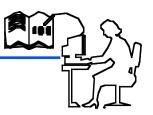
Book Mark Library Services Pty Ltd

Fact Sheet - Borrower Rollover SAS



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 SAS ID numbers

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

Exporting from SAS

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

Open SAS, on the main menu open 'People', then 'export' then 'enhance export', click on yellow student folder, click on 'fields in order', click on Student ID, Last name, First name, Date of birth, Class, Year, Sex, click on 'export'. In the Save as window 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 with header and click Save. Check on your USB drive that you have a file named STUDENTS.TXT (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 Import format to SAS (VIC) from the drop down list.

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

Click on **Configure Borrower Types**, check your year levels are correct for each student borrower type (refer diagram, at right)

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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 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.

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**.

