

## Bookmark Fact Sheet

# Updating Borrowers / Class Rollover

June 2023

At the beginning of the school year, students change classes and year (grade) levels. Their borrower types in Bookmark may need to change to reflect a different year level.

Bookmark provides different ways to update borrower information. You can choose the "method" that suits best.

The three borrower data fields that require change are:

- The **class** name is the physical class into which borrowers are going. It is often used for overdues. Classes can be composite - e.g. have several year levels like 4/5.
- The **year level** is the borrower's grade or standard. A borrower can only have one year level. They are a year (grade) 4 or year 5. Year level is not the class they are in, it is the *grade*.
- The **borrower type** number. This determines the maximum number of loans and the length of time borrowed (due date). It is usually related to the year level and may or may not change depending on how the borrower types have been set up.

**Reminder: BACKUP before updating information!**

## Delete Borrowers

First thing to do is deal with borrowers who have left.

- Assign a "Left" class and/or a "left" borrower type and/or a "L" year level. Changing their classes to LEFT has the advantage of easily identifying borrowers who are no longer at the school *after the rollover*.

To mass delete borrowers, go to Borrowers > Delete borrowers.

**Delete Borrowers**

288 borrowers  
 Click to highlight those to be deleted, then click on DELETE.  
 Many borrowers can be deleted at the same time by using the Shift or Ctrl keys when clicking.  
 The order of the list can be changed (re-sorted) by clicking on a column heading.

Number	Name	Class	Year level ▲	Type	Loans	AdminID	Barcode
347	PIKE, Jennica	2MB	2	1 - Years P, 1, 2	Yes	19156	B0000347
351	NEWBY, Ilsa	2MB	2	1 - Years P, 1, 2	Yes		B0000351
358	WALLACE, Elvis	LO	2	2 - Year 3,4		18611	B0000358
361	MCFADZEAN, Lachlan	2MB	2	1 - Years P, 1, 2	Yes	18882	B0000361
366	CUTLER, Mitchell	2MB	2	1 - Years P, 1, 2	Yes		B0000366
372	BOVIS, Zak	2MB	2	1 - Years P, 1, 2	Yes	15539	B0000372
374	GUBERINA, Charles	2MB	2	1 - Years P, 1, 2	Yes	18584	B0000374
392	LEIM, Hugo	2MB	2	1 - Years P, 1, 2	Yes	19145	B0000392
405	ALLEN, Jade	2MB	2	1 - Years P, 1, 2	Yes		B0000405
410	CORMACK, Eimear	2MB	2	1 - Years P, 1, 2	Yes		B0000410
425	ALLOWAY, Sophia	2MB	2	1 - Years P, 1, 2	Yes		B0000425
430	FAIRFAX, Beau	2MB	2	1 - Years P, 1, 2	Yes		B0000430
435	NOVAK, Siena	2MB	2	1 - Years P, 1, 2	Yes		B0000435
451	TUCKEY, Indigo	2MB	2	1 - Years P, 1, 2	Yes	19731	B0000451
482	PLOWMAN, Elke	LO	2	1 - Years P, 1, 2		19068	B0000482
487	PULLEN, Charlotte	LO	2	1 - Years P, 1, 2	Yes		B0000487
490	HAMILTON, Jaime	2MB	2	1 - Years P, 1, 2	Yes		B0000490
491	DAWSON, Oliver	2MB	2	1 - Years P, 1, 2	Yes		B0000491
492	COLLITON, Erika	2MB	2	1 - Years P, 1, 2	Yes	15539	B0000492
114	ROBINSON, Chloe	3ST	3	2 - Year 3,4	Yes	19699	B0000114
128	CHIA, Charlie	3ST	3	2 - Year 3,4	Yes		B0000128
168	EDEN, Miles	3ST	3	2 - Year 3,4	Yes	18587	B0000168
193	ELKAN, Finn	3ST	3	2 - Year 3,4	Yes	18805	B0000193
198	CAMPBELL, Lindsay	3ST	3	2 - Year 3,4	Yes	16547	B0000198
200	HADDAD, Charlotte	1SR	2	2 - Year 3,4	Yes		B0000200

List loans   Scan   Overdue notice   Delete   Go back

Highlight the person/s to be deleted. (Changing the order of the list can help. Click on the heading at the top of a column to change the order based on that column.)

The Shift and the Control keys may be used to select more than one person at a time.

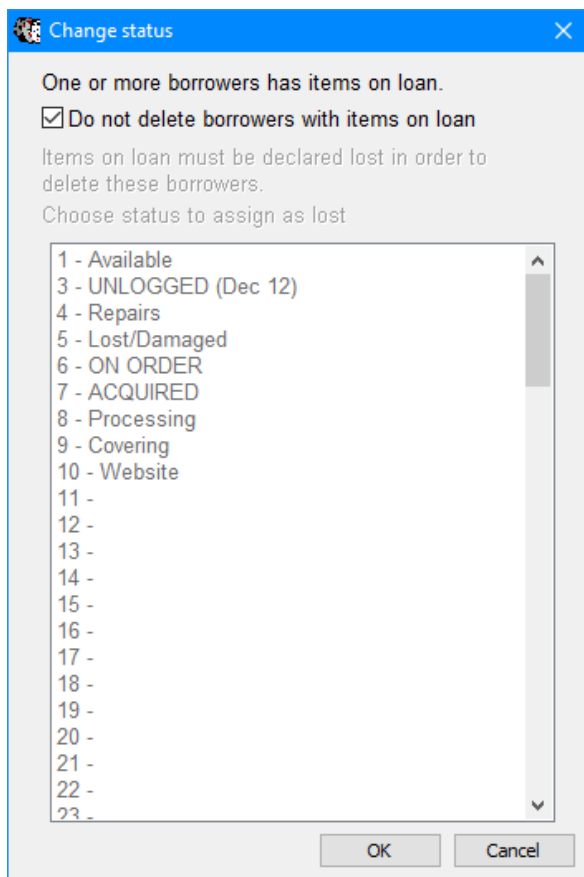
Press the Delete key to remove the borrowers or click on the Delete button.

**Notice**

Delete 27 borrowers. Are you sure?

Yes   No

If there are books on loan to a borrower, it will ask what to do. If you do not wish to delete the borrowers with outstanding loans, leave the checkbox ticked. If you wish to delete them but make the items missing, remove the tick then click on a status to be assigned. Click OK.



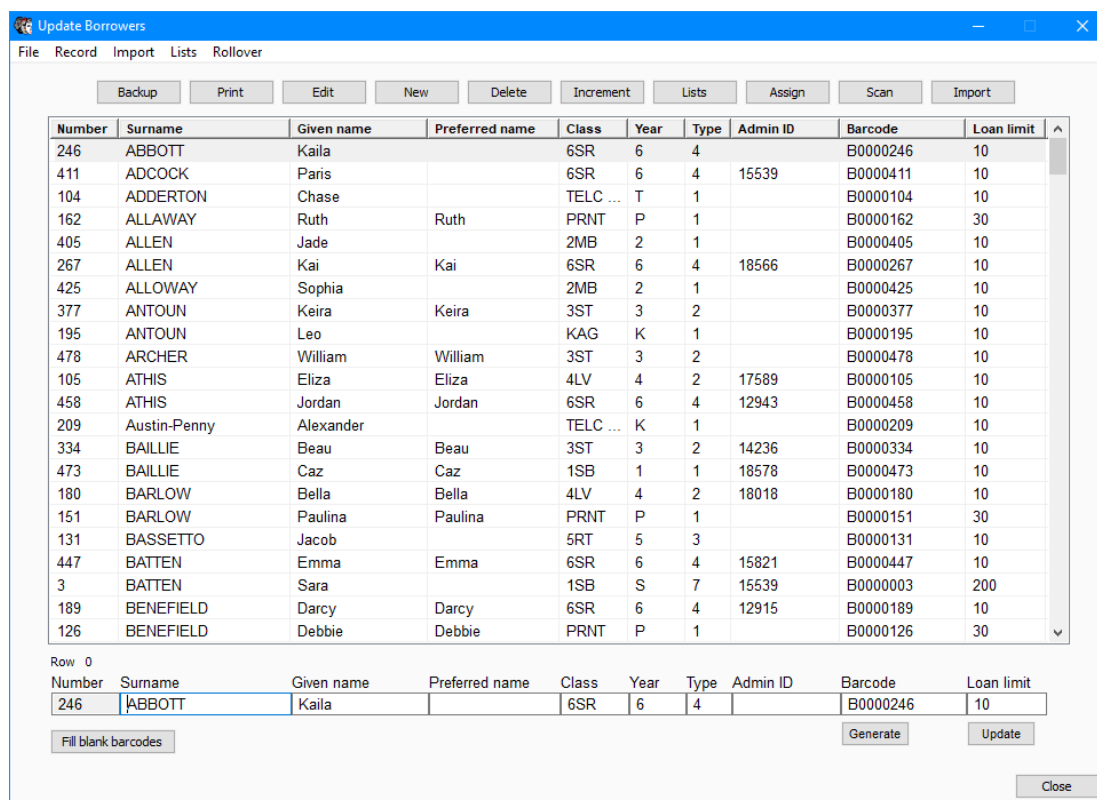
Done.!

### **To update Borrowers manually**

Updating the borrower entries one by one in Add/Edit is the slowest way to update students. Several other faster methods are available. It is, however, a good place to add new staff and sometimes new borrowers.

#### *Rollover from a list*

Go to Rollover. Click on option 1 – Update Borrowers List.



Click on the borrower to be changed. The row is highlighted, and a copy of that person's information appears beneath the list.

Click on the editboxes beneath the list. Change details as needed and click Update. Or press Enter (same as clicking on Update). Or press the Up or Down Arrow Keys. Or click on another borrower. All these actions cause any changes to be immediately saved to the database and the list updated. The next borrower down automatically appears.

If the list is sorted correctly, you can literally "go down the list" to update everyone.

## Sorting

To help, the list can be re-arranged or "sorted". Just click on the heading at the top of the column and the list is sorted based on the contents of that column.

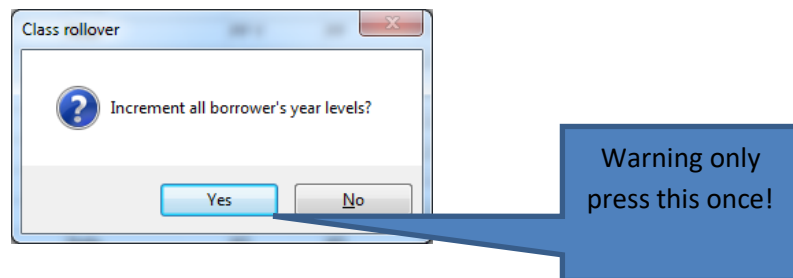
Sorting is a way to put everyone together in the same class, for example, or year level.

## Increment

The Increment button is a fast way of jumping everyone to the next year level.

No.	Borrower type	Year levels
1	Years P, 1, 2	P, 1, 2
2	Year 3,4	3,4
3	Year 5	5
4	Year 6	6
5	Ex LVS Students	
6	Parents	
7	Teacher	
8	Ancillary Staff	
9	Library Staff	
10	Ten	
11		
12		
13		
14		
15		
16		

Make sure the correct year levels are entered against the correct borrower types. Click OK.



Click Yes and everybody will instantly be a year level higher. That takes care of the year level and borrower type.

Be careful! *Do not repeat this* as the year levels are automatically incremented with each click. There is no easy "go back" !

The students must then be put into classes.

Do this by going down the list or leave the Update Borrower List window to use a different, faster method.

### 3 - Assign Borrowers to Classes in Batches

This allows highlighting many borrowers then putting them into a class, a year level and/or a borrower type en-mass. Borrowers can be done in batches. When a batch has been assigned, they are removed from the visible list.

1. Fill in what needs to be changed Not all fields need to be filled in. It only changes what is filled

2. Highlight the borrowers to be changed.

3. Click save at the end to save all the changes..

3. Click Assign and the borrowers will be updated and disappear from this list i

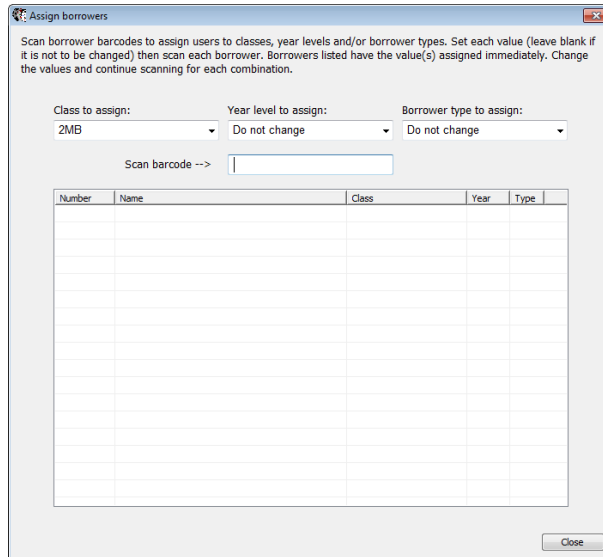
Again, putting the list in order helps.

This can be a quick way to assign students to classes and year levels, but it does not delete or add borrowers.

### 4 – Scan borrowers into classes

The scan button opens a window that can be used to assign borrowers classes, year levels and types. The Change button does this by presenting a list but the Scan button allows you to scan in barcodes.

First set up the class, year level and borrower type. Then scan the barcodes of all borrowers that are to be assigned those values. Repeat for each combination required. This approach assumes borrower barcodes are readily available.

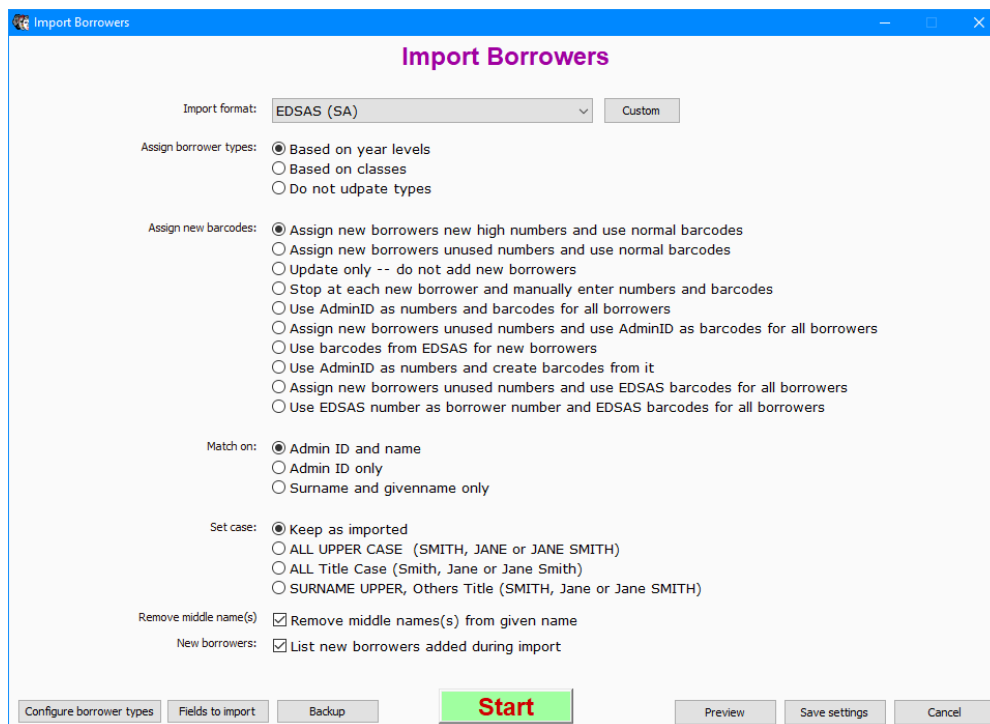


## Import Borrowers

This is the fastest method of updating borrower information and adding new borrowers. It is also the easiest once set up.

This function reads data taken from school administration systems straight into Bookmark.

Do a **backup** before starting so that if things go wrong, the data can be restored. A backup button is located at the bottom of the window.



When importing the data, Bookmark tries to match the student ID from the office record against the AdminID in Bookmark. If this fails, it tries to match against the name. If both fail, the student is considered new and is added as a new borrower with a new barcode number. If either match succeeds, the student's data is updated.

It is recommended to first enter the Admin ID values against as many students as possible before importing the first time. This gives the greatest number of matches. This can be done on the Update Borrower List window.

The screenshot shows the 'Import Borrowers' window with the following configuration options:

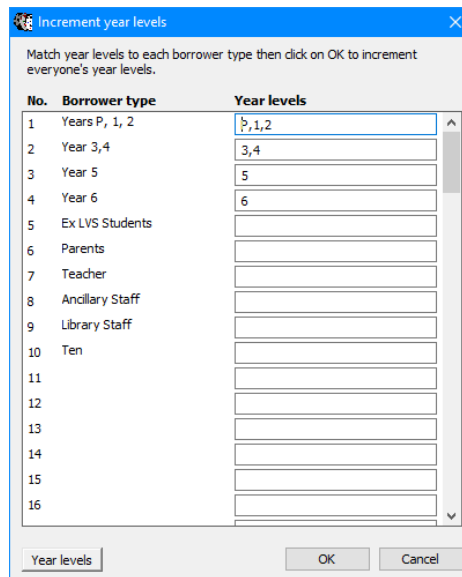
- Import format:** EDSAS (SA) (Callout 3 points to this field)
- Assign borrower types:**
  - Based on year levels
  - Based on classes
  - Do not update types
- Assign new barcodes:**
  - Assign new borrowers new high numbers and use normal barcodes
  - Assign new borrowers unused numbers and use normal barcodes
  - Update only -- do not add new borrowers
  - Stop at each new borrower and manually enter numbers and barcodes
  - Use AdminID as numbers and barcodes for all borrowers
  - Assign new borrowers unused numbers and use AdminID as barcodes for all borrowers
  - Use barcodes from EDSAS for new borrowers
  - Use AdminID as numbers and create barcodes from it
  - Assign new borrowers unused numbers and use EDSAS barcodes for all borrowers
  - Use EDSAS number as borrower number and EDSAS barcodes for all borrowers
- Match on:**
  - Admin ID and name (Callout 1 points to this option)
  - Admin ID only
  - Surname and givenname only
- Set case:**
  - Keep as imported
  - ALL UPPER CASE (SMITH, JANE or JANE SMITH)
  - ALL Title Case (Smith, Jane or Jane Smith)
  - SURNAME UPPER, Others Title (SMITH, Jane or Jane SMITH)
- Remove middle name(s):**
  - Remove middle names(s) from given name
  - Include 2nd email address if available in Alt Email (Callout 2 points to this checkbox)
- New borrowers:**
  - List new borrowers added during import

Buttons at the bottom: Configure borrower types, Fields to import, Backup, Start (highlighted in green), Preview, Save settings, Cancel.

### 1. Configure borrower types.

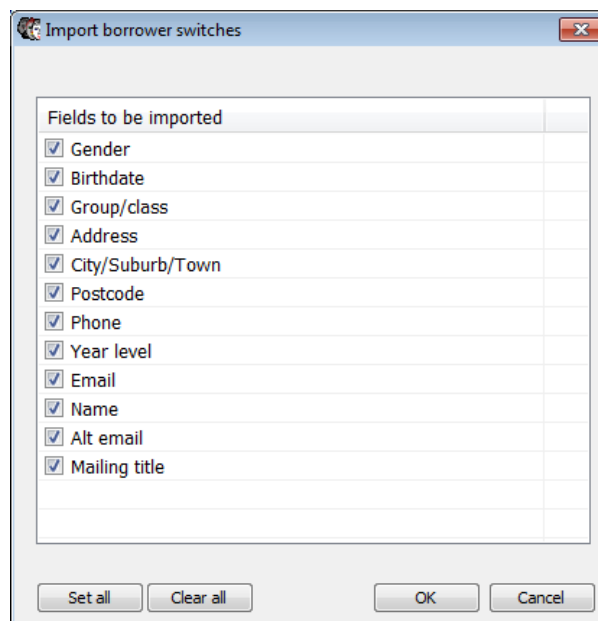
Match the year levels to the borrower types. This can also be done on the Borrower Types window. Once done, it does not need to be done again.





## 2, Field switches.

This determines which field will be imported. Tick the fields to be imported.



## 3. Import format.

This tells Bookmark which admin system from which you are importing data. If it is not in the list, you may need to use Custom or ask the Bookmark Help Desk to make up a special entry.

## 4. Barcodes for new borrowers

Finally, make sure the correct choice is made to produce barcodes for new borrowers. Often it is the top choice "Assign new borrowers new high numbers", but one of the other options might be more suited to your situation.

Click Start. Find the file from the office and click OK.

It will bring up the first borrower.

Check that the right field has the correct information and click Save. Click NEXT.

If the information appears correct, click *mass import*.

Borrowers are imported into Bookmark's database fast. It only takes seconds.

If everything has been prepared properly beforehand, all students are in their new classes, year levels and borrower types within those seconds. New students have been added.

After importing or assigning students to their classes and year levels, there are a few final things to do.

## **7 – Update Borrower Info Against Items**

When books are borrowed, the borrower's number, name, class and year level are stored against the item. When borrower data is updated, this information is not automatically changed. This is in case you want to keep the previous classes against the borrowers. It is, however, a good idea to update the classes for anyone who has items still on loan from last year.

## **9 – Rollover Existing Loans**

This function can be used to mass extend items on loan – such as teacher resources – or return them.