could not be found.

- New duplicate found. Shows the number of new records for which a match could be found, but it was not the same borrower. Record not added.
- Delete not found. Shows the number of records to be deleted where the borrower could not be found.
- Unchanged. Shows the number of updates that did not change the borrower record.
- Total. Shows the total number of records in the import.

If errors or exceptions have occurred during processing, the system will display a message (for instance that borrower records could not be deleted due to outstanding fines or reservations).



After you have acknowledged this message, the system will return to the main AFO screen. You can check the errors and exceptions via AFO 443.

- **Document control - Change History**

Version	Date	Change description	Author
1.0	June 2008	creation	