



BOOKMARK FACT SHEET

Updating Borrowers / Class Rollover

August 2017

Bookmark provides different ways to update borrower information at the beginning of the school year.

The three fields that require change are:

- a> The **borrower type** number. This determines the number of loans and the length of time borrowed.
- b> The **class** name is the physical class into which borrowers are going. It is used for overdues. Classes can be composite - e.g. have several year levels.
- c> The **year level** is the borrower's grade or standard.

Reminder: BACKUP before updating information!

Delete Borrowers

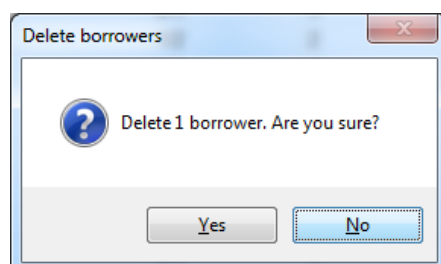
Borrowers who have left need to be dealt with. They can be assigned a "Left" class or borrower type or they can be deleted.

Go to Borrowers , Delete borrowers.

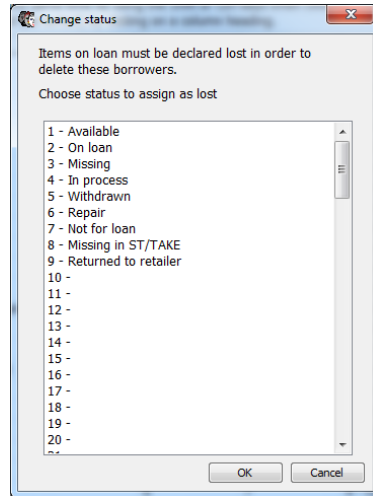
Highlight the person/s to be deleted.

The Shift and the Control keys may be used to select more than 1 person at a time.

Press the Delete key to remove the borrower/s.



If there are books out to the borrower it will ask what to give them a status.
Click on the choice to highlight it, and press OK.

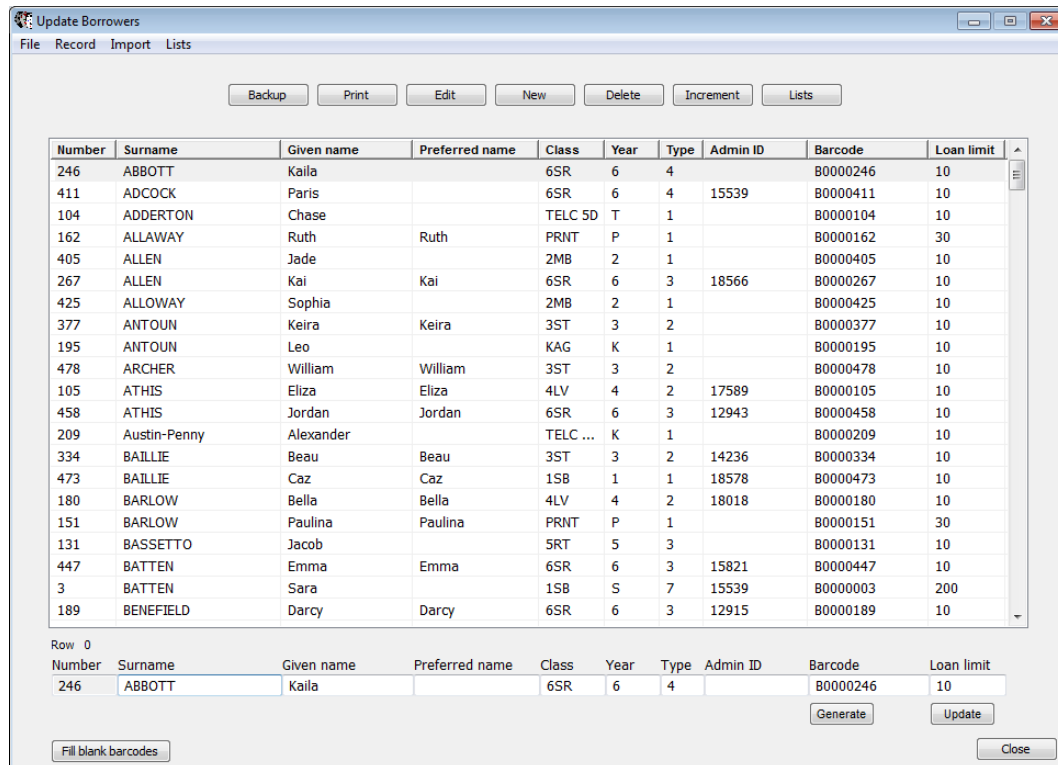


Done.!

To update Borrowers manually

Do not update the entries one by one in add/edit.

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



Simple change

Click on the one to be changed. That person's information appears beneath the list.

Change details in the box along the bottom of the screen and click Update. Or press Enter. 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.

You can literally "go down the list" to update everyone.

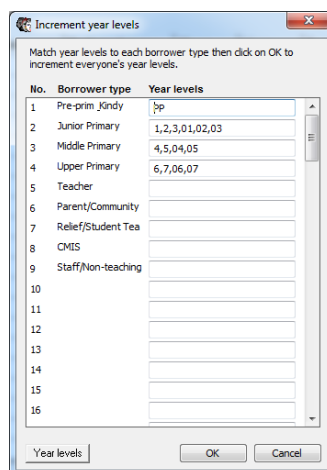
Sorting

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

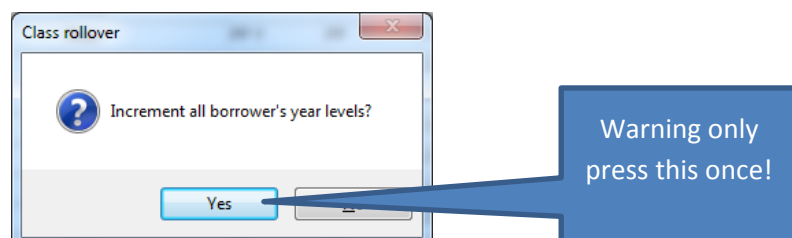
Sorting is a way to put everyone together in the same class, for example, or year level.

Increment

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



Make sure that the correct year levels are against the correct borrower types. Say ok.



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

Then the students must then be put into classes.

2 – Import Borrowers

To update borrowers using the school admin system data

This is the fastest method of updating borrower information and adding new borrowers.

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

Do a **backup** before starting so that if things go wrong, the data can be restored.

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.

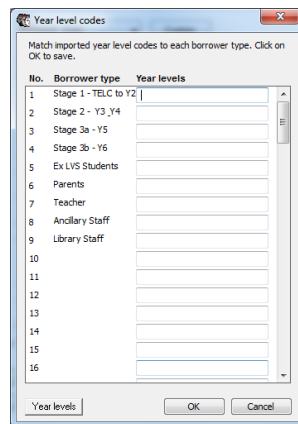
It is recommended to first enter the Admin ID values against as many students as possible before importing the first time. This gives the greatest number of matches.

The screenshot shows the 'Import Borrowers' dialog box with the following settings and callouts:

- Import format:** EDSAS (SA) (Callout 3 points to this dropdown)
- 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
- Match on:** Admin ID and name, Admin ID only (Callout 1 points to this section)
- 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)
- Print new borrowers:**
- Buttons:** 'Configure borrower types' and 'Field switches' (Callout 2 points to these buttons)
- Bottom buttons:** 'Preview', 'Start', 'Save settings', 'Cancel'

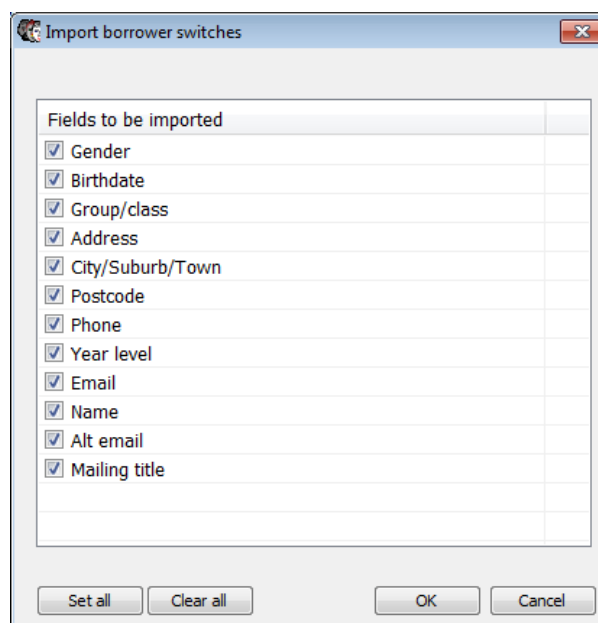
1. Configure borrower types.

Match the year levels to the borrower types. This can also be done on the Borrower Types window.



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.

Click Start. Find the file, 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*.

Save Mass import Next

Import record 1 of 503

Borrower Number/barcode: 45

Surname: nerk

Given name: Fred Alphonse

Preferred name: Fred

Gender: M

Year level: 07

Birthdate: 17/06/1990

Address:

Suburb:

Postcode:

Phone:

Email:

Privacy code:

Borrower Type: 1 - Stage 1 - TELC to

Loan limit: 10

Group/Class: YEAR7

Write reviews?

AdminID: 01000

Barcode:

Extra:

Loan note:

Return note:

Cancel

The program counts up to the number of borrowers to be imported, then it files. You can check for the imports, but you **MUST** press SAVE for it to be permanent.

Also, importing does not remove students who have left. That is easiest to do in Delete Borrowers.