



## BOOKMARK FACT SHEET

### Importing Student Data from Cases

January 2019

Below are the steps to transfer student data from the CASES 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 CASES

1. **Students > Export – Library - Bibliotechlib**
2. The file is called Bibstds.csv. It is exported to a folder on the U drive
3. Copy the file to a USB flashdrive. The file cannot be exported directly to the flashdrive.
4. Do not open the file in Excel and do not change the filename.

#### Importing Student Data into Bookmark

1. Open Bookmark.
2. Borrowers
3. Rollover
4. Import Borrowers
5. Make sure all settings are correct. Top is set to Bibliotech Export from Cases
6. Make sure Configure is correct. Year levels must be next to corresponding borrower types.
7. Do a quick backup.
8. Click on **Start**
9. Locate the Bibstds.csv file and 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.