

Before performing these tasks always **do a backup first**. You should be using latest version of Bookmark. Do an update **UTILITIES - UPDATE**.

Change due dates

CONTROLS - due dates

Change any old dates. Click Staff borrower type number and change the date or click on Calendar. Check **Holiday dates** and **Final due date**

Delete borrowers who have left

BORROWERS - Delete borrowers You can delete one at a time by selecting and then clicking **Delete** follow the prompts to confirm and put any books on loan into Lost or Missing.

OR to mass delete all Year 6. Click on the Year Level heading to sort into Year Levels then scroll down to the 06 or 6 year level. Click on the first Year 6 student then hold down **Shift** and scroll down then click on the last Year 6 student which should highlight all Year 6. Click on **Delete** and follow the prompts. You can also use **Control** click to select multiple borrowers from the list.

Update student ADMIN ID numbers

All existing students must have their ADMIN ID number eg SMITH, John 556 To check and update these numbers have your class rolls handy with the students ADMIN ID's.

BORROWERS - Rollover - Update borrowers list. All borrowers displayed alphabetically add ID number for any students without one. Highlight the borrower to be changed in the list then make the changes at the bottom of the screen. Add Admin ID if required then either click **Update** or press **enter** to save the change.

Do another backup. Click on **Backup**.

If importing borrowers for the first time it may be easier to delete all students rather than adding hundreds of ADMIN ID's

Exporting from ADMIN System other than CASES or SAS

Exporting students from the ADMIN System will be different for each system. The fields needed by Bookmark are **Surname, Given Name, Gender (Sex) Student ADMIN ID, Class, Year level and perhaps Birth Date and parent email** (for sending overdue). Other fields such as Address, phone number may also be exported. These are not required by Bookmark and could be an issue with privacy laws. The file should be exported as a CSV file (it must not be an XLS file) Save the file on your USB drive and name it **STUDENTS.CSV DO NOT Open** the file in Excel to check it, Excel makes changes that effect the file.

Importing Student Data into Bookmark.

BORROWERS - Rollover - Import borrowers

Change **Import format** to **Custom** from the drop down list. Then click on the **Custom** button. Click on the **Load Sample** button and find your file. On the right side click on the field you wish to import then on the left click on where you want the data to go. Repeat this for all fields you wish to import.

Assign Borrower Types - leave as **Based on year level**.

Assign New Barcodes - choose either the first or second. If using **AdminID's as barcodes** choose **Assign new borrowers unused numbers and use Admin ID as barcodes for all borrowers**

Match on Admin ID and Name

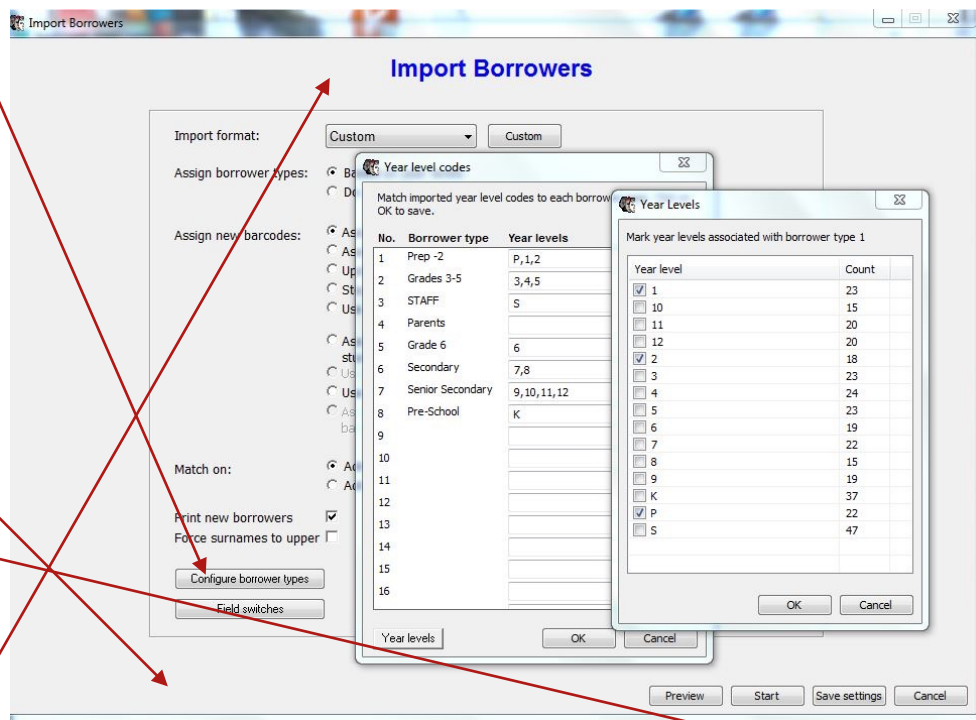
Set case - normally keep as imported (your choice)

Untick Print New Borrowers

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Click on **Configure Borrower Types**, check your year levels are correct for each student borrower type (refer diagram, on right) especially prep does the office use **0** or **P** or **Foundation**

Click on **Field Switches**, put ticks in **Gender, Birthdate, Group/Class, Year Level, email** and **Name** (address details should not be imported). Click **OK**, click **Save Settings**



Import Borrowers

BORROWERS - Rollover

-Import Borrowers import format **Custom** click on **Custom** then **Load sample** insert your USB and choose the USB drive (probably E or F or J) . Choose the file **STUDENTS.CSV** and **open** The screen to the right will appear. **Borrower fields** are Bookmark fields

Import fields are the fields in STUDENTS.CSV file.

Click on Student last name in **Import fields**. Then click on Surname in **Borrower fields**. Surname should now appear in Equivalent **Bm field**.

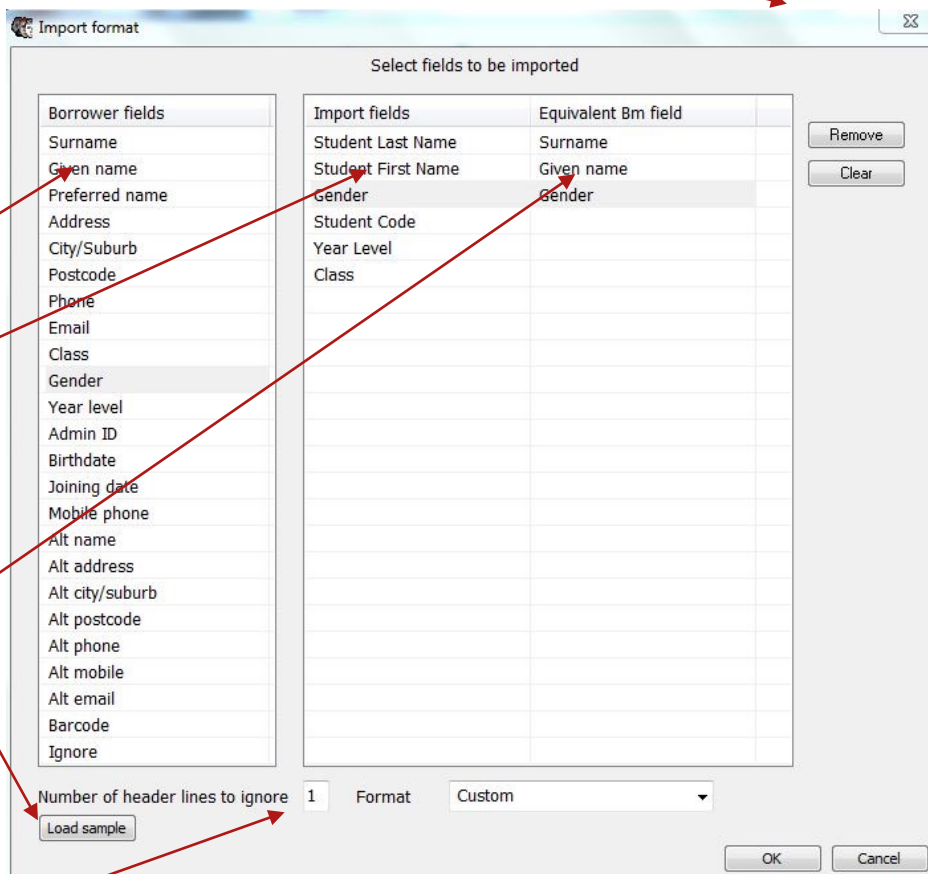
Repeat for Student first name and then Gender, Student code, year level, class and email.

If the file contains lines at the beginning which do not contain student data, enter the number of lines next to 'Number of headers lines to ignore'

The import fields may differ in name depending on your ADMIN System.

Click **OK**

Click **Start** select the **STUDENTS.CSV** file click **Open** check the first borrower if all OK click **Mass Import**. Check the imported list and click **Save**.



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Add new staff

BORROWERS - Add/Edit borrowers Choose the next highest number. Type name then choose Borrower type. Suggest the Group be S (for staff) Click **Save** (or **Press F1**) to save the record.

Delete Classes no longer used.

BORROWERS - Authority Lists - Classes click on the Rebuild button.

Print Borrower sheets from Bookmark

BORROWERS - Labels

1 - Print Barcode Labels

4 - Page Setup - DO NOT CHANGE if correct last year

Choose the Borrower Template that matches your current

borrower labels. Standard Bookmark labels shown

The site ID should match your current labels (not 0000)

Make the top margin 20.

The stripe width should be 0.3

Close the page setup screen.

Close the page setup screen.

Choose 1. Class Sheets

Select a **class** or **ALL**

Choose a suitable layout.

Choose name format,

tick the following options Sort, and Top of Page and untick

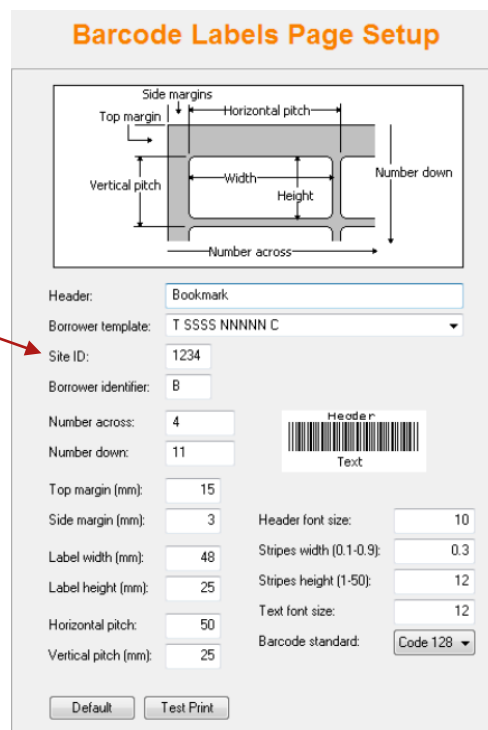
List Names

click **Proceed**.

Tick show checksum digit

OK

If Print Preview looks Ok just click **Print**.



The image shows a 'Barcode Labels Page Setup' dialog box. At the top, there is a diagram of a label with various dimensions labeled: Top margin, Side margins, Horizontal pitch, Vertical pitch, Width, Height, Number across, and Number down. Below the diagram are several input fields and a preview area. The 'Header' field contains 'Bookmark'. The 'Borrower template' is set to 'T SSSS NNNNN C'. The 'Site ID' is '1234' and the 'Borrower identifier' is 'B'. The 'Number across' is '4' and the 'Number down' is '11'. The 'Top margin (mm)' is '15', 'Side margin (mm)' is '3', 'Label width (mm)' is '48', 'Label height (mm)' is '25', 'Horizontal pitch' is '50', and 'Vertical pitch (mm)' is '25'. The 'Header font size' is '10', 'Stripes width (0.1-0.9)' is '0.3', 'Stripes height (1-50)' is '12', and 'Text font size' is '12'. The 'Barcode standard' is set to 'Code 128'. There is a preview area showing a barcode with 'Header' and 'Text' labels. At the bottom, there are 'Default' and 'Test Print' buttons.