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Patrons

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Patrons overview

You manage your patron records database by adding, editing, and deleting individual patron records as well as groups of patron records. You can also import and export files of patron records and set up a custom index. With accurate records, you can keep track of your patrons and their circulation activities.

Setting up

Before you add patron records to your database (either by entering individual records or by importing new records), make sure you have the necessary patron types already set up. For more on setting up types, see "Setting up patron types" in the *Setup* chapter of this manual.

Backing up

Back up your database files before and after you make major changes or additions to your records. For more on backups, see "Backing up Spectrum data" in the *Backup* chapter of this manual.

Choosing a task

The Patrons tasks include Edit, Import, Export, Batch Process, Custom Index, and Import Patron Images. You choose tasks by clicking the Patrons button on the Navigator toolbar.

To choose a task

From the Navigator toolbar, click the **Patrons** button and choose the menu command for the patron task you want to open.

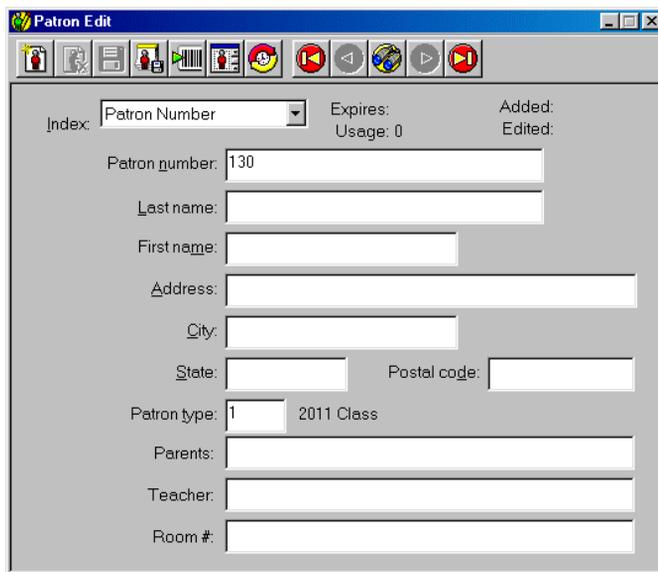


Editing patron records

You add, edit, and delete individual patron records so you can keep track of your patrons and their circulation activities.

To open Patron Edit

From the **Winnebago** menu, choose **Patrons > Edit**, or click the **Patrons** button in the Navigator toolbar and choose **Edit**. The Patron Edit window opens.



The screenshot shows a window titled "Patron Edit" with a toolbar at the top containing icons for home, search, print, refresh, back, forward, and other navigation functions. The main area contains a form with the following fields:

- Index: Patron Number (dropdown menu)
- Expires: Usage: 0
- Added: Edited:
- Patron number: 130
- Last name: [text box]
- First name: [text box]
- Address: [text box]
- City: [text box]
- State: [text box] Postal code: [text box]
- Patron type: 1 2011 Class
- Parents: [text box]
- Teacher: [text box]
- Room #: [text box]

Patron Edit window
In this window, you can add, edit, and delete patron records.

Managing patron records

To manage patron records, use the Patron Edit window. You add, edit, and delete individual patron records in this part of the program.

If you haven't already done so, you should set up patron types before adding or editing your patron records. Also, if you plan to use the patron user-defined fields, you should name those fields before you edit patron records (see "Setting up patron types" in the *Setup* chapter of this manual).

Loading patron records

Before you can edit or delete an existing record, you must load it into the Patron Edit window. You can look up a patron record in several ways. Before you load a record, you may want to change the index by which your records are sorted. You can sort and search your records by patron number, patron name, patron type, or any of the three user-defined fields.

When you open the Patron Edit window, the default patron record is displayed. The default record is usually not the first record when your database is sorted by the selected index. You must click one of the load buttons (First, Previous, Look Up, Next, or Last) or use the equivalent menu command before the database is sorted according to the selected index. For example, if Patron Number is the selected index, and you want the lowest patron number to display in the window, you must select First from the Record menu after opening the window.

How to load a record by specifying its position

Example scenario: You want to edit one of your patron records. You know the patron's last name begins with Z, but you don't remember how to spell it. You can sort your records to quickly find the patron's record.

To load a record by specifying its position



First



Previous



Next



Last

- 1 Click the **Patrons** button in the Navigator toolbar and choose **Edit**.
- 2 From the **Index** box, choose **Patron Name**. All of your patron records are now sorted by name.
- 3 Click the **Last Record** button. The last record is loaded, which in this case is a patron name beginning with Z.
- 4 Click the **Previous Record** button until you reach the record you were looking for. (*Note: The **Previous Record** and **Next Record** commands are not available until you have loaded another patron record.*)

How to load a specific record

Example scenario: You want to edit one of your patron records. You know the patron number is 10157.

To load a specific record

- 1 Click the **Patrons** button in the Navigator toolbar and choose **Edit**.
- 2 From the **Index** box, choose **Patron Number**.
- 3 Click the **Look Up Patron** button. The Find Patron window opens, where you enter the value of the record you're searching for (using the selected index).
- 4 Enter *10157* in the **Patron Number** box.
- 5 Click **OK**. The record is loaded. *Note:* If an exact match is not found, the next record that most closely matches the value entered is loaded.



Look Up

Note: If you choose Patron Name as the index, two text boxes are displayed in the Find Patron window for the first and last name. To perform a search, you must at least enter a value in the Last Name box. You can enter a partial last name in the Last Name box to find the closest match if, for example, you're not sure of the spelling. If you enter text in the First Name box only, the first record according to the Patron Name index is loaded.

Adding new patron records

When a new patron wants to check out a material or exercise some other library privilege, you must add the patron to the database by filling out a new patron record.

You can incorporate new patron records into your database in two ways:

- Add the records manually (ideal for adding a small number of records).
- Import a file of records (ideal for adding many records).

The following steps explain how to add patron records manually. However, if you need to add a large number of patron records from a disk, you should import those patron records (see "Importing patron records" in this chapter).



New Record button

How to add a new patron record

Example scenario: You want to create a record for a new library patron, Pat Nielsen. Pat will graduate in 2005, which in your program is patron type 5.

To add a patron record

- 1 Click the **Patrons** button in the Navigator toolbar and choose **Edit**. The default patron record is displayed in the window. (If you haven't saved a default record yet, the boxes contain no data.)
- 2 You can accept the default patron number or enter a different number. (To choose a patron number to assign to the new patron record, see "Assigning patron numbers".)
- 3 In the **Last name** box, enter *Nielsen*.
- 4 In the **First name** box, enter *Pat*.
- 5 Enter the rest of the patron information in the appropriate boxes.
- 6 In the **Patron type** box, enter *5*. The description of the patron type is displayed to the right of the box and the names of the user-defined fields change depending on the patron type you entered.

Note: You should choose a patron type *before* you enter data in the user-defined fields.

- 7 Click the **Save Record** button. The current date appears in the Patron Edit window after **Added**.



TIP: Press the Tab key to move to the next box, or press the Shift + Tab keys simultaneously to move to the previous box

Editing existing patron records

You can edit an existing patron record. Editing is similar to adding a new record—just load the record and enter new data or modify the existing data.

How to edit a patron record

Example scenario: One of your patrons, Megan Wyatt, has moved, so you need to change her address in Patron Edit.

To edit a patron record

- 1 Click the **Patrons** button in the Navigator toolbar and choose **Edit**.
- 2 Load the patron record you want to edit. For instructions, see "Loading patron records".
- 3 Edit the patron record's address data in the Patron Edit window as necessary.
- 4 Click the **Save Record** button. The current date appears in the Patron Edit window after **Edited**.

Note: At any point while editing a patron record, you can revert to the last saved version of the record. The previously saved version of the record is loaded—without maintaining any changes made since the last time the record was saved. See "Reverting to the last saved version" for detailed instructions.

Assigning patron numbers

Each library patron must have a patron number. You can assign the patron number or have the program assign a number. The patron number can be changed at any time. You can select and assign numbers to new and existing records in several ways:

- **Use the number already entered.** When you first open the Patron Edit window, there is no record loaded. The Patron Edit window displays a number in the Patron number box that hasn't been assigned to a record yet. You can leave this number in the Patron number box and start entering your new record information.
- **Enter another number.** Assign a patron number to the new record by entering the number in the Patron number box. (If you set up partitions, the number you enter must be in the patron range you set up. See "Setting up your location" in the *Setup* chapter of this manual.) If the number you enter has already been assigned to a patron record, a message is displayed that the patron number is in use and you are informed to enter a different number
- **Set a number.** Choose the Use Number command from the Patron menu to look up and set the next patron number to be used. The Use Number command uses the number that you set with the Set Next Number command or the next available patron number.

The number you set using the Set Next Number command is the number that is available for the Use Number command from the Patron menu. (You're not loading the set number in the Patron number box yet—just setting the number.)

How to set the next patron number

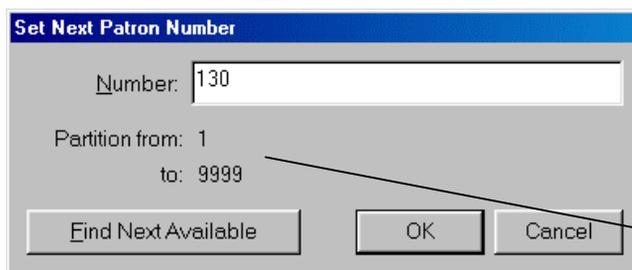
Example scenario: You want the patron numbers for the next set of patron records that you add to begin with 101xx. You've already entered some patron numbers that begin with this number, but you're not sure what was the last patron number used in this series.

To set a number

- 1 Click the **Patrons** button in the Navigator toolbar and choose **Edit**.
- 2 Click the **Set Next Number** button. The Set Next Patron Number window opens.



Set Next
Number button



Set Next Patron Number window
In this window, you enter or look up the number to assign to the next patron record.

Partition information is displayed only if you set up partitions.

- 3 In the **Number** box, enter 10100.
- 4 Click the **Find Next Available** button to search for the first available number greater than 10100.
- 5 Click **OK**.

How to assign a patron number

After you specify what the next patron number will be, you can assign it to a patron record.

To assign a set number to an existing patron record

When editing an existing record, choose **Use Number: n** from the **Patron** menu (where n equals the number you set). The set number is loaded into the **Patron number** box.

To assign a set number to a new patron record

When adding a new record, click the **New Record** button. The set number is loaded into the **Patron number** box. After you save the patron record with the assigned patron number, the **Use Number: n** command increments to the next available number.

Assigning patron types

You can assign a patron type to a record or change the patron type currently assigned to a record. The way you assign a patron type varies, depending on whether you know the numbers attached to each of your patron types. For example, you may know you have a patron type called Faculty, but you may not know that it is type 2.

You can change a record's patron type three ways: click the Select Patron button, choose the Set Type command from the Patron menu, or just enter the type number in the Patron type box. Either way, after you change a type you should check the record's user-defined information in the bottom of the Patron Edit window. This data is specific to each patron type. You name these fields in Patron Types Setup (see "Setting up patron types" in the *Setup* chapter of this manual).

How to assign a patron type

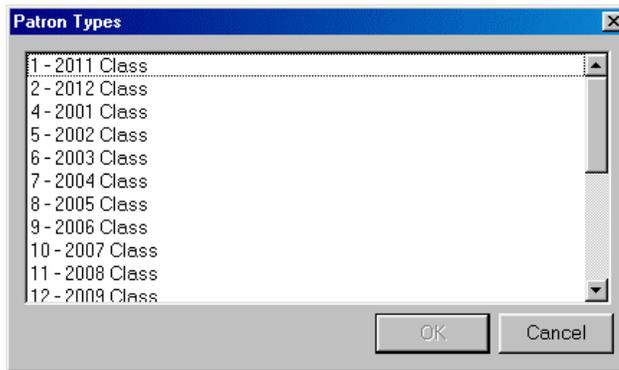
Example scenario: You've discovered that a patron record lists the wrong grade level for a patron, so you need to change the patron to the 2005 Class patron type. You can't remember what type number is associated with that patron type.

To assign a patron type to a record when you *don't* know the type number

- 1 Click the **Patrons** button in the Navigator toolbar and choose **Edit**.
- 2 Load the patron record you want to edit. For instructions, see "Loading patron records".
- 3 Click the **Select Patron Type** button. The Patron Types window opens, listing the available patron types.



Select Patron Type button



Patron Types window

In this window, you choose the patron's type, which categorizes the patron.

- 4 Select the patron type you want to assign to the record, in this case *16 – 2005 Class*.
- 5 Click **OK**. Note that the names of the user-defined fields in the Patron Edit window change accordingly.
- 6 Click the **Save Record** button. The current date appears in the Patron Edit window after **Edited**.

Example scenario: A student will be skipping a grade level and you need to assign her to the 2006 Class patron type. You know that the type number associated with that type is 17.

To assign a patron type to a record when you *do* know the type number

- 1 Click the **Patrons** button in the Navigator toolbar and choose **Edit**.
- 2 Load the patron record you want to edit. For instructions, see "Loading patron records".
- 3 In the **Patron type** box, enter *17*. The description of the patron type, *2006 Class*, is displayed to the right of the box. Note that the names of the user-defined fields in the Patron Edit window change accordingly.
- 4 Click the **Save Record** button. The current date appears in the Patron Edit window after **Edited**.

Renewing patron privileges

When you renew privileges for a patron, you update the expiration date of that patron's library privileges. Even if a patron's privileges have not expired yet, you can still change the length of time privileges are valid.

There are two methods for updating expiration dates: by monthly intervals or on a specific date. The method used for a particular patron depends on the patron type. Before renewing a patron's expiration date, check the update method you chose by opening the Patron Type Setup window. For more information, see "Setting up patron types" in the *Setup* chapter of this manual.

When you choose the Renew Privileges command, the expiration date changes immediately without an alert. The new expiration date appears in the upper area of the Patron Edit window. To undo this change, exit the record without saving or choose Revert to Saved from the Record menu.

You can also renew patrons' circulation privileges from the Circulation window when their patron records are loaded. For more information, see "Renewing patron privileges" in the *Circulation* chapter of this manual. Or, you can renew all patrons with the same patron type using Patron Batch Process. See "Batch processing patron records" for more information.

How to renew a patron's privileges

Example scenario: A patron's privileges have expired and you want to renew them.

To renew a patron's privileges

- 1 Click the **Patrons** button in the Navigator toolbar and choose **Edit**.
- 2 Load the patron record you want to renew. For instructions, see "Loading patron records".
- 3 Click the **Renew Privileges** button. The new expiration date appears in the Patron Edit window. The new date depends on the patron type the patron is assigned to.
- 4 Click the **Save Record** button.



**Renew Privileges
button**



TIP: To undo this change, exit the record or choose Revert to Saved from the Record menu *before* you save the record.

Saving patron records

After you enter new data for records you're adding or editing, you can save the records. You don't *have* to save records this way (if you make changes and then proceed, you must choose whether to save or discard the changed records). However, saving this way is useful when you've made a number of changes and you want to save before you enter more data.

To save a patron record

After adding or editing a patron record, click the **Save Record** button.



**Save Record
button**

Reverting to the last saved version

At any point while editing a patron record prior to saving the changes, you can revert to the last saved version of the record. You might use this feature after you've made considerable changes to a record, only to discover the changes you made were wrong. You could then revert to the last saved version—removing the erroneous changes.

To revert to a saved patron record

From the **Record** menu, choose **Revert to Saved**. The previously saved version of the record is loaded—without maintaining any changes made since the last time the record was saved.

Managing default patron records

When you create a new patron record, the program automatically fills in information for you based on the default record. This saves you data-entry time since you do not need to enter this information yourself. For example, you may want to enter the city, state, and zip code information in the default record if your patrons all live the same city.

How to create a default patron record

Example scenario: Most of your patrons live in the city where your library is located: Springfield, MN. You decide to enter this information in the default patron record so you don't have to type it every time you create a new record.

To create a default patron record

- 1 Click the **Patrons** button in the Navigator toolbar and choose **Edit**.
- 2 In the **City** box, type *Springfield*.
- 3 In the **State** box, type *MN*.
- 4 In the **Postal code** box, type *56087*.
- 5 Click the **Save as Default** button. The record data is saved as your default record. This is entered for you every time you create a new patron record.



Save as Default
button



TIP: Press the Tab key to move to the next box, or press the Shift + Tab keys simultaneously to move to the previous box

How to delete a default patron record

If you have previously saved a default patron record, you can remove some or all of the default data.

Example scenario: Someone accidentally clicked the Save as Default button when a patron record was open. Now whenever you open Patron Edit or create another record, this information is displayed. You want all of the fields to be blank when you create a new record.

To delete a default patron record

- 1 Click the **Patrons** button in the Navigator toolbar and choose **Edit**. The default patron record appears in the window.
- 2 In each field, delete the default data. *Note:* You cannot leave the Patron type field blank.
- 3 Click the **Save as Default** button.



TIP: Press the Tab key to move to the next box, or press the Shift + Tab keys simultaneously to move to the previous box

Deleting patron records

In Patron Edit, you can delete a patron record to eliminate an obsolete record from your collection. You should delete patron records of people who move or no longer want to use the library; or, if you have a school library, of students transferring or graduating. However, you *can't* delete a record if the patron has checked out or reserved materials or has messages or fines. You also can't delete a record you just added or edited without saving it first.



If you delete a record by mistake, you can recover it *as long as it's still displayed*. If you haven't done anything else, the record you deleted is still visible in the window. To recover the record, make a minor change to the data (for example, place your cursor in any box in the Patron Edit window, delete one character, and replace it with the same character). Then choose Save from the Record menu to put the record back in the database.

How to delete a patron record

Example scenario: A patron has moved out of your district, so you want to delete his name from Spectrum CIRC/CAT.

To delete a patron record

- 1 Click the **Patrons** button in the Navigator toolbar and choose **Edit**.
- 2 Load the patron record you want to delete. For instructions, see "Loading patron records".

- 3 Click the **Delete Record** button. The program confirms that you want to delete the record. If the patron has material checked out, the program warns that you cannot delete the patron record.
- 4 Click **Delete** to confirm the deletion. The record data remains on screen, except the expiration date, usage, and add and edit dates. After you load another record, you cannot reload the deleted record's data.

Managing patron images

In the Patron Edit window, you can add and view a single patron image. You can also view a patron image in the Circulation part of the program. Using this image, you can verify that the correct patron is checking out materials.

There are two ways to add patron images to the program:

- Adding an image to a single patron record. This is done in Patron Edit.
- Importing multiple patron images and mapping them to existing patron records using a map file. This is done in the Import Patron Images part of the program. See "Importing patron images" in this chapter for more information.

Creating patron image files

If you don't get patron images from a vendor, you can create computer image files from your patrons' pictures. There are third-party software programs that generate computer images from pictures. In order to use patron images in Spectrum, the computer images must be bitmap file format. Microsoft Windows uses a .bmp file extension to indicate bitmap images.

Sagebrush recommends using patron barcode numbers as the naming scheme for your image files, so you can easily correlate each patron record with the correct image. For example, say Terry Smith's patron barcode number is 098765432. You could name Terry's image file 098765432.bmp. When you link Terry's record with the correct image in Patron Edit, you would search for the 098765432.bmp file.

Adding patron images

If you want to add a patron image to a single patron record, you can do this in Patron Edit. The patron image you associate with the patron record must be a bitmap image.



When you add a patron image, you are adding it to the Spectrum CIRC/CAT database. You should keep the original bitmap file in case the image is accidentally deleted from the database.

How to add a patron image

Example scenario: A new student has moved into your district. You've already scanned a picture of her and created a bitmap file. Now you want to add her picture to Spectrum CIRC/CAT.

To link a patron's image

- 1 Click the **Patrons** button in the Navigator toolbar and choose **Edit**.
- 2 Load the patron record you want to add the image to. For instructions, see "Loading patron records".
- 3 From the **Patron** menu, choose **Add Patron Image**. The Link Patron Image window opens.
- 4 Locate the drive or folder that contains the patron image file.
- 5 In the folder list, double-click the folders until you open the folder that contains the patron image file.
- 6 Select the bitmap file of the patron image.
- 7 Click **Open**. The image is displayed in the patron record.
- 8 Click the **Save Record** button.

You can also use these instructions to add a different image to a patron record that already has an image associated with it.

Viewing patron images

The Patron Edit window displays an image of the patron, if available. When you click the image, a window opens with an enlarged version of the image. The image is only available after you enter a valid patron number and if patron image data is loaded.

Note: In order for patron images to display correctly on a Windows-based computer, monitor color settings must be set at a minimum of High Color (16 bit) or higher. On a Macintosh computer, monitor color settings need to be set at a minimum of 256 Colors.

How to view a patron image

Example scenario: You want to view a larger image of a patron.

To view a patron's image

- 1 Click the **Patrons** button in the Navigator toolbar and choose **Edit**.
- 2 Load the patron record that contains the image you want to examine. For instructions, see "Loading patron records".
- 3 In the Patron Edit window, click the patron image. A window opens with an enlarged version of the patron's image.
- 4 Click the enlarged image to return to the Patron Edit window.

Removing patron images

You can remove an image file from a patron record.



When you delete a patron image, you are permanently deleting it from the Spectrum CIRC/CAT database. You should always keep the original bitmap file in case the image is accidentally deleted from the database.

How to remove a patron image

Example scenario: You accidentally added Pat Nielsen's image to Kelly Wolf's patron record. Because you don't have a picture of Kelly to add to the system, you just want to remove Pat's image from Kelly's patron record.

To remove a patron image

- 1 Click the **Patrons** button in the Navigator toolbar and choose **Edit**.
- 2 Load the patron record that contains the image you want to remove. For instructions, see "Loading patron records".
- 3 From the **Patron** menu, choose **Remove Patron Image**. A window opens to confirm you want to remove the image.
- 4 Click **Remove**. The image is no longer displayed in the window.
- 5 Click the **Save Record** button.

Importing patron records

You can import patron records into your database from a file on a floppy disk or CD or from a different location on your hard disk. The time required to import patron records depends on the size of the file you're importing and the speed of your computer. You may want to import large files when your library is closed.

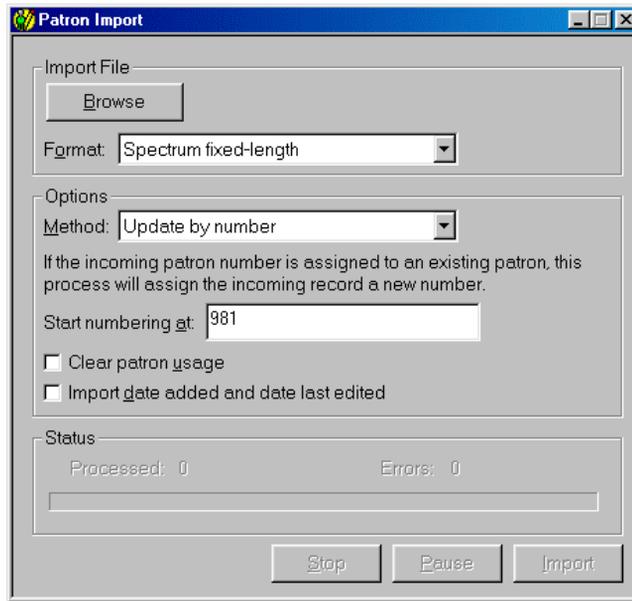
Note: If you have Windows 98 on your client computer, make sure that Power Management is not turned on while you import from a client computer to the server. If Power Management shuts down your client computer during the import process, your database could become corrupt. You can access Power Management through the Control Panel. While you import, you should also turn off any other program that shuts down or suspends activity on your computer.

Backing up

Back up your database files before and after you import patron records. For more on backups, see "Backing up Spectrum data" in the *Backup* chapter of this manual.

To open Patron Import

From the Navigator toolbar, click the **Patrons** button and choose **Import**. The Patron Import window opens.



Patron Import window

In this window, you import patron records into Spectrum CIRC/CAT.

Assigning patron numbers

You can choose the number to begin assigning new patron numbers if the file doesn't already have numbers assigned. By default, the program assigns the next highest patron number after the last used one—but you can change this to any number you want to assign to patron records.

You may have created a partition to separate your patron and material numbers (see "Setting up your location" in the *Setup* chapter of this manual). If you're using a partition, the program alerts you if all of the numbers in that patron partition are in use.

When the program updates by name or patron number, it looks for an exact match. If there is no match, it creates a new record. You should enter a starting number for new patron records even if you're updating existing records.

Note: Always enter a number in the "Start numbering at" box in the Patron Import window. In this way, if there are conflicts and different numbers are assigned, you know where to look for those records. We suggest using a number higher than what your database will ever reach, yet within the partition—this makes the patron records easily identifiable.

Performing a patron import

When you import patron records, you must select the file to import to and the file's format, select the import method, assign numbers to new records, and set import options.

For more information about the Patron Import window, see "About the Patron Import window" in the *Patrons* chapter of the *Spectrum CIRC/CAT Reference Manual*.

How to import patron records

Example scenario: You have a file of patron records to import into Spectrum CIRC/CAT. It is a tab-delimited file named patrons.txt. You know there may be some patrons in the file that are already in Spectrum CIRC/CAT, so you want to replace any existing patron records with the new record if the patron numbers match.

To import patron records

- 1 From the Navigator toolbar, click the **Patrons** button and choose **Import**. The Patron Import window opens.
- 2 Click the **Browse** button.

3 Locate and select the file to import, in this case *patrons.txt* and click the **Open** button. The file name is displayed in the Patron Import window.

If Spectrum CIRC/CAT detects that the incorrect format is selected, an alert window opens to inform you. Click **Yes** to automatically change the file to the correct format.

4 From the **Format** list, select the format of the file being imported. In this case, choose **Delimited with tabs**.

5 Select the method of importing. In this case, choose **Update by number** from the **Method** box.

6 In the **Start numbering at** box, enter *500250*. Patron numbers are assigned to any records whose patron numbers already exist in the program starting at this number.

7 Select **Clear patron usage**.

8 Select **Import date added and date last edited**.

9 Click **Import** to start importing.

If you've already imported a patron file, a window opens stating that the *p_import.log* already exists.

10 Click **Append** to add error messages to the existing log file. Click **Overwrite** to replace the existing error messages saved in the file with new error messages.

The import process begins. When it is complete, a window opens and displays the number of records added to the database. If any errors were detected, you can click the View File button to view the error log. For more information, see "How to open the *p_import* log file immediately after the import process" later in this chapter.

To pause or stop the import, see "Pausing or stopping a patron import" later in this chapter.

Pausing or stopping a patron import

While the program is importing patron records, you can click **Pause** to temporarily halt the importing processing or **Stop** to cancel importing. *Note:* You can only select **Stop** after **Pause** is selected.

If you cancel importing during the import process, only the patron records that the program has already processed are in your database. The record being processed when you click **Stop**—and any records after that one—are not imported.

You can't restart importing patron records again from where you left off after you stop the import. If you try to re-import records from this file, the program starts processing the entire file. To import records from this file again and *not* create duplicate records, make sure you choose one of the *update* import methods ("Update by number" or "Update by name").

How to pause or stop a patron import

To pause the import

Click **Pause**. The program temporarily halts the import. (Click **Import** to resume importing.)

To stop the import

- 1 Click **Pause**.
- 2 Click **Stop**. The program stops importing records but the Patron Import window remains open.

After importing patron records

When the import process is complete, an information window opens showing the number of records that were added to the database and the number of records that weren't added. To view errors that occurred when importing patron records, click the **View file** button in the information window. This opens the `p_import.log` file.

Addressing patron import errors

The program reports problems with records being imported both during and after the import process. You should address all errors either while importing or after importing, as appropriate. Errors that can't be automatically corrected by the program or addressed by the user during importing are recorded in a log, or error, file. After you finish importing, you can check the contents of this log. You should check the listed records in the log thoroughly. If data in any of the imported patron records is missing or incorrect, add or edit the patron record in the Patron Edit part of the program. See "Editing patron records" earlier in this chapter.

For information about specific error messages, refer to "Patron Import troubleshooting" in the Troubleshooting appendix of the *Spectrum CIRC/CAT Reference Manual*.

How to open the p_import.log file immediately after the import process

After importing, the Patron Import status window displays information about the number of records that were imported, the number of records that were not imported, and so on. Any import errors are listed in the p_import.log file.

To open the p_import.log file after the import process

If the import process generates errors, the Patron Import status window contains a **View File** button. To open the log, click the **View File** button.

How to open the p_import.log file after closing the Patron Import status window

You can view import errors even after closing the Patron Import status window.

To open the p_import.log file (Windows)

- 1 Click the **Start** menu in the Windows desktop.
- 2 Click **Find**.
- 3 Click **Files or Folders**. The Find: All Files window opens.
- 4 Enter *p_import.log* in the **Named** box.

- 5 Choose the drive to search by clicking the arrow beside the **Look in** box.
- 6 Click **Find Now**.
- 7 Double-click the **p_import.log** file listed in the bottom of the Find window.
- 8 If the computer prompts you with an option to open the file, choose **NotePad**. The **p_import.log** file opens so you can view the import errors.

To open the **p_import.log** file (Macintosh)

- 1 Double-click the **Hard Disk** icon.
- 2 Open the **Spectrum** folder.
- 3 Locate the **p_import.log** file.
- 4 Double-click the file to open it.
- 5 The log file opens in a word processing program such as SimpleText so you can view the import errors.

Exporting patron records

You can export patron records from your database to a file. You may want to do this when you need to import your patron records into another program. You may also want to export patrons before you delete patrons. If a mistake is made while deleting patrons, you can re-import those patrons and no data is lost. (This example is in addition to keeping good backups.)

You can export individual records or a range of records.

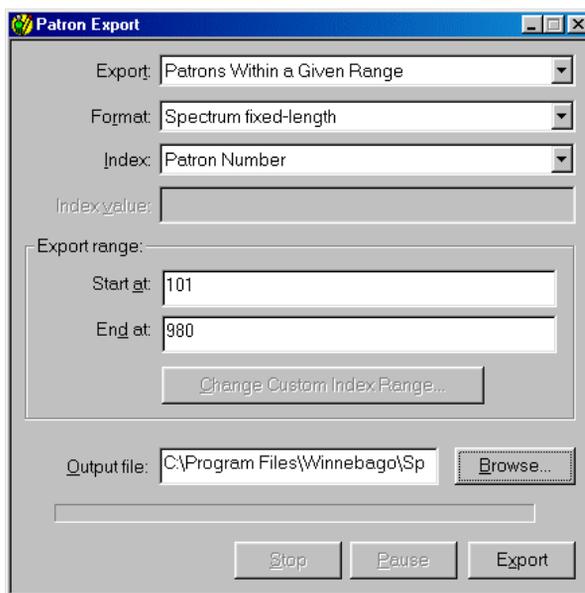
Note: If you have Windows 98 on your client computer, make sure that Power Management is not turned on while you export from a client computer to the server. If Power Management shuts down your client computer during the export process, your database could become corrupt. You can access Power Management through the Control Panel. While you export, you should also turn off any other program that shuts down or suspends your computer.

Backing up

Back up your database files before you export records. For more on backups, see the "Backing up Spectrum data" in the *Backup* chapter of this manual.

To open Patron Export

From the Navigator toolbar, click the **Patrons** button and choose **Export**. The Patron Export window opens.



Patron Export window

In this window, choose the options necessary to export patron records.

Exporting patron records individually

You can export patron records individually by specifying their patron numbers.

How to export patron records individually

Example scenario: You want to export the patron with patron number 60544. Furthermore, you want the exported record to be tab delimited and in a file called *p_export.001*.

To export records individually

- 1 From the Navigator toolbar, click the **Patrons** button in the window and choose **Export**. The Patron Export window opens.
- 2 From the **Export** box, select **Patrons Individually**.
- 3 From the **Format** box, select the format to export the file. In this case, select **Delimited with tabs**.
- 4 Enter the patron number to export, *60544*, in the **Index value** box.
- 5 Enter the file name to export to, *p_export.001*, in the **Output file** box. Or click **Browse** to select the destination file and path.
- 6 Click **Export**.



TIP: You can add additional patron records to this same file if you want to export more than one individual record. Just repeat steps 4 and 6 for each record that you want to export.

Exporting a range of patron records

You can specify a range of patron records and have the program export all patrons that fall within that range. The arrangement of records within the export file depends on the type of range you select. For example, if you select a range of records by patron type, the records are sorted by patron type.

How to export a range of patron records

Example scenario: You want to export all patrons with a patron type of 1, 2, or 3. Furthermore, you want the exported records to be delimited with tabs, and you want to place the exported records into a file called `p_export.002`.

To export patron records in a range

- 1 From the Navigator toolbar, click the **Patrons** button in the window and choose **Export**. The Patron Export window opens.
- 2 From the **Export** box, select **Patrons Within a Given Range**.
- 3 From the **Format** box, select the **Delimited with tabs** format.
- 4 From the **Index** box, select the index to sort the records. In this case, select **Patron Type**.
- 5 Enter the range of patron records you want to export. In this case, enter *1* in the **Start at** box and *3* in the **End at** box.
Note: If you select a custom index from the **Index** box, click **Change Custom Index Range** to change the range (see "Using a custom index to export patron records") later in this chapter.
- 6 Enter the export file name, `p_export.002` in the **Output file** box, or click **Browse** to select the destination file and path.
- 7 Click **Export**.

Using a custom index to export patron records

When you select "Patrons Within a Given Range from the Export" box, you can use a custom index to set the export range. Before you select a custom index, you must create it in the Patron Custom Index part of the program (see "Creating a patron custom index" in this chapter).

Because you can have up to three data fields in the custom index, you set a range for custom indexes using the Custom Index Range Selection window instead of using the Start at and End at boxes in the Patron Export window. The Custom Index Range Selection window is only available after you select a custom index in the Index box and click the Change Custom Index Range button. The custom index displays the index name you assigned in Patron Custom Index.

How to select the range for a patron custom index

Example scenario: You have a mailing list of patrons that live in your city that were added to your database within the past year. You created a custom index called CITY DATE ADDED to sort your patron records by city and date added. Now you want to export only the records that contain your city name, Springfield, and fall within the appropriate date range.

To open the Custom Index Range Selection window and set a range

- 1 From the Patron Export window, make sure **Patrons Within a Given Range** is selected in the **Export** box.
- 2 In the **Index** box, choose the desired custom index. In this case, choose *CITY DATE ADDED*. *Note:* Before you can do this, the custom index must already be set up in the Patron Custom Index part of the program.
- 3 Click the **Change Custom Index Range** button. The Custom Index Range Selection window opens.

The name of the custom index—as assigned in the Patron Custom Index part of the program—is at the top of the window.

Custom Index Range Selection

Index name: ZIP/STATE/NAME

Postal code range:

Start at: 55921

End at: 98592

State range:

Start at:

End at:

Last name range:

Start at:

End at:

Cancel OK

Custom Index Range Select window

In this window, you set the range for the custom index.

Each group lists the index field name and has a Start at and End at box for setting the range of that index field.

- 4 The window contains a box for each field in the custom index. For the first field, in this case **City**, enter the starting and ending values for the range. In this example, enter *Springfield* in both the **Start at** and **End at** boxes.
- 5 For the second field, in this case **Date added**, enter the starting and ending values for the range. In this example, enter the date from one year ago in the **Start at** box and today's date in the **End at** box.
- 6 Click **OK** to save the range and close the window.

Now you can export the patron records within the specified range.

Selecting a patron export output file

You have to specify the destination of the exported files. You can enter the path and file name of the destination file, or you can select the output file by clicking the **Browse** button and locating it yourself.

How to select a patron export output file

Example scenario: You want to save the exported records to a file called `p_export.004`.

To select the file to export

- 1 In the Patron Export window, click **Browse**. A window opens for you to locate and select the file you're exporting to. If you want to export to a floppy disk, make sure the disk is inserted.
- 2 In the **File name** box, enter the name of the file, in this case `p_export.004`.
- 3 Click **Save**. The window closes, and the file name you selected is automatically entered into the **Output file** box in the Patron Export window.

Batch processing patron records

You can use the batch process feature to change information in your patron records. The phrase "batch process" refers to the action of modifying groups of records in your database. You can use this feature to make the following modifications to groups of patron records:

- Add, edit, or clear data such as patron user-defined data.
- Change fields such as patron types (for example, when groups of students move to the next grade) and expiration dates.
- Delete groups of patron records. *Note:* You cannot delete patrons records for patrons that have materials checked out or reserved, or that have fines or messages attached.

You can batch process all of your records, records in a selected range, records that meet certain conditions, or records in a selected range that meet certain conditions.

Note: If you have Windows 98 on your client computer, make sure that Power Management is not turned on while you batch process on the computer. If Power Management shuts down your computer during the batch process, your database could become corrupt. You can access Power Management through the Control Panel. While you batch process, you should also turn off any other program that shuts down or suspends activity on your computer.

Backing up

Back up your database files before and after you make major changes to your records. For more on backups, see "Backing up Spectrum data" in the *Backup* chapter of this manual.

How to start Patron Batch Processing

Follow the directions below to start the batch process.

To start batch processing

- 1 From the Navigator toolbar, click the **Patrons** button and choose **Batch Process**. The Patron Batch Processing window opens, which provides an overview of the patron batch process.



Patron Batch Processing window
This window provides an overview of the patron batch process.

- 2 View the basic steps of the batch process.
- 3 Click **Next** to continue. The Range window opens.

The batch process feature has a "wizard" look—which guides you through each step of a multi-step process. It offers helpful information and explains options along the way. Follow the instructions in the windows, and use the Back and Next buttons to navigate through the windows. Click Exit in any window to cancel the batch process.

Understanding batch process steps

When you first start the Batch Process feature, an introductory window opens that explains the four basic steps involved in batch processing your material records.

Here is a description of the various windows you encounter when batch processing. Each window corresponds to a step in the batch process.

Window	Description
Range	Lets you set the range of records to process. The batch process won't necessarily modify all of these records. However, while processing, the program only inspects these records.
Conditions	(This step is optional.) Lets you set the conditions, if any, for the records to process. By specifying one or more conditions, you identify the particular characteristic(s) of the records to be modified. Only those material records in the range that meet the condition(s) set in this step are modified.
Actions	Lets you set the modification(s) to be made. Here you specify how you want to change the records in the range that meet the condition(s).
Finalize	Lets you verify the settings of your batch process before you start processing.

Step 1: Specifying the patron records to process

The first step in batch processing is to specify the records that you want processed. You can do this by specifying a range of records.

Initially, the range is set to include all of your patron records. However, you can narrow the range to best meet your needs.

If you have a lot of records in your database and don't need to change them all, specifying a range of the records you need to process can substantially reduce batch processing time. All the patrons in the range you set up may not be modified; however, all these records are inspected to find those that do require processing, according to the criteria you set up.

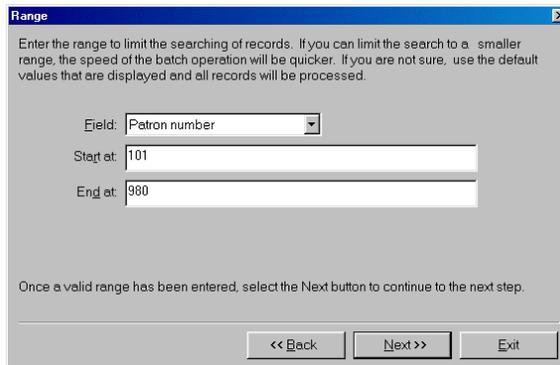
You specify records in the Range window. For more information about the Range window, see "About the Range window" in the *Patrons* chapter of the *Spectrum CIRC/CAT Reference Manual*.

How to specify a range of patron records to process

Example scenario: You want to batch process only those records with patron types 1, 2, and 3.

To specify a range of records

- 1 In the Range window, select the field that you want to base your range on. In this case, choose **Patron Type** from the **Field** box.



Range window

In this window, you define the range of records to process.

- 2 Enter the starting and ending values of the range. In this case, type 1 in the **Start at** box and 3 in the **End at** box.
- 3 Click **Next** to continue to the Conditions window.

Step 2: Setting patron batch process conditions

When you set batch process conditions, only those records that have certain characteristics, such as a certain postal or location code, are processed. The program won't modify any records in your range that don't meet your condition(s). For example, you may want to change only the records you added to the database after January 1, 2000. In this situation, you could use a condition to process only the records added after that date. These conditions work in conjunction with the range you set in the Range window.

It's not necessary to set conditions to batch process your records. If you don't want to set conditions, click the Next button to continue. All records within the range you specify in the Range window are processed.

You can set up to five conditions for the batch process.

Adding, editing and removing patron batch conditions

When you click Add or Edit in the Conditions window, the Add Condition window or Edit Condition window opens. You use these windows to enter the details of a condition. Remember, the batch process modifies only those patron records that meet the condition(s) specified, if any.

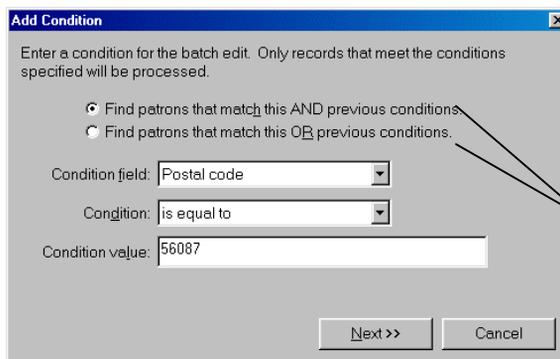
You can add, edit and remove conditions.

How to add a patron batch condition

Example scenario: You want the program to batch process only those records which have the postal code 56087. This is the only condition that you want to specify.

To add a batch process condition

- 1 In the Conditions window, click **Add**. The Add Condition window opens.



Add Condition window

In this window, you define a condition a record must meet in order to be processed.

If you're using multiple conditions, you need to set Boolean operators. If this is the first condition you entered, the Boolean operators are unavailable.

- 2 Select a field from the **Condition field** box. In this case, choose **Postal code**.
- 3 Select a condition from the **Condition** box. In this case, choose **is equal to**.
- 4 Enter the condition value in the **Condition value** box. In this case, enter **56087**.
- 5 Click **Next** to continue to the Actions window.

You can now set the options for this condition. For more information, see "Setting options for batch process conditions". For more information about the Add Condition window, see "About the Add and Edit Condition windows" in the *Patrons* chapter of the *Spectrum CIRC/CAT Reference Manual*.

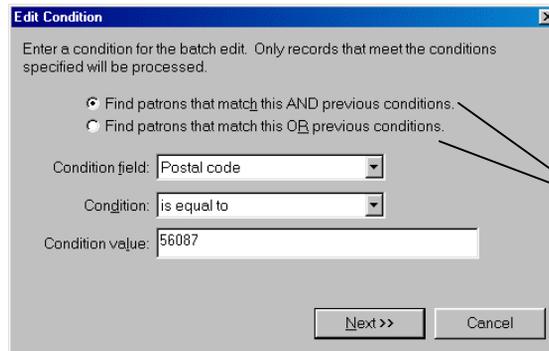
Note: With some fields, you cannot set condition options. If so, you will see a Save button instead of a Next button.

How to edit a patron batch condition

Example scenario: You have already set a condition specifying that the postal code value should be equal to 56087. Now you want to change this condition to specify that values must be equal to "56083".

To edit a batch process condition

- 1 In the Conditions window, select the condition you want to edit from the list of existing conditions.
- 2 Click **Edit**. The Edit Condition window opens.



Edit Condition window

In this window, you define a condition a record must meet in order to be processed.

If using multiple conditions, you need to set Boolean operators. If this is the first condition you have, the Boolean operators are unavailable.

- 3 Make the necessary changes. In this case, in the **Condition value** box, type *56083*.
- 4 Click **Next** to continue to the Actions window.

You can now set the options for this condition. For more information, see "Setting options for batch process conditions". For more information about the Edit Condition window, see "About the Add and Edit Condition windows" in the *Patrons* chapter of *Spectrum CIRC/CAT Reference Manual*.

How to remove a patron batch condition

Example scenario: You specified a condition and realize that it is not needed.

To remove a condition

- 1 In the Conditions window, select the condition you want to remove.
- 2 Click **Remove**.

Using multiple conditions and Boolean operators

When creating a batch process, you can set more than one condition. When adding a second or subsequent condition, you must include a Boolean operator (AND or OR) so that the program knows how to apply the multiple conditions. These options are both available in the Add Condition window whenever you add multiple conditions.

Setting options for patron batch process conditions

Sometimes when you set batch process conditions, you need to set options for those conditions. When you click Next in the Add Condition or Edit Condition windows, the Condition Options window is displayed. *Note:* This window opens only if you can further define the value(s) entered for the condition.

The condition options compare the condition value(s) you enter with the values in the selected field for all the patron records in the specified range. For example, you may add a condition that processes patron records with location codes that begin with numbers greater than 10. You need to click the Next button in the Add Condition window to set options for that condition. You would then select Numeric as your condition option, because the condition value—10—is a number.

It's not necessary to specify options for every condition you set. Depending on what you select from the Condition box in the Add Condition window or the Edit Condition window, you see either a Next or a Save button. The Next button takes you to the Condition Options window. The options displayed depend on what condition you select from the Condition box.

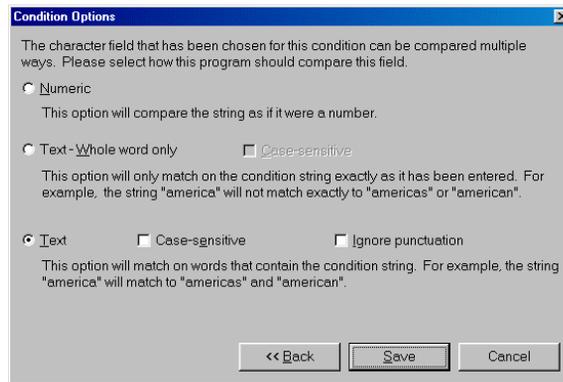
For information about the Condition options window, see "About the Condition Options window" in the *Patrons* chapter of the *Spectrum CIRC/CAT Reference Manual*.

How to set options for patron batch process conditions

Example scenario: You have set up a condition that specifies that city values must be equal to "Springfield". The program lets you specify two options for this condition: "Case-sensitive" and "Ignore punctuation". You want to specify that the condition be case-sensitive and that the program ignore punctuation.

To set options for a condition

- 1 If you have not already done so, click **Add** in the Conditions window and specify the condition. Then click **Next**. The Condition Options window opens.



Condition Options window

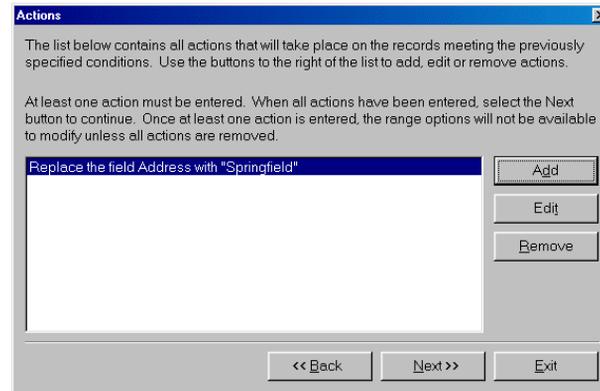
In this window, you specify how the program compares the condition value you enter with the values in the selected field.

Depending on the conditions selected in the Add Condition or Edit Condition window, this window may contain different options than those shown here.

- 2 Choose the desired options. In this case, select both **Case-sensitive** and **Ignore punctuation**.
- 3 Click **Save**. The program returns you to the Conditions window.

Step 3: Setting patron batch process actions

When you click Next in the Conditions window, the Actions window opens.



Actions window

This window displays the actions that will be taken on the patron records that fall within the specified range and meet the specified conditions.

For information about the Actions window, see "About the Actions window" in the *Patrons* chapter of the *Spectrum CIRC/CAT Reference Manual*.

In the Actions window, you can open the Add Action and Edit Action windows. In the Add Action or Edit Action window, you select the action to be done, the field to apply the action to, and how the field is to be changed. You can define up to five modifications—depending on the actions that you select (if you choose to delete, no additional modifications are allowed). When you have finished, you should be able to read your settings like a sentence. For example, an action might read "Replace the field Postal code with 56083."

After at least one action is entered, the range options in the Range window are not available to modify until you remove all actions.

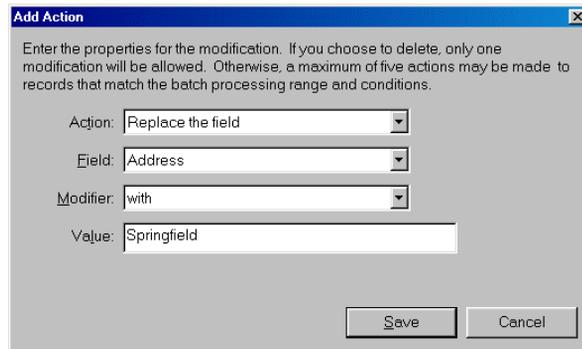
You can add, edit and remove conditions.

How to add an action

Example scenario: Some records in your library have your city misspelled as "Springfeld" instead of "Springfield". You have already specified the range and condition necessary to process these records. Now you want to specify an action that changes the contents of the city fields to "Springfield".

To add a batch process action

- 1 Click **Add** in the Actions window. The Add Action window opens.



Add Action window

In this window, you define the actions to be taken on the patron records.

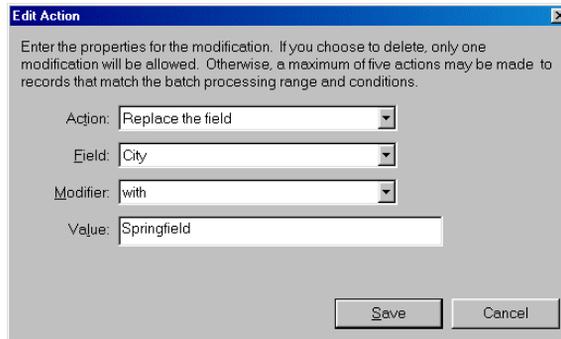
- 2 Select an action to perform from the **Action** box. In this case, choose **Replace the field**.
- 3 Select a field from the **Field** box. In this case choose **City**.
- 4 Select a modifier from the **Modifier** box. In this case, choose **with**.
- 5 Enter the appropriate information in the **Value** box. In this case, type *Springfield*.
- 6 Click **Save** to return to the Actions window.

How to edit an action

Example scenario: You already entered an action and realize that you need to change it.

To edit a batch process action

- 1 Select the action you want to edit from the list of actions in the Actions window.
- 2 Click **Edit**. The Edit Action window opens.



Edit Action window

In this window, you define the actions to be taken on the patron records.

- 3 Make the necessary changes.
- 4 Click **Save** to return to the Actions window.

How to remove an action

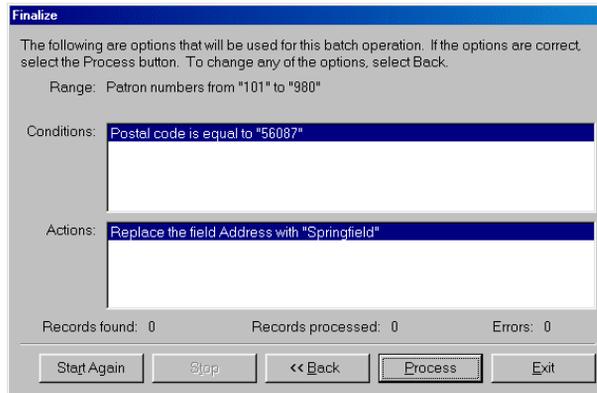
Example scenario: You already entered an action and realize that it is no longer needed.

To remove a batch process action

- 1 In the Actions window, select the action that you want to remove.
- 2 Click **Remove**.

Step 4: Verifying patron batch process settings

When you click Next in the Actions window, the Finalize window opens.



The screenshot shows a window titled "Finalize" with a blue header. Below the header, there is a text box containing the following instructions: "The following are options that will be used for this batch operation. If the options are correct, select the Process button. To change any of the options, select Back." Below this text, the "Range" is set to "Patron numbers from *101* to *980*". There are two input fields: "Conditions:" with the text "Postal code is equal to *56087*" and "Actions:" with the text "Replace the field Address with *Springfield*". At the bottom of the window, there are three status indicators: "Records found: 0", "Records processed: 0", and "Errors: 0". Below these indicators are five buttons: "Start Again", "Stop", "<< Back", "Process", and "Exit".

Finalize window

In this window, you can review the range, conditions, and actions for the patron batch process.

All of the batch process settings appear in the Finalize window. For more information about the Finalize window, see "About the Finalize window" in the *Patrons* chapter of the *Spectrum CIRC/CAT Reference Manual*.

Before you click Process to begin the batch process, carefully look over your options to make sure you chose the correct records and changes. If the options aren't correct, you can return to the previous windows to change them by clicking the Back button. Remember, if actions exist, the range options in the Range window are unavailable for modification until you remove the actions.

Step 5: Starting the patron batch process

Once you have verified that all your settings are correct, you can start the batch process.

To start the batch process

- 1 Review the options in the Finalize window. (If the current batch process options aren't correct, you can change them by clicking **Back** or cancel the entire process by clicking **Exit**.)
- 2 Click **Process** to start the batch process (click **Stop** to cancel the process). When the batch process is done, an information window informs you that the process is complete. (If an action cannot be performed on one or more records, you are informed of the reason.)
- 3 Click **OK**.



TIP: To start another batch process, click Start Again. To exit batch process, click Exit.

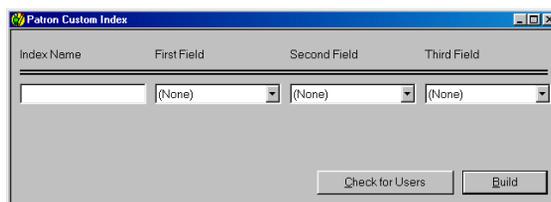
Creating a patron custom index

In Spectrum CIRC/CAT, your patron database is automatically indexed by some patron fields, so that you can sort your records by these fields. You can also create and save your own custom index. The custom index can be based on a single field or multiple fields. When new patron records are added to the database, the existing custom index is automatically updated to include the new records.

Once you have created an index, you can use it when exporting patron records and printing reports, just as you would a standard index. For example, to sort students by homeroom in a school library, you could create an index sorted by the user-defined 1 (which you have defined as homeroom), last name, and first name. Or, to create a mailing list for a public library, you could create an index sorted by postal code, state, and city.

To open Patron Custom Index

From the Navigator toolbar, click the **Patrons** button and choose **Custom Index**. The Patron Custom Index window opens.



Patron Custom Index window

In this window, you can create a custom index to use for printing reports and exporting records.

For information about the Patron Custom Index window, see "About the Patron Custom Index window" in the *Patrons* chapter of the *Spectrum CIRC/CAT Reference Manual*.

Creating and editing a patron custom index

To create or edit a patron custom index, you enter an index name, select the appropriate fields and have the program build the index. If the index already exists, the program informs you and confirms that you want to rebuild the index.

How to create and edit a patron custom index

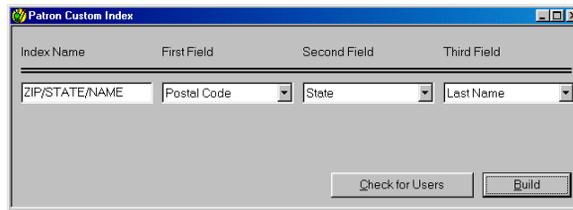
Example scenario: You want to create an index called CITY DATE ADDED, which first sorts by city and then sorts by the date the record was added. In other words, you want records arranged by city. However, for records that have the same city, you want that group of records further sorted by date added.

To create or edit a patron custom index

- 1 From the Navigator toolbar, click the **Patrons** button and choose **Custom Index**. The Patron Custom Index window opens.
- 2 Enter the name of the patron custom index in the **Index Name** box. In this case, type *CITY DATE ADDED*. Notice that the characters are displayed in capital letters.
- 3 Select the fields to be indexed by in the **First Field**, **Second Field**, and **Third Field** boxes. (If you don't use a field, select **(None)** in its box.) In this case, choose **City** for the **First Field**; choose **Date Added** for the **Second Field**; choose **(None)** for the **Third Field**.
- 4 To check whether the patron files are in use, click **Check for Users**. The Check for Users window opens, informing you whether other users are using the patron files. You cannot build a custom index while the patron files are in use.
- 5 Click **OK** to close the Check for Users window.
- 6 Click **Build**. The Build Patron Custom Index window opens and shows the progress of the build process.
- 7 When the window indicates that the custom index is complete, click **Close**.

Note: If you stop the build process, the index is not built. To build it, you must restart the process. (If you don't explicitly build a custom index, the index files are created the next

time a program opens them, so they show up on your hard disk, but they won't have useful information in them.)



Patron Custom Index window

After you build a custom index, the index name and fields are displayed in the boxes.

Renaming the patron custom index

You can rename a patron custom index without having to rebuild the index.

How to rename the patron custom index

Example scenario: You have already built a patron custom index called CITY DATE ADDED. Now you want to change the index name to CITY DATE.

To rename a patron custom index

- 1 From the Navigator toolbar, click the **Patrons** button and choose **Custom Index**. The Patron Custom Index window opens showing the existing custom index.
- 2 For the index you want to change, enter the new name in the **Index Name** box. In this case, enter *CITY DATE*.
- 3 Click **Build**. The program informs you that only the name has changed.
- 4 Click **OK** to update the name.

Removing the patron custom index

If you no longer need a particular patron custom index, you can remove it from the system. To remove it, you must rebuild the index.

How to remove the patron custom index

Example scenario: You have previously created a patron custom index called *PATRON TYPE EXP DATE*. You no longer need this index and now want to remove it.

To remove a patron custom index

- 1 From the Navigator toolbar, click the **Patrons** button and choose **Custom Index**. The Patron Custom Index window opens showing the existing custom index.
- 2 For the index that you want to remove, in this case *PATRON TYPE EXP DATE*, delete the name of the patron custom index in the **Index Name** box.
- 3 Click **Build**. The Build Patron Custom Index window opens.
- 4 When the custom index is complete, click **Close**. Each of the field boxes has **(None)** selected.

Using the patron custom index

You can use a patron custom index when exporting patron records and when printing reports. When performing these activities, your custom index can be selected from the Index box. You will notice that custom index names are always displayed in capital letters.

When exporting records or printing a report, if you select a patron custom index, the default custom index range is displayed. The Change Custom Index Range button is also enabled. When you click this button, the Custom Index Range Selection window opens, so that you can use the index to specify a range. To help you do this, the Custom Index Range Selection window lists the field(s) used to build the index and lets you specify a range for each. The first index field defaults to the lowest and highest values in the database so all records are initially included in the range. The second and third index fields, if available, are blank by default.

For example, you could create a mailing list of patrons that live within your city that were added to your database within the past year. You could create a custom index to sort your patron records by city and date added, then export only the records that contain your city name and fall within the appropriate date range.

For more information on using a patron custom index, see "Using a custom index to export patron records" in the *Patrons* chapter and "Selecting a custom index range" in the *Reports* chapter of this manual.

Importing patron images

Patron images are displayed in the Circulation and Patron Edit parts of the program. Using this image, you can verify that the correct patron is checking out materials.

There are two ways to add patron images to the program:

- Add an image to a single patron record. This is done in Patron Edit. See "Managing patron images" in the "Editing patron records" section of this chapter for more information.
- Import multiple patron images and map them to existing patron records using a map file. This is done in the Import Patron Images part of the program.

In Import Patron Images, you can import multiple patron images into your database from a file on a CD, floppy disk, or a different location on your hard disk. Typically, the map file and patron images are provided by a photography vendor such as Herff Jones and Lifetouch. This feature is useful for importing class pictures at the beginning of the school year.

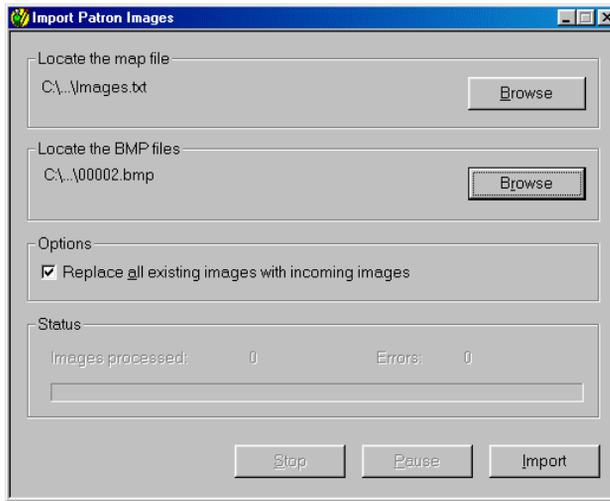
Note: In order to use patron images in Spectrum, the computer images must be in bitmap file format. Microsoft Windows uses a .bmp file extension to indicate bitmap images.



When you import patron images, you are adding them to the Spectrum CIRC/CAT database. You should always keep the original bitmap files in case an image is accidentally deleted from the database. You can then add a single bitmap image to a patron record in the Patron Edit part of the program.

To open Import Patron Images

From the Navigator toolbar, click the **Patrons** button and choose **Import Patron Images**. The Import Patron Images window opens.



Import Patron Images window
In this window, you can import a file of patron images.

What is a map file?

A map file is a file provided by your photograph vendor that lists each patron number and bitmap file. The file must list the data in quote-comma-quote delimited format. Each patron record must be on a separate line of text.

There are two acceptable formats for the map file: 2-field format and 5-field format. The fields must be in the order described below, and cannot contain any additional data. When you request files from your vendor, make sure you specify one of the following formats.

2-field format

This map file format contains two fields, patron number and bitmap file. This is the type of file provided by vendors such as Herff Jones.

Example

```
"649465", "00001.BMP"  
"687692", "00002.BMP"  
"859428", "00003.BMP"
```

5-field format

This map file format contains five fields (listed in order): patron number, bitmap file, grade level, last name, and first name. Since Spectrum CIRC/CAT only uses the first two fields, the last three fields are ignored. This is the type of file provided by vendors such as Lifetouch.

Example

```
"465649", "00004.BMP", "010", "COLLINS", "TRACY"  
"692687", "00005.BMP", "007", "BAKER", "MICHAEL"  
"428859", "00006.BMP", "011", "ALLEN", "TARA"
```

Note: Other vendors may be used as long as they provide the map file in one of the two formats above.

How to import patron images

Example scenario: Your photography vendor sent you a CD containing the new school photos for the second grade students. You want to import the images and overwrite last year's student pictures.

To import patron images

- 1 From the Navigator toolbar, click the **Patrons** button and choose **Import Patron Images**. The Import Patron Images window opens.
- 2 In the **Locate the map file** group, click **Browse**.
- 3 In the Open window, locate and select the map file on the CD and click **Open**.
- 4 In the **Locate the BMP files** group, click **Browse**.
- 5 In the Open window, locate the folder where your image files are saved and select one of the bitmap (.bmp) files. This tells Spectrum CIRC/CAT where to locate your image files. Click **Open**.
- 6 Make sure the **Replace all existing images with incoming images** option is selected.
- 7 Click **Import**.

If you've already imported a patron file, a window opens stating that the p_photos.log already exists. Click **Append** to add error messages to the existing log file. Click **Overwrite** to replace the existing error messages in the file with new error messages.

The import process begins. When it is complete, a window opens and displays the number of images added to the database.

- 8 Click **OK** to return to the Import Patron Image window. If any errors were detected, you can click the **View File** button to view the error log.

To pause or stop the import, see "Pausing or stopping a patron image import".



When you import patron images, you are adding them to the Spectrum CIRC/CAT database. You should always keep the original bitmap files in case an image is accidentally deleted from the database. You can then add a single bitmap image to a patron record in the Patron Edit part of the program.

Pausing or stopping a patron image import

While the program is importing patron images, you can click **Pause** to temporarily halt the importing processing or **Stop** to cancel importing. *Note:* You can only select **Stop** after **Pause** is selected.

If you pause the import, you can click **Import** to resume importing where you left off.

If you stop the import, only the patron images that the program already processed will be in your database. The image being processed when you click **Stop**—and any images after that one—will not be imported.

How to pause or stop a patron image import

Follow the instructions below to pause or stop a patron image import.

To pause the import

Click **Pause**. The program temporarily halts the import. (Click **Import** to resume importing.)

To stop the import

- 1 Click **Pause**.
- 2 Click **Stop**. The program stops importing records but the Import Patron Images window remains open.

