



# Importing Student Records as Patron Records

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Polaris 5.6:1



World Headquarters  
5850 Shell-mound Way  
Emeryville, CA 94608  
+1.510.655.6200

Eastern US - New York  
103 Commerce Blvd., Suite A  
Liverpool, NY 13088  
+1.800.272.3414

# Importing Student Records

You can import student records from education registration systems for use in Polaris as patron records. Innovative Interfaces does the first import for you during data migration, if you request this service. Then at the beginning of each new term, or whenever you need to update the Polaris database, you follow these steps to import the new student patrons:

- Export the student records from your student registration system to a .TRN file
- Upload the .TRN file into Polaris

See also:

- ["Exporting Records From Your Registration System" on page 2.](#)
- ["Scheduling Your Updates" on page 2.](#)
- ["TRN File Format" on page 3.](#)
- ["Data Dictionary" on page 6.](#)
- ["Including Both School and Home Addresses" on page 13.](#)
- ["Uploading Student Data to Polaris" on page 14.](#)

### Exporting Records From Your Registration System

You export the student records from your registration system to a .TRN (transaction) file, which is the Polaris offline file format for upload. This file maps the data in your registration system to Polaris data fields. You are responsible for creating the file and ensuring that it conforms to the necessary format and content. See ["TRN File Format" on page 3](#). Innovative Interfaces does not provide software for exporting information from your student record system. However, if you provide a sample patron upload file, we can assist you in evaluating the file to make sure it meets the necessary format requirements. For details about required and optional data, see ["Data Dictionary" on page 6](#).

Among the requirements are these:

You must include a valid Polaris Patron Code ID for each student. If you are in the process of implementing Polaris for the first time, your Polaris Implementation Manager can provide a Polaris Code Sheet that lists the Polaris codes set for your system. If you are already using Polaris, obtain an updated Polaris Code Sheet from your Polaris Site Manager, since your Polaris Patron Codes may have changed since you first implemented Polaris. See ["Patron Code ID" on page 6](#).

You must include assign a unique patron barcode to each patron's information before the .TRN file is created. See ["Patron Barcode" on page 7](#).

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### Scheduling Your Updates

When you update the Polaris database with new student data, the data in the new .TRN file overlays the data in the current patron records, so you must include all the data fields in your .TRN file. (Blank fields will remove information from the equivalent fields in existing records when the file is uploaded.) If you use Record Code 7 in each patron's data, new patrons are created as necessary, while all existing data in current patron records is updated with the data in the new .TRN file. See ["Record Code" on page 6](#).

Since a large file that includes all student data may be time-consuming to create and upload because it replaces all the existing data, an alternative strategy is to export and do periodic uploads of new student data only (Record Code 5). Also, individual student data can be updated in Polaris at any time, using the Patron Registration workflow.

### TRN File Format

The upload file must be a pipe-delimited text file in the form specified below. The encoding can be ANSI, Unicode, or UTF-8.

#### File Name

The file name must be in the format:

PTF\_<YYYY><MM><DD><HH><MI>\_<WorkstationName>.TRN

Where:

<YYYY> is the four digit year

<MM> is the two digit month

<DD> is the two digit date

<HH> is the two digit hour

<MI> is the two digit minute

<SS> is the two digit second

<WorkstationName> is the network computer name of a valid Polaris staff client workstation

#### File Header

The file begins with a one-line header in this form:

1 | <time> | <date> | <branchID> | <userID> | <workstationID> | 20

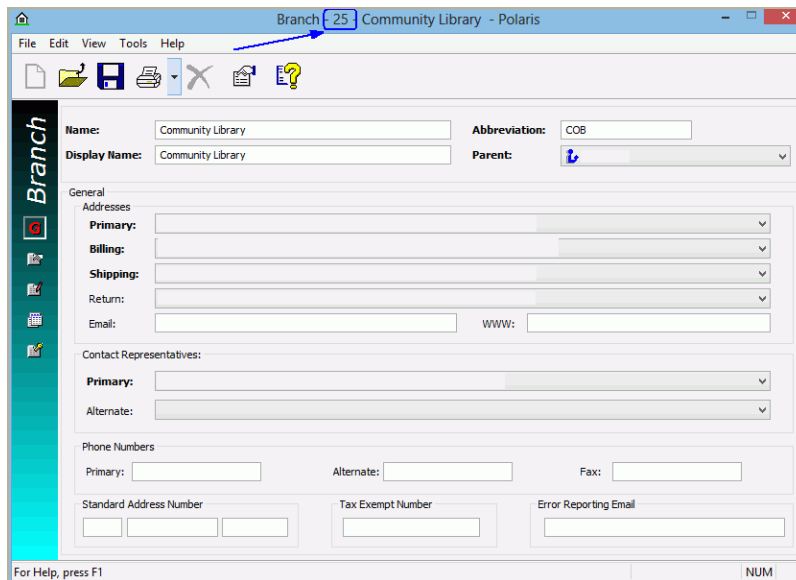
Where:

<time> is in the form **HH:MM:SS**

<date> is in the form **<MM>/<DD>/<YYYY>**

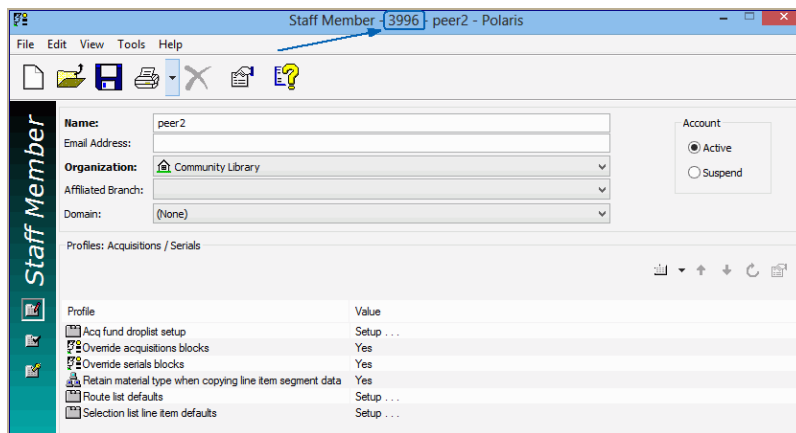
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**<branch>** is a valid Polaris OrganizationID with an organization code ID of 3 (Branch). This number is the Polaris record number, visible in the Polaris Branch workform as shown in the example below:



The screenshot shows the Polaris Branch workform for 'Community Library'. The window title is 'Branch -25 Community Library - Polaris'. The form includes fields for Name, Abbreviation (COB), Display Name, and Parent. It also has sections for General, Addresses (Primary, Billing, Shipping, Return), Contact Representatives (Primary, Alternate), and Phone Numbers (Primary, Alternate, Fax). There are also fields for Standard Address Number, Tax Exempt Number, and Error Reporting Email. A vertical sidebar on the left is labeled 'Branch'.

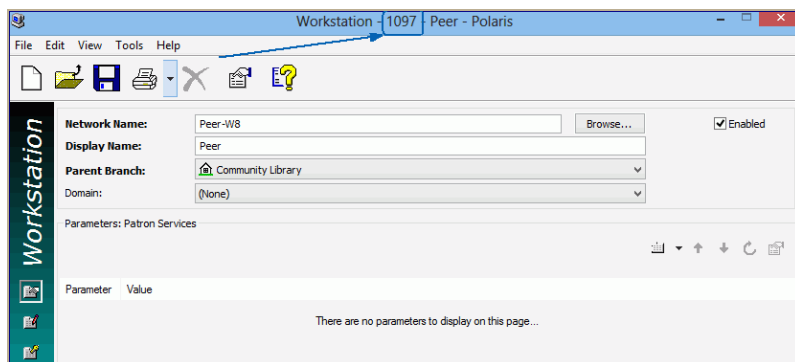
**<user>** is a valid Polaris staff client user ID with Polaris permission to use offline Polaris. This number is the Polaris record number, visible in the Polaris Staff Member workform as shown in the example below:



The screenshot shows the Polaris Staff Member workform for 'peer2'. The window title is 'Staff Member -3996 peer2 - Polaris'. The form includes fields for Name, Email Address, Organization (Community Library), Affiliated Branch, and Domain. It also has an Account section with radio buttons for Active and Suspend. Below these fields is a section for Profiles: Acquisitions / Serials, which contains a table of profile settings.

Profile	Value
Acq fund droplist setup	Setup ...
Override acquisitions blocks	Yes
Override serials blocks	Yes
Retain material type when copying line item segment data	Yes
Route list defaults	Setup ...
Selection list line item defaults	Setup ...

**<workstation>** is a valid Polaris workstation ID with Polaris permission to use offline Polaris. This number is the Polaris record number, visible in the Polaris Workstation workform as shown in the example below:



**<version>** is not currently used; leave these characters as shown

At the end of the header data, insert a CR (ASCII character 13) to indicate the end of the header.

### Patron Content

Each row represents a single, implicitly structured data item (a patron). Insert a CR (ASCII character 13) at the end of each row to indicate the end of that patron's data. Many patrons may be included in the patron file. The row takes this form:

```
<record code>|<creation date>|<Name Last>|<Name First>|<Name Middle>|<Name Title>|<Name Suffix>|<Patron Code ID>|<Patron Branch ID>|<Patron Barcode>|<Expiration Date>|<Patron Statistical Code ID>|<Gender (F, M, N)>|<Password>|<Language ID>|<Registration Date>|<Birth Date>|<Permission (currently is not being used)>|<Maintain Reading List (1, 0)>|<Former ID>|<User Defined Field 1>|<User Defined Field 2>|<User Defined Field 3>|<User Defined Field 4>|<User Defined Field 5>|<Do Not Delete (1, 0)>|<Exclude From Bills (1, 0)>|<Exclude From Collection (1, 0)>|<Exclude From Holds (1, 0)>|<Exclude From Overdue Notice (1, 0)>|<Use Plain Text E-mail (1, 0)>|<-Address Label>|<Address Type>|<Street One>|<Street Two>|<City>|<State>|<Postal Code>|<Zip Code Plus Four>|<County>|<Country ID>|<Address Check Date>|<E-mail Address>|<Alternative E-mail Address>|<Phone 1>|<Phone1CarrierID>|<Phone 2>|<Phone2CarrierID>|<Phone 3>|<Phone3CarrierID>|<Fax Number>|< Delivery Option ID>|<PatronRecordID>|<EnableSMS>|<eReceiptOptionID>|<TxtPhoneNumber>
```

See ["Data Dictionary" on page 6](#).

### Data Dictionary

The table lists required and optional data fields.

If a required field contains data that your student record system does not include, you must supply a default value. Valid values are shown in the table.

If you do not use an optional field, supply an empty pipe for the field.

Column	Data Type	Max Data Length	Valid Codes/Format	Data required?
Record Code	Integer	n/a	5 = New Patron 7 = Update Patron  If you use Record Code = 7 for all patrons in the file, the system will update existing patrons and create new patrons if they do not currently exist in Polaris. See <a href="#">"Scheduling Your Updates" on page 2..</a>	Y
Creation Date	Date	n/a	YYYY-MM-DD	N
Patrons Last Name	String	32		Y
Patrons First Name	String	32		Y
Patrons Middle Name	String	32		N
Patron Name Title	String	8		N
Patron Name Suffix	String	4		N
Patron Code ID	Integer	n/a	A valid Polaris Patron Code. These are listed	Y

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Column	Data Type	Max Data Length	Valid Codes/Format	Data required?
			in Polaris Administration and available from the Polaris Code Sheet provided by the Polaris Implementation Manager.	
Patrons Branch ID	Integer	n/a	A valid Polaris OrganizationID having an OrganizationCodeID of 3 (branch). For information on obtaining this value, see <a href="#">"File Header" on page 3.</a>	Y
Patron Barcode	String	20	Unique identifier; for example, the student identification number from the student database.	Y
Expiration Date	Date	n/a	YYYY-MM-DD HH:MM:SS	Y
Patron Statistical Code ID	Integer	n/a	A valid Polaris Patron Statistical Class Code ID	N
Gender	String	1	M, F, or N	Y
Password	String	16		N
Language ID	Integer	n/a	LanguageID (1=English)	Y
Registration Date	Date	n/a	YYYY-MM-DD	N



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Column	Data Type	Max Data Length	Valid Codes/Format	Data required?
Birth Date	Date	n/a	YYYY-MM-DD	N
Permission	Integer	n/a	DO NOT USE	N
Maintain Reading List	Integer	n/a	0 = Do not maintain 1 = Maintain	Y
Former ID	String	20		N
User Defined 1	String	64		N
User Defined 2	String	64		N
User Defined 3	String	64		N
User Defined 4	String	64		N
User Defined 5	String	64		N
Do not delete	Integer	n/a	1 = Staff may not delete the patron 0 = Staff may delete the patron	Y
Exclude from bills	Integer	n/a	1 = Never bill this patron 0 = This patron may be billed	Y
Exclude from collection	Integer	n/a	1 = This patron may not be sent to collection agency 0 = This patron may be sent to collection agency	Y
Exclude from holds	Integer	n/a	1 = This patron may not be sent hold notifications	Y

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Column	Data Type	Max Data Length	Valid Codes/Format	Data required?
			0 = This patron may be sent hold notifications	
Exclude from overdue	Integer	n/a	1 = This patron may not be sent overdue notifications 0 = This patron may be sent overdue notifications	Y
Plain text	Integer	n/a	1 = This patron only wants plain text notification 0 = This patron may be sent HTML notifications	Y
Free Text Address Type Label	String	30	This label must be one of the following: ~Home ~Work ~School ~Primary ~Alternate ~Office ~Other  And must include the ~ character in front of the label. Indicates the start of an address group (street, city, etc.)  To include multiple addresses for student,	Required for address

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Column	Data Type	Max Data Length	Valid Codes/Format	Data required?
			see <a href="#">"Including Both School and Home Addresses"</a> on page 13.	
Address Type	Integer	n/a	1 = Generic 2 = Notice	Y
Street One	String	64		N
Street Two	String	64		N
City	String	32		N
State	String		2 character abbreviation	N
Postal Code	String	10	5 character postal code	N
Zip Plus Four	String	4	4 character Zip+ code	N
County	String	32		N
Country ID	Integer	n/a	Country ID (1 = USA)	Y
Address Check Date	Date	n/a	YYYY-MM-DD	N
Email address	String	64		N
Alternate Email Address	String	64		N
Phone 1	String	20		N
Phone 1 Carrier ID	Integer	2	Unique numeric identifier for mobile phone carrier - see the Mobile Phone Carriers database table in Polaris Administration.	N

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Column	Data Type	Max Data Length	Valid Codes/Format	Data required?
Phone 2	String	20		N
Phone 2 Carrier ID			Unique numeric identifier for mobile phone carrier - see the Mobile Phone Carriers database table in Polaris Administration.	N
Phone 3	String	20		N
Phone 3 Carrier ID	String	20	Unique numeric identifier for mobile phone carrier - see the Mobile Phone Carriers database table in Polaris Administration.	N
Fax Number	String	20		N
Delivery Option ID	Integer	n/a	1 = Mail, 2 = Email, 3 = Phone1, 4 = Phone2, 5 = Phone3, 6 = FAX	N
Patron Record ID	Integer		Used internally by Polaris, automatically generated when record is created in Polaris	N
SMS Enabled	Bit	n/a	1 = This patron wants text message notification  0 = This patron does not want text message notification	N

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Column	Data Type	Max Data Length	Valid Codes/Format	Data required?
eReceipt Option ID	Integer		2 = e-mail 8 = text message 100 = both	N
Txt Phone Number	Integer	n/a	Indicates which Phone number (1, 2, 3) should be used for text messages.	N
Exclude from almost overdue/auto-renew	Integer	n/a	1 = This patron may not be sent almost overdue or auto-renew notifications  0 = This patron may be sent almost overdue or auto-renew notifications	Y
Exclude from patron record expiration	Integer	n/a	1 = This patron may not be sent patron record expiration notices  0 = This patron may be sent patron record expiration notices	Y
Exclude from inactive patron	Integer	n/a	1 = This patron may not be sent inactive patron notices  0 = This patron may be sent inactive patron notices	Y

### Including Both School and Home Addresses

If you want to include both school and home addresses for each student, repeat the following block of address information for each address, using **~School** or **~Home** as the Free Text Address Label:

Free Text Address Label

Address Type

Street One

Street Two

City

State

Postal Code

Zip Plus Four

County

Country ID

### Uploading Student Data to Polaris

You upload the .TRN file into Polaris using the Polaris staff client. This is the same process you use when you register new patrons offline and then upload the offline file of new patron registrations to Polaris.

**Note:**

It is recommended that you test your exported patron file and practice loading it into Polaris before you do the actual production load.

To upload your TRN file to the Polaris database using the online Polaris staff client:

**Note:**

Polaris Hosted users should be sure to share the disk drives on the workstation in Remote Desktop. In the Remote Desktop Connection dialog box, select the Polaris terminal server and click **Options**. On the Local Resources tabbed page, select (check) **Disk Drives**. See “Managing Offline Circulation” in Polaris staff client Help for details.

1. Copy the TRN file to Local Drive:\ProgramData\Polaris\ version\OfflineTransaction (default location) on the Polaris staff client workstation.

**Notes:**

Administrators can specify the filepath for offline transaction files on the workstation during staff client installation. If the filepath differs from the default location, copy the TRN file to the location specified during installation.

The filepath for Windows XP workstations is **Local Drive:\Program Files\Polaris\version\offline\polaris**

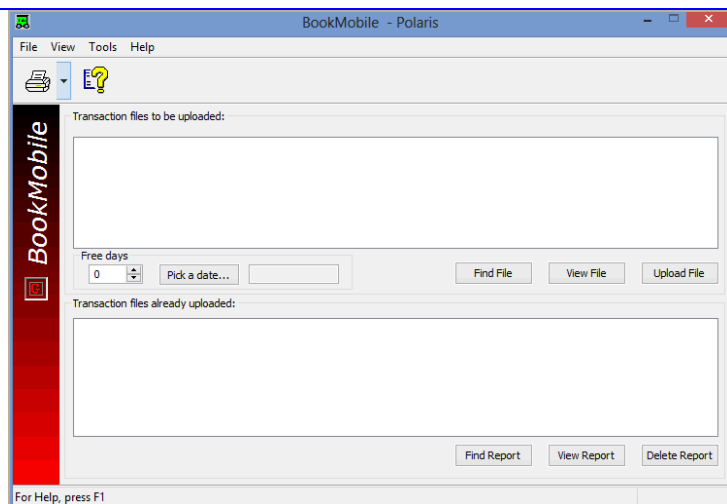
2. Log on to the Polaris staff client and select **Circulation, Bookmobile** from the Polaris Shortcut Bar.



Click this button on the Shortcut Bar to display the Bookmobile workform.

The Bookmobile workform appears. The list displays the transaction files available on the local drive.

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3. To view the file before uploading it, follow these steps:
  - a. Select the TRN file that you want to view in the **Transaction files to be uploaded** list.
  - b. Click **View File**.

The View Transaction file dialog box displays the files.
  - c. When you are finished viewing the files, click **Close** on the dialog box.
4. To set error handling during upload, follow these steps:
  - a. Click **Upload File**.

The Error Stop Option dialog box appears.
  - b. Choose one of the following options, and click **OK**.
    - Click **stop on errors** if you want the file upload process to stop for any file in which Polaris finds an error. When errors are found, a message indicates why the file is not being uploaded.
    - Click **continue and get error report in the end** if you want Polaris to complete the file upload process and then compile an error report.
5. Click **Upload File** to upload the selected file.

The file is transferred to the **Transaction files already uploaded** list with a .log extension. (To view a log file, select the file in the **Transaction files already uploaded** list, and click **View report**.)

### Related Information

Delete a transaction report - In the Bookmobile workflow, select the log file in the **Transaction files already uploaded** list, and click **Delete report**.