



## **Data migration using CSV files**

### **Indhold**

This document describes how data can be imported into Cicero using CSV files and the required format for these files

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# Indholdsfortegnelse

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# 1 Introduction

When converting data from another library system into Cicero, data must be delivered to Systematic in CSV files in a defined format. The CSV files are used as an intermediate format for loading into Cicero.

This document describes how the various CSV files must be formatted so that data can be loaded into Cicero.

## Patron data:

It is possible to import patron data from CSV files directly into Cicero LMS and Cicero Mobile – read [Cicero LMS – Patron import] and [Cicero Mobile – Patron import] for further information.

## Bibliographic record data:

Bibliographic records are initially located in DBC's data well or are imported into Cicero Catalogue in a separate process. The CSV files for importing holdings, reservations, etc. must therefore refer to the bibliographic record ID number (the RecordId field) in the catalogue system used.

## For libraries using Cicero Catalogue:

The library should start by providing a MarcXML file in UTF-8 encoding containing all the bibliographic records. This file is imported into Cicero Catalogue, producing an output file with new record id's for each record. The CSV files will have to reference the new record id from the output file.

It's also possible for the library to develop a tool that integrates directly to Cicero Catalogue, and upload the records to Cicero Catalogue that way. Then the library chooses which id to use for the records.

## For libraries using DBC:

If the library has locally catalogued records and appended records (with deviations from the central catalogue), it must be agreed in more detail how these records are to be handled in relation to DBC.

### 1.1 Additional documentation

Note: Additional documentation for this area currently only exists in Danish. If an automatic translation is insufficient, please contact Systematic support.

Reference	Link
[Cicero LMS - Setup]	<a href="https://cicerconnect.zendesk.com/hc/da/articles/360010183817">https://cicerconnect.zendesk.com/hc/da/articles/360010183817</a> See section about data import
[Cicero LMS – Administrative tools]	<a href="https://cicerconnect.zendesk.com/hc/da/articles/9709574905885">https://cicerconnect.zendesk.com/hc/da/articles/9709574905885</a> See section about maintenance of online holdings
[Cicero LMS – Patron import]	<a href="https://cicerconnect.zendesk.com/hc/da/articles/9706850042141">https://cicerconnect.zendesk.com/hc/da/articles/9706850042141</a>
[Cicero Mobile – Patron import]	<a href="https://cicerconnect.zendesk.com/hc/da/articles/10703653353629">https://cicerconnect.zendesk.com/hc/da/articles/10703653353629</a>

# 2 General rules

The following general syntax rules apply to all CSV files.

Separator: semicolon ( ; )

Encoding: UTF-8

Headers: yes

All files must contain a header that defines the order of data for the following lines. All values must be written in quotation marks and the order of the fields must follow the order specified in the header. See examples below.

When Systematic imports a CSV file, any invalid lines in the file will be returned in a new CSV file. This file will use the same format, adding an error column with an error message for that line. Such files can be manually corrected and then imported if needed. The error column is ignored when importing data.

### 3 Data types

The following sections describe the different data types that can be imported and the required format.

#### 3.1 Holdings

Materials are imported into Cicero with the fields below.

*Fields (red fields are mandatory, others can be left empty)*

- **recordId**: Id number of the bibliographic record.
- **recordIdType**: Catalogue type, for DBC (Denmark): **FAUST** – for others, using Cicero Catalogue: **CATALOGUE**.
- **itemNumber** string (255): Material number, must be unique.
- **branchShortName** string (100): Placement level 1, must match short name of an existing branch.
- **departmentShortName** string (8): Placement level 2, short name of department.
- **sectionShortName** string (8): Placement level 3, short name of section.
- **locationShortName** string (8): Placement level 4, short name of location.
- **sublocationShortName** string (8): Placement level 5, short name of sublocation.
- **materialGroupName** string (50): Material group name.
- **state**: Status of the material – allowed values: **AVAILABLE, ORDERED, LOST, IN\_TRANSIT, DISCARDED, NOT\_DELIVERED**. Use **ORDERED** for monographs and **NOT\_DELIVERED** for periodicals if they have been ordered from the supplier and not yet received by the library.
- **periodicalYear** string (255): For periodicals: year.
- **periodicalVolume** string (255): For periodicals: volume.
- **periodicalNumber** string (255): For periodicals: number.
- **themeName** string (255): Theme the material belongs to.
- **acquisitionDate**: Date of acquisition. Defaults to import date if not specified, format: **dd-MM-YYYY**.

Placement information on level 2-5 (**departmentShortName, sectionShortName, locationShortName, sublocationShortName**) will be created when importing holdings if they don't exist already. The full placement name can be updated using the import of Placements (see 3.8) or from the client.

Material groups and themes will be created as needed by the import if they don't exist already.

At least one periodical-field (**periodicalYear**, **periodicalVolume**, **periodicalNumber**) should be filled in when the bibliographic record type is periodical. The import doesn't check this, but working with the material in Cicero after the import requires it.

### Examples

Header row:

```
recordId;recordIdType;itemNumber;branchShortName;departmentShortName;locationShortName;
sublocationShortName;materialGroupName;state;periodicalYear;periodicalVolume;periodicalNumber;
themeName;acquisitionDate
```

```
"01252232";"FAUST";"8209237270";"Branch A";"VOK";"MAG";;"alm";"AVAILABLE";"";"";"";"";"05-07-2001"
```

```
"53441939";"FAUST";"8209237271";"Branch A";"VOK";"ÅR";;"alm";"AVAILABLE";"2019";"";"";"";""
```

```
"CIC-73209";"CATALOGUE";"2375587270";"Branch B";"VOK";"MAG";;"alm";"AVAILABLE";"";"";"";"";"15-07-2021"
```

```
"0254472";"CATALOGUE";"82375158270";"Branch
C";"VOK";"MAG";;"alm";"AVAILABLE";"2025";"";"5";"";"25-03-2001"
```

### Validation

There must be a record in the catalogue with the specified recordId.

Item number/material number must be unique within the file, and cannot exist in Cicero already.

Fields **departmentShortName**, **sectionShortName**, **locationShortName**, **sublocationShortName**,

**periodicalYear**, **periodicalVolume**, **periodicalNumber**, **themeName**, **acquisitionDate** can be left empty.

Materials that are lend out or on a reservation pickup shelf must be imported in state **AVAILABLE**. When importing loans/reservations, the state will be updated accordingly.

## 3.2 Loans

Loans are imported into Cicero with the fields below:

*Fields (red fields are always mandatory, others can be left empty depending on circumstances)*

- **itemNumber** string (255): Material number.
- **loanerNumber** string (255): Loaner number. Mandatory if **state** is **LENDOUT**.
- **loanDate**: Date when the loan was created, valid formats: **dd-MM-yyyy** or **dd/MM/yyyy**.
- **returnDate**: Latest date when the loan should be returned, valid formats: **dd-MM-yyyy** or **dd/MM/yyyy**.
- **returnedDate**: Date when the loan was actually returned – may only be specified only for loans in state **RETURNED**, valid formats: **dd-MM-yyyy** or **dd/MM/yyyy**.
- **state**: Status of the loan, allowed values: **RETURNED**, **LENDOUT**.
- **branchIsil**: ISIL number for the branch where the loan was made. There must be a branch in the agency that matches, if specified.
- **createdBy** string (255): User who created the loan. Defaults to the Systematic user performing the import if not specified.

- **modifiedBy** string (255): Latest user who modified the loan. Defaults to the Systematic user performing the import if not specified.

### Examples

Header row:

itemNumber;loanerNumber;loanDate;returnDate;returnedDate;state;branchIsil;createdBy;modifiedBy

"3545311714";"C1234567890";"06-10-2020";"06-10-2020";"";"LENDOUT";"DK-761500";"";"

"3545311715";"";"06-10-2019";"16-10-2019";"20-10-2019";"RETURNED";"DK-761510";"";"

"3545311716";"C1234567890";"06-10-2022";"16-10-2022";"20-10-2022";"RETURNED";"";"

"3545311717";"C1234567890";"06-10-2017";"16-10-2017";"";"LENDOUT";"";"Username 1";"

"3545718";"C12345";"06-10-2022";"16-10-2022";"20-10-2022";"RETURNED";"";"Username 2";"Username 3"

### Validation

When importing loans with status **LENDOUT**, the status of the loaned material will be updated accordingly.

The material's latest loan time is always set to the **loanDate** if it's later than the current value.

For loans with status **LENDOUT**, it is a prerequisite that the material number and borrower number are found in the database. In addition, a loan date (**loanDate**) and return date (**returnDate**) must be supplied. The loan date (**loanDate**) must be the same as or before the return date (**returnDate**). The status (**state**) of the referenced material must be one of these: **AVAILABLE**, **IN\_TRANSIT**, **LOST**.

For historical loans with status **RETURNED**, the material number must exist in Cicero but the borrower number (**loanerNumber**) can be empty. The loan date (**loanDate**), return date (**returnDate**) and returned date (**returnedDate**) must be specified. The loan date (**loanDate**) must be the same as or before the return date (**returnDate**) and returned date (**returnedDate**). If **returnedDate** is empty, **returnDate** is used.

If **branchIsil** is specified, a branch with the specified ISIL number must exist.

Username in **createdBy/modifiedBy** does not have to exist in the system. The specified username will appear in all relevant places in the system (material history, statistics, etc.). If the fields are empty, the Systematic user that loads the files will be used instead.

## 3.3 Reservations

Reservations are imported into Cicero with the fields below:

*Fields (red fields are always mandatory, others can be left empty depending on circumstances)*

- **recordId**: Id number of the bibliographic record.
- **recordIdType**: Catalogue type, for DBC (Denmark): **FAUST** – for others, using Cicero Catalogue: **CATALOGUE**.
- **loanerNumber** string (255): Loaner number. Mandatory if reservation state is **ACTIVE** or **AT\_RESERVATION\_SHELF**.
- **pickupBranchISIL**: ISIL number for the pickup branch, which must exist in the agency.

- **reservationType**: Reservation type, allowed values: **NORMAL**.
- **dateOfInterest**: Expiration date of the reservation. Valid formats: **dd-MM-yyyy** or **dd/MM/yyyy**.
- **state**: Status of the reservation. Allowed values: **ACTIVE**, **FULFILLED** or **AT\_RESERVATION\_SHELF**.
- **periodicalYear** string (255): For periodicals: year.
- **periodicalVolume** string (255): For periodicals: volume.
- **periodicalNumber** string (255): For periodicals: number.
- **itemNumber** string (255): Material number, if the reservation is for a particular material number.
- **readyForPickupMaterialItemNumber** string (255): Material number of the material that is ready for pickup by the loaner – mandatory if state is **AT\_RESERVATION\_SHELF**, and may not be specified otherwise.
- **latestPickupDate**: Latest date when the loaner can pick up the material, after which the reservation is cancelled. Valid formats: **dd-MM-yyyy** or **dd/MM/yyyy** – mandatory if state is **AT\_RESERVATION\_SHELF**, and may not be specified otherwise.
- **pickupNumber** string (1000): Pickup number of the material that is ready for pickup by the loaner – mandatory if state is **AT\_RESERVATION\_SHELF**, and may not be specified otherwise.

### Examples

Header row:

recordId;recordIdType;loanerNumber;pickupBranchISIL;reservationType;dateOfInterest;state;periodicalYear;periodicalVolume;periodicalNumber;itemNumber;readyForPickupMaterialItemNumber;latestPickupDate;pickupNumber

"53441939";"FAUST";"C0002658277";"DK-123456";"NORMAL";"26-02-2021";"ACTIVE";"2018";;;;;;

"07140827";"FAUST";"C0002658277";"DK-123456";"NORMAL";"26-02-2021";"ACTIVE";;;;;;

"78451238";"FAUST";"C361408870";"DK-761500";"NORMAL";"12-02-2023";"AT\_RESERVATION\_SHELF";;;;;;"8641278871";"18-12-2022";"195"

### Validation:

Only reservations with the status **ACTIVE**, **FULFILLED** or **AT\_RESERVATION\_SHELF** can be imported.

The status **FULFILLED** means that the reservation has been fulfilled and the loaner has loaned the material. The information is therefore historical, in the same way as loans with the status **RETURNED** are. **loanerNumber** is not mandatory for reservations in state **FULFILLED**.

The import handles reservations on single bibliographic records (**NORMAL**). This means that reservations of the types "equal good" (parallel reservations) or series reservations cannot be imported.

The material numbers specified in **itemNumber** and **readyForPickupMaterialItemNumber** must exist, otherwise the reservation will not be imported.

The fields **readyForPickupMaterialItemNumber**, **latestPickupDate** and **pickupNumber** may only be filled in and are mandatory if the imported reservation is in state **AT\_RESERVATION\_SHELF**.

For reservations imported with the status **AT\_RESERVATION\_SHELF**, the material specified in the field **readyForPickupMaterialItemNumber** must have one of the following states: **AVAILABLE**, **READY\_FOR\_PICKUP**.

### 3.4 Balances

Balances are imported into Cicero with the fields below:

*Fields (red fields are mandatory, others can be left empty)*

- **balanceNumber** string (255): Balance number. Must be unique within the CSV file, and in combination with already imported balances.
- **loanerNumber** string (255): Loaner number.
- **balanceType**: Balance type. Allowed values: **FEE** or **COMPENSATION**.
- **balanceDate**: Date when balance was created. Valid formats: **dd-MM-yyyy** or **dd/MM/yyyy**.
- **dueDate**: Latest payment date. Valid formats: **dd-MM-yyyy** or **dd/MM/yyyy**.
- **returnDate**: The due date of the loan that caused the creation of the balance, if any. Valid formats: **dd-MM-yyyy** or **dd/MM/yyyy**.
- **originalAmount** decimal(19.2): The initial amount of the balance. Format: "X.XX".
- **paidAmount** decimal(19.2): Amount already paid. Use "0.00" if nothing has been paid yet.
- **state**: Status of the balance. Allowed values: **CREATED**, **SENT\_TO\_COLLECTION**, **FULLY\_PAID**.
- **itemNumber**: Material number to assign to the balance. The material must exist.
- **feeType**: The type of fee. Mandatory when **balanceType** is **FEE**, and not allowed otherwise. Allowed values: **OVERDUE\_LOAN**, **BALANCE\_REMINDER**, **SERVICE**, **RESERVATION**.
- **internalNote**: Internal note for the balance.
- **vatRate** integer: The VAT percentage as a whole number. Format: "X".

#### Examples

Header row:

```
balanceNumber;loanerNumber;balanceType;balanceDate;dueDate;returnDate;originalAmount;paidAmount;state;itemNumber;feeType;internalNote;vatRate
```

```
"10000033";"17267372";"FEE";"28-06-2019";"28-07-2019";"20-03-2019";"150.00";"0.00";"CREATED";"6591568473";"OVERDUE_LOAN";"Internal note";""
```

```
"10000034";"17267372";"FEE";"27-06-2019";"27-07-2019";"";"150.00";"100.00";"CREATED";"6591568473";"OVERDUE_LOAN";"";"20"
```

```
"10000035";"17372";"FEE";"27-06-2019";"27-07-2019";"";"150.00";"100.00";"CREATED";"6591568473";"SERVICE";"";"25"
```

```
"10000036";"172633372";"FEE";"27-06-2019";"27-07-2019";"";"150.00";"100.00";"CREATED";"6591568473";"RESERVATION";"";"20"
```

"10000039";"18887346";"COMPENSATION";"28-06-2019";"28-07-2019";"17-12-2018";"98.00";"10.00";"SENT\_TO\_COLLECTION";"6591511273";"";"20"

"10000040";"18887346";"COMPENSATION";"28-06-2019";"28-07-2019";"17-12-2018";"98.00";"98.00";"FULLY\_PAID";"6591568473";"";"20"

#### Validation:

The amounts specified must have 2 decimal places.

The return date for the loan (**returnDate**) must be before the balance creation date (**balanceDate**).

The payment date (**dueDate**) must be after the balance creation date (**balanceDate**).

Any material number referenced (**itemNumber**) must exist.

The VAT (**vatRate**) must be a positive whole number and be lower or equal to 100.

If the VAT is left empty (either missing value or ""), the balance will be imported with the configured value from "VAT on fees".

### 3.5 Bookings

Bookings are imported into Cicero with the fields below:

*Fields (red fields are mandatory, others can be left empty):*

- **requestedFromBranchISIL**: ISIL number of branch where materials are requested from.
- **deliveryBranchISIL**: ISIL number of branch where materials should be delivered.
- **loanerNumber** string (255): Loaner number.
- **loanerGroupHierarchy**: Loaner group whose loaners are meant to loan the materials. Path from root group using "\" as separator.
- **recordId**: Id number of the bibliographic record.
- **recordIdType**: Catalogue type, for DBC (Denmark): **FAUST** – for others, using Cicero Catalogue: **CATALOGUE**.
- **preferredMaterials**: Number of materials. This number is used as both "Requested" and "Minimum" number of materials for the booking.
- **fromDate**: Booking from date. Valid formats: **dd-mm-yyyy** or **dd/mm/yyyy**.
- **toDate**: Booking to date. Valid formats: **dd-mm-yyyy** or **dd/mm/yyyy**.
- **state**: State of the booking. Allowed values: **ACTIVE**, **FULFILLED** or **COMPLETED**. **ACTIVE** is when no materials have been lend out yet. **FULFILLED** is when materials (at least one) are currently lend out, **COMPLETED** is when materials have been lend out and all are returned (historical).

#### Examples

Header row:

requestedFromBranchISIL;deliveryBranchISIL;loanerNumber;loanerGroupHierarchy;recordId;recordIdType;preferredMaterials;fromDate;toDate;state

"DK-123456";"DK-123456";"C0026838";"Alle\Skole 1\Elever\4C";"29387516";"FAUST";"25";"27-09-2020";"28-06-2021";"FULFILLED"

"DK-123456";"DK-123456";"C0042923";"";"28886187";"FAUST";"22";"16-11-2021";"24-12-2021";"ACTIVE"

*Validation:*

Bookings can be imported in the states **ACTIVE**, **FULFILLED**, **COMPLETED**.

The specified branches (**requestedFromBranchISIL**, **deliveryBranchISIL**) must correspond to branches in Cicero.

The date **fromDate** must be before **toDate**.

If a booking is **ACTIVE** or **FULFILLED**, the following must be met:

- **loanerNumber** must correspond to a borrower in Cicero.
- **loanerGroupHierarchy** (if specified) must correspond to a borrower group in Cicero.

The bibliographic record (**recordId**) must exist in the catalogue.

### 3.6 **Loaners**

For importing loaners directly into Cicero, see format and instructions in [Cicero LMS – Loaner Import] or [Cicero Mobile – Loaner Import].

The following describes the data format that must be provided if Systematic is to perform the import.

The format differs from that used when importing through the client.

Loaners are imported into Cicero with the fields below:

*Fields (red fields are always mandatory, others can be left empty depending on circumstances)*

- **branchISIL**: ISIL number for the loaner's preferred pickup branch. Must exist in Cicero.
- **externalIdentifier** string (255): External id of the loaner. Must be unique. An existing loaner in the system matching this id will be overwritten.
- **name** string (512): Loaner's name.
- **type**: Loaner type. Allowed values: **PERSON, LIBRARY, COMPANY, GROUP**.
- **loanerNumber** string (255): Loaner number. Must be unique, and cannot exist in Cicero already. If not specified, Cicero will generate a loaner number.
- **cpr** string (50): National id number of the loaner (Denmark: CPR, Sweden: Personnummer, Norway: Fødselsnummer). Must be unique. Is validated according to the national person number system configured for the agency.
- **address** string (255): Loaner's street address.
- **zipCode** string (255): Loaner's zip code.
- **city** string (255): Loaner's city.
- **phone**: May contain 1 phone number, or a list of phone numbers in the format "{number1;number2;number3}". A maximum of 3 numbers are allowed.
- **email**: May contain 1 email address, or a list of email addresses in the format "{address1;address2;address3}". A maximum of 3 email addresses are allowed.
- **birthDate**: Valid format: **YYYY-MM-DD**.

- language: Allowed values: **da, sv, fo, en, nb, de**.
- loanerGroups: Loaner groups for the loaner. These are created by the import if needed. Use “\” as separator to specify hierarchy if needed. The root loaner group should not be included.  
  
Similar to email and phone, this can be a list of loaner groups in the format “{loaner group 1;loaner group 2;loaner group3\subgroup 4\subgroup 5}”.
- identifiers: Additional identifiers for the loaner (in addition to **loanerNumber**). The loaner can use **loanerNumber** or any of the identifiers supplied to log in to Cicero. Must be prefixed with the identifier type + “\”, and can be a list of identifiers similar to phone and email. Allowed identifier types: **LIBRARY\_CARD\_TYPE, WAY\_F\_TYPE, UNI\_C\_TYPE**. A maximum of 5 identifiers are allowed.
- pinCode string (16): Loaner’s pincode.
- contactPerson string (512): Contact person is mandatory for loaner types **GROUP** and **COMPANY** and may not be specified for other loaner types.
- companyLoanerType: Type of company. Allowed values: **PRIVATE, CHILDREN, ADULTS**. (**CHILDREN/ADULTS** refers to institutions for children or adults). Mandatory for loaner type **COMPANY** and may not be specified for other loaner types.
- companyId: Company id number/VAT number. If specified, it will be validated according to the national person number system configured for the agency.
- libraryId: ISIL number for library loaners. Mandatory for loaner type LIBRARY, and may not be specified for other loaner types.
- notificationEmail string (255): Email address to be used for notifications. May contain 1 email address. It doesn’t matter whether this email address is also specified in the email field, but it also counts as 1 of 3 allowed email addresses.
- notificationPhone string (50): Phone number to be used for SMS notifications. May contain 1 phone number. It doesn’t matter whether this number is also specified in the phone field, but it also counts as 1 of 3 allowed phone numbers.
- enableDigitalPost: Enable Digital Post messages for the loaner. Allowed values: **true** or **false**. Empty value is equal to **false**.
- createdDate: Date of creation for the loaner. Must be today or an earlier date. If **lastActivityDate** is specified, **createdDate** must be equal to or before **lastActivityDate**. Defaults to the import date if empty, which is why **createdDate** must be specified if **lastActivityDate** is. Valid formats: **YYYY-MM-DD** or **DD-MM-YYYY**.
- lastActivityDate: Date of latest activity for the loaner. Must be today or an earlier date. See description of **createdDate** above.
- gender: Loaner’s gender. May only be specified for loaner type **PERSON**. Allowed values: **MALE, FEMALE, OTHER**.
- coName string (255): C/O name part of the loaner’s address.
- internalNotes: Internal notes for the loaner.

#### *Existing loaners:*

If a loaner already exists in Cicero, either based on **externalIdentifier, cpr** (PERSON), **companyId** (COMPANY) or **libraryId** (LIBRARY), the existing borrower will be updated and a new borrower will not be created.

If one of the specified identifiers from the **identifiers** field already exists in the system (even on the same loaner), the borrower will not be imported.

### Examples

Header row:

branchISIL;externalIdentifier;name;type;loanerNumber;cpr;address;zipCode;city;phone;email;birthDate;language;loanerGroups;identifiers;pinCode;contactPerson;companyLoanerType;companyId;libraryId;notificationEmail;notificationPhone;enableDigitalPost;createdDate;lastActivityDate;gender;coName;internalNotes

### Person

"DK-761501";"06170600";"Albert Jørgensen";"PERSON";"3182733703";"2303959999";"Thorsøvænget 91";"2670";"Greve";"20978723";"loaner1@systematic.com";"1995-03-23";"da";"Voksne udenfor kommunen";"";"0360";"";"";"";"";"loaner2@systematic.com";"32787902";"true";"1992-03-09";"2020-07-07";"MALE";"";"

"DK-761510";"06145840ABC";"Hans Petersen";"PERSON";"";"2708919999";"Thorsøvænget 91";"8700";"Horsens";"{20448733;55882585}";"{loaner2@systematic.com;loaner2@gmail.com}";"1991-08-27";"sv";"{Voksne indenfor kommunen;Personale}";"LIBRARY\_CARD\_TYPE\897654230";"3070";"";"";"";"";"loaner2@gmail.com";"20448733";"false";"2020-06-30";"";"OTHER";"";"Internal note on this loaner."

### Company

"DK-761501";"63836465";"Systematic A/S";"COMPANY";"";"";"Søren Frichs Vej 39";"8000";"Aarhus C";"89432000";"fbs@systematic.com";"";"da";"Virksomheder";"";"";"Michael Holm";"PRIVATE";"37160587";"";"";"";"true";"2020-01-01";"2021-09-10";"";"";"";"

### Group

"DK-761501";"75414";"Læsekreds 4";"GROUP";"58478575414";"";"Østerlundvej 100";"1964";"Frederiksberg C";"20978723";"loaner10@systematic.com";"";"";"Læsekredse";"LIBRARY\_CARD\_TYPE\L123009";"6248";"John Smith";"";"";"";"";"";"";"";"";"";"";"";"

### Library

"DK-761501";"710100";"Københavns biblioteker";"LIBRARY";"710100";"";"Fårdalsvænget 53";"6000";"Kolding";"20978723";"library1@systematic.com";"";"da";"Danske Biblioteker";"";"2080";"";"";"";"DK-710100";"";"";"";"";"";"";"";"";"";"

## 3.7 Loaner consent

Loaner consent data is imported into Cicero with the fields below:

*Fields (all fields are mandatory):*

- loanerNumber string (255): Loaner number. Loaner must exist in Cicero.
- consentType: Type of consent. Allowed values: **KEEP\_HISTORICAL\_LOAN\_DATA**, **SYNC\_WITH\_NATIONAL\_REGISTRY**.
- consent: Whether the loaner consents to this consent type. Allowed values: **false**, **true**.

### Examples

Header row:

loanerNumber;consentType;consent

"C04122017366";"KEEP\_HISTORICAL\_LOAN\_DATA";"false"

"C04122017367";"KEEP\_HISTORICAL\_LOAN\_DATA";"true"

*Validation:*

The combination of **loanerNumber** and **consentType** must be unique within the file.

If the specified **consentType** already exists for the loaner, it will be updated.

Consent information for a loaner is only needed when the loaner has given a particular consent. Already imported consents can be withdrawn by importing a new file where **consent** is false.

### 3.8 **Loaner bank data**

Loaner bank data is imported into Cicero with the fields below:

*Fields (red fields are always mandatory, others can be left empty depending on circumstances)*

- **loanerNumber** string (255): Loaner number. Loaner must exist in Cicero.
- iban string (50): International bank account number.
- bic string (20): Bank identifier code.
- accountHolder string (512): Name of the account holder.

*Examples*

Header row:

LoanerNumber;iban;bic;accountHolder

"C04122017366;;;John Doe"

"C04122017367;DK50 0040 0440 1162 43;DABADKKK;Jane Doe"

*Validation*

The combination of **loanerNumber** and at least one of the other fields must be present within the file.

Subsequent duplicated rows are treated as errors. A row is duplicate if the **loanerNumber** is present in an earlier row.

If bank data (iban, bic, accountHolder) already exists for the loaner, it will be updated.

**Iban validation** follows the standard which is as follows:

Must start with exactly 2 letters (country code).

Followed by optional whitespace.

Followed by exactly 2 digits (check digits)

Ends with 1-30 alphanumeric characters (bank and account identifier), with optional spaces between characters

**Bic validation** follows the standard which is as follows:

Must start with exactly 8 alphanumeric characters (bank code + country code + location code), with optional spaces after each character.

Optionally followed by exactly 3 more alphanumeric characters (branch code), with optional spaces after each character.

### 3.9 Loaner memberships

Loaner memberships are imported into Cicero with the fields below:

*Fields (red fields are always mandatory, others can be left empty depending on circumstances. If any of the green fields have a value then all of the green fields must have a value. The green fields indicate that the membership is paid)*

- **loanerNumber** string (255): Loaner number. Loaner must exist in Cicero.
- **membershipName** string (255): Name of the membership category in use for the membership.
- **status**: Status of the membership. Allowed values are – CURRENT, NEXT, EXPIRED, CANCELLED.
- **startDate**: Date that the membership started, format: **dd-MM-yyyy** or **dd/MM/yyyy**
- **endDate**: Date that the membership ends, format: **dd-MM-yyyy** or **dd/MM/yyyy**
- **paymentDate**: Date that the membership was paid, format: **dd-MM-yyyy** or **dd/MM/yyyy**
- **paymentRate** decimal(19.20): Amount paid for the membership

*Examples:*

Header row:

```
loanerNumber;membershipName;status;startDate;endDate;paymentDate;paymentRate
```

```
C04122017367;Membership 2025;CURRENT;01-01-2025;31-12-2025;01-01-2025;30
```

```
C04122017367;Membership 2026;NEXT;01-01-2026;31-12-2026;01-01-2026;30
```

```
C04122017367;Membership 2020;EXPIRED;01-01-2020;31-12-2020;01-01-2020;30.31
```

```
C04122017366;Membership 2025;CURRENT;;;;
```

*Validation*

- Each loaner can have only one CURRENT and only one NEXT membership
- For NEXT and CURRENT statuses, the category name must match an existing membership category
- If any of the green fields have a value, all of them must have a value.
- For CURRENT and NEXT status memberships, paymentDate cannot be after startDate.
- For CURRENT, NEXT, EXPIRED, and CANCELLED statuses: startDate cannot be after endDate
- For CURRENT status: The membership period must be active, so (startDate ≤ today ≤ endDate)

- For NEXT status: startDate and endDate must be set to future dates, so (today < startDate; today < endDate)
- PaymentRate must use period: '.' and should be a number without any currency character.
- Memberships with status EXPIRED cannot overlap in period with other EXPIRED memberships in Cicero or in the import data.
- CURRENT or NEXT memberships to be imported cannot have overlapping periods with other memberships of their same type, neither in Cicero nor in the import data.

#### *Payment Rate VAT percentage on created membership*

If no VAT percentage could be matched to this membership then the VAT percentage will be set to the configured value of "VAT on membership rates".

#### *Membership categories for memberships with status CURRENT or NEXT*

Before importing memberships with state CURRENT or NEXT, it is required to manually create the membership categories that these use.

#### *Automatic creation of membership category for memberships with status CANCELLED or EXPIRED*

For rows with status CANCELLED or EXPIRED: If a membership category with the specified membershipName is not present in Cicero, it will be created. This functionality is not meant to be used to create membership categories for memberships with status CURRENT or NEXT.

Data of note saved on this created membershipcategory is:

- Membership name – set to the input date of import field membershipName
- Description – Will get value "Created by import"
- Rate amount – will be set to the paymentRate from the import data, unless that is either 0 or not present. Otherwise will default to "1"
- Rate VAT – Will be set to the configured value for membership vat: "VAT on membership rates"

### 3.10 Placements

Placements are imported into Cicero with the fields below:

*Fields (all fields are mandatory):*

- type: Placement type, 0 = department, 1 = section, 2 = location, 3 = sublocation.
- name string (100): Placement name.
- shortName string (8): Placement shortname.

*Examples:*

Header row:

type;name;shortName

"0";"Voksen";"VKS"

"1";"Skønlitteratur";"SKN"

"2";"Musik";"MUS"

"3";"Faglitteratur";"FAG"

Importing placements will create the placements in the CSV file. In case the imported data matches **type** + **shortName** for an existing placement, the **name** of the existing placement will be updated.

### 3.11 Shelves

Shelves are imported into Cicero with the fields below:

*Fields (red fields are mandatory, others can be left empty):*

- **identifier** string(50): Shelf identifier.
- **name** string (50): Shelf name.
- **sortingValue**: Sorting value used on pickup lists. Decimal value, ie. "1.2" or "1".
- **type**: Type of shelf. Allowed values: **REGULAR**, **PICKUP**.
- **placement**: The shelf's placement.

*Examples:*

Header row:

identifier;name;sortingValue;type;placement

"12we34a";"History";"1";"REGULAR";"DK-761500/PL/PL/PL/PL"

"ad34a24d";"Pickup 12";"1.5";"PICKUP";"DK-761500////"

*Validation:*

**placement** must be in the format "branch/department/section/location/sublocation", using branch ISIL number and placement shortNames.

The branch specified in the **placement** must exist in the system. Placements (department/section/location/sublocation) that don't exist already will be created.

When importing shelves, it can be indicated whether the shelves are to be overwritten or created. It must be agreed with Systematic in each individual case whether a file is imported with overwriting activated.

- When importing shelves with overwrite activated, existing shelves matching the **identifier** will be updated.

- When importing shelves without overwrite activated, shelves will be rejected if the imported **identifier** already exists.

### 3.12 Lists (loaner favorites)

Loaner favorites are imported into Cicero with the fields below:

*Fields (red fields are mandatory, others can be left empty):*

- **loanerNumber** string (255): Loaner number.
- **listName** string (255): Name of the list.

- **bibliographicRecordId**: Id number of the bibliographic record.
- periodicalYear string (255): For periodicals: year.
- periodicalVolume string (255): For periodicals: volume.
- periodicalNumber string (255): For periodicals: number.

*Examples:*

Header row:

loanerNumber;listName;bibliographicRecordId;periodicalYear;periodicalVolume;periodicalNumber

"C000000001";"List 1";"46521625";"";"";""

"C000000001";"List 2";"46577625";"2017";"";"3"

"C000000001";"List 1";"46221622";"";"1150";""

"C000000001";"List 2";"46521335";"";"";""

*Validation:*

**loanerNumber** must exist in Cicero.

**bibliographicRecordId** must exist in the catalogue.

### 3.13 Online holdings

See [Cicero LMS – Administrative tools].

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