

Refreshing Alice borrower data from MAZE Canberra / Goulburn CEO Schools February 2007

Overview

The Alice Library system allows student borrower details to be imported from the MAZE administration system.

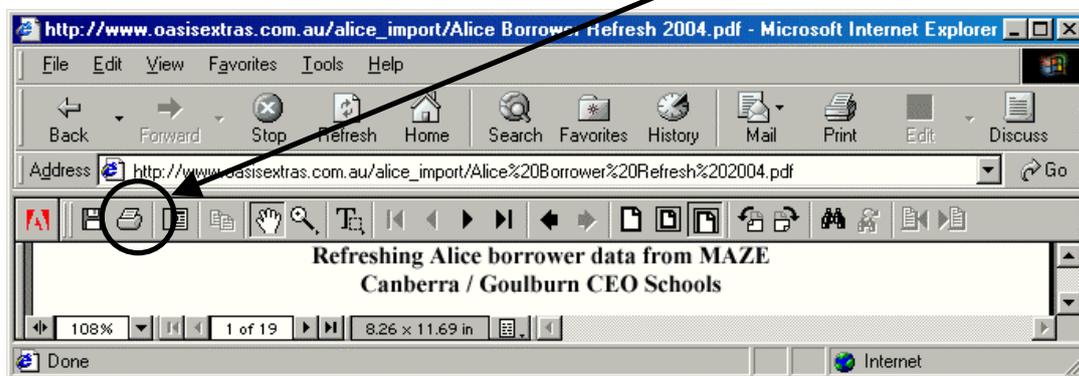
Existing library borrower records will be updated with the correct Scholastic Year, Roll Class and other student details;

- New students in MAZE but not yet in Alice will have a new borrower record created;
- Left students no longer in MAZE will be removed from Alice, unless they have outstanding loans.

A procedure has been developed that will check the validity of the MAZE export data before refreshing it into Alice. This will alert you to missing Student IDs in Alice or Student IDs that are incorrect for the borrower.

Preparation

1. If you feel more comfortable working from a paper copy of these instructions, **Print these instructions** by clicking the Printer icon near the **top left** of the screen. Do not use the Internet Explorer printer icon at the top middle of the screen. It won't print properly.



2. **Have one blank floppy disk** available to use.
3. Ask the librarian:
 - what **Borrower Loan Category** to use;
 - whether **Alice will allocate barcodes** or will the **Student ID Number** be used as the barcode;
 - what numbers to use for **the Borrower Loan Limits**.

Follow these STEPS...

At Maze Computer

1. [Export Student Data from MAZE](#)

At the Alice Shutdown computer

2. [Check Exported Data Against Alice Borrower Data](#)
3. [Refresh Student Details into Alice from MAZE](#)

If Student Ids are used as borrower Barcodes

4. [If the Student ID is also the Alice Borrower Barcode...](#)

Each step is described in more detail on the following pages.

If you have printed these instructions...

An Internet link is included as part of these instructions.

- Check Alice Borrowers

If you are reading the on-line version of this document these links can be clicked and will work directly.

If you have printed these instructions, return to the web page from which you printed them and follow the links that are provided there.

1. Export Student Data from MAZE for Import into Alice

Before you start

Ask the librarian:

1. What **Borrower Loan Category** code that is used for most (or all) students in Alice Library.
It should be a single letter like 'S' for Student or 'P' for pupil.
2. Whether
 - Alice allocates the barcodes
 - The Student ID is used as the barcode.

Perform these steps at the MAZE computer.

Either follow the Short Instructions or the Detailed Instructions. You do not need to do both.

Short Instructions

1. Insert a blank floppy disk in the floppy disk drive.
2. In MAZE, Select **Students and Families, CEO Data Exports, General Student**, Then select the appropriate report,
3. Click **Export, Save**
4. Enter the **Borrower Loan Category**. Leave the other prompts blank. Click **OK**.
5. When the export has finished, click **Confirm and Close**.

If the short instructions were too brief, follow the **Detailed Instructions** below.

Detailed Instructions

1. Insert a blank Floppy Disk in the floppy disk drive.
2. From the Maze Main Menu:

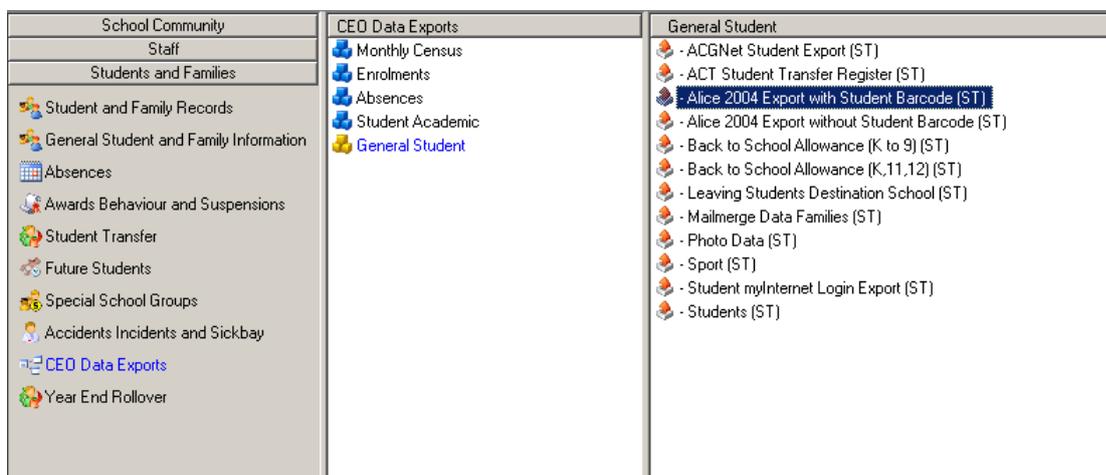
Students and Families

↳CEO Data Exports

↳General Student

↳Alice 2004 Export with Barcodes or

↳Alice 2004 Export without Barcodes



- If your library **allows Alice to allocate barcodes**, double click on:
 “Alice 2004 Export without Student Barcode”.
 Most Primary Schools use this option
 If your library **uses the Student ID as the barcode**, double click on:
 “Alice 2004 Export with Student Barcode”.

- MAZE will then ask a number of questions:

- Extra Characters: Normally this will be left blank. If not, then your librarian should be able to advise you what should be entered.
- Number of Student ID digits used in barcode. If you allow Alice to allocate barcodes, please leave this as 0. If your school uses the Student ID as the barcode, please delete the 0 and then enter either 6 or 7 depending upon the number of digits your school uses in the barcode.
- Default Borrower Category: Your librarian will advise you what code should be entered here. For example, **S** for Student or **P** for Pupil.
- Number of Category 1 Items Allowed: Leave this as 0. The librarian will set the loan limits for new borrowers in Alice.
- Number of ‘Other’ Category Items Allowed: Leave this as 0. The librarian will set the loan limits for new borrowers in Alice.

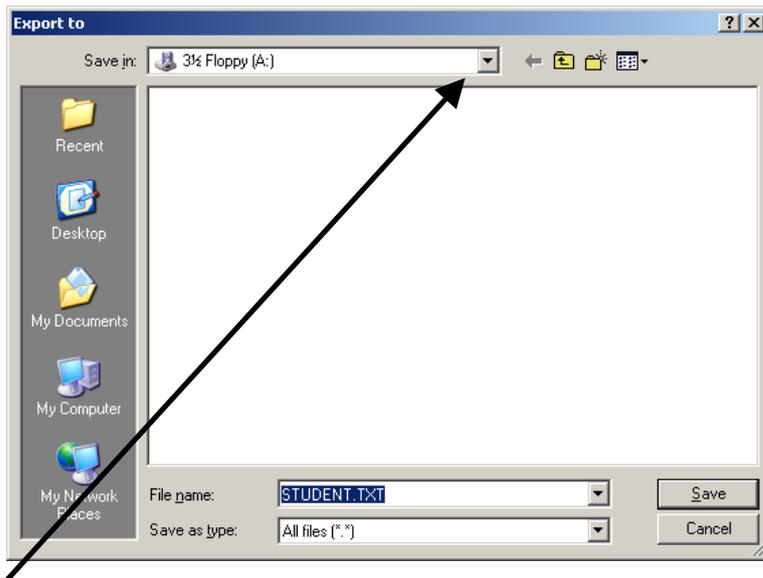
Click **OK**

- Maze next asks which students you wish to export.

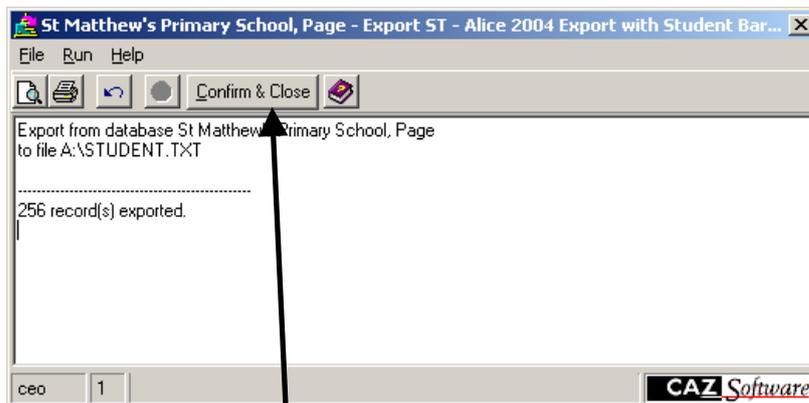
Input	Value
Starting Year	KG
Final Year	Y06
First Student	AHRENA01
Last Student	WRIGHC01
Enrolled on or After (dd/mm/yyyy)	01/01/2007

Accept the default values displayed by clicking on **OK**
 The default values will export ALL students

- The Export to screen will be displayed



7. Navigate to the floppy drive by choosing from the drop-down box. Click on **Save** when the floppy drive is selected.
MAZE will then display xxx record(s) exported.



8. Click **Confirm & Close**.
9. The Librarian will now be able to use this floppy disk to run the procedures in Alice to import the student information.

2. Check Exported Data Against Alice Borrower Data

This step compares and updates the Student ID stored in Alice with the one supplied by MAZE. Students are matched by their name and if the program cannot match unambiguously, you will be asked to make the match manually.

Perform these steps at the Alice Shutdown computer. Follow either the Short Instructions or the Detailed Instructions. You do not need to do both.

Short Instructions

1. **IMPORTANT:** If your library uses the Student ID as the barcode, read **section 4** of this document and make the changes required **for Seven Digit Borrower Barcodes BEFORE** proceeding.
2. Click on the link '[Check Alice Borrowers.exe](#)' to download and execute the file containing the procedure to check the exported Maze Student Data against the Alice library borrower data.
3. Unzip the file to L:\OASIS\AOASIS and then click **Close** to run the checking program. (If your Alice is not installed on the L: drive, change L: to the appropriate drive letter.)
4. Ensure the Maze-Alice data transfer disk is in the floppy disk drive A: and press **Enter** to load the file A:\STUDENT.TXT
5. If any students are not matched by name then select them from the list of un-matched students. To skip a student who has left, press <Esc> and then <C>**ontinue**.
6. When all students have been matched, Print the summary.

If the short instructions were too brief, follow the **Detailed Instructions** below.

Detailed Instructions

IMPORTANT: If your library uses the Student ID as the barcode, read section 4 of this document and make the changes required **for Seven Digit Borrower Barcodes BEFORE** proceeding

Click on the link '[Check Alice Borrowers.exe](#)' to download and execute the file containing the procedure to check the exported Maze Student Data against the Alice library borrower data..

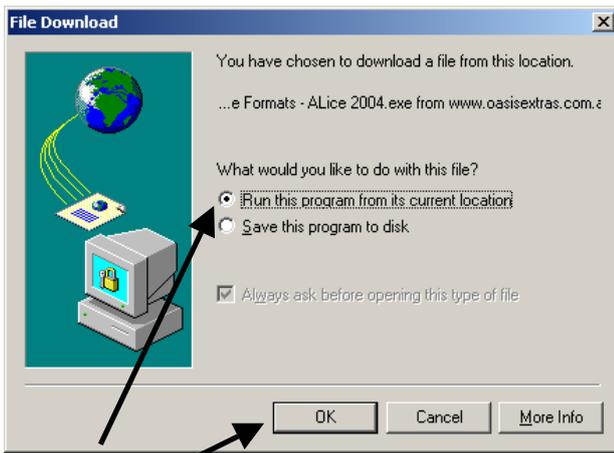
Internet Explorer will display a warning message.

The exact message will vary with the version of Internet Explorer being used and how it is configured.

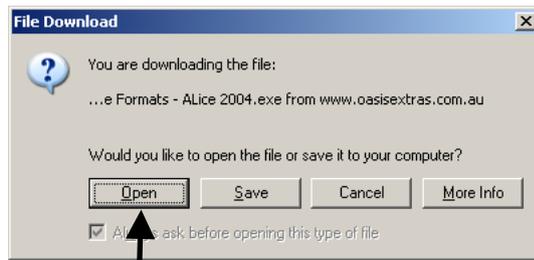
Double click to download and execute the file [Check Alice Borrowers.exe](#)

Internet Explorer 5

Internet Explorer 6



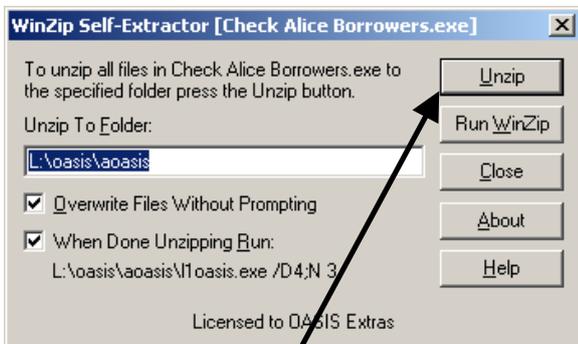
Click **Run this program from its current location**
Click **OK**



Click **Open**



Click **Yes**

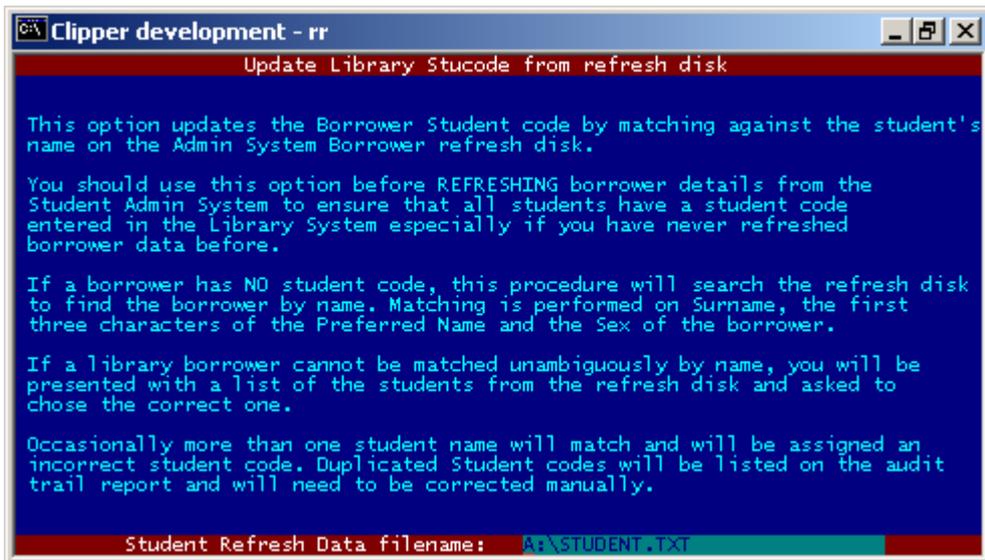


If your Alice system is installed on a drive letter other than L:, change L: to the correct drive letter.

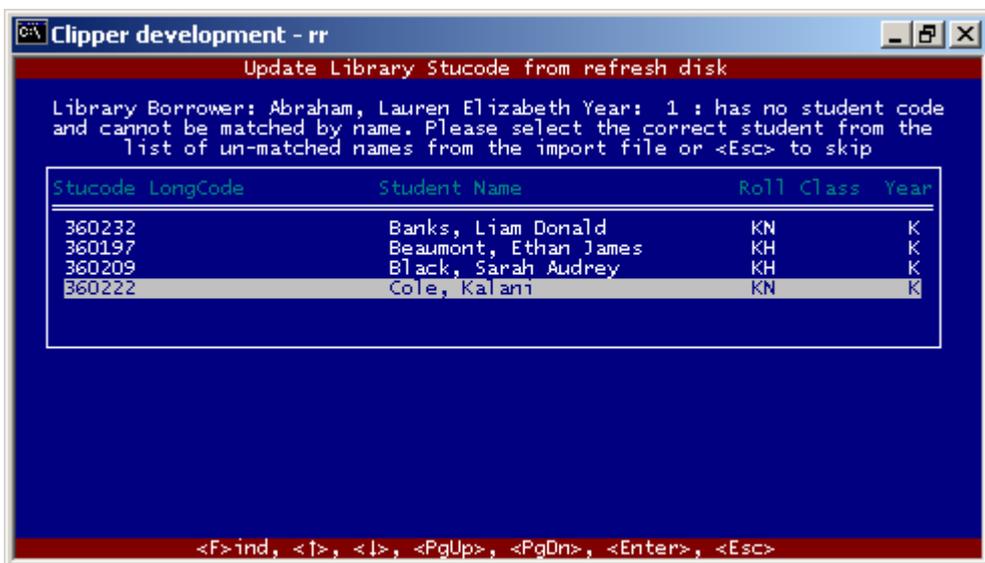
Click **UNZIP**



Click **OK**



Insert the MAZE-Alice export floppy disk into drive A: and press **Enter**.



Most students will be matched automatically by name. Where a student name is found in the library system that is NOT matched by name to the Maze student data, you will be prompted to select the student from a list of students who have not already been matched from the Maze-Alice Import disk.

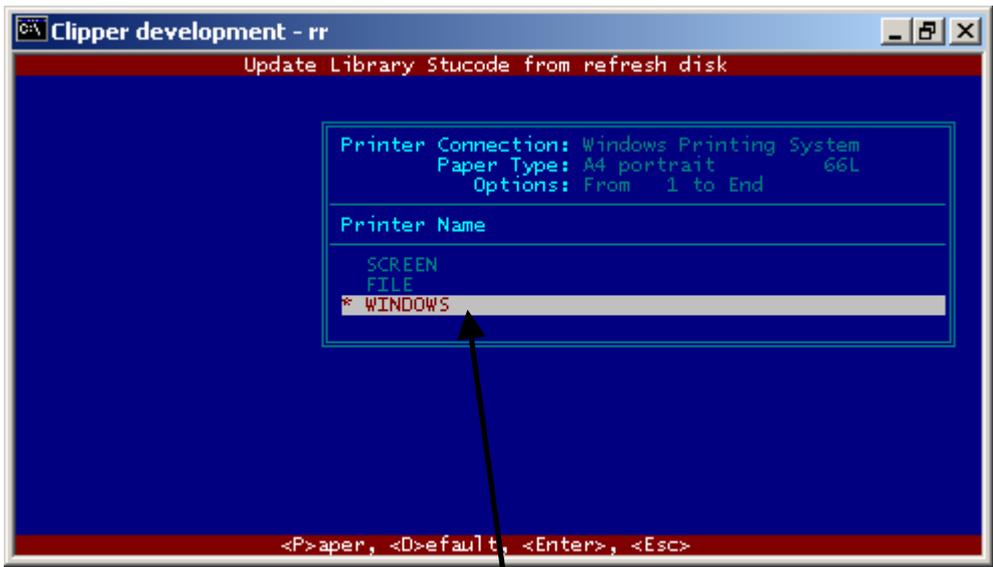
Highlight the correct student's name and press **Enter** to select them.

If the student is no longer at the school, press **<Esc>** and then **<C>ontinue** to skip over this student.

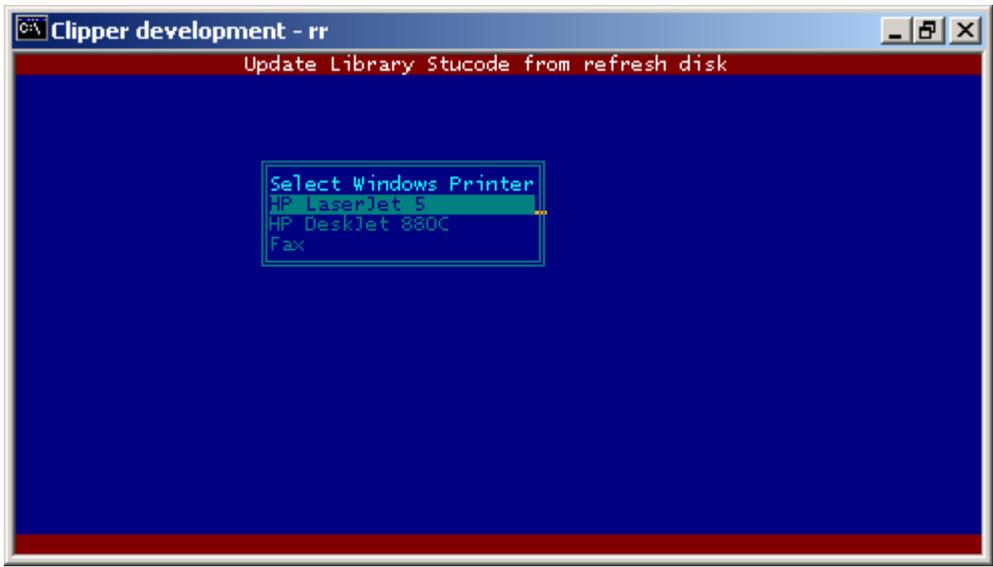
When all unmatched students have been identified or skipped over, a report will be printed of changes made.

Select **<P>rint**

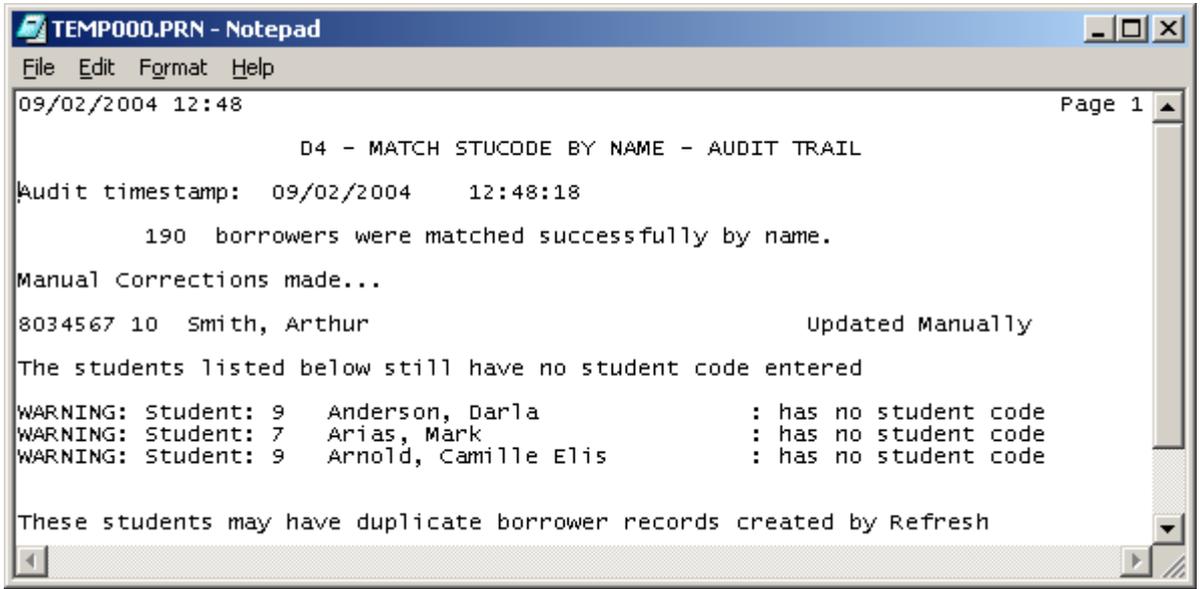
Select **<C>hange Printer**



Select the printer name **WINDOWS**.



Select the correct **Windows Printer** to be used and press **Enter**



A report similar to this one will be printed.

Manual Corrections Made

Any students that you matched manually will be listed here.

Students with no Student code in Alice

Any students that still do not have a student code in Alice will be listed here.
Only students who have left the school should be listed.

3. Refresh Student Details into Alice from MAZE

Preparation

1. Get the **MAZE – Alice Student Export data disk** from the front office.

Perform these steps at the **ALICE Shutdown computer**. Follow either the Short Instructions or the Detailed Instructions. You do not need to do both.

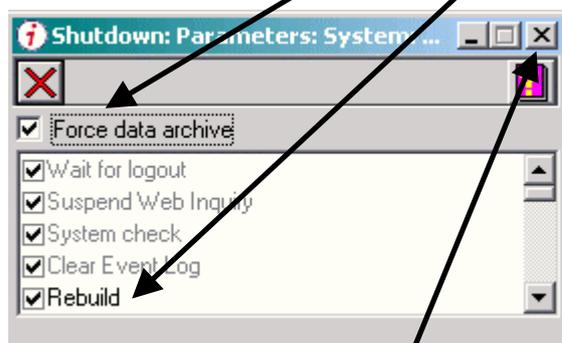
Short Instructions

1. Perform an **Alice Shutdown** with **Force Data Archive** and **Rebuild** selected (This step is essential to confirm any changes made in the previous Alice Borrower Data Check!)
2. Delete all students in the highest scholastic year i.e. those who have left. Select **Circulation, Global Change, Delete**. Print the list of any students remaining in the highest scholastic year. Return their loans using **Circulation, Loans** and delete them using **Circulation, File, Borrower**.
3. Preload the Student data from the floppy disk. **System, Data Loading, Borrower**.
File: A:\STUDENT.TXT
Format: Comma Delimited
Borrower Type: Student
Loan Category: S (or whatever the correct Borrower Loan Category is for your library)
Next Borrower: .NEXT.
Barcode Prefix: B
Refresh: ✓
4. Perform an **Alice Shutdown**. This will actually load the data and includes a Rebuild Indexes and Data Archive.
5. Check that new students have been added, that existing students have correct scholastic year and roll class and left students are no longer present.
6. Global Change Borrower Loan Limits and Borrower Resource loan category if required.

If the short instructions were too brief, follow the **Detailed Instructions** below.

Long Instructions

- 1 Perform an **Alice Shutdown** with **Force Data Archive** and **Rebuild** selected.
(This step is essential to confirm any changes made in the previous Alice Borrower Data Check!)
Select: **System, Parameters, Shutdown**
Tick: **Force Data Archive** and **Rebuild**



Close the Shutdown Window



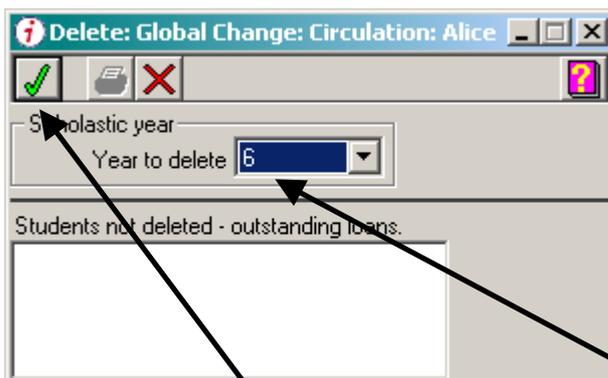
Close the Main Alice Menu Window



Click the **Green Tick** to perform the Alice Shutdown immediately.

Important: Allow the Shutdown to complete. Do NOT close the Shutdown task list window as this will cancel the Shutdown process. Shutdown should take 5 – 15 minutes.

2. **Delete all students in the highest scholastic year** i.e. those who have left.
From the Alice Main Menu Select: **Circulation, Global Change, Delete.**



Select the highest scholastic year at your school as the **Year to delete**.
Click the **Green Tick**.

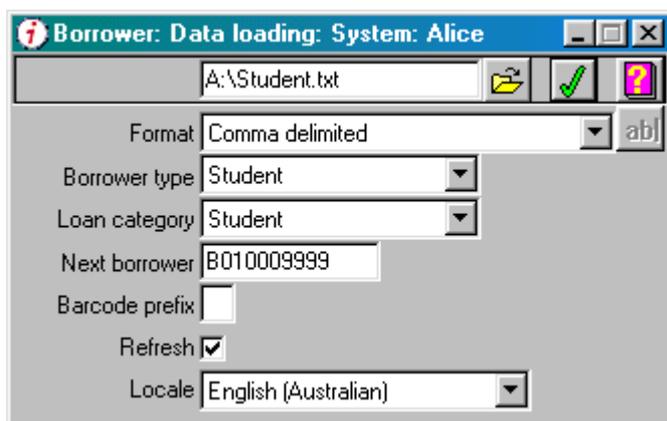
Any students who are not deleted because they have outstanding loans will be listed along with details of their outstanding loans.

Print this report.

Return the outstanding loans in **Circulation, Returns**.

Delete each of these students using **Circulation, File, Borrower**.

3. Insert the **MAZE-Alice Export disk** in the floppy disk drive.
4. Select: **System, Data Loading, Borrower**.



5. Fill in the details as shown above.
The **Format** chosen **MUST** be **Comma Delimited**.

For the **Next Borrower** barcode **and barcode prefix**, choose one of the following options:

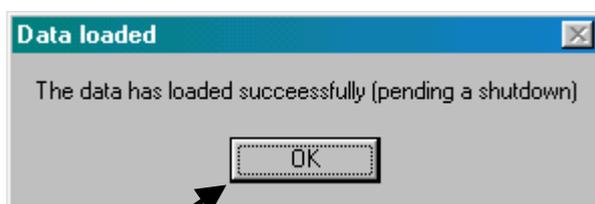
- Scan the next available Borrower Barcode from the sheet or roll of barcodes and leave Barcode prefix blank. Alice will start allocating borrower barcodes sequentially starting with the barcode entered;
- If you want Alice to allocate the next available barcode, leave 'Next Borrower' as '.NEXT.' and enter the barcode prefix 'B';

If you exported student data from MAZE WITH student IDs as barcodes, the student ID will be used as the borrower barcode irrespective of which option you choose – but you still must choose one option otherwise the Green Tick will not be available to select.

Refer to the separate discussion about Barcodes if you use the Student ID number as the Barcode. See Section 5

Caution: Since the **Refresh** box is ticked, the file STUDENT.TXT must contain ALL students in the school. You must not select **Refresh** if the file contains just new students because Alice will delete the Alice borrower records for all borrowers not in The MAZE-Alice Import file STUDENT.TXT.

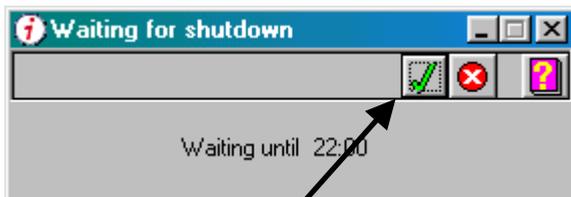
6. **Click the Green Tick.** (If the Tick is not green, one or more fields have not been filled in.)



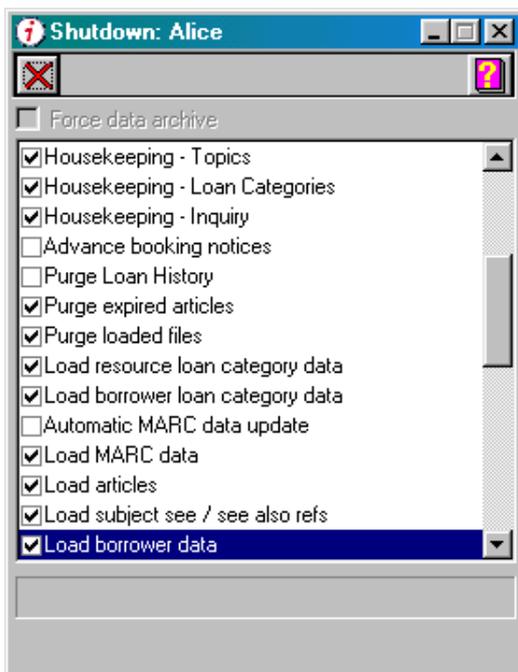
7. **Click OK.**
Close the **Borrower: Data loading: System: Alice** Window by clicking the **X** in the top right corner of the window.

Note: The borrower data will be pre-loaded in just a few seconds but will not update the Alice data files until an **Alice Shutdown** has been performed.

8. Perform an **Alice Shutdown**.
Close all open Alice windows
Close the Alice Menu window.



Click the **Green Tick** in the **Waiting for Shutdown** window to perform the shutdown.



Note: As part of the Shutdown, Alice will **Rebuild Indexes** then **Load Borrower Data** and finally create a **Data Archive**. These steps may take several minutes to complete.

Important: Allow the Shutdown to complete. Do NOT close the Shutdown task list window as this will cancel the Shutdown process. Shutdown should take 5 – 15 minutes.

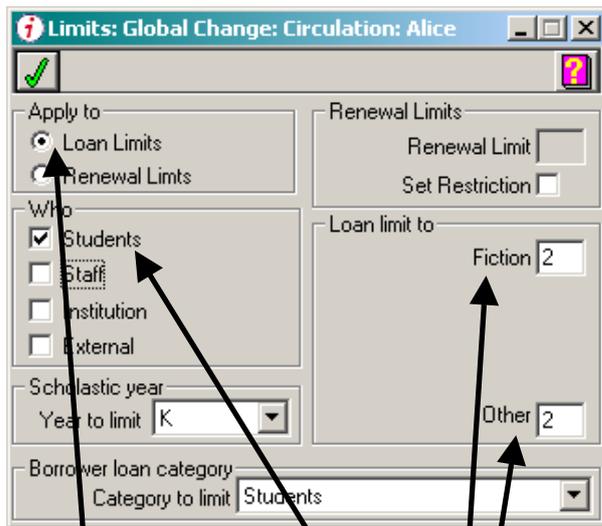
9. Logon to Alice again and **check that the borrower details have been updated** correctly.

Select: **Circulation, File, Borrower**.

Check:

- New Students have been added and have an appropriate barcode;
- Existing students have had their Scholastic year and roll class updated;
- Left students are no longer present, other than those with outstanding loans.

10. If Loan Limit values were not entered when the MAZE-Alice Export file was created, Select: **Circulation, Global Change, Limits**



Tick **Loan Limits** and **Students**

Set to appropriate values the **Loan Limits**.

Click the **Green Tick** to globally set the Loan Limit for all students in one Scholastic Year. Repeat the process for other scholastic years as required.

11. If your library has more than one **Borrower Loan Category**, you will need to globally change the **Borrower Loan Category** for some of the students. Select: **Circulation, Global Change, Loan Category**



Set the **Scholastic Year to update** and the

Borrower Loan Category to be assigned to all students in that Scholastic Year.

Click the **Green Tick**.

Repeat the process for other Scholastic Years as required.

Congratulations! Your student borrowers' details have now been updated.

4. If the Student ID is also the Alice Borrower Barcode...

You do **not** need to read this section if you allow Alice to allocate borrower barcodes. This section is only relevant for libraries where the student ID number is used as the borrower barcode.

1. To support **7 digit Borrower Barcodes**, make the following changes:
 - System, Parameters, Library, Barcodes:
 - Tick “Keep 7th Character”.
 - Tick “Special Barcodes”
 - Enter the “Special Barcode Rearranging Formula” as shown below.

Character	Position	Rearranging formula	
Special barcode 1	R	1	1+2+3+4+5+6+7+9+10+11+12
Special barcode 2		0	
Special barcode 3		0	

2. When exporting student details from MAZE, select the report:
Alice 2004 Export **with** Student Barcode.
This export will include the Student ID as the second field in the export file and Alice will allocate the student ID as the barcode for a newly created borrower. Alice will NOT change the barcode of any existing borrowers so if the MAZE ID has been changed for existing borrowers and you want to change their borrower barcode to match, you will need to use OASIS Library Extras option D4 to do this AFTER the borrower details have been Updated into Alice.
3. Alice will ONLY allow the school code to be included at the end of the student barcode if the student ID is exactly 6 characters long. Students with 7 digit Student Ids will have a barcode created without the school code. For example: If the school's code is 9999 the following barcodes will result.

6 digit ID	123456	Barcode: 1234569999
7 digit ID	1234567	Barcode: 1234567

4. Alice is very forgiving about the format of barcodes and will accept pretty much any barcode format. However, it will become pathologically confused if a Borrower barcode is identical to a Resource Barcode.
5. If your library uses non-standard barcodes because it was migrated from another library system in the past and 'Foreign Barcodes' translation is used to 'map' the non-standard barcodes into Alice format, then you need to be particularly careful that the Foreign Barcodes translation does not create duplicate barcodes. This is particularly likely with library systems that have been migrated from Ocelot as the resource barcodes started with the digit 1.