

Refreshing Alice borrower data from MAZE ACT Government Schools 2008

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 in Alice;
- Left students no longer in MAZE will be removed from Alice, unless they have outstanding loans.

In 2006, the process was changed because MAZE changed from 6 to 7 digit student codes and new MAZE reports were created to export the student data to refresh Alice borrower details. The old MAZE reports must **NOT** be used as they will produce incorrect results.

A new automatic 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.

Schools that use the Student ID Number as the borrower barcode will also be affected by the introduction of 7 digit Student ID Numbers and should read section 5 of these notes carefully as changes must be made to the default Alice parameters **BEFORE** loading new borrowers.

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 a USB thumb drive** available to use. (Note: Because of their now notorious unreliability, the use of a floppy disk to transfer data is **NOT** recommended.)

Follow these STEPS...

At the Maze Computer

1. [Load New Export reports into MAZE \(Only needs to be done once\)](#)
2. [Export Student Data from MAZE](#)

At the Alice Shutdown computer

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

If Student Ids are used as borrower Barcodes

5. [If the Student Code is also the Alice Borrower Barcode...
Additional Changes Required For 7 Digit Student Codes.](#)

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

If you have printed these instructions...

Two Internet links are included as part of these instructions.

- Check Alice Borrowers
- Barcode From ID

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. Load and Verify the new Alice Export procedures into MAZE

This step should have been performed for you already by IT Support.

2. Export Student Data from MAZE for Import into Alice

Before you start

Have a USB thumb drive on hand to receive the data.

Perform these steps at the MAZE computer.

Short Instructions

1. Insert the USB thumb drive into the computer.
2. In MAZE, Select **Export button** in toolbar,
3. Chose either:
 - **Alice Export with All Years** if you want Alice to allocate library borrower barcodes e.g. B02003xxxx, or
 - **Alice Export with All Years (Student ID as Barcode)** if you want to use the 7 digit MAZE/SRKS ID as the barcode for new borrowers e.g. 8034567.
4. Click **Export**.
5. Accept **year levels range** and click **OK**
6. Accept (or enter) **D:\student.txt** as the **Export To** location and click **Save**.
You may need to change the drive letter if the USB thumb drive is not using drive D:.
Do NOT use a filename longer than 8 characters or include spaces in the filename as the Checking program used at step 3 cannot interpret long 'windows' filenames'
7. When the export has finished, click **Confirm and Close**.

The Librarian will now be able to use the data on the USB Thumb drive to run the procedures in Alice to import the student information.

3. 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.

Do I need to do this step?

You can skip this step if you are sure that ALL existing borrowers have their correct MAZE/SRKS ID stored in the Student Code field in Alice. This will be the case if you have refreshed borrower data from MAZE previously since the change to 7 digits IDs and entered the MAZE/SRKS ID into Alice for any new students you entered by hand.

If you are unsure, you should NOT skip this step. Any students who do NOT have their correct MAZE/SRKS ID in Alice will have a new borrower record added, i.e. they will appear TWICE.

Before You Start

Ensure that the MAZE-Alice transfer filename is 8 characters or less. The checking program cannot interpret long 'Windows' filenames longer than 8 characters and you will not be able to load the file.

Ensure that Alice is installed in the **L:\OASIS** directory.

If the Alice shortcut starts Alice using the command 'L:\OASIS\AFW.EXE', Alice is installed in the standard way and this procedure will work.

If the Alice Shortcut starts Alice using a drive letter other than L: or without the \OASIS subdirectory, THIS PROCEDURE WILL NOT WORK. Contact OASIS Extras (02 6238 2663) for advice.

Short Instructions

1. 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.
2. 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.) (Confirm any messages about overwriting an existing file)
3. Insert the USB thumb drive containing the Maze-Alice data file into the computer and wait for it to be recognised.
4. If necessary change the drive letter of the filename from A:\STUDENT.TXT to D:\STUDENT.TXT and press **Enter** to load STUDENT.TXT
5. If any students are not matched by name then select them from the list of unmatched 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

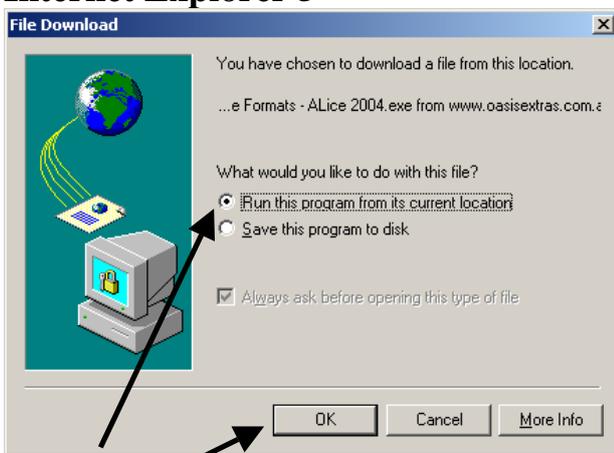
1. Insert the USB thumb drive containing the Maze-Alice data file into the computer and wait for it to be recognised.
2. Click on the link '[Check Alice Borrowers.exe](#)' to download and execute the file containing the procedure to check the exported Maze Student Data against the Alice library borrower data.

Internet Explorer will display a warning message.

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

Double click to download and execute the file **Check Alice Borrowers.exe**

Internet Explorer 5

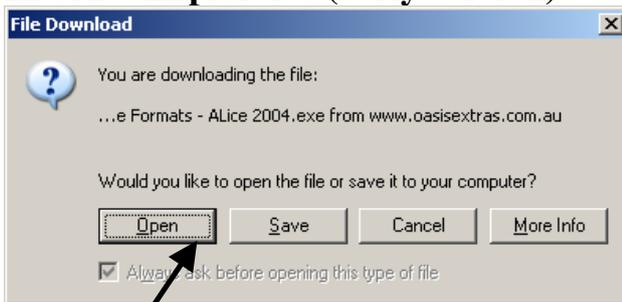


Click **Run this program from its current location**
Click **OK**



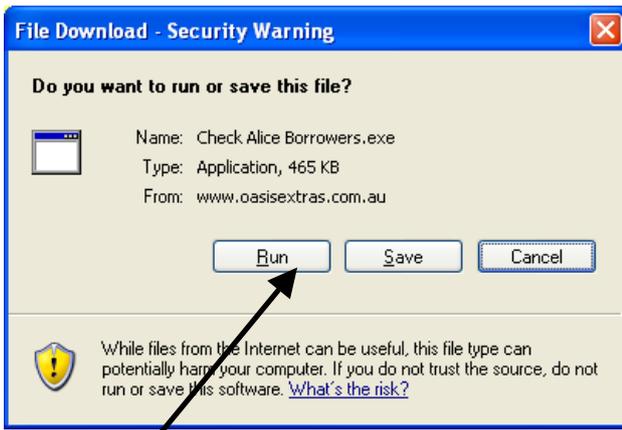
Click **Yes**

Internet Explorer 6 (early version)



Click **Open**

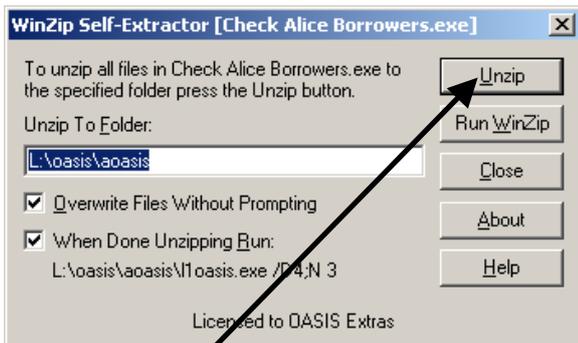
Internet Explorer 6 (recent version)



Click **Run**

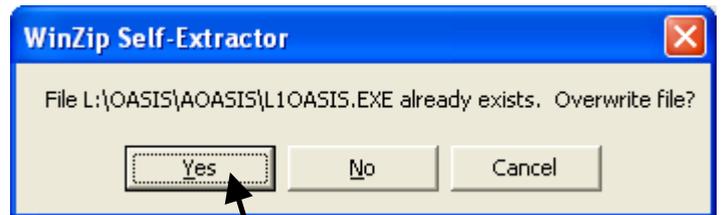


Click **Run**

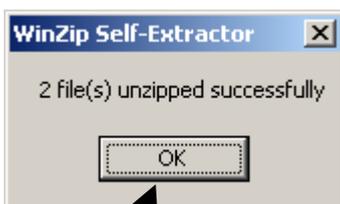


Click **Unzip**

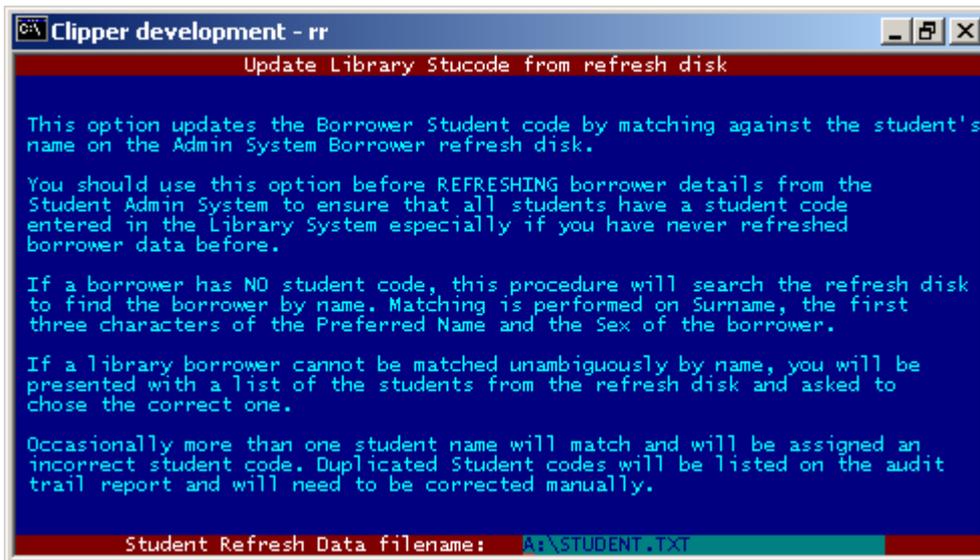
Note: If your Alice system is installed on a drive letter other than L:, change L: to the correct drive letter.
 Note: Alice MUST be installed in a subdirectory \OASIS. If it is not, you will receive the error message 'File missing ASYSTEM.D <Esc>'. This procedure will NOT work unless Alice is installed in the standard way.



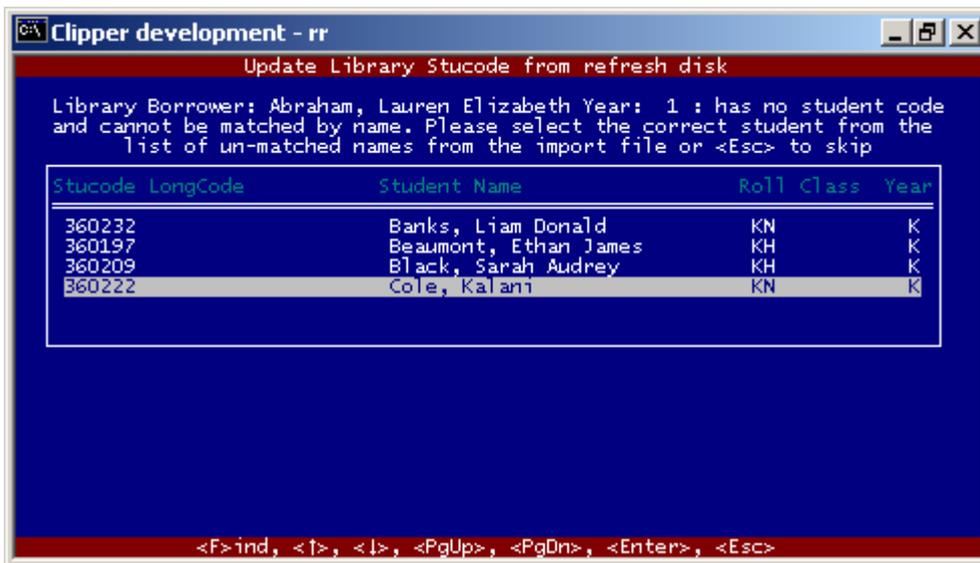
If this option has been run before, the files will already exist and you may be asked to overwrite the existing files. Click **Yes** three times



Click **OK**



If necessary change the drive letter of the filename from A:\STUDENT.TXT to D:\STUDENT.TXT (or whatever the drive letter is for the USB thumb drive) and press **Enter** to load STUDENT.TXT



If Alice borrower data has been refreshed from MAZE in the past then most students will be matched automatically by name because the names will be exactly the same in both MAZE and Alice. Matching is performed using the exact Surname, the first three letters of the Given Name and the student's Gender. Very occasionally this 'fuzzy' matching will cause the wrong student to be matched where two students have the same surname and the same first three letters of their given 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. Most students listed will have left the school and hence are no longer on MAZE, but have not been removed from Alice due to outstanding loans. The most common reasons that names fail to match between Maze and Alice are spelling errors in the surname and nicknames that are different from the Given Name e.g. 'Thomas' known as 'Tom'.

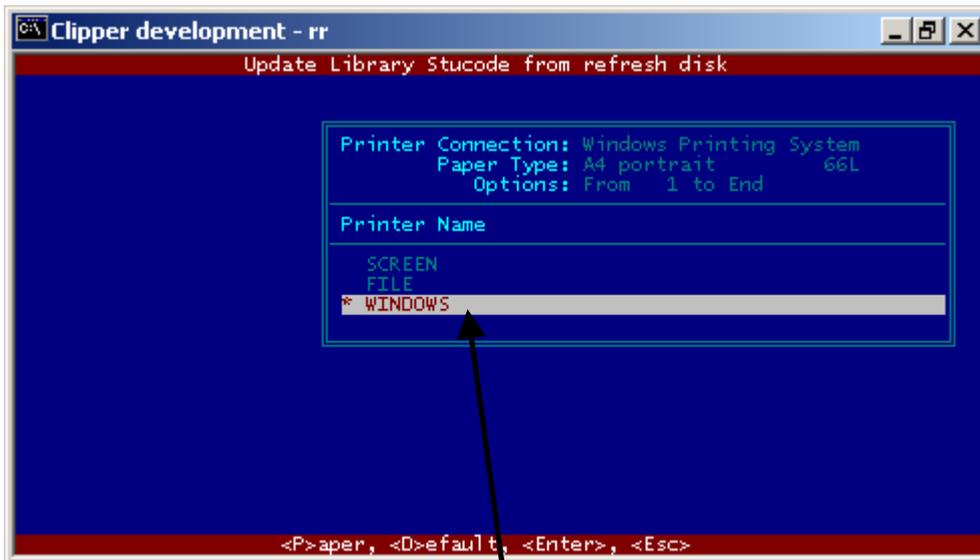
Highlight the correct student's name and press **Enter** to select them.

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

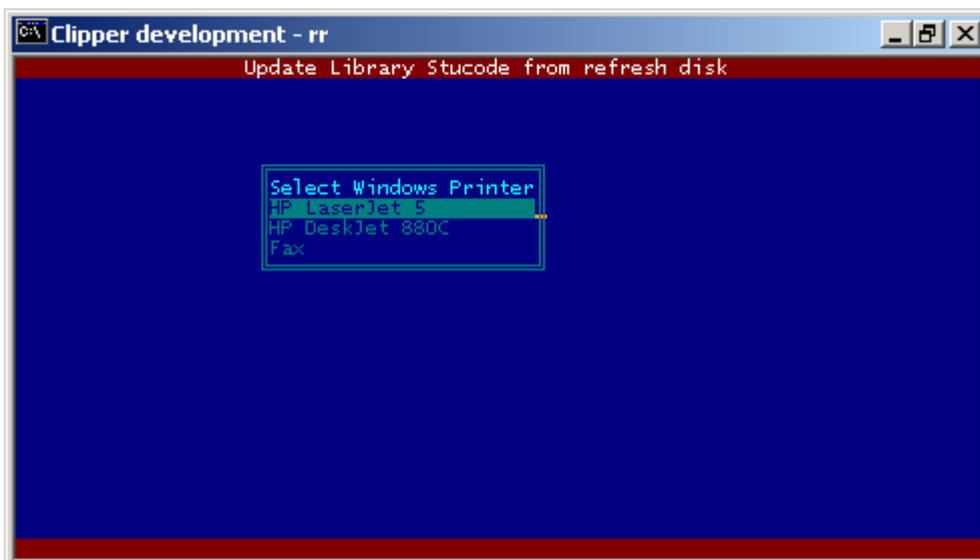
When all unmatched students have been identified or skipped over, a report will be printed of changes made.

Select <P>rint

Select <C>hange Printer



Select the printer name **WINDOWS**.



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

```
TEMP000.PRN - Notepad
File Edit Format Help
09/02/2004 12:48 Page 1
D4 - MATCH STUCODE BY NAME - AUDIT TRAIL
Audit timestamp: 09/02/2004 12:48:18
190 borrowers were matched successfully by name.
Manual Corrections made...
8034567 10 Smith, Arthur Updated Manually
The students listed below still have no student code entered
WARNING: Student: 9 Anderson, Darla : has no student code
WARNING: Student: 7 Arias, Mark : has no student code
WARNING: Student: 9 Arnold, Camille Elis : has no student code
These students may have duplicate borrower records created by Refresh
```

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.

4. Refresh Student Details into Alice from MAZE

Preparation

1. Get the **MAZE – Alice Student Export file STUDENT.TXT** on a USB thumb drive from the front office.
2. If you intend to make the MAZE Student Code the Alice Barcode, make the Alice System Parameter changes listed in section 5 first.

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

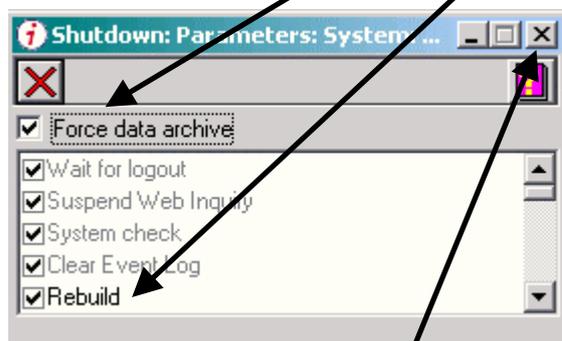
Short Instructions

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**.
Note: If most students are not deleted by this step, check the Scholastic Year Authority file in **Circulation, File, Scholastic Year** and consolidate any duplicated year levels using the **Scissors** tool.
3. Preload the Student data from the floppy disk. **System, Data Loading, Borrower**.
File: **D:\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**. (If you enter a barcode here ensure that the check letter is NOT included. The bacode must be B123459999 and NOT B12345X9999)
Barcode Prefix: **B** (If you enter a specific barcode you do not need to enter the barcode prefix)
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



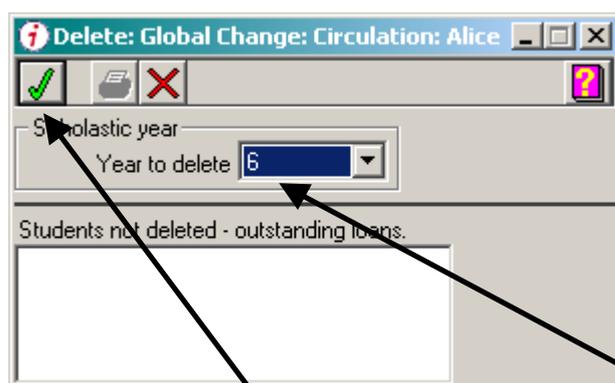
Close the Main Alice Menu Window



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.

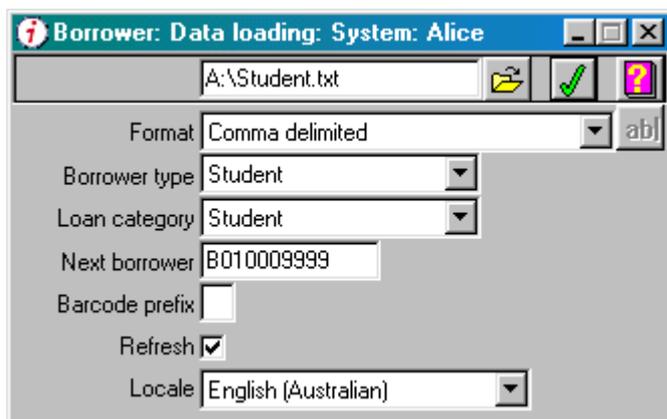
Print this report.

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

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

Note: If most students are not deleted by this step, check the Scholastic Year Authority file in **Circulation, File, Scholastic Year** and consolidate any duplicated year levels using the **Scissors** tool.

3. Insert the USB thumb drive containing **STUDENT.TXT** into the computer.
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:
EITHER:

- 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.

Note: If you enter a barcode here ensure that the check letter is NOT included. The barcode must be in the format B123459999 and NOT B12345X9999)

OR

- 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**.

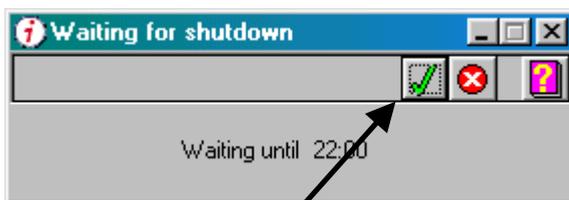
6. **Click the Green Tick.** (If the Tick is not green, one or more fields have not been filled in.)



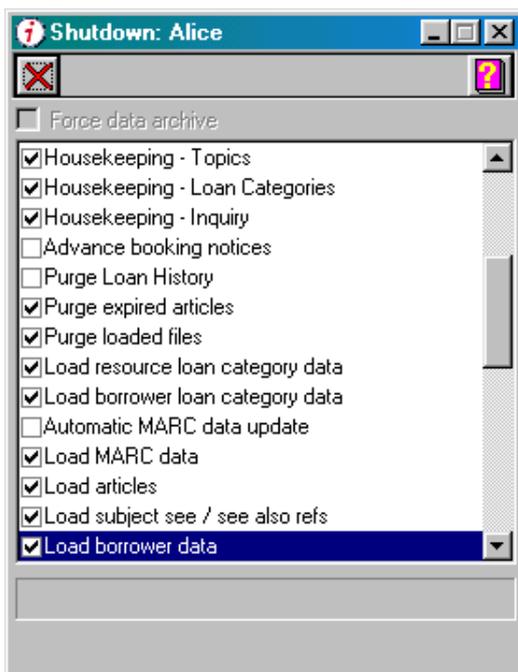
7. **Click OK.**
Close the **Borrower: Data loading: System: Alice** Window by clicking the **X** in the top right corner of the window.

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.

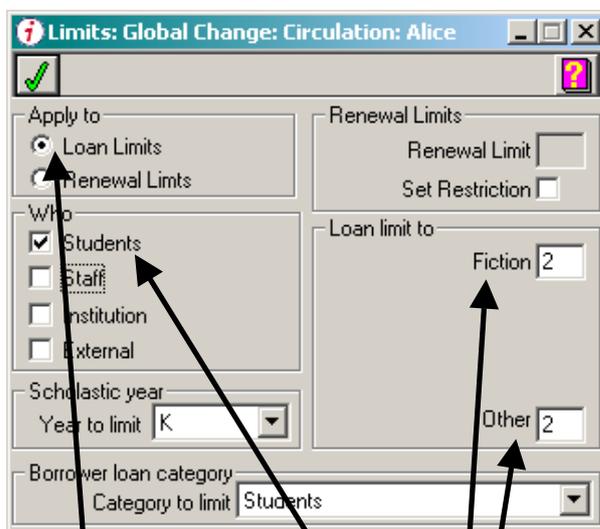
9. Logon to Alice again and **check that the borrower details have been updated** correctly.

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**

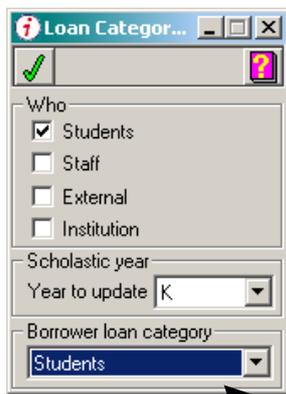


Tick **Loan Limits** and **Students**

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.

5. 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. When exporting student details from MAZE, select the report:

Alice Export with All Years (Student ID as 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 the **Barcode From ID utility** to do this **AFTER** the borrower details have been updated into Alice.

2. 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

3. 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.
4. 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 especially likely to be an issue with Alice library systems that have been migrated from Ocelot as the Ocelot resource barcodes started with the digit 1.

Additional Changes Required For 7 Digit Student IDs.

Now that Student IDs are 7 digits long, additional changes need to be made to Alice Parameters to allow the 7 digit Student ID to be used as the Borrower Barcode.

Summary of the changes required:

System, Parameters, Library, Barcode,

Keep 7th Character: Tick this box

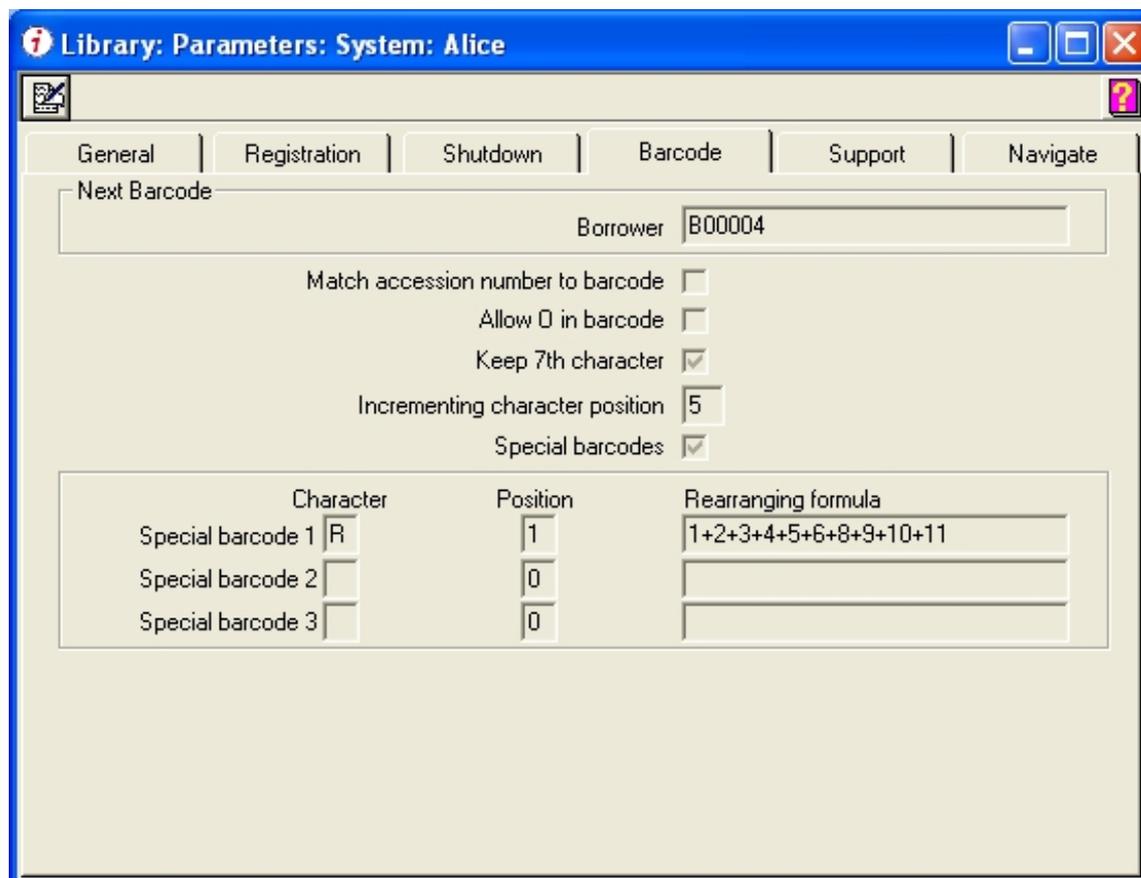
Special Barcodes: Tick this box

Special Barcode 1:

Character: R

Position: 1

Rearranging Formula: 1+2+3+4+5+6+8+9+10+11



Character	Position	Rearranging formula
Special barcode 1	1	1+2+3+4+5+6+8+9+10+11
Special barcode 2	0	
Special barcode 3	0	

Detailed Explanation:

Alice standard barcodes are in the format B12345 X cccc or R12345 X ccc where:

R is for a Resource barcode (i.e. book) and **B** is for Borrower barcode. Some schools use other barcode prefixes as well e.g. T for Textbooks

12345 is the unique number of the barcode

X is the Check Letter for the barcode and is calculated by combining all the other characters in the barcode using a mathematical formula. It can be used to check if the barcode has been read correctly. Alice normally discards the check letter (7th character position) before storing the barcode, hence B12345Xccc is stored in Alice as B12345ccc.

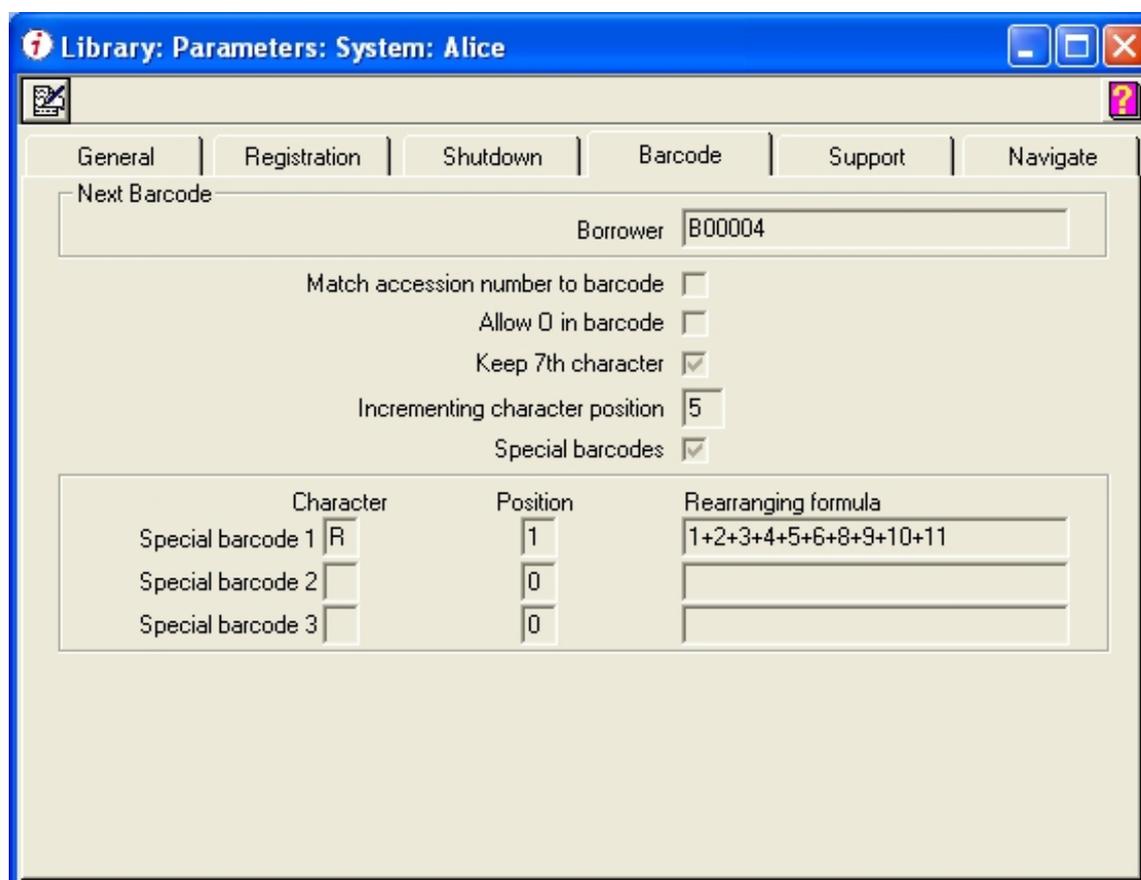
cccc is the 'unique' school identifier. Sometimes it is the postcode, more frequently the school's DEET number or an Alpha code to identify the school.

If the School Code is entered in **System, Parameters, General, Library, School Code**, then Alice will append this code to any 6 character barcode entered so that typing B12345 will become B12345cccc and save typing in the School code.

Seven character barcodes created from the Central Student ID create specific difficulties because Alice, in its default setup, will strip off the seventh character of the barcode (which is usually the check letter) and create a 6 character barcode which then will overlap with up to nine other barcodes created from 7 digit IDs.

The way around this is to disable the removal of the 7th character, in **System, Parameters, Library, Barcode, Keep 7th Character**. Doing this allows 7 character Borrower barcodes to be read correctly but has the unwanted side effect of stopping Resource barcodes from working by preventing the check letter from being stripped out and hence the raw barcode including the check letter will no longer match the resource barcode stored in Alice which has had the check letter removed.

This side effect can be overcome using the **Special Barcodes** rearranging formulas in **System, Parameters, Library, Barcode**. The Special Barcodes option was included to allow Alice to rearrange the characters in barcodes from other library systems into the format that Alice uses but can also be used to force Alice to strip out the 7th character position in Resource barcodes so that they continue to match the barcodes stored in Alice.



This example rearranging formula says: Any barcode where the first character is 'R' will use the

first 6 characters, drop the 7th and then take the 8th to 11th (school code). so that R12345 X cccc becomes R12345ccc as it did before activating 'Keep 7th Character'.

Instances where this will NOT work

This will work fine except for schools that already use special barcodes to translate Ocelot (or other library system barcodes). As there are only three translation formulas available, if all three are already in use to translate the foreign barcodes from the previous library system, there may be none left for this translation.

The second case where this solution cannot be implemented is where a school uses several barcode prefixes for resources. If more than three different barcode prefixes are used, it will not be possible to create enough translation formulas to support all of the prefixes.

What if I have already loaded borrower data without making these parameter changes?

Alice only creates barcodes using the Student Code for NEW borrowers who do not already have a record in Alice. A new borrower record will be added if no borrower already exists in Alice with the same Student Code. A 'duplicate' borrower record will be created in Alice if the Student Code in Alice does not match the Central Student Id (SRKS code) in the Import file from MAZE. This is why it is vitally important that all students have their Student Code in Alice before performing the Borrower Import.

If the MAZE 'With Student ID as Barcode' export option from MAZE is used, the second field in each record contains the Central Student Code (SRKS ID) and this is used to create the barcode for newly added students. Unless 'Keep 7th Character' is ticked, when a new borrower is created using **System, Data Loading, Borrower**, the 7 digit Student Code will have the final 7th digit removed to create a 6 digit barcode with the school code added to the end. Hence a Student ID of 01234567 will create a barcode 0123456cccc. The other 9 Student IDs in the range 01234560 - 01234569 will also attempt to create the same barcode 0123456cccc, but because Alice will not allow duplicate barcodes, any subsequent overlapping barcodes will be created as 'standard' Alice barcodes starting with the Next Borrower Barcode listed in **System, Parameters, Library, Barcode**.

Help! How do I fix this?

First, change the Alice parameters as described above to enable 'Keep 7th Character' and enter the Special Barcode formula.

OASIS Extras has written a utility program that will change the borrower barcode to match the Student ID stored in Alice. It also changes all references to the old barcode into the new barcode e.g. Loan records, loan history and reservations, so that existing loan transactions and history are maintained.

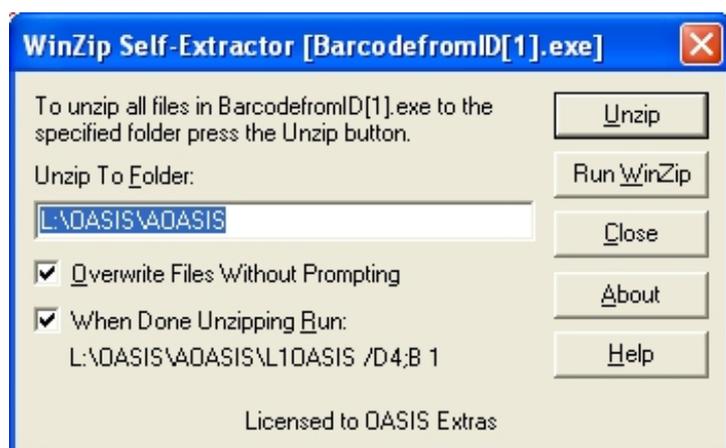
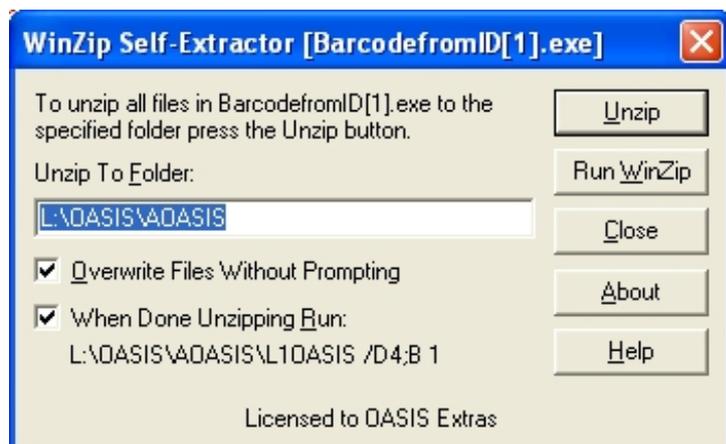
1. You should perform an **External Data Backup** of your Alice data before using this option in case it does not produce the results you expect. Optionally (but recommended) perform an **Alice Shutdown with Force Data Archive**.
2. No one else can be using Alice when you run this utility.

- Alice must be installed in the standard configuration on drive letter L: with an OASIS directory visible underneath the L: drive. This option will NOT work if this is not the case.
- Download and RUN the program from this link.

[Barcode From ID](#)

Click RUN and RUN (Unknown Publisher).

Click UNZIP



- Provided there are no duplicated student codes in Alice, you will see the message: 'No Duplicated CODEs found. OK to continue <Esc>'. Press Escape key to continue. If Alice contains any duplicated student codes, you will need to fix these before you can continue. This restriction is to prevent duplicated barcodes from being created
- A screen explaining what the utility does will be displayed. Press Escape to continue.
- Select the *File Update Mode*. No Logging is recommended as it is the fastest but you MUST perform an Alice Shutdown with Force Data Archive immediately afterwards.
- If you did not perform an Alice Shutdown with Force Data Archive at Step 1. you may receive the message: *An OASIS Data Backup is required. Continue Anyway? <Y>es, <N>o.* Press **Y**
- 'Library Code to add to barcodes'. **This MUST be blank** as 7 digit borrower barcodes CANNOT include the school code.

10. *Discard Leading Zero on 7 digit Student Codes?* The usual answer to this question is **NO**. You would only select YES in the special case where Student ID cards had been made incorrectly with the barcode missing the leading zero. This can happen if the data is imported into Excel and treated as a number before being sent to the ID Card producer.
11. *Press C to continue.* After a moment (a few seconds to a few minutes depending on the number of Borrowers and the speed of the computer) Alice will prompt:
12. <L>ist Audit Log or <Esc>. Press **L**.
13. <S>creen or <P>rint. Press **P**.
14. <C>hange printer. Press **C**.
15. If you want to print the Audit listing to a printer, select the printer 'WINDOWS' and press Enter. After a moment all installed windows printers will be displayed. Select an appropriate printer and press Enter. **WARNING:** the listing may be VERY long as it includes details of all Loan and Loan history records that have been changed. If you don't want to print out the Audit Trail, Select FILE as the print destination and select <P>ath and filename to specify a filename and location for the Audit Trail.
16. Do Alice Shutdown with Rebuild and FORCE DATA BACKUP now! <Esc>. Press **Escape** to close the option.
17. Start Alice on the Shutdown Machine and enter your password. Immediately before doing anything else, perform an **Alice System Shutdown** with **Force Data Archive**. Select **System, Parameters, Shutdown**. Tick '**Force Data Archive**', close the Shutdown Task List window, Close the Alice Menu. Click the **Green Tick** to perform Shutdown Now
18. When you next restart Alice, All Student Borrower barcodes will now be their 7 Digit Student Code.

Note: The barcode of any student with a blank Student Code will NOT be changed.

Martin Hood
OASIS Extras
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Phone: 02 6238 2663
Mobile: 0428 452265
Fax: 02 6238 2664
Email: martin@oasisextras.com.au