



BOOKMARK FACT SHEET

Importing Student Data from OneSchool

February 2020

Below are the steps to transfer student data from the OneSchool administration system to Bookmark.

Note: before doing these steps as a start-of-the-year rollover, be sure to delete all borrowers who have left.

Exporting Student Data from OneSchool

1. Click on reports
2. Click *Student Management* from the dropdown
3. Select *Lists*
4. Click the *Dynamic Student List Report*
5. When this tab opens, leave everything as is as it automatically generates some fields (columns). But also...
6. In *Display Fields* select the following: Date of Birth, Sex, Residential Address
7. The fields that are default should be: Year level & Roll Class
8. Under this in *Formatting Parameters* change the Report Render Type to EXCEL
9. Click *Generate Report*
10. Open the Excel spreadsheet and delete all rows down to the headings (Student name, EQ ID etc). Keep those
11. Finally Click on File then Save As and set to *.csv file type. Save it.
12. Copy the file to a USB flash drive

Importing Student Data from the saved file into Bookmark

1. Open Bookmark.
2. Borrowers
3. Rollover
4. Import Borrowers
5. Make sure all settings are correct. Set the top to Dynamic List (OneSchool QLD)
6. Click on the Configure borrower types button. Make sure year levels have been correctly entered against student borrower types.
7. Click on Backup to do a quick backup.
8. Click on **Start**
9. Locate the csv file containing the student data. Open it
10. If the first student looks good, click on Mass Import
11. When finished a list of all the new students added may be shown. This can be either ignored or printed. Close.