



Before performing these tasks always **do a backup first**. You should be using the 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 ICON ID numbers

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

BORROWERS - Rollover- 1 - Update borrowers list All borrowers displayed alphabetically, sort by clicking the Admin ID heading which will put all borrowers without Admin ID's at the top. (Note staff do not have ID's). 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 ICON

Get your admin people to export the students to a USB following these steps exactly.

Open ESIS. Go to **Students** then **Current Student Maintenance**. Click **OK** on Search Criteria.

All students appear on Left Hand Grid called "Current Student Selector". **Right click** in this screen and select "**Copy Grid to Excel**". Click **ok**. Then when excel opens cut and paste the following Fields into a new sheet.

Surname, Given1, Year Level, Form, Gender, ID (you may also include parent email, address details if required).

Click **Save as** name the file **Students** then change to your USB drive (E or F or ...). At the bottom of the window where it says File Type change this to **CSV** and click **Save**. Check on your USB drive that you have a file named **STUDENTS.CSV** (it must not be an XLS file but may have an Excel icon which is OK) **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 the import format to CUSTOM then click on the **Custom** button. At the bottom enter number **1** in the Number of header lines to ignore, then 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. Click **OK**

Assign Borrower Types - leave as **Based on year level**. **DO NOT CHANGE**

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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

Click on **Configure Borrower Types**, check your year levels are correct for each student borrower type (refer diagram, at 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** and **Name** (address details should not be imported). Click **OK**, click **Save Settings**

Import Borrowers

BORROWERS - Rollover - Import borrowers insert your USB, click on **Start** and choose the USB drive (probably E or F or J) . Choose the file **STUDENTS.TXT** and **open** the first new borrower should appear on screen, check the displayed details if all details are in the correct field click **Save** check the next borrower if all OK click **Mass Import**. Check the imported list **1 Update borrowers list** and click **Close**.

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 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.

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 on each label (normally) Click **OK**, if **Print Preview** looks Ok just click **Print**.

No.	Borrower type	Year levels
1	Prep - Year 3	P, 1, 2, 3
2	Year 4 - Year 6	4, 5, 6
3	STAFF	
4		
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		
16		

Header:

Borrower template:

Site ID:

Borrower identifier:

Number across:

Number down:

Top margin (mm):

Side margin (mm):

Label width (mm):

Label height (mm):

Horizontal pitch:

Vertical pitch (mm):

Header font size:

Stripes width (0.1-0.9):

Stripes height (1-50):

Text font size:

Barcode standard: