Book Mark Library Services Pty Ltd

Fact Sheet - Borrower Rollover RMSIS / Integris Students

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 ADMIN ID numbers
All existing students must have their ADMIN ID number entered. 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, sort by clicking the Admin ID heading which will put all borrowers without Admin ID's at the top. 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 press **enter** (to save the change) and the next borrower appears. Repeat as necessary. **Do another backup.** Click on **Backup**.

Exporting from RMSIS / Integris
Get your admin people to export the students to a USB following these steps exactly.
Select **Admin > Reports > Exports**. Select the **EDWA Library Export.** Select **Students.** Set the destination. Set New **Query to all students via Find > Select > Yes.** Click on **Print** to export the file. You cannot export directly to the usb, export to your document folder and then copy onto a usb for library.

DO NOT open the file.

Importing Student Data into Bookmark.

BORROWERS - Rollover - Import borrowers
Change **Import format** to **RMSIS / Integris Students (WA)** 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 diag at right). If unsure of year levels use 0,00 for Prep and 1,01 for year level 1 etc. Click **OK** when finished.
Click **Field Switches,** put ticks in **Gender, 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 Student file and **open** the first new borrower should appear on screen, check the displayed details if all details are in the correct fields click **Save** check the next borrower if all OK click **Mass Import.** Check the imported list **Rollover - Update borrowers list.** Sort by clicking column headings.

Import Staff
Repeat the above steps to export Staff and choose
RMSIS / Integris Staff (WA) in bookmark Import

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

Delete Classes no longer in use.
BORROWERS - Authority Lists - Classes click on 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, Use alt. barcode and Top of Page and click **Proceed**.
Tick Show checksum digit on each label (normally)
Click **OK**, if Print Preview looks Ok just **Print.**