



Student Import Wizard

Creating a CSV from any other MIS.



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Introduction

These instructions cover the necessities in creating a CSV manually, when you are using a Management system that MLS have not provided instructions for. Most management systems provide some way to export data to txt, csv, tsv etc.

Usually this is done by creating a report and exporting the data but depending on your MIS it may be done another way. If you are unsure how to export data from your system, contact the provider of your Management System.

This document is split into 2 parts, both are outlined below.

- **Part 1** – Mandatory Fields
- **Part 2** - Formatting
- **Part 3** – Additional Fields
- **Part 4** – Guardian Details



Part 1: Mandatory Fields

The first line of the CSV file should always contain the column headers. Of these headers, there are certain fields that are mandatory and are always required. Ensure that the following headers are present in the CSV file.

Column Header	Description
ManagementSystemID	Unique alphanumeric value which identifies the borrower in the MIS.
Forename	The borrower's forename.
Surname	The borrower's surname.
DateOfBirth	The borrower's date of birth, DD/MM/YYYY
Gender	The borrower's gender. M/F or Male/Female.
TutorGroup	The Tutor Group/class/registration group of the borrower.
YearGroup	The year the student is in.

- **ALL** fields shown above **MUST** be included within the CSV File in order for the system to import any data.



Part 2: Formatting

When a CSV file is produced it must be created within a certain format so that the library system can interpret it. There are two rules the file should follow:

- Each field should be surrounded by quotation marks
- Each field must be separated by a comma

It is not required that each header/value is qualified with quotation marks but it is recommended. This is because in some cases, the data you wish to import may contain this character (,) and it is easy for the fields to become offset.

An example of what a CSV file may look like at this point is shown below.

```
"ManagementSystemID","Forename","Surname","DateOfBirth","Gender","TutorGroup","YearGroup"  
"0005678","Joseph","Bloggs","05/05/1985","Male","10Green","10"
```



Part 3: Additional Fields

The fields shown in the following table can also be imported into the library management system, in addition to the required fields in which have been shown above.

Field Name	Description
LibrarySet	The set the borrower belongs to.
House	The house the borrower belongs to.
Barcode	The borrower's barcode number *see note below
LogonName	The logon name a borrower can use to access the system.
Password	The password a borrower can use to access the system.
Title	The borrower's title. Mr, Mrs, Miss, Dr etc.
Address1	The first line of the students address.
Address2	The second line of the students address.
Address3	The third line of the students address.
Address4	The fourth line of the students address.
Address5	The fifth line of the students address.
Address6	The sixth line of the students address.
Postcode	The borrower's postal code.
TelephoneNumber_Home	The borrower's home telephone number.
TelephoneNumber_Work	The borrower's work telephone number.
TelephoneNumber_Mobile	The borrower's mobile telephone number.
Email	The email address of the borrower.
Ethnicity	The borrower's ethnicity.
DateAdded	The date that the borrower was added.
RFID	The RFID value assigned to the borrower.

- *Note that you cannot update existing records by including the barcode in the CSV.

As many or as few of these fields can be added in addition to the mandatory fields but if any of the mandatory fields are missing then the CSV will fail to import into the system.

Part 4: Guardian Details & Uploading CSV

In addition to the Additional Fields you can specify for a borrower, Guardian details for the borrower can also be added, the table below lists the following fields you can import as Guardian details and a description of what the field is.

Field Name	Description
Guardian1_Title	Guardian1's title.
Guardian1_Surname	Guardian1's surname.
Guardian1_Forename	Guardian1's forename.
Guardian1_Address1	Guardian1's address line 1.
Guardian1_Address2	Guardian1's address line 2.
Guardian1_Address3	Guardian1's address line 3.
Guardian1_Address4	Guardian1's address line 4.
Guardian1_Address5	Guardian1's address line 5.
Guardian1_Address6	Guardian1's address line 6.
Guardian1_Postcode	Guardian1's postcode.
Guardian1_Email	Guardian1's email.
Guardian1_TelephoneNumber_Home	Guardian1's home telephone number.
Guardian1_TelephoneNumber_Work	Guardian1's work telephone number.
Guardian1_TelephoneNumber_Mobile	Guardian1's mobile telephone number.

There are two lots of guardian details that each borrower can hold. The above table shows the first group. To import the second set of guardian details (i.e. 'Guardian 2') then change each field from Guardian1 to Guardian2. For example:

- Guardian2_Title
- Guardian2_Surname
- Guardian2_Forename

When you have created CSV file following the instructions above, you can import it using the **WBLs** option when selecting a mapping option.

