

Bookmark Fact Sheet

Importing Student Data from EMS

July 2024

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

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

Exporting Student Data from EMS

1. Locate the EMS report called Bookmark Report
2. Single left click on the name of the report
3. EMS opens the report
4. Click on down-pointing arrow at top left
5. Dropbox list
6. Click on 2nd one down, CSV
7. The file downloads usually into the Downloads folder
8. Open the Downloads folder
9. Right-click on the *Bookmark Report.csv* file
(Note: for Windows 11, click on Show More Options before the next step)
10. Left-click on Send To and the USB Flash drive

Do not open the File in Excel! Excel can mangle enrolment IDs, phone numbers and other large numbers. Save without opening.

Importing Student Data from the file into Bookmark

1. Open Bookmark.
2. Borrowers
3. Rollover
4. Import Borrowers
5. Make sure all settings are correct.
6. Make sure the Import format at the top is set to EMS. (Not EDSAS.) This is in a dropdown list.
7. Make sure Configure (bottom left button) is correct. Year levels must be next to corresponding borrower types.
8. Click on Backup and do a quick backup. If anything goes wrong, it can be restored immediately in Utilities > Restore > Bookmark's Location.
9. Check the other settings to make sure they are correct.

10. Click on **Start**
11. Locate the exported EMS file and open it.
12. If the first student looks good, click on Mass Import.
13. When finished a list of all the new students added may be shown. This can be either ignored or printed. Close.

Notes:

- Change to the EMS Import format in Bookmark. It is completely different to the EDSAS format.
- EMS data does not contain the EDSAS ID. Bookmark uses the EnrollmentID from EMS instead. The EnrollmentID is also used for borrower photos.
- There is no barcode field in EMS data as there is for EDSAS. Normal Bookmark barcodes can continue to be used or the EDID can be used as a barcode.
- The EnrollmentID cannot be used as a barcode. It is too large. The EDID can.
- Neither the EDID nor the EnrollmentID can be used for borrower numbers. The borrower record number becomes completely unrelated if the EDID is used as a barcode. Easier to use regular barcodes unless necessary for ID cards.
- The first time EMS data is imported, matches are made on borrower names. The EnrollmentID will replace the EDSAS number in the AdminID field.
- Borrower photos are transferred into Bookmark as normal, but you might want to delete the ones with the EDSAS numbers or names as filenames beforehand, as all the EMS photos should have the EnrollmentID as the filename.