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### Loading PATRON records from a file into a MOBIUS System

Each library creates a record for each patron by keying or loading. Regardless of the method used for creating a patron record, it must have enough information to allow checkout, renewal, notices, and requests if applicable. For the patron record to successfully update via subsequent patron record loads, the record must also have a match key (UNIQUEID Field). The handout provides information on content of patron records and the format for loading records.

There should be only one record in the database for a person at a given institution. If a patron is both a staff member and a student, the library decides which set of privileges apply. The method of loading can determine this. If a person is affiliated with more than one institution, each institution creates a record for that patron. Be careful not to modify or delete another library's record for a patron.

### Explanation of Fields

Each patron record contains three kinds of fields: system created, fixed length fields, and variable length fields.

Every record has the same system created elements: record number, created date, modified date, and number of revisions. As the system writes a record to the database for the first time it assigns a sequential record number. For patron records that number begins with a "P". The middle portion of the number is a sequential number, and the final digit is a check digit. The check digit may be 0-9 or an "x". This number uniquely identifies a record. If the record is deleted, the number is not reused. The system maintains the modified date and the number of revisions counter

All patron records contain a single occurrence of the fixed-length fields. These fields contain either a coded value defined in a table or a date.

Patron records may have up to twenty-six different types of variable-length fields. These fields can be repeated. A record does not contain a variable-length field if it is empty. In addition to NAME and ADDRESS, MOBIUS requires UNIQUEID and DEPARTMENT. These last two are specific to MOBIUS and are not documented in the User Manual.

## **Fixed Length Fields**

The libraries of each system (cluster) and MCO work together to define values for the coded fixed fields. All libraries will not use all of the codes; some ranges of values may be specific to an institution. If your library does not use one or more of the codes in the fixed fields, the patron record must still have a placeholder value because the fixed fields are positionally defined.

Field code ('0')

This is the signal of the beginning of a new record and is always '0'.

### **Patron Type (000 to 255)**

Each library defines a specific set of values for locally needed patron types. This value determines the borrowers' privileges, renewals, loan periods, notices, and fine amounts if any.

### **PCODE1 (1 character)**

This one-character code can be used for a variety of statistical subdivisions. Libraries in a system (cluster) determine the codes used. If no code is assigned, the field should contain a hyphen ("-").

### **PCODE2 (1 character)**

This one-character code can be used for a variety of statistical subdivisions. Libraries in a system (cluster) determine the codes used. If no code is assigned, the field should contain a hyphen ("-").

### **PCODE3 (000 to 255)**

This three-digit numeric code can be used for a variety of statistical subdivisions. Libraries in a system (cluster) determine the codes used. (If your cluster does not have a PCODE3 value for N/A, enter " " three blanks if PCODE3 is not defined on your system.)

### **Home Library (5 characters)**

This field uses a location code defined in the location tables. For all MOBIUS libraries this code should be one of the three-character bibliographic locations entered in lower case letters and padded with two blanks. For example: "wdb "

### **Patron Message Code (1 character)**

A value in this field triggers the display of the associated message each time a user selects and displays the patron record. Libraries in a system (cluster) determine the codes used and the messages associated with them. (Hyphen unless defined)

### **Patron Block Code (1 character)**

This code allows libraries to manually block a patron from checking-out or renewing items even if the patron has not exceeded any of the library-specified thresholds on the system. It allows blocks from elsewhere on campus to be reflected in the library system. The institution can set a code in the file of patron records to be loaded to either create a new record on the system already blocked to update an existing borrower to block. Libraries in a system (cluster) determine the codes used and the meaning associated with each. Codes must be entered in a system table. (Hyphen unless defined)

### **Patron Expiration Date (8 characters, mm-dd-yy)**

Patron records loaded into the system overlay on a key-match (see UNIQUEID). The incoming record expiration date replaces the one in the database record. Libraries determine the expiration date needed to prevent loan periods longer than the expiration date in the patron's record.

## **Variable Length Fields**

The software does not require all fields listed. However, for a patron to circulate, place requests, and receive notices in a MOBIUS system the record must contain: FIXED FIELDS, NAME, ADDRESS, DEPARTMENT, and UNIQUE ID.

### **Name**

The name is entered as indexed: last name, first middle. It will display online and print on notices as entered. If you want mixed case or if you want all capitals for mailing, enter the name in that format.

### **Address**

This is the primary or local address field. Enter a dollar sign (“\$”) to indicate a line break as shown in the example record. Notice production does not upcase name and address information. If your library will be sending notices through the mail, you may want to enter all this information in capital letters.

### **Address2**

This is a secondary or permanent address. For students this may be the home address.

### **Telephone**

This is the primary or local telephone number. There is no automatic formatting of this data. If you want “( )” around the area code and “-“ after the exchange, those characters need to be in the record.

### **Telephone2**

Secondary telephone number.

### **Department**

MOBIUS systems use this field to provide a library return address for INN-Reach (Direct Patron) Request notices. This is a local adaptation and is not documented in the User Manual. Enter the same three-character bibliographic location code used in the Home Library fixed field in lower case letters. Do not follow it with blank spaces.

### **Unique ID**

This is an extremely important field for patron records in a MOBIUS system. Whether a record is loaded or keyed in at a circulation desk, it should have a properly constructed Unique ID. The patron keys this number to see information about his account and to place requests, and the patron load program uses this field as the key for updating existing patron records in the database.

The MOBIUS implementation of Unique ID is a combination of a patron identification number and an alpha suffix identifying the institution. The identification number can be any number unique within your institution and easily known by the patron, for example, a student number. The alpha suffix follows the number in all capital letters with no spaces.

Example:

*Using Sequential Campus Number*  
12345678CC (Columbia College)

## Barcode

The patron barcode field is an indexed variable length field. It is usually the quickest and most precise patron search at the circulation desk. Circulation staff does not have to use the patron barcode to check out a book to a patron. If your institution uses a campus identification card, you can load the number encoded on the card into this field. If your institution uses a separate barcode (i.e., issued by the library, not the campus), the barcodes must be added manually. This can be done when keying a new record or later if patron records are loaded from a registration database.

## Email Address

Enter a complete email address if you want a patron to receive all borrower notices via email.

## Note

This is free text note field. A Patron record can contain multiple note fields. The patron note fields only display to staff, not to patrons in the VIEW your circulation record function.

## Record Loading

The MOBIUS Consortium Office loads files of patron records for member libraries. We can schedule these loads as frequently as once a week to keep your patron data current. The Innovative load format with which we've been most successful is Text File Image (Format 3). The User Manual includes the formats for patron data. Below is a description of the format from the User Manual and also fields to the MOBIUS implementation.

## Text File Image (Format 3)

This format carries both fixed-length and variable length data. The fixed-length data are grouped in the first field of each new record. Each field in this format is a new line and begins with a single-character field tag. Each field ends with a carriage return (hexadecimal 0D) and a line feed (hexadecimal 0A).

## Example Record:

```
0001ab001shb  --12-31-01<0D0A>
nSmith, Jane<0D0A>
aP.O. Box 177$305B East Hall<0D0A>
t(510) 555-1305<0D0A>
h123 Hill St.$Oakland, CA 95155<0D0A>
p(510) 444-1010<0D0A>
dshb<0D0A>
u123456789UU<0D0A>
b2117102003159<0D0A>
zjan smith@campus.edu<0D0A>
```

## Note

Each line ends with a hard return. Do not put the ASCII characters "<0D0A>" in your patron records. "<0D0A>" is the translation of the hexadecimal character for hard return.

## Fixed Length Fields

The first line of each record in the file is called the "zero" field because its field tag is "0". It contains the fixed-length data for each patron record.

## **Batchloading Patron Records**

Enter a character (either hyphen or blank [Hexadecimal 20] according to the field descriptions above) for any unused fixed-length field value so the zero field is always 24 characters long.

<b>Field</b>	<b>Length</b>
Field Code	1 Character (Always a '0')
Patron Type	3 Digits (000 to 255)
PCODE1	1 Character
PCODE2	1 Character
PCODE3	3 Digits (000 to 255)
Home Library	5 Characters, padded with blanks if needed (e.g., "shb ")
Patron Message Code	1 Character
Patron Block Code	1 Character
Patron Expiration Date	8 Characters (mm-dd-yy)

### ***Variable Length Fields***

Each line following the zero field line contains a single-character field tag in the first column, followed by that field's data. Each field code used in the incoming Patron record must be defined in the system.

<b>Code</b>	<b>Field</b>
n	Name
a	Address
t	Telephone
h	Address2
p	Telephone2
d	Department
u	Unique ID
b	Barcode
z	Email Address
x	Note

## **Transferring Patron Files to the MOBIUS Consortium Office**

MCO uses secure copy (SCP) to receive patron files from the MOBIUS institutions. Please see the document File Transfer Policy & Procedures for instructions on setting up secure copy and connecting to the SCP server.

### ***File Naming***

Patron Files should have descriptive names, including elements identifying the School and the type of patron.

Examples:

*Drury students,*  
drustu