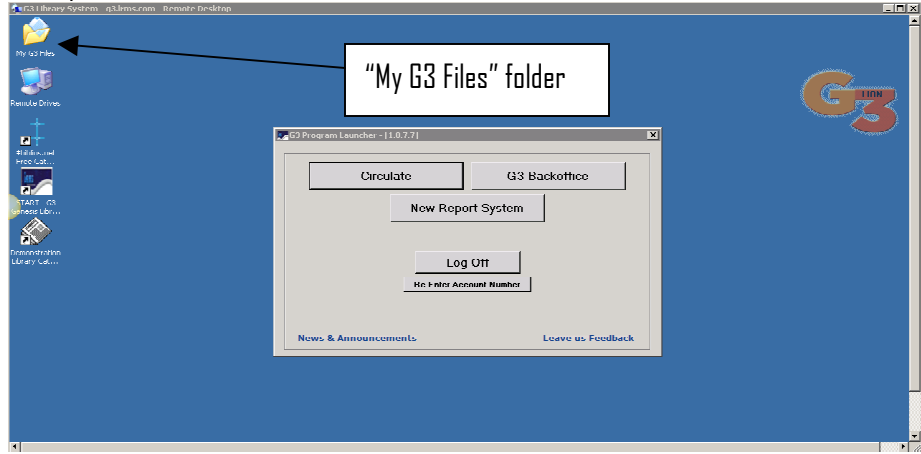# LRMS Hosted Services Exporting and Importing Borrower Records:

The purpose of this document is to provide step-by-step instructions for Exporting or Importing BORROWER records.

Hosted G3 Desktop Screen View:
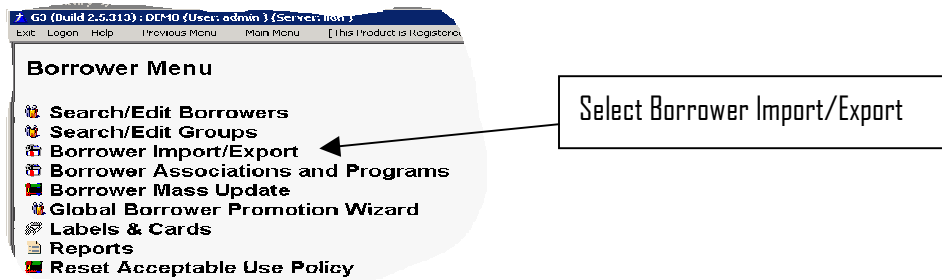

"My G3 Files" folder

"My G3 Files" and User Account Numbers

When performing one of these functions the G3 Desktop "My Files" folder also is used. This folder by default is located in the upper left corner of this screen view. This desktop and folder was added to allow for a simpler way of Exporting or Importing BORROWER record files. One individual staff person can manage this entire function from their workstation without having to leave their location. Using the G3 Launcher and the Account Numbers assigned to the other location this staff person having a User Name and password for each library can manage Exporting and Importing from their G3 Launcher screen and the "My G3 Files" folder.


Select Borrower Management
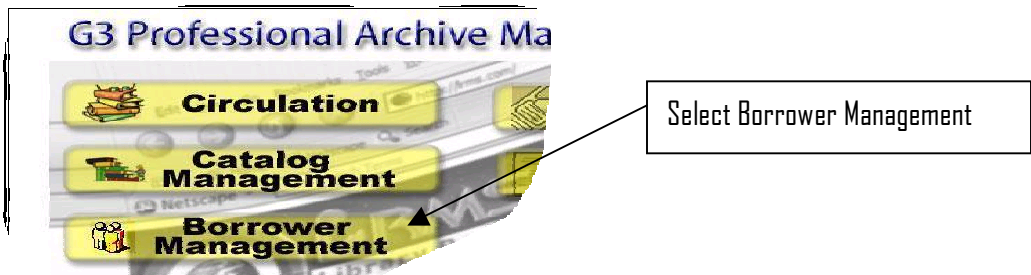
Exporting or Importing of BORROWER records is accomplished using the G3 Backoffice menu (also known as the Main Menu) and then selecting the Borrower Management menu, and then picking the BORROWER Import/Export menu, select your option of whether you are Importing or Exporting.
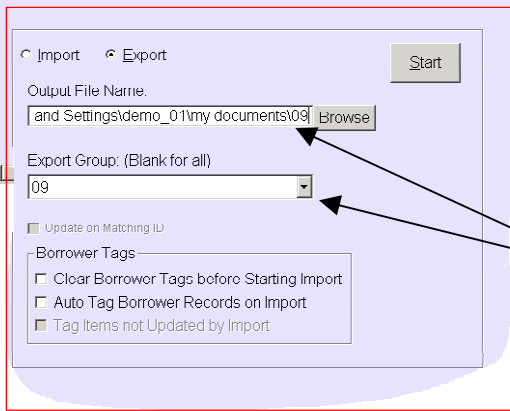

Select Borrower Import/Export

When Exporting BORROWER records this same "My G3 Files" folder is used to retain the exported records. This same file will be used to add this Group through importing this same file into the next library location. Union based customers do not use this method, promote your groups using the Transfer method see Promoting Borrower Groups or one of the other methods within the Training Help Guide.

Export Screen
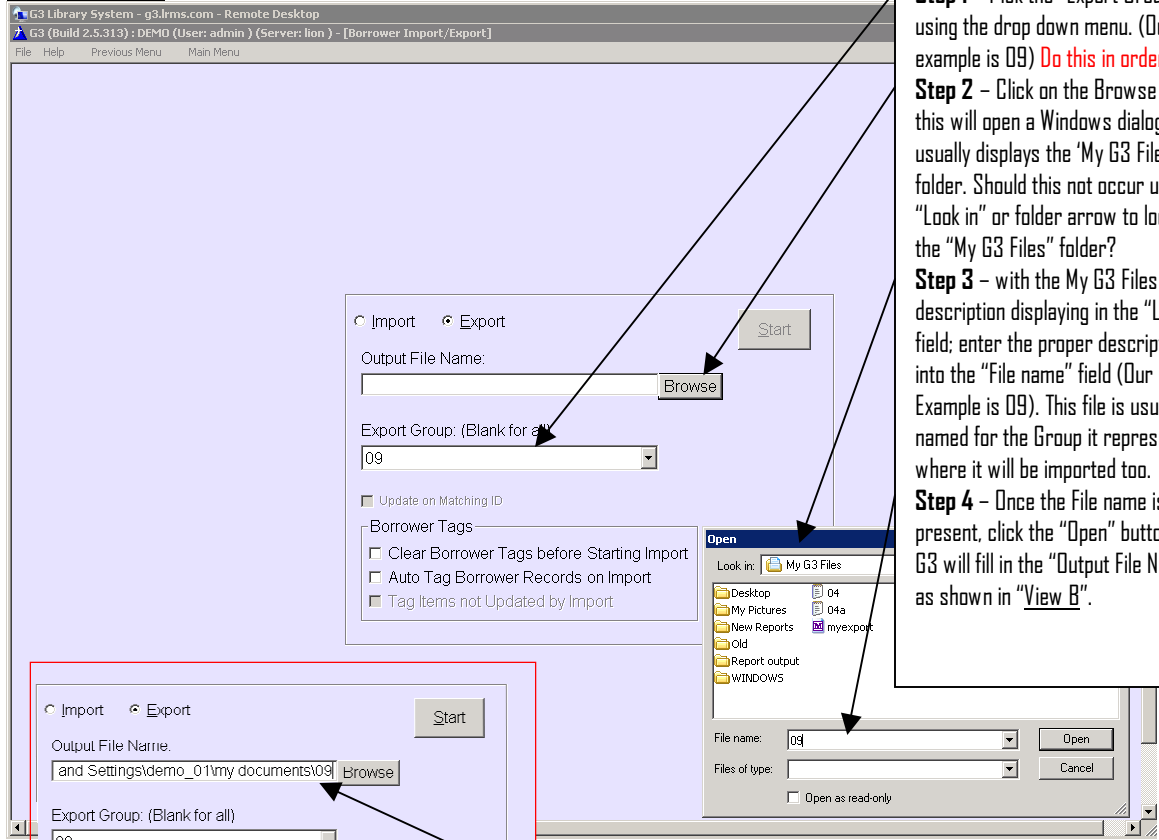
Step 1 – Pick the "Export Group" using the drop down menu. (Our example is 09) Do this in order shown

Step 2 – Click on the Browse button, this will open a Windows dialog box, usually displays the 'My G3 Files' folder. Should this not occur use the "Look in" or folder arrow to locate the "My G3 Files" folder?

Step 3 – with the My G3 Files description displaying in the "Look in" field; enter the proper description into the "File name" field (Our Example is 09). This file is usually named for the Group it represents to where it will be imported too.

Step 4 – Once the File name is present, click the "Open" button and G3 will fill in the "Output File Name" as shown in "View B".
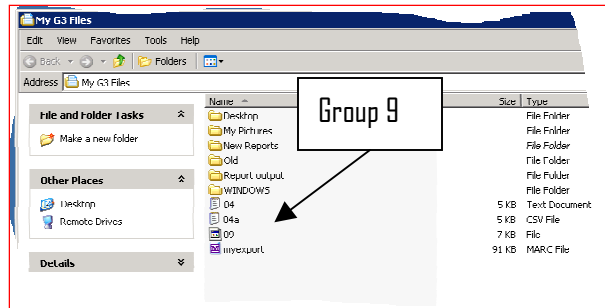
Step 5 – Once the "Output File Name" is verified and the "Export Group" field has the proper Group displayed, proceed by clicking on the **"Start"** button. G3 will export your file plus verify the number of Borrowers exported "View C" to the "My G3 Files" folder in a Tab Delimited format ready for Import to the next location. See "View D"
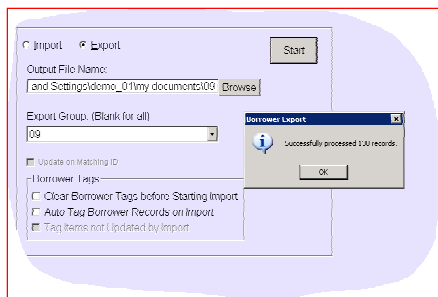
Screen "View B"

Screen "View C"

Screen "View D"

If your policy is to pass this file to the next library; use Copy and Paste to move this file.

Simply copy this file from the "My G3I Files" to your drive or local hard drive.
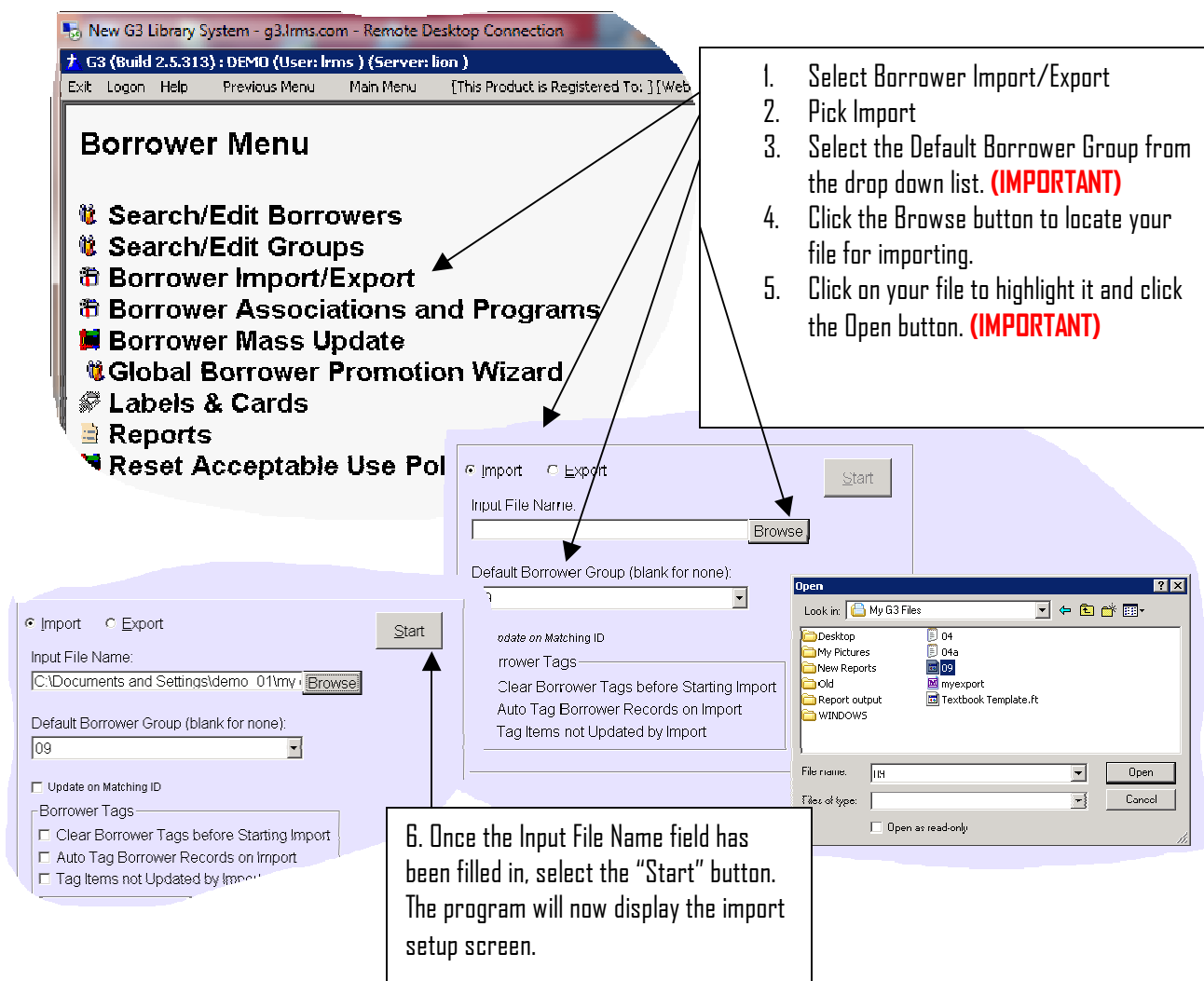
If you are not familiar with how to "Copy and Paste", it is done using the Mouse and the Right Mouse button. Placing the mouse pointer on the file that is to be copied and clicking the Right Mouse button once a Menu will open; look for the word "Copy" and click on it. Now the copied file is in computer memory and can be placed anywhere you want to place it by simply using the Right Mouse button again and this time selecting the word "Paste".

However there is a better way to add Borrower files to any other LRMS connected Library.

One person using their LRMS hosted service connection and G3 Launcher along with the "My G3 Files" folder manages this method. Using the account numbers of the other libraries and having a User name and Password for each account you can access each library and its database to Import or Export data. Logon to the LRMS Hosted services as normal, using whichever account number, G3 user name and password; access the Borrower Management area of the receiving program and follow the previous instruction to export the borrower data to the G3 My Files folder.

Importing your exported Borrower file from the "My G3 Files" or from your flash drive.

Using practically the same steps to create the export file we will now use this same area of the program to import the borrower file.
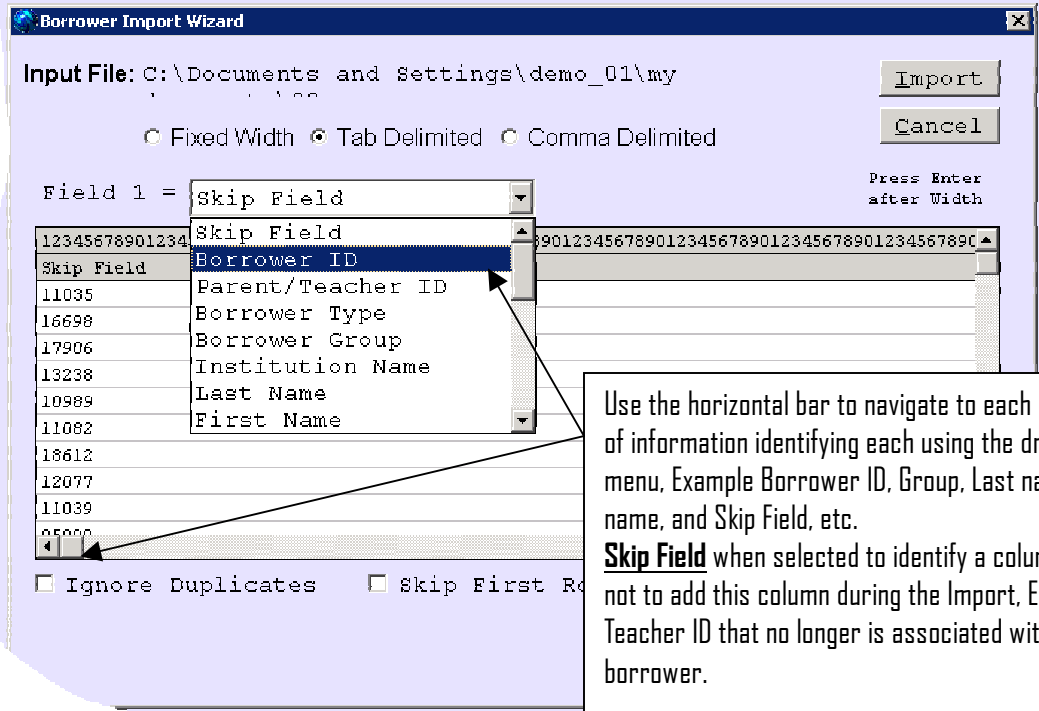

1. Select Borrower Import/Export
2. Pick Import
3. Select the Default Borrower Group from the drop down list. **(IMPORTANT)**
4. Click the Browse button to locate your file for importing.
5. Click on your file to highlight it and click the Open button. **(IMPORTANT)**

6. Once the Input File Name field has been filled in, select the "Start" button. The program will now display the import setup screen.

Setting up the Input file settings (also a universal file import

The program is asking for you to identify each column/Field of information to enable proper import of the file information. Files created by exporting from the library program are automatically recognized as a Tab Delimited file format. Once all of the columns of information are properly identified and verified you will select the "Import" button to start adding borrowers.
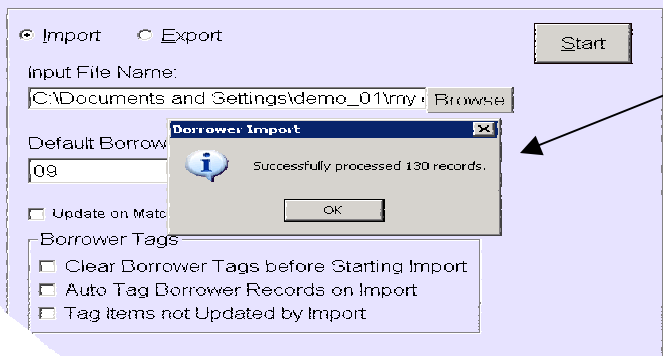
Use the horizontal bar to navigate to each column/field of information identifying each using the drop down menu, Example Borrower ID, Group, Last name, First name, and Skip Field, etc.
Skip Field when selected to identify a column indicates not to add this column during the Import, Example a Teacher ID that no longer is associated with the borrower.

The program will confirm the number of borrowers that have been added.