

General Instructions for Synchronising Borrowers...

<http://manual.libcodetest.com/> > Search for **inload borrowers** and jump into the first article *Synchronising Borrowers and Rolling over Student Data for lots of detail and options.*

08.06.06.08.01 Using OneSchool (for EQ)

Page copied from Online Manual – go into Help / Online help on any LibCode screen to get to manual...

Some things to do BEFORE you start:

- **Backup Before you start!!! (an Alternate or External backup is perfect because it's quick!)**
 - Load LibCode > Utilities > Backup/Restore... Alternate or External Backup
 - Remember where the backup is so you can restore Circulation Only if there is a problem with this process...
 - If you do the normal "Backup" then if you have to Restore / Circulation only then the system automatically knows where to get the data...
- **Check ALL Student borrowers DO HAVE the EQID as their "Borrower No." in the LibCode Circulation system.**
 - Jump into Circulation > Borrowers > when Borrowers are displayed click BorrowerNo. column to sort borrowers then look down the list.
 - Staff (Staff is in the Group field) don't need a Borrower No. but ALL Students that you want to Synchronise with OneSchool data MUST have their EQID as there Borrower No. Edit borrowers as necessary.
- **Make sure you Check your data AFTER the synchronise...**
 - If there is a problem DON'T use Circulation...
 - Utilities > Backup-Restore > Restore > Circulation Only data from the backup you made... or call us for help!
- **You can create a file from ANY Office System to use this inload function but it MUST be 8 fields and CSV!**
School_Centre,EQID,MSID,Last_Name,Preferred_First_Name,Middle_Names,Year_Level,Roll_Class

Now... take a deep breath, be calm and let's do this magic... 😊

Steps for OneSchool

1. Ask your office people to Log into One School.
2. Go to Reports.
3. Go into Data Export Reports.
4. Select Library Export.
5. A file download screen appears with the option to Open or Save... Click save and save the data on to a USB stick.
6. Once the download is complete close the window- now you are ready to load the file into LibCode!
7. You could open this file in EXCEL and use the info to add EQID as Borrower No. for students if necessary.
8. Now the LibCode bit...
9. Do a backup! (Can be an Alternate or External backup if you are in a hurry.)
10. Go into Utilities > Update > Circulation > Synchronise Borrowers > OneSchool.
Note that if you don't have a OneSchool option you need to upgrade your LibCode software!
11. Check out the options on the screen as there are a couple of things you need to check out and answer, then click Synchronise.
12. CHECK YOUR DATA NOW!!!! Go into Circulation > Borrowers and have a good look around.
 - Look up a few students you know and check the details are correct...
 - Look up a few students you know have left and make sure that's ok
 - Look up some new students and make sure they are ok...

IF NOT HAPPY... you need to Restore > Circulation Only from the backup you did in Step 9. and give us a call.)

All done!