Voyager® 9.1.1
Technical User's Guide

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Patron Record Standard Interface File

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Introduction

The Patron Record Standard Interface File (SIF) is the format of a file that is used in three ways in Voyager

- Input file for the Patron load done at migration
- Input file for the Patron Update program
- Output of the Patron Extract program.

Purpose of This Chapter

This section discusses the layout of the Patron Record SIF.

- File specification
- File format fixed segment
- File format address segment
- File format variable segment
- File format end-of-record segment

File Specification

The data required for the Patron database records should be supplied in the following manner.

Each patron data record should be one continuous string, terminated by a line-feed (\n in some formats, hex '0A' in others).

The fields must be the indicated length and must all be present and a specific order and format. The notes segment is an exception to the length requirement.

The data fields which are designated numeric must be right-justified and zero-filled on the left.

The data fields which are designated strings (not designated numeric) should be left-justified and blank-filled on the right but not hex-null-terminated.

If the export data is in a continuous stream, you must insert a hex null terminator between records. However, if the export data is broken into one line per record, the null terminator does not need to be inserted.

Patron Record SIF Format

The following conventions are used in the listed tables.

Item #   Represents the relative position of the item in the record (sequence).

NOTE:
In all the following tables, the first column, Item #, consists of the field sequence numbers which are not to be included in the record.

Item name   Definition of the item.

Offset   Actual starting position of the item in the record relative to 1.

Format   Format of the variable.

s   String, left-justified/blank filled.

n   Numeric, right-justified/zero-filled.

d	Date in the format ccyy.mm.dd, where c is the century, y is the year, m is the month, and d is the day. The maximum high value that can be used is 2382.12.31. This field may be blank under certain conditions.
b	Blanks.
Required	Y for yes, the field must have valid data in it (not just blanks).

NOTE:
The Social Security Number (SSAN) or the Institution ID is required for all records.

The maximum record should consist of the following:

>   1 base segment length: 1 x 456 = 456

>   9 address segments length: 9 x 429 = 3861

>   1 notes segment length: 1 x 1000 = 1000

>   1 end-of-record mark length: 1 x 1 or 2 = 1 or 2

The total maximum record length is 5318 or 5319.

The minimum record should consist of the following:

>   1 base segment length: 1 x 456 = 456

>   1 address segment length: 1 x 429 = 429

>   1 notes segment length: 1 x 1 = 1

>   1 end-of-record mark length: 1 x 1 or 2 = 1 or 2

The total minimum record length is 887 or 888.

Base Segment

Table 19-1 on page 19-4 defines the base (fixed) segment of all records.

Also, a patron record must have one set, but can have up to three sets of the following fields: patron barcode, patron group, barcode status, and modification date. However, if one of the above fields exists in a set that has data, the other three fields must also have data. The exception to this is the patron barcode, which can be blank.

If more than one patron barcode is present, the associated patron groups must be unique.

NOTE:
The maximum lengths of some of the address and name fields in the database are longer than allowed in the Patron Record SIF. Consequently, these fields will be truncated in the SIF. If you are concerned that some data may exceed the lengths allowed in the SIF, use the XML jobs instead. For more information, see Patron Batch Jobs in XML on page 5-1.

Table 19-1.   Base (Fixed) Segment of Record

Item #	Item Name	Offset	Format	Required	Length	Description
01	patron id	1	n		10	Internal record number for Voyager. This field should be zero-filled. The patron ID will be determined by the SSAN or Institution ID (whichever is unique) and the patron record will be updated if either is found, or added if not.
02	patron bar-code id 1	11	n*		10	ID of first library card bar-code.
03	patron bar-code 1	21	s		25	First library card barcode. Footnote 1
04	patron group 1	46	s		10	Valid patron group as defined by library in system administration. Footnote 2
05	barcode status 1	56	n*		1	Valid: 1 is active. 2 is lost. 3 is stolen. 4 is expired. 5 is other.
06	barcode modified date 1	57	d		10	If blank, load run-date will be used.
07	patron bar-code id 2	67	n*		10	ID of second library card barcode.
08	patron bar-code 2	77	s		25	Second library card bar-code. Footnote 1

Table 19-1.   Base (Fixed) Segment of Record

Item #	Item Name	Offset	Format	Required	Length	Description
09	patron group 2	102	s		10	Valid patron group as defined by library in the System Administration module.
10	barcode status 2	112	n		1	Valid: 1 is active. 2 is lost. 3 is stolen. 4 is expired. 5 is other.
11	barcode modified date 2	113	d		10	If blank, load run-date will be used.
12	patron bar-code id 3	123	n*		10	ID of third library card bar-code.
13	patron bar-code 3	133	s		25	Third library card barcode. Footnote 1
14	patron group 3	158	s		10	Valid patron group as defined by library in the System Administration module.
15	barcode status 3	168	n*		1	Valid: 1 is active. 2 is lost. 3 is stolen. 4 is expired. 5 is other.
16	barcode modified date 3	169	d		10	If blank, load run-date will be used.
17	registra-tion date	179	d		10	The date the record was added to an external system such as administration or human resources.

Table 19-1.   Base (Fixed) Segment of Record

Item #	Item Name	Offset	Format	Required	Length	Description
18	patron expiration date	189	d	y	10	Date patron record is to be considered no longer active by the Voyager system. Standard date format.
19	patron purge date	199	d	y	10	Date patron record is to be deleted by the Voyager system. Standard date format.
20	voyager date	209	b		10	The run-date of the load will be used if this is a new patron.
21	voyager updated	219	b		10	The run-date of the load will be used.
22	circulation happening location code	229	s		10	This is the location code for any circulation happening location in the Circulation Policy Group to which the patron belongs. When entering patrons manually, it is the location code of the desk where the patron was added. It must be a valid location code.
23	institution ID	239	s	Footnote 3	30	Any value. If the ID came from the registrar or from human/resources and if it is important to know the source, the indicator should be part of this field (a prefix of **reg** or **h/r**).
24	ssn	269	s	Footnote 3	11	Patron's social security account number: with or without dashes.

Table 19-1. Base (Fixed) Segment of Record

Item #	Item Name	Offset	Format	Required	Length	Description
25	statistical category 1	280	s		3	Valid statistical category code as defined by library in the System Administration module. If this is an update to an existing patron record and there is an entry in this field, all existing statistical category records will be removed from the database and replaced with those found in this record.
26	statistical category 2	283	s		3	See statistical category 1.
27	statistical category 3	286	s		3	See statistical category 1.
28	statistical category 4	289	s		3	See statistical category 1.
29	statistical category 5	292	s		3	See statistical category 1.
30	statistical category 6	295	s		3	See statistical category 1.
31	statistical category 7	298	s		3	See statistical category 1.
32	statistical category 8	301	s		3	See statistical category 1.
33	statistical category 9	304	s		3	See statistical category 1.
34	statistical category 10	307	s		3	See statistical category 1.
35	name type	310	n	y	1	Valid data: 1 is personal, the name is an individual. 2 is institutional, the name may be a department or organization.

Table 19-1. Base (Fixed) Segment of Record

Item #	Item Name	Offset	Format	Required	Length	Description
36	surname	311	s	y	30 (50 in DB)	Patron's last name or institution name. Include any suffix (Jr. or PH.D.).
37	first name	341	s		20 (50 in DB)	Patron's first name. Required for name type 1.
38	middle name	361	s		20 (50 in DB)	Patron's middle name or initial.
39	title	381	s		10	Patron's title, if any.
	transaction counters	--	--	--	--	The next 10 fields are transaction counters.
40	historical charges	391	n		10	Total number of charges for patron's entire history. Maximum value is 2147483648.
41	claims returned count	401	n		5	Total number of claims returned for patron's entire history. Maximum value is 32767.
42	self-shelved count	406	n		5	Total number of items self-shelved for patron's entire history. Maximum value is 32767.
43	lost items count	411	n		5	Total number of lost items for patron's entire history. Maximum value is 32767.
44	late media returns	416	n		5	Total number of late media returns for patron's entire history. Maximum value is 32767.
45	historical bookings	421	n		5	Total number of historical bookings for patron's entire history. Maximum value is 32767.

Table 19-1. Base (Fixed) Segment of Record

Item #	Item Name	Offset	Format	Required	Length	Description
46	canceled bookings	426	n		5	Total number of canceled bookings for patron's entire history. Maximum value is 32767.
47	unclaimed bookings	431	n		5	Total number of unclaimed bookings for patron's entire history. Maximum value is 32767.
48	historical callslips	436	n		5	Number of historical call slips for this patron.
49	historical distribu-tions	441	n		5	Total number of historical distributions for this patron's entire history.
50	historical short loans	446	n		5	Total number of historical short loans for this patron's entire history.
51	unclaimed short loans	451	n		5	Total number of unclaimed short loans for this patron's entire history.
52	address count	456	n	Y	1	Valid data: 1 through 9. There must be at least 1 address segment (type 1: permanent) following. There may be as many as 8 additional addresses (2 through 9) which may be either type 2: temporary, or 3: e-mail.

* Numeric if present, blank (not zero filled) otherwise.

1 If any one of the following are defined: patron barcode, patron group, barcode status, and modification date, the remaining three fields must also be defined (except the patron barcode, which can be blank to allow for a blank barcode patron). If a barcode already exists, it will be updated with this information. If a barcode exists for this patron with the same patron group, the status on the existing barcode will be changed to 5 (other) and the new one will be added with the status 1 (active), except where the input barcode is blank and the patron group and barcode status match an existing record. If this is the case, no alterations are made.

2 If there is more than one patron barcode present, the associated patron groups must be unique. At least one patron group must be present.

3 For each patron, either the social security number or the institution ID is required and that number must also be unique to the current record. There can be no duplicates. The social security number will be used in update runs to identify the record. If it is absent, the institution ID will be used in its place. Only one of these two fields may be altered on an update as the other will be required to identify the record in the database.

Address Segment

Table 19-2 defines the address portion of the record. This segment is repeatable up to nine times consecutively. All address segments must follow the base segment. Note that for the address segment, these sequence numbers might vary, according to the number of the address records.

Table 19-2. Address Segment of Record.

Item #	Item Name	Offset	Format	Required	Length	Description
53	address id	457	n		10	Internal record number for Voyager.
54	address type	467	n	y	1	Valid data: 1 = permanent -- only one is permitted 2 = temporary 3 = e-mail Permanent address (type = 1) update: If existing permanent address has the protect_address flag = y, an error will be reported. If not, the address will be updated with the new data. Temporary/e-mail address update: Any existing temporary/e-mail addresses without address protection will be deleted from the database and replaced by the new type 2 and 3 addresses supplied. Type 2 and 3 addresses with address protection will not be deleted.·All addresses added/updated will default to not protected.

Table 19-2. Address Segment of Record.

Item #	Item Name	Offset	Format	Required	Length	Description
55	address status code	468	s	y	1	Valid data: n = normal h = hold mail The next two items represent the beginning and ending effective dates for the address. For e-mail and temporary addresses this date will be rejected if it overlaps dates of another address of the same type.
56	address begin date	469	d	y	10	Beginning date.
57	address end date	479	d	y	10	Ending date. Beginning and Ending Dates can *not* be the same date.
58	address line 1	489	s	y	50 (100 in DB)	Street address, or e-mail address for address type **3** (cannot be blank).
59	address line 2	539	s		40 (100 in DB)	Second line of street address.
60	address line 3	579	s		40 (100 in DB)	Third line of street address.
61	address line 4	619	s		40 (100 in DB)	Fourth line of street address.
62	address line 5	659	s		40 (100 in DB)	Fifth line of street address.
63	city	699	s		40	City
64	state (province) code	739	s		7	Any 2-character state or 7-character province code.

Table 19-2.   Address Segment of Record.

Item #	Item Name	Offset	Format	Required	Length	Description
65	zipcode/postal code	746	s		10	Zipcode in format 12345 or 12345-6789 or other postal code.
66	country	756	s		20	Country: any format is valid.
67	phone (primary)	776	s		25	Primary phone: any format is valid.
68	phone (mobile)	801	s		25	Mobile phone: any format is valid.
69	phone (fax)	826	s		25	Fax phone: any format is valid.
70	phone (other)	851	s		25	Other phone: any format is valid.
71	date added/ updated	876	b		10	This will be set to the run-date of the load.

Variable Segment

Table 19-3 defines the variable segment of the record. This segment must follow the last address segment. The segment is not required and may be between 0 (zero) and 1000 characters in length. A segment of zero characters (a non-existent segment) indicates that there are no notes for the record.

NOTE:
If the user is performing a Patron Update and extended notes processing is selected, then each note in the Notes segment, must be preceded by a tab character. This includes the first note.

Table 19-3.   Variable (Notes) segment of record

Item #	Item Name	Offset	Format	Required	Length	Description
72	Notes	After Last Address	s		1000 Max.	Variable Portion of Record Patron notes. This field may contain any data. A field of zero characters in length indicates that there are no notes.

End-of-Record Segment

Table 19-4 defines the end-of-record marker. This segment must follow the notes segment.

Table 19-4.   End-of-record marker

Item #	Item Name	Offset	Format	Required	Length	Description
73	End-of-Record Marker	Last	s	y	1 or 2	Valid data: Line-feed (\n or hex '0A'). A carriage-return/line-feed is also acceptable.