mandarin™
LIBRARY AUTOMATION
A BUDGET-FRIENDLY, FEATURE-RICH, FULLY-INTEGRATED, COMPLETE SYSTEM WITH RENOWNED CUSTOMER SUPPORT

Impressions
July - September 2023

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We wanted to remind you of a few housekeeping items to prepare for the new year.

We hope you had an enjoyable, safe and fun summer season!

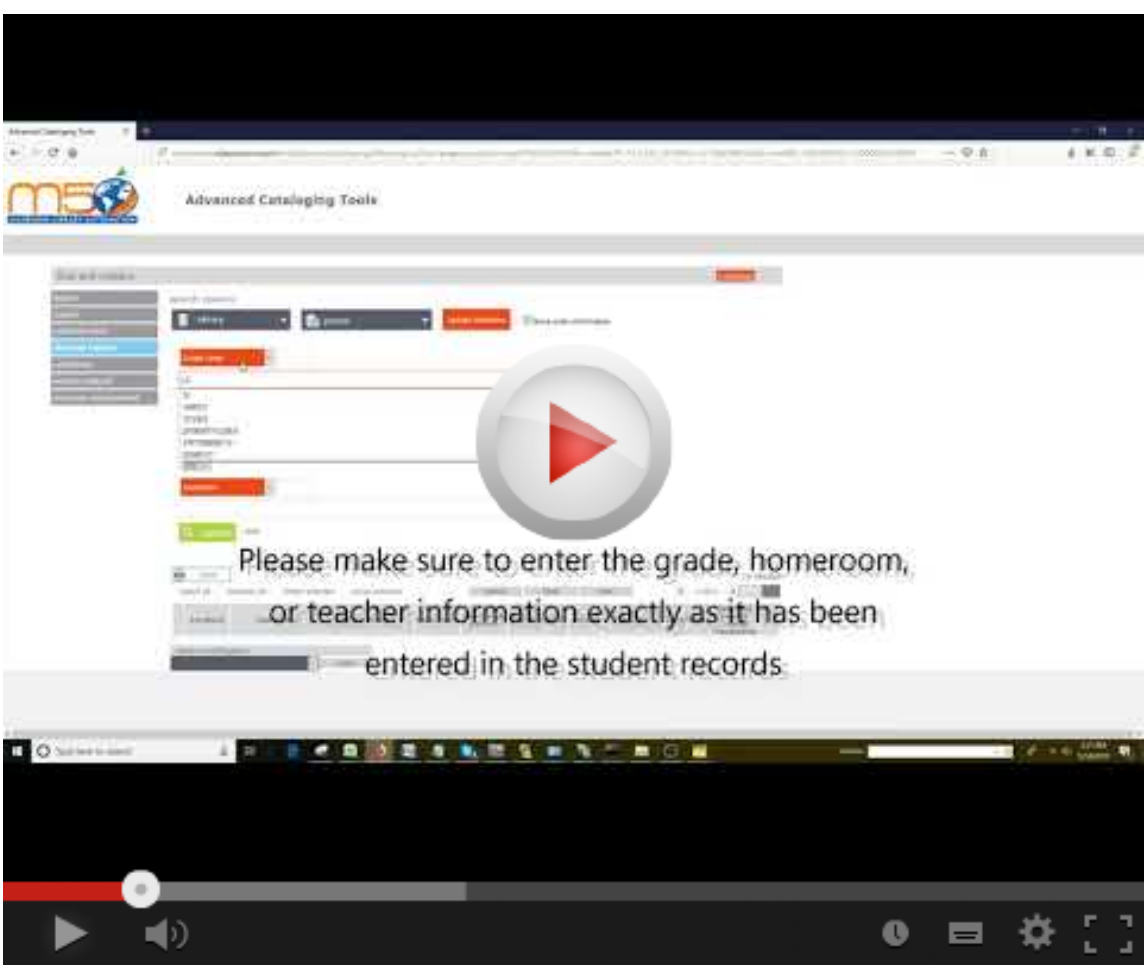
We want to remind you of a few housekeeping items to prepare for the new year and show you a new feature...

In this newsletter, you will find out how to remove records for students that have graduated, import new students records and find out more about our new classroom mode in circulation.

Removing Graduated students

How to delete/purge student records for the last grade from the previous school year

- In the "catalog" button, click the drop-down arrow and select "cataloging tools"
- On the column to the left, select "find and replace"
- Switch to the patron table. Click on the drop-down with the word "last name" and change it to "grade". Type in the highest grade in the search box (ex. 12) and click the "search" button.
- Once the search is done, click "select all" and click either "delete selected" (to mark for removal) or "purge selected" (to completely remove the patrons from the database).



Importing Student and Patron

Note: School libraries, If you are importing student records for your new school year.

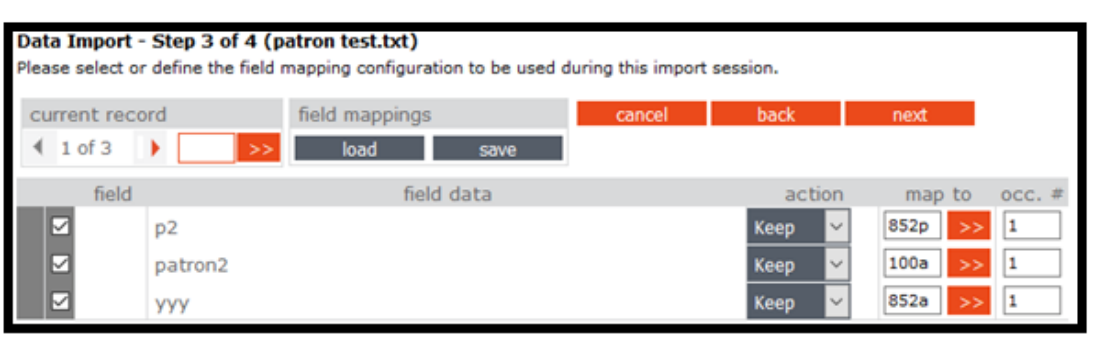
- Have you deleted/purge the student records from the last grade previous school year? If not, delete or purge the students who are no longer in the school **before importing the incoming student information.** Here is how (link)

To import patrons or students it is better to first create an Excel file to have a better look at the information being imported into Mandarin. The minimum information recommended would be a unique identifier for each patron barcode or student ID (from your SIS), last name and first name.

- Additional fields for schools: grade, homeroom, teacher, Email, etc.
- Additional fields for academic/public: address, phone number, cell, Email, etc.
- Create a different spreadsheet if necessary for each group of patrons you are importing. For instance, for new staff or teachers members because you can only choose one group when you do an import.
- **Once you create an Excel file we can help you import it, email it to us and provide as much detail about the data in the email. We'll go ahead and import it for you.**

Here is what we are going to do:

- We will open the Excel file and make sure the information lines up in every column with the information the library needs. After this, the file will be saved as "tab delimited".
- In the “catalog” button, click on the drop-down arrow and select "Cataloging Tools". On the column to the left, select "import"
- From “select table”, choose “patrons”, then click the blue folder and navigate to the patron file location. Next, select “upload”.
- Click “import” on the right. At step 1 of 4, click “next”. On step 2 of 4, the patrons on the file will be listed. Click “next”.
- MAPPING: At step 3 of 4 a check mark will be placed next to the fields to be imported. Select the fields where import each row as shown below.



Field mapping list for patrons

- At step 4 of 4, click the down arrow for the patron group where these will be imported (a group assignment rule can be applied as well). Finally click “finish” to import the patrons.

IF NECCESARY

1. Print student barcode sheets grouped by grade, teacher, or homeroom
2. Check and update the school calendar and holidays

Setting up the schedule, holidays, and global recalls