



MarkBook® Class Exchange

Exchanging Class Data between MarkBook® for Windows® and MarkBook® Cloud version

INTRODUCTION

In order to exchange or update class data between MarkBook® for Windows and MarkBook® Cloud versions, a CSV (Comma Separated Value) text file is required.

The CSV file that contains Student, Mark Set, Assessment, Learning Skills and Attendance data. Both versions of MarkBook can produce this file to create or update classes in the other version.

EXCHANGING FILES

The file may be transferred from one device to another using a number of methods:

- **USB FLASH DRIVES**
- **CLOUD SERVICES:** e.g. Dropbox, Google Drive, OneDrive, iCloud Drive, etc. if supported on the sending and receiving devices.
- **EMAIL:** As an attachment (but not encrypted for security)

GUIDELINES for CLASSES CREATED in MarkBook® Cloud version

MarkBook® for Windows® has restrictions involving field length and allowed characters. During an import into MarkBook® for Windows®, if the data found in the CSV file fails to conform to these restrictions that data may be modified or the file may be rejected.

Please consider the following: (All text is not case sensitive)

- Commas and double quotes (") must **NEVER** be used in any field. Single quotes/apostrophes are OK.
- Class IDs **MUST NOT** contain the following characters: \/:*?<>
- Every student **MUST** have a unique Student Number which should never change.
- The fields for First Name, Last Name, Student Number and Gender **MUST** be completed.
- Mark Set IDs (Short Codes) **MUST NOT** contain: \/:*?<> and should not be longer than 4 characters.
- In classes with multiple Mark Sets, the **leading 4 characters** of Set IDs **must be unique**.
- The **leading 4 characters** of Category Descriptions within a Mark Set **must be unique**.
- Category Descriptions longer than 8 characters will be truncated
- All fields in an entry heading **MUST** be filled.
- In mark entries, "Out Of", Weight and marks **MUST NOT** be negative values.
- In **Level/ABC** and **Mode Schemes**, base values of each level **must be integers**, ranging from 0 to 99. Symbols may not be longer than 3 characters. No value or symbol may be duplicated.

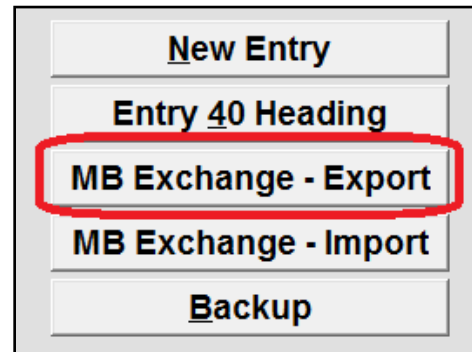
MarkBook® Class Exchange

Exchanging Class Data between MarkBook® for Windows® and MarkBook® Cloud version

WINDOWS

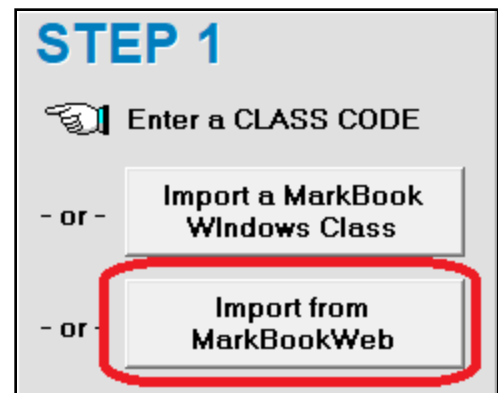
Export an Existing Class

1. After, opening the class, click on the "MB Exchange -Export" button.
2. A dialog box will appear where you may edit the suggested file name and the path where it will be saved. Click on "Save" when the file name and path are OK.



Create a New Class

1. On MarkBook's opening screen, click on the "New Class" button.
2. Use the **Drive and Folder** dropdowns or the **Browse** button to establish the path where this new class will be saved.
3. In the "Step 1" panel, click on the "Import from MarkBook Web" button.
4. A dialog box will appear where you can navigate to the path where the CSV file is located.
5. Click on the file; then, click on "Open".



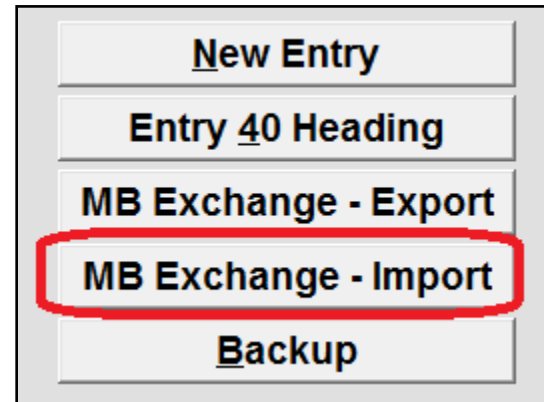
IMPORTANT: If the **ClassID** matches an existing class, the file will be **rejected**. The New Class routine in MarkBook Windows is only used to create the class; updates use a separate routine.

MarkBook® Class Exchange

Exchanging Class Data between MarkBook® for Windows® and MarkBook® Cloud version

Update an Existing Class

1. After opening the class, click on “**MB Exchange - Import**” button.
2. The “**MB EXCHANGE - IMPORT**” form will appear along with an “**Open File**” dialog box
3. Locate the file exported from MarkBook Web and click on “**Open**”.
4. Click on “**Express**” to update without further input; click on “**Custom**”, to choose how the existing class will be updated. After scanning the CSV file for problems, both routines will:
 - Add new students
 - Update information for existing students,
 - Update the schemes used for ABC/Level equivalents and Mode calculations
 - Update Learning Skills
 - New Mark Sets will be added along with their entries
 - New Categories in existing Mark Sets will be added along with their entries



Express Update

In addition to the actions listed above, this routine **REPLACES** entries and attendance in **ALL** Mark Sets with the data in the CSV file. Data in other features such as Comments, Loaned Items, Seating Plans and so on are **not** affected.

Custom Update

This option offers more flexibility. You may

- Select individual entries from the source file to update existing entries in any Mark Set.
- Select individual entries from the source file to be added to any Mark Set.
- Replace all the entries in a Mark Set without affecting other Sets.
- Choose whether to update attendance.

MarkBook® Class Exchange

Exchanging Class Data between MarkBook® for Windows® and MarkBook® Cloud version

Individual Entries (Numbers refer to items in the graphic below)

1. Choose a **Source Mark Set**; then, select an entry from that Set.
2. If the Source Mark Set ID matches* one in Windows, that Set will be selected as the Destination Set. If there is no match*, then a Set must be selected manually. In the graphic below the matching Set IDs are "MAT1".
3. If the **Category** of the selected Source entry matches* one in the Destination Set, then it will be selected automatically; otherwise, a Destination Category must be selected from the dropdown. Other fields may not be edited at this stage.
4. If the Source entry has exactly the same Title, Block (Unit, Term, etc.) and Category as an existing entry in the Destination Mark Set, then the **Update** option is enabled; otherwise, the only option is to **Add** it as a New Entry.
5. Click the **Update** button to apply the selected option.

MB EXCHANGE - IMPORT File: 8D_MBWin_2016-10-26.csv
Source: MarkBook Windows Date: 2016 10 26

FROM: 8D (2016) - in MB Win

Source Mark Set **MAT1 - Mathematics 1** Click on an Entry Title to select it.

#	Date	Title	Block	Category	Type	Weight	Out Of
8	Oct. 5	ORDER OF OP CHK (1.12)	1	NumSens	Summative	1	1
9	Oct. 5	CHP CHK DATA BANK	1	DataMang	Summative	5	15
10	Oct. 8	SEQUENCE (1.13)	1	NumSens	Summative	15	15
11	Oct. 13	EXPLORERS CHECK	1	NumSens	Summative	15	5
12	Oct. 17	*BALLOON EXPERIMENT	1	DataMang	Summative	10	110
13	Oct. 19	CPTR 2 LEARN TOGETHER	1	Algebra	Summative	5	5
14	Oct. 25	EXPONENTS (2.1)	1	Algebra	Summative	2	10
15	Oct. 26	OCT. REPORT RETURN	1	NumSens	Summative	1	10
16	Oct. 27	SQU ROOT CHK (2.2)	1	Algebra	Summative	1	5
17	Oct. 29	ORDER OP QUIZ	1	Algebra	Summative	3	15
18	Nov. 2	FACTORS (2.5)	1	Algebra	Summative	3	5

TO: 8D (2016) - in MB Win

Destination Mark Set **MAT1 - Mathematics 1**

Import Options

- ☒ Update Entry #9
- ☐ Add Entry #19
- ☐ Replace ALL

Selected Entry

Title: CHP CHK DATA BANK

Term: 1 Date: Oct. 6

Category: DataMang Weight: 5

Type: Summative Out Of: 15

Update #9 **Attendance**

Note*: Matches require the leading 4 characters to be the same. This is not case sensitive.

Replace ALL

- This option is available if **EVERY** entry in the Source Mark Set matches* a **category** in the Destination Mark Set.
- **EVERY** entry in the Destination Mark Set is **DELETED**; then, **REPLACED** with EVERY entry in the Source Mark Set.

MarkBook® Class Exchange

Exchanging Class Data between MarkBook® for Windows® and MarkBook® Cloud version

Attendance

Some things to note:

- If separate attendance is kept for each Mark Set then only the selected Set is updated.
- Start Date codes must be entered in MB Win at some point. Otherwise, attendance calculations are not possible.
- The only codes imported are "A" (absent) or "L" (late/tardy).
- For an existing event in MB Win, if the codes A and L are switched in the update, that change will be made. However, if an existing event is deleted, that change will not be made; it must be done manually.
- Attendance remarks entered MarkBook Web, Mac or iOS are not used in MarkBook Windows.

MarkBook WEB



Export an Existing Class

From the **Home** form, click on **My Classes > Export Class** (orange). In the "Save" dialog that appears, you may edit the suggested file name and path and then click on "Save".

Create a New Class or Update an Existing Class

From the **Login** screen, click on **Create New Class** or, if you're already logged in or you're updating a class, from the **Home** form click on **My Classes > Import Class** (yellow).

1. Click on the **Browse** buttons to locate the file and, if available the folder containing student photos; then, click on the **Load** button.
2. Click on **"Next"** (bottom right), when it's enabled. **Note:** This may take a few minutes.
3. Step through forms to check and, if necessary, edit the data from the file.
4. Click **Finish** to complete the import.

Note: Picture files must be within a folder using the naming format **student_number.jpg** (or bmp) with **student_number** matching the one entered for the corresponding student in the class list.