Bellingham Public Library

and

Bellingham Public Schools

ConnectED student data sharing: Data Transform

Jon McConnel

Horizon: Dec. 11, 2017, Updated 12/17/2017, 8/22/2018, 11/9/2018, 11/13/2018

Polaris: Jan. 3, 2019, Updated 2/12 2019, 3/20/2019, 5/30/2019, 6/10/2019, 9/4/2019, 10/16/2019, 1/28/2020, 9/21/2020 for 6.5, 5/10/2021 for 6.7, 8/19/2021 for 7.0 and coming school year

To bulk import and update borrower records in the Polaris ILS, there is the ability to use Polaris’ Offline Transaction file format, .trn.

Batch deletes are not an option. Deleting the accounts of Opt-Out students or students who move will be manual through a separate process.

## .trn DATA FORMAT

See “ImportStudentRecords56.pdf” for full details. What follows are details specific to BPL’s ConnectED records.

### File Name

**PTF\_<YYYY><MM><DD><HH><MI>\_<WorkstationName>.TRN**

Where:

**<YYYY>** is the four digit year

**<MM>** is the two digit month

**<DD>** is the two digit date

**<HH>** is the two digit hour

**<MI>** is the two digit minute

**<SS>** is the two digit second

**<WorkstationName>** is the network computer name of a valid Polaris staff client

workstation

 <WORKSTATION>: **LI-15057-LT**

 Example: **PTF\_20190212143030\_LI-15057-LT.TRN**

### DELIMITER

The file must be pipe delimited:

 |

## HEADER

The file begins with a one-line header in this form:

**1|<time>|<date>|<branchID>|<userID>|<workstationID>|20<CR>**

Where:

**<time>** is in the form **HH:MM:SS**

**<date>** is in the form **<MM>/<DD>/<YYYY>**

<branchID> = **3**  [3 = Bellingham Central Library]

<user>= **55** [Polaris record code for Jon’s User account]

<workstation>: **280** [Polaris record code for Jon’s workstation]

<version>: **20**

<cr>: At the end of the header data, insert a CR (ASCII character 13) to indicate the end of the header.

## Patron Content Data Rules

Each row represents a single, implicitly structured data item (a patron). Insert a CR (ASCII

character 13) at the end of each row to indicate the end of that patron’s data. Many patrons

may be included in the patron file. The row takes this form:

**<record code>|<creation date>|<Name Last>|<Name First>|<Name Middle>|<Name Title>|<Name Suffix>|<Patron Code ID>|<Patron Branch ID>|<Patron Barcode>|<Expiration Date>|<Patron Statistical Code ID>|<Gender ID (1,2,3)>|<Password>|<Language ID>|<Registration Date>|<Birth Date>|<Permission (currently is not being used)>|<Maintain Reading List (1, 0)>|<Former ID>|<User Defined Field 1>|<User Defined Field 2>|<User Defined Field 3>|<User Defined Field 4>|<User Defined Field 5>|<Do Not Delete (1, 0)>|<Exclude From Bills (1, 0)>|<Exclude From Collection (1,0)>|<Exclude From Holds (1, 0)>|<Exclude From Overdue Notice (1, 0)>|<Use Plain Text E-mail (1,0)>|~<Address Label>|<Address Type>|<Street One>|<Street Two>|<Street Three>|<City>|<State>|<Postal Code>|<Zip Code Plus Four>|<County>|<Country ID>|<Address Check Date>|<E-mail Address>|<Alternative E-mail Address>|<Phone 1>|<Phone1CarrierID>|<Phone2>|<Phone2CarrierID>|<Phone 3>|<Phone3CarrierID>|<Fax Number>|< Delivery Option ID>|<PatronRecord ID>|<Enable SMS>|<eReceiptOption ID>|<TxtPhoneNumber>**|**<Exclude From Almost Overdue Auto Renew>|<Exclude From Patron Record Expiration>|<Exclude From Inactive Patron>|<Obfuscated Password>|<Hashed Password>|<Patron's Legal Last Name>|<Patron's Legal First Name>|<Patron's Legal Middle Name>|<Use Legal Name on Print/Phone Notices><CR>**

Rows of Patron Data

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Field #** | **Column** | **Data Type** | **Max Len** | **Notes** | **Req?** |
| 1 | Record Code | Integer | n/a | Use **7** for all. 7=Update | Y |
| 2 | Creation Date | Date | n/a | YYYY-MM-DDIf a NEW record, set to date the file was generated. Leave blank if an existing record. | N |
| 3 | Patron Name Last | String | 32 |  | Y |
| 4 | Patron Name First | String | 32 |  | Y |
| 5 | Patron Name Middle | String | 32 |  | N |
| 6 | Patron Name Title | String | 8 | Don’t include | N |
| 7 | Patron Name Suffix | String | 4 |  | N |
| 8 | Patron Code ID | Integer | n/a | Use **21** for all. 21 = ‘B – Student’ | Y |
| 9 | Patron’s Branch ID | Integer | n/a | Use **3** for all. 3 = Bellingham Central Library | Y |
| 10 | Patron Barcode | String | 20 | “BE”+ Student ID | Y |
| 11 | Expiration Date | Date | n/a | YYYY-MM-DD HH:MM:SS**2022-09-30 23:59:59** (note the space between date and time)(**Use last of Sept., after end of current school year)** | Y |
| 12 | Patron Stat Code ID | Integer | n/a | Use **2** for all. 2 = ‘Bellingham City’ | N |
| 13 | Gender ID | Integer | n/a | Use “1” for all. “1” = N/A | Y |
| 14 | Password | String | 16 | Use “**1234**” for all | N |
| 15 | Language ID | Integer | n/a | Use **1** for all. 1 = English | Y |
| 16 | Registration Date | Date | n/a | YYYY-MM-DDIf a NEW record, set to date the file was generated. Leave blank if an existing record.For annual initial load, add generated date to all. | N |
| 17 | Birth Date | Date | n/a | YYYY-MM-DD | N |
| 18 | Permission | Integer | n/a | Leave blank | N |
| 19 | Maintain Reading List | Integer | n/a | Use **0** for all. 0 = Do not maintain | Y |
| 20 | Former ID | String | 20 | Leave blank | N |
| 21 | User defined 1 | String | 20 | Grade Level: same codes as Horizon. See list below. | N |
| 22 | User defined 2 | String | 20 | School: same codes as Horizon. See list below. | N |
| 23 | User defined 3 | String | 20 | Parent/Guardian: Leave blank | N |
| 24 | User defined 4 | String | 20 | Internet Access: always “**Unfiltered**” | N |
| 25 | User defined 5 | String | 20 | Not Currently Using; Leave blank | N |
| 26 | Do not delete | Integer | n/a | Use **1**. 1 = Staff may not delete the patron | Y |
| 27 | Exclude from bills | Integer | n/a | Use **0**. 0 = This patron may be billed | Y |
| 28 | Exclude from collection | Integer | n/a | Use **1**. 1 = Patron won’t be sent to collection agency | Y |
| 29 | Exclude from holds | Integer | n/a | Use **0**. 0 = Send the patron holds notices | Y |
| 30 | Exclude from overdue | Integer | n/a | Use **0**. 0 = Send the patron overdue notices | Y |
| 31 | Plain text | Integer | n/a | Use **0**. 0 = Email notices in HTML | Y |
| 32 | Free Text Address Type Label | String | 30 |  Use “**~Mailing**”  | Y |
| 33 | Address Type | Integer | n/a | Use **1**. 1 = Generic | Y |
| 34 | Address Street One | String | 64 |  | N |
| 35 | Address Street Two | String | 64 | Only use if Address Street One is populated | N |
| 36 | Address Street Three | String | 64 |  | N |
| 37 | Address City | String | 32 |  | N |
| 38 | Address State | String |  | 2-character abbreviation | N |
| 39 | Address Postal Code | String | 10 | 5-character postal code | N |
| 40 | Address Zip’s +4 | String | 4 | 4-character Zip+ code | N |
| 41 | County | String | 32 | Include if known: “**Whatcom**” or “**Skagit**” | N |
| 42 | Country ID | Integer | n/a | Use **1**. 1 = USA | Y |
| 43 | Address Check Date | Date | n/a | YYYY-MM-DD. like **2022-09-30** (**Use last of Sept., after end of current school year)** | N |
| 44 | Email address | String | 64 |  | N |
| 45 | Alternate Email Address | String | 64 | (Not needed or expected) | N |
| 46 | Phone 1 | String | 20 |  | N |
| 47 | Phone 1 Carrier ID | Integer | 2 | Leave blank. Used for SMS text notices | N |
| 48 | Phone 2 | String | 20 | (not needed or expected) | N |
| 49 | Phone 2 Carrier ID | Integer | 2 | Leave blank. Used for SMS text notices | N |
| 50 | Phone 3 | String | 20 | (not needed or expected) | N |
| 51 | Phone 3 Carrier ID | Integer | 2 | Leave blank. Used for SMS text notices | N |
| 52 | Fax Number | String | 20 | (not needed or expected) | N |
| 53 | Delivery Option ID | Integer | n/a | If student has email address, then **2**. If no email address but phone, then **3**. If no email or phone, then **1**. See below for code list. | N |
| 54 | Patron Record ID | Integer |  | Leave blank | N |
| 55 | SMS Enabled | Bit | n/a | Leave blank | N |
| 56 | eReceipt Option ID | Integer | n/a | Leave blank | N |
| 57 | Txt Phone Number | Integer | n/a | Leave blank | N |
| 58 | Exclude from almost over-due/Auto-renew | Integer | n/a | If student has email, then use **0**. 0 = send almost over-due/auto-renew notices.If no email, then Use **1**. 1 = do not send almost over-due/auto-renew notices | Y |
| 59 | Exclude from patron record expiration | Integer | n/a | Use **1**. 1 = Don’t send expiration notices | Y |
| 60 | Exclude from Inactive patron | Integer | n/a | Use **1**. 1 = Don’t send inactive notices | Y |
| 61 | Obfuscated Password | String | 256 | Leave blank | N |
| 62 | Hashed Password | String | 256 | Leave blank | N |
| 63 | Patron's Legal Last Name | String | 32 | Leave blank | N |
| 64 | Patron's Legal First Name | String | 32 | Leave blank | N |
| 65 | Patron's Legal Middle Name | String | 32 | Leave blank | N |
| 66 | Use Legal Name on Print/Phone Notices | Integer | n/a | Use 0. 0 = Don’t use Legal Name on Print/Phone Notices | N |
| <CR> | ASCII character 13 |  |  |  |  |

For students whose contact information is protected, include the following address info., which will provide a way for notices to be routed to the student:

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| 32 | Free Text Address Type Label | String | 30 |  Use “**~Mailing**”  | Y |
| 33 | Address Type | Integer | n/a | Use **1**. 1 = Generic | Y |
| 34 | Address Street One | String | 64 | 1306 Dupont ST | N |
| 35 | Address Street Two | String | 64 | Ed Tech-SIS | N |
| 36 | Address Street Three | String | 64 |  | N |
| 37 | Address City | String | 32 | Bellingham | N |
| 38 | Address State | String |  | WA | N |
| 39 | Address Postal Code | String | 10 | 98225 | N |
| 40 | Address Zip’s +4 | String | 4 |  | N |
|  |  |  |  |  |  |
| 41 | County | String | 32 |  | N |
| 42 | Country ID | Integer | n/a | Use **1**. 1 = USA | Y |
|  |  |  |  |  |  |
| 53 | Delivery Option ID | Integer | n/a | Use **1.**  1 = Mailing | N |

## User Defined 1: Grade Level

For evaluation purposes only, WCLS has been including a code for the student’s school building in [borrower.grade]. It allows us to look at account use by grade (and by School by Grade, if both are included). Those codes have migrated to Polaris as-is.

**Code Description**

01 First Grade

02 Second Grade

03 Third Grade

04 Fourth Grade

05 Fifth Grade

06 Sixth Grade

07 Seventh Grade

08 Eighth Grade

09 Ninth Grade

10 Tenth Grade

11 Eleventh Grade

12 Twelfth Grade

K Kindergarten

## User Defined 2: School

For evaluation purposes only, WCLS has been including a code for the student’s school building in [borrower.homeroom]. It allows us to look at account use by school. Those codes have migrated to Polaris as-is.

Code descr

BE\_EL\_ALDERWOOD Bellingham SD Alderwood Elementary

BE\_EL\_BIRCHWOOD Bellingham SD Birchwood Elementary

BE\_EL\_CARLCOZIER Bellingham SD Carl Cozier Elementary

BE\_EL\_COLUMBIA Bellingham SD Columbia Elementary

BE\_EL\_CORDATA Bellingham SD Cordata Elementary

BE\_EL\_GENEVA Bellingham SD Geneva Elementary

BE\_EL\_HAPPYVALLEY Bellingham SD Happy Valley Elementary

BE\_EL\_LOWELL Bellingham SD Lowell Elementary

BE\_EL\_NORTHERNHEIGHTS Bellingham SD Northern Heights Elementary

BE\_EL\_PARKVIEW Bellingham SD Parkview Elementary

BE\_EL\_ROOSEVELT Bellingham SD Roosevelt Elementary

BE\_EL\_SILVERBEACH Bellingham SD Silver Beach Elementary

BE\_EL\_SUNNYLAND Bellingham SD Sunnyland Elementary

BE\_EL\_WADEKING Bellingham SD Wade King Elementary

BE\_HI\_BELLINGHAM Bellingham SD Bellingham High School

BE\_HI\_OPTIONS Bellingham SD Options High School

BE\_HI\_SEHOME Bellingham SD Sehome High School

BE\_HI\_SQUALICUM Bellingham SD Squalicum High School

BE\_MI\_FAIRHAVEN Bellingham SD Fairhaven Middle School

BE\_MI\_KULSHAN Bellingham SD Kulshan Middle School

BE\_MI\_SHUKSAN Bellingham SD Shuksan Middle School

BE\_MI\_WHATCOM Bellingham SD Whatcom Middle School

BE\_FPP Bellingham SD Family Partnership Program

BE\_VISIONS Sea Mar Visions Youth Treatment Center

BE\_HPLC Home Port Learning Center

BE\_HI\_REENG Bellingham SD Re-Engagement Program

## Delivery Option ID

1 = Mail

2 = Email

3 = Phone1

4 = Phone2

5 = Phone3

6 = FAX

## Free Text Address Type Label

~Mailing

~Right To Service

~Alternate

 Note: the list of Free Text Address Type Labels in the documentation shows the defaults provided with Polaris. We changed some of them, and have hidden most. The three listed above are all we’re using, and in the case of the students, since we’re just getting a single address, we’ll set all addresses to ~Mailing.