

Borrowers Add, Edit, Delete, and Rollover for new year (Manual Borrowers & Fact Sheets)

Before making major changes to your borrowers, do a BACKUP.

To add a Borrower

Borrowers - Add/Edit Borrowers

Note –set Defaults for Type, Class and Yr level if entering multiples.

Choose the next highest or unused number and **Enter** or click **GO**

Click on **Generate Barcode** button and type in details Name, Year, Class and assign a Borrower Type.- If a student, enter **Admin ID**, **SAVE**

EXAMPLE:Add new pupil Jimmy JONES, grade 1, class 1L, Borrower type 2, CASES ID JON 0002

Delete a Borrower *Borrowers - Delete Borrowers*

Delete one or more borrowers who have exited the school. (eg delete Yr 6 prior to Rollover).

Click a column heading to sort by that column eg click **Name** heading to sort the list alphabetically, or on **Year level** column to sort for Year level. Use **Shift Click** to select a continuous group or **Control Click** to select non-continuous borrowers. Click on **Delete**

If deleted borrowers have items *On Loan*.you will be prompted to change status of their items

Untick this box **Do not delete borrowers with items on loan** / Change item Status to **3-Missing** (or use an empty number and change the heading in *Cataloguing - Authority Lists - Status*) then **OK**

EXAMPLE Delete all Yr6 students (routinely done prior to start of year Rollover) and put any items the deleted students have on loan into Status 3 Missing

Rollover – Start of Year Process

Borrowers – Rollover - Update Borrower list

Check all returning students have a valid Admin ID in Bookmark prior to doing Rollover.

Bookmark uses the Admin ID to update borrower information. If ADMIN ID data is missing, Bookmark may create a duplicate borrower entry. (If ADMIN ID is missing for lots of your returning borrowers, it may be faster/easier to delete all borrowers and then import data records afresh from the school's Admin system. BUT WARNING-This action deletes borrower histories).

Update Borrowers list gives a listing of all borrowers. Prior to Rollover, sort the list by Admin ID, then edit borrower records to add missing Admin IDs. (Note Staff may not have Admin ID):

Click on **Admin ID** heading to sort the borrower list and bring missing Admin IDs to the top. At bottom of screen type in missing **Admin IDs** and press Enter or click **Update**

EXERCISE: Add missing Admin IDs prior to Rollover-Click on **Admin ID** heading to sort list – **Select** the student Geddes Raoul and enter Admin ID GED0001 into box at bottom of screen- Click **Update**. or press Enter Repeat to amend ADMIN ID for Yalvern, Guy YAL0001.

Importing Borrowers from School Admin System (separate notes on website)

Ask office staff to get data from the School Admin system

CASES-21 or CHESS – Students-Export data- Library systems- Extract data for Bibliotechlib-

Do not change the filename and DO NOT OPEN the file in EXCEL. Most office computers cannot save directly to USB, so save to My Documents (or U drive) then copy to USB.

(to include email addresses another export is available.)

EXAMPLE: Import the **BSBSTDS.csv** file from the Vic. CASES Admin system.

Borrower – Rollover – Import Borrowers (

No.	Borrower type	Year levels
1	Prep	0
2	Junior Primary	1,2
3	Years 3-6	3,4,5,6
4	Staff	
5	Community	
6	Other Schools	
7		
8		

Year levels | OK | Cancel

Field Switches tick as appropriate to your needs-.

Click **Save Settings** to save your config and import field settings.

When you click **Save**, you will return to the Rollover menu

Configure Borrower Types

Check borrower type has appropriate year levels beside it eg 01 or 1 (year 1), 02 for year 2 etc., 0, 00, or P for prep, F for Foundation(Special Schools use UG for ungraded)

Then click **Import borrowers - Start**

Navigate to where you have saved your **BIBSTDS.csv** file.

The first record will appear- If the data appears in the correct fields, click **Mass Import** or **Cancel** if not correct.

Go back to **Update Borrower list** and review the data to check new students are added.

Schools not using CASES

There are separate information sheets available for other office admin systems- see website.

A Custom option allows you to configure for any other system. Fact sheets available.

If we are unable to support your Admin system there are other Rollover options to quickly update Year level, Classes and Borrower Types.

Check Borrower Types and return dates for teachers

Borrowers – Authority Lists -Borrower types OR Controls – Borrower Lists – Borrower types

Double click to open and check Borrower Types to ensure the rollover is complete and as expected.

Also, Staff return date need to reflect the current year.

Due date This is the normal loan period for this borrower type. It can be a number of days or a set date.

Item Type Due Dates

Different item types may have different due dates for each borrower type. eg non Fiction 7 days, Novels 30 days.

Item type loan limits

Separate loan limits can be set for each item type. eg 1 non fiction, 2 novels

History cut-off date

Bookmark will not display Histories prior to this date, they are hidden not deleted.

Loan alerts for previously borrowed.

The screenshot shows the 'Edit Borrower Type' window for 'Staff'. The window has a title bar 'Edit Borrower Type' and a close button. The main content area is titled 'Edit Borrower Type 4'. It contains the following fields and controls:

- Description: Staff
- Loan limit: 150
- Resv limit: 5
- Overdue block: blocked (dropdown menu)
- Overdue limit: (empty field)
- Year levels: (empty field) with a 'Year levels' button
- Due date: 01/12/2019 with an 'Edit' button
- Restriction: (empty field) with a 'Restriction' button
- Item type due dates: A table with columns 'Icon', 'Description', and 'Due date'. There is an 'Edit' button next to it.
- Item type loan limits: A table with columns 'Icon', 'Description', and 'Loan limit'. There is an 'Edit' button next to it.
- History cut-off date: (empty field) with an 'Edit' button
- Loan alerts: Two checkboxes:
 - ☐ Pop up alert in loans if borrower has previously loaned the item
 - ☐ Do not allow borrower to reborrow same item 2 times in a row

At the bottom of the window, there are two buttons: 'Names' and 'Close'.

EXAMPLE: Double click on the description “Staff”. Change the **Due date** either by typing 10-DEC-21 or clicking on Edit and choosing the new date.

Remove the **Overdue blocked** and increase the **Loan limit** to 200 items **Close - Close**

Adding Borrower Photos

Borrowers – Photos - Import

(Note: In **Controls- Circulation Controls – Display switches** you can choose to display (or not display) photos when the borrower label is scanned.)

Get a copy of student photos from the office. The photo filenames are in the format **AdminID.JPG** eg BAR0002.JPG (for Vic)

Photos can be imported from any folder. Go to **Borrowers – Photos - Import** and

Choose **Copy photos from a folder / OK** and navigate to the folder containing the photos

EXAMPLE – Import the photo folder from your desktop called **grade5 pics**. Then go to Borrower-Add/Edit Borrower and check that Ken Southfield (borrower 12) now displays a photo.

Printing Borrower Class Sheets

Several brands of barcode stickers are defaults in Bookmark that you can choose. There are different layouts entered as standards. In addition you are able to customise the 4x11 page setup to any size.

Borrowers - Labels - Print Barcode Labels - Page Setup

The Borrower Template should match your barcode style -amend if necessary

Enter your site ID, usually the school number as on your labels.

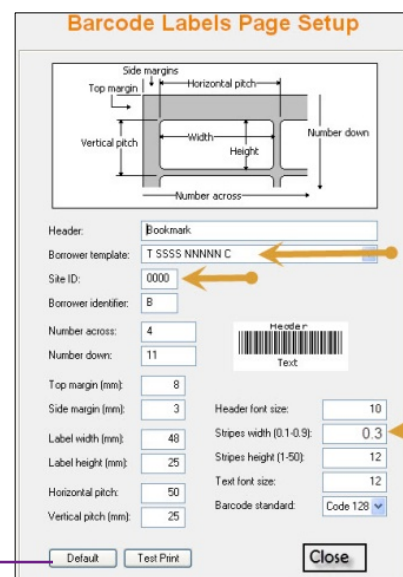
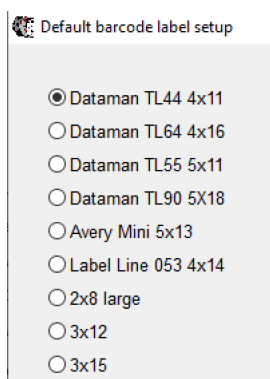
Enter Borrower identifier (usually B or 3)

Enter Rows and Columns (if you wish to change)

Change measurements (if required)

Stripe width normally 0.3

Close the setup page.



Borrowers - Labels - Print Barcode Labels - Class Sheets

Select the **Group/Classes** to print (or click **All**),

Select a pre-formatted **Layout** (some include photos)

Choose **Name format** you prefer

Choose to include **SWAP & FINISH**

SWAP & FINISH will not print on the 4x11 page setup format.

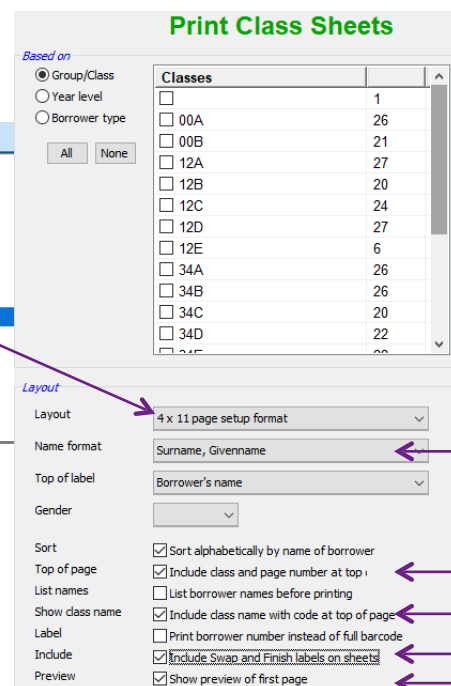
Tick **Show preview**

Click **Proceed**

Check the preview before printing

1 Pre formatted layouts

- 3 x 9 format
- 2 x 8 format, larger size labels
- 2 x 8 format, normal size labels
- 2 x 8 format with photos
- 2 x 5 format with photos
- 3 x 12 format
- 4 x 11 page setup format
- 2 x 5 business card format
- 3 x 8 format
- 3 x 9 format
- 3 x 10 format
- 1 x 8 ruler format
- 1 x 8 ruler format with photos
- 3 x 3 with photos
- 1 x 10 short ruler format with photos
- 1 x 15 ruler format



EXAMPLE Print class 5M Borrower Barcode Labels with photos

-Use 2X8 label format with photos

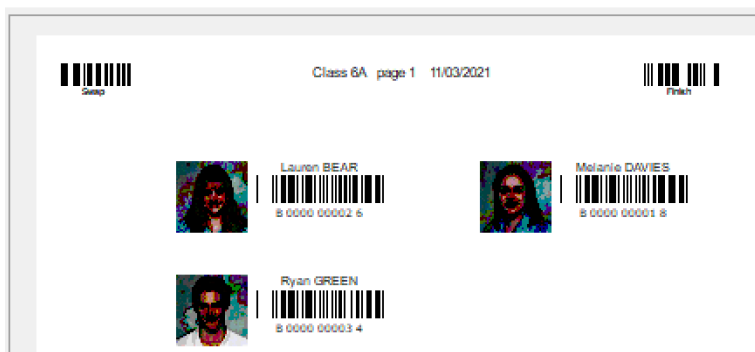
Display names as **Given Surname**.

Include the **SWAP & FINISH**

Click on **Proceed** (include checkdigit)

The first page of labels should now display

Print preview



Overdue Lists and Notices

You can print or email a class list of overdue items or individual notices for each borrower. Bookmark can include a message and also automatically decide which message to include based on how long overdue an item is.

Print a List of Items either on Loan or Overdues

Overdues - Overdue lists

Select **All** or select a **Class Group or Year level**

If you want a list of **everything on loan**, tick ☒ **Ignore date. List all items on loan.** - Proceed

Select an individual borrower and click **List** (at bottom of screen) or just **print** them all (this will include item titles.

EXAMPLE: List Overdues for Year 5

Print Overdue Notices

Overdues - Overdue Notices

Select **All** or select a **Class/**

Group or Year level

Proceed

Select settings -Regular/Letter/

Email

with or without covers

Select message type or set

to **automatically** (at bottom)

Banner - school letterhead saved as jpg file.

Footer - jpg file for a footer

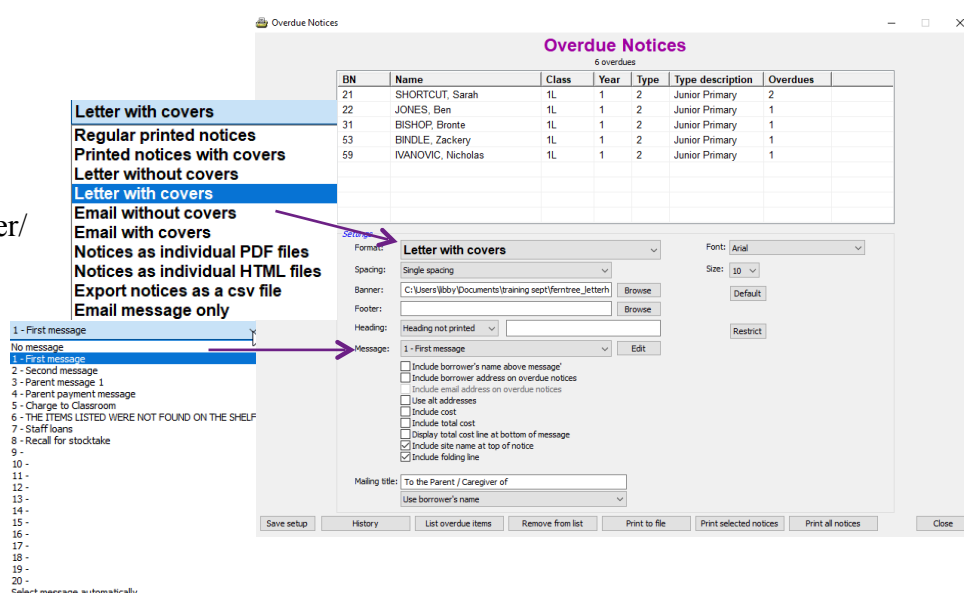
Heading -

Message - choose or let Bookmark select Automatically.

Mailing title

Save setup

Print or **Print all notices.**



To email overdue notices, first get your technician to enter email settings using **Controls- General Controls - Email** and also import the email addresses into Bookmark.

You can include Book Covers in the overdue notice. It is also possible to add a banner, eg School's Letter Head, and Footers/Headers if you have stored these electronically.

EXAMPLE: List overdue notices for Year 5. Choose Letters with Covers, Add a Banner – (called ferntree_letterhead)

Set up Overdue Messages

Overdues - Messages

You are able to set up multiple messages appropriate to different overdue periods, or different groups of borrowers. When printing overdue notices, choose the Message number to be used or choose Automatic messages.

EXERCISE: Go to **Overdues -Messages** and look at the messages already typed in:-

Message 1	Please return these items immediately. If there is a problem, let us know. Thank you Mrs Smith
Message 2	Your overdue items have still not been returned. Please see Mrs. Smith at once. Parent signature: _____
Message 3	Dear Parents, This book was borrowed by your child last term and is still outstanding. We would appreciate the return of the book or payment as above to finalize the matter. Thanking you in anticipation Mary Smith - Teacher/Librarian
Message 4	YOUR OVERDUES HAVE STILL NOT BEEN RETURNED OR PAID FOR. THIS MATTER IS URGENT AND MUST BE RESOLVED. PLEASE PAY \$ IMMEDIATELY.

Setting and printing Automatic Overdue Messages

Overdues - Messages – Automatic Setup

When printing overdue notices, choose option **Select message automatically** and Bookmark will print the appropriate message for the longest overdue item for each borrower.

Adjust the message text and the numbers to suit your library. The earliest message you send might be for 7 or 14 days overdue. The longest overdue items get the last message and the number should be 999.

EXERCISE : Check that Automatic messages appear as in the diagram. Click OK

Holiday Dates

These dates extend the period of loan so that items do not become overdue during the holiday period when the library is closed. This option is best created at the start of the year through **Controls – Due dates**.

Email Overdue Notices

Overdue notices cannot be sent via email unless the email settings are correct. These must be set before trying to send any notice. Request your IT tech to go to **Controls – General Controls – Email** and complete the information in the screen to facilitate email.

Second, borrowers email addresses need to be added. This can be done manually, or through a download of students at Rollover from the school admin system.

Overdue notices can be emailed to borrowers provided Bookmark is able to access a smtp email server. Not all education organizations provide access to smtp email servers.

Note: Schools in Victoria and most private schools are unblocked. Public schools in Western Australia and Queensland are automatically blocked by state-wide policy.

Note: Email systems cannot access the covers and images stored in your copy of Bookmark. If you want to include covers in email overdue notices, upload the covers to the CPAC (Dept of Education & Children's Services (SA) website – refer to Bookmark Manual.

It is possible to print overdue notices to PDF files (choose **Notices as individual pdf files**) which can then be sent through COMPASS or other communication systems.



Loans

Total loans today 0 Total returns today 0

Scan borrower barcode >>

Name

5M

Choose a name

- Choose a name
- 11 *CLARKSON, Emma
- 1 *DAVIES, Melanie
- 114 *HAGAN, Harry
- 26 *LAKEFIELD, David
- 58 *ROGERS, Atlanta
- 115 *ROSS, Annabelle
- 12 *SOUTHFIELD, Ken
- 10 *SOUTHPORT, Karen
- 44 *STREET, Brendon
- 109 TANN, Trisha
- 23 *WALTERS, Janet

Circulation - loans and returns

There are several techniques to circulate items and different display options.

Using a scanner - **Scan** borrower barcode, **Scan** items to be borrowed, **Scan FINISH** to complete.

FINISH clears the borrowers name so the next items do not go to the wrong name.

EXAMPLE: From **Loans menu** Type **35** for Borrower Davina Daniels. She wants to borrow Item 3 and 45. Type item barcode **3** and **Enter** or **scan** the barcode. Repeat for item **45**.

Scan **Finish** or press the **Esc** key. You can swap between loans and returns quickly by pressing anyone of the first four function keys eg **F1** key or scanning the **SWAP** barcode.

(SWAP/FINISH can be printed at the top of the Borrower Class Barcodes)

Exceeding the default loan limit

Exceeding the default loan limit is possible but requires a Loans password.

EXAMPLE Type in Borrower **35** for Davina Daniels. She wants to borrow a third book – Item number **15**. Type this into Loans screen, then when prompted, type in the Loans password (**OK**) then press Enter or click on OK

Returning an item

EXERCISE: From **Loans** screen enter Borrower 114 Harry Hagen and select Item 865 (has been overdue for a long time) then click on **Return – Yes**. This only returns selected books for the person displayed. OR just go to the returns screen.

Return a book and change Status to Lost

Borrower 8 Vanessa reports losing an item barcode 3002. Go to **Returns**, type in the barcode number **3002** and immediately type **STATUS** in the Barcode box or scan Status barcode and press **Enter**.

From the Status list choose **Lost 2021** (you could just type Status 11 and the book will go straight into Lost 2020)

Loan books for longer than the default loan period

On the Loans screen display the borrower's current loans and click on **Options SET DATE /OK** and type in the Loan Password /OK. Then use the Calendar to select a new due date and OK

OPTIONS in Loans

Loans Options	
RETURNS	Return items
EXTEND	Extend items on loan to this borrower
SETDATE	Set a different due date
PRINT	Print items on loan
OVERDUE	Print overdue notice
SLIP	Activate narrow receipt printout (slip)
DUMP	Activate wide receipt printout
RECALL	Recall notice
SEARCH	Simple search (F8)
EMAIL	Email items on loan
LIST OVERDUES	List overdue items
TRANSFER	Transfer items on loan
TEMP	Set temporary due date
STATUS	Change an item's status
LIST LOANS	List items on loan
BORROWER NOTES	Edit notes for this borrower

EXAMPLE: Type 10 for Borrower 10 Karen Southport and Enter. View her loans.

Click **Options - EXTEND** (or type **EXTEND** into the barcode box or scan the **EXTEND** barcode)

Type the Loan block password (**OK**). And click on **OK**
You can use the normal loan period for the extension, or click on **Change Due Date** button to make it longer or shorter.

Click on the first book or **Select all** to Extend all books and **OK. Finish**

EXAMPLE: Borrower 38 Paul Sampras wants to borrow books whilst on holidays until 15/11/2020 whilst on holidays. Get borrower **38** on the **Loans** screen. Click on **Options - SETDATE** and enter the loan block password (**OK**). Enter the new date **15/11/2021** or use calendar and **OK**.

Note - the due date changes to 15/11/2021 for this one transaction only.

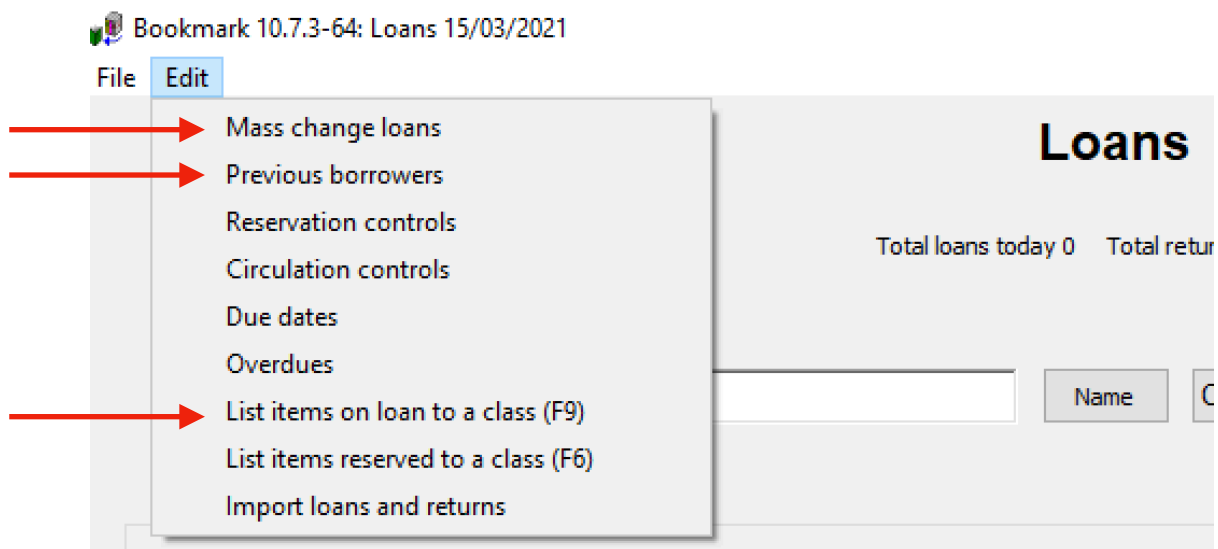
Loan books **6883** and **7508** and check the Return date.

OPTIONS in Edit Menu

List overdues & List loans both can be printed.

A **Loan Note & Return Note** can be put on individual items or borrowers.

Edit menu in loans

**Mass change loans**

Circulation – Loans - Edit (top menu bar) - **Mass change loans –**

Select either **Change by choosing from a list** OR

Extend by scanning barcodes

Change by choosing from a list This feature will extend all current /overdue teacher loans to the current Due Date (Dec 2021).

In the sample training data, Staff are Borrower Type 4.

Click on **Type** heading to sort, click on the first staff member in Type 4, it will be highlighted. Scroll to the last staff member and hold down the **Shift key** and click to highlight all staff (or use **Control key** and click to select individuals.)

Click on **Extend**. The return date will be extended to the current Return date for Type 4 Staff.

Previous borrowers

List of previous borrowers for an item.

List items on loan to a class

List of items on loan for a class.

Circulation Controls

Controls - Circulation Controls

Circulation Controls are displayed on separate tabs for **Display**, **Loans**, **Returns** and **Reservations**.

The screenshot shows the 'Circulation Controls' window with the 'Display' tab selected. The window contains several sections of settings:

- Menu display style:** Radio buttons for 'Standard' and 'Menu first' (selected). An arrow points to the 'Menu first' option.
- Loans/Returns font size:** Radio buttons for 'Large font', 'Medium font' (selected), and 'Small font'.
- Window:** Radio buttons for 'Window mode' (selected) and 'Full-screen mode'. A checkbox for 'Allow more than one Circulation open on the same computer at the same time' is checked. Two arrows point to the 'Window mode' radio button and the 'Allow more than one...' checkbox.
- Display switches:** Checkboxes for 'Enable minimize control on titlebar' (checked), 'Enable close control on titlebar' (checked), 'Disable book cover displays' (unchecked), and 'Display barcode and typed input as dots' (unchecked).
- Special passwords:** A list of labels with corresponding text input fields: 'Typing Code:', 'Circulation Controls:', 'Enter Circulation:', 'Exit Circulation:', 'Enter Returns:', 'Exit Returns:', 'Make Reservation:', 'Enter Previous borrowers:', and 'Enter Reservation ctrls:'.
- Controls enabled on Circulation menu:** Checkboxes for 'Returns' (checked), 'Reserve' (unchecked), 'News' (unchecked), 'Search' (checked), 'Bookings' (unchecked), and 'Exit' (checked). An arrow points to the 'Returns' checkbox.
- Setup name:** A text input field with the value 'Default setup'.
- Buttons:** Three buttons labeled 'Colours', 'Sounds', and 'Default'. An arrow points to the 'Colours' button.
- Footer:** A dropdown menu showing 'Default setup' and a 'Close' button. An arrow points to the dropdown menu.

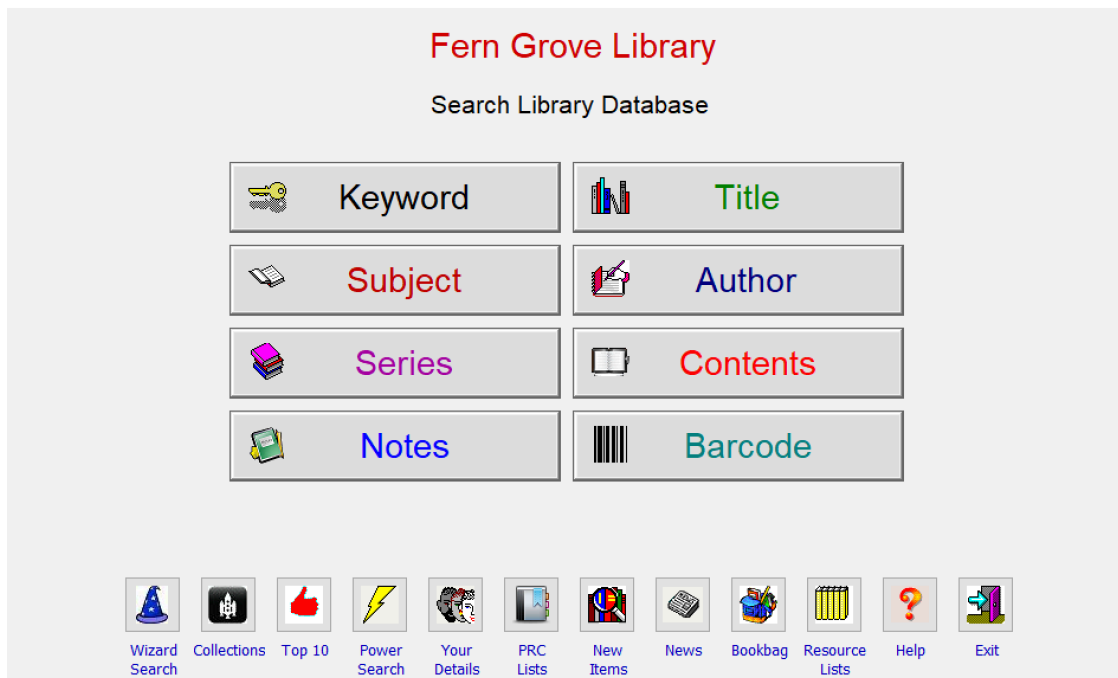
You can change screen **colours**, alert **sounds** and **setup** different configurations.

Switches change the behaviour of some parts of **Circulation**. We suggest the following switches be turned on in LOANS.

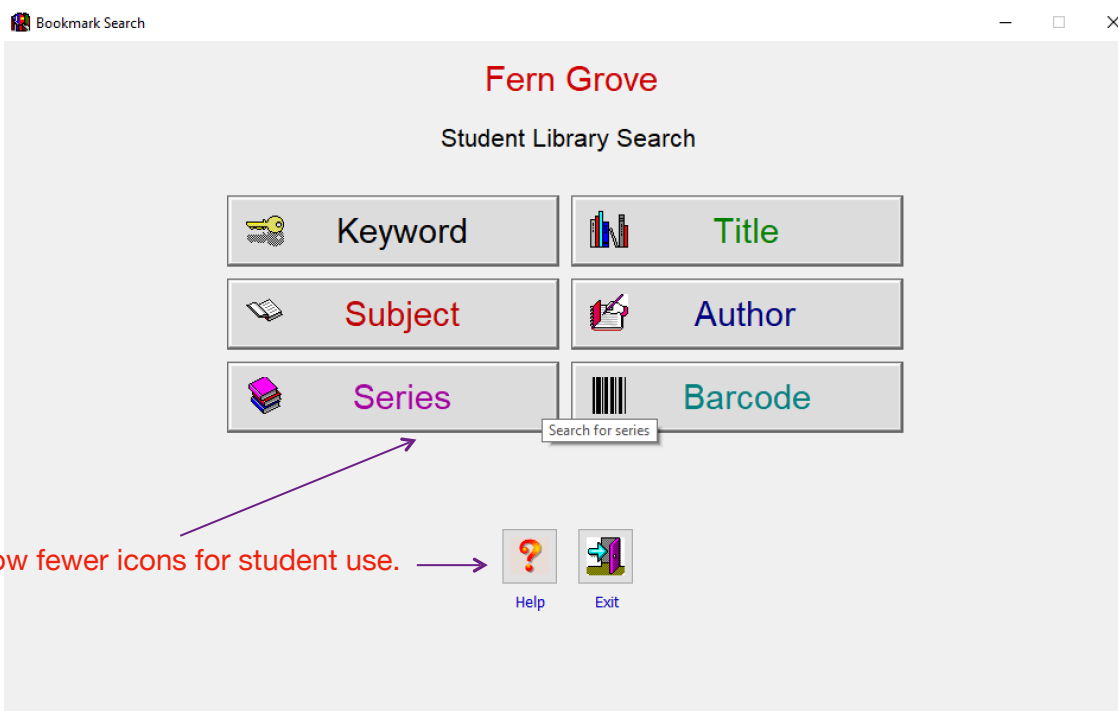
The screenshot shows the 'Circulation Controls' window with the 'Loans' tab selected. The window is divided into several sections:

- Loans switches:** A list of checkboxes for configuring loan behavior. Arrows point to the following options:
 - ☒ Allow borrowing an item that is on loan to someone else
 - ☒ Make sound and flash window when a loan block occurs
 - ☒ Show Name button to find borrowers by name
 - ☒ Use list of names based on a class (in a droplist)
 - ☒ Enter name directly on barcode request box to find
- Loan Blocks:** A section for configuring loan blocks. An arrow points to the 'Loan block password' field, which contains 'OK'. Below it, there are checkboxes for 'Setdate', 'Extend', 'Print', and 'Notice', all of which are checked. There are also checkboxes for 'Name', 'Return', and 'Slip/Dump', all of which are unchecked. Below these are three override options:
 - ☒ Override overdue block msg: Overdues!
 - ☒ Override loanlimit block msg: Loan limit reached!
 - ☒ Override loan restriction msg: Restricted item!
- Buttons visible on loans screen:** A section with checkboxes for buttons to be visible on the loans screen. Arrows point to the following options:
 - ☒ Return
 - ☒ Reserve
 - ☒ History
 - ☒ Options/Search
 - ☐ Extend
 - ☒ Swap (F1 key)
- Display switches:** A section with checkboxes for display options. Arrows point to the following options:
 - ☐ Display news on loans screen
 - ☒ Display borrower photo in loans
 - ☐ Use full search program instead of simple search
- Borrower privacy:** A section with checkboxes for privacy settings. Arrows point to the following options:
 - ☐ Ask for Privacy Password when Show command is issued
 - ☐ Ask for Privacy Password when History command is issued
 - ☒ Display list of items on loan when borrowing
 - ☐ Request Privacy Code for loans

At the bottom of the window, there are buttons for 'Loan blocks', 'Loan receipts', 'Barcodes', 'Classes', and 'Loans colours'. A 'Default setup' dropdown menu is located at the bottom left, and a 'Close' button is at the bottom right.



Icons and Options can be hidden. You can have several setups for different computer



Subject Search

Type your search words below then click on the Search button to start

Advanced search limiters:

Type of Search: Words anywhere in the subject

Words anywhere
or Word begins

Limit to Item Type: Any item type

Limit to Location: Any location

Limit to item type or location

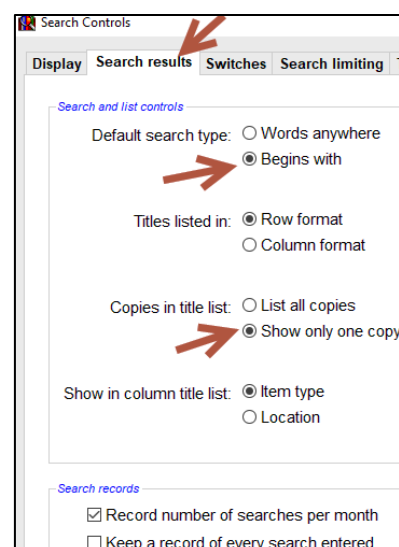
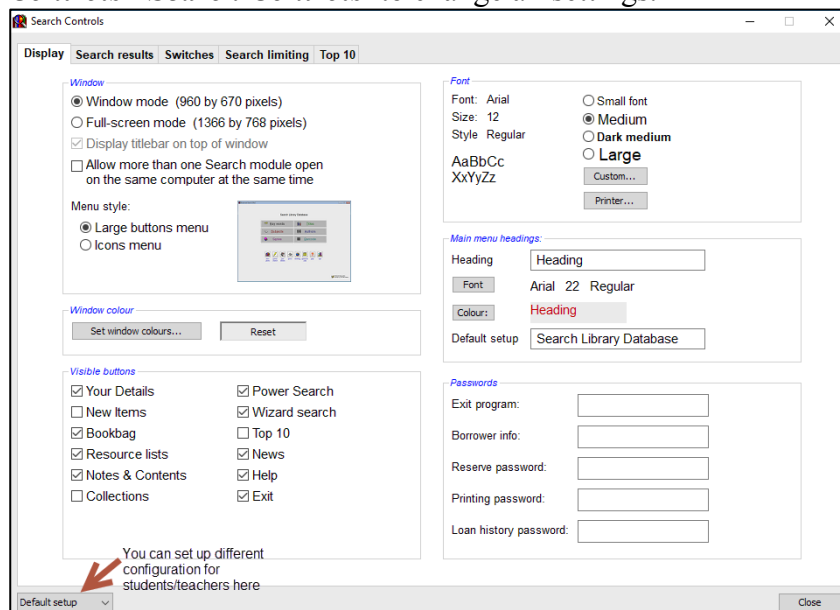
There are 2 basic searches in Bookmark. Search for **Words anywhere** or search for **Word begins**. **Words anywhere** requires correct spelling.

Word begins will make a guess based on the first 2 or 3 characters.

A subject search for **Word begins** with **DINGOES** would not find **AUSTRALIAN DINGOES** whereas a **Words anywhere** would find both **DINGOES** & **AUSTRALIAN DINGOES**

You can choose which you make the default as most users do not change settings.

Controls - Search Controls to change all settings.



Key words Search

A keyword search looks in **Title, Subjects, Author, Call number, Volume, Synopsis, Lexile, Level, PRC, Series, Notes, Contents.**



Power Search (Icon at bottom of the Search screen)

In cases where a normal search returns too many results or a more complex strategy is needed, a **Power Search** might help. This option can be turned on or off through **Controls**.

EXERCISE: Click on Power Search to find Poetry books by Fox.

Click on **CHOOSE** and select a field, or type words into Power Search:

Author ▼	Fox	And ▼
Subject ▼	Poetry	

click **Start Search**

You can narrow your search by including **Item type** or **location**

Bookbag and Resource Lists

Search Results can be collected into a *temporary* list called the '**Bookbag**'. This is useful to group items for a particular project/class. A **Resource List** is a permanent list created from the **Bookbag**. **Resource Lists** can be **Private** (only visible to creator) or **Public** (everyone can see it). **Resource Lists** can be made **Open** (others can add to it) or **not open** (only the creator can amend it). The steps-: Search catalogue ➤ add items to temp Bookbag ➤ change Bookbag to a perm Resource list
EXAMPLE: As an example, *search for books about dogs*.

Select an item and on the right of the item list click on **Add to Bookbag**, repeat to add 2 more.
 Note Bookbag (3) indicates 3 items collected in Bookbag.)

Click into the **Bookbag** button at the bottom of screen. Click **Create/Edit Resource Lists**. Give the list a name such as **Dog Resources for Grade 6**. Click OK to create the new list
 Type in your borrower barcode- for this example, use **Borrower 62 (Bill Brown)**

Click **Add from Bookbag** which will copy items from Bookbag to **Resource List**.

To make the list **Public** so others can view it, give the list a **Public name** at the top of the window. e.g. **Dog Resources for Grade 6**.

Tick ☒ Check box to make the list an Open List to which anyone can add (or leave empty to be sole editor)

Save and Close

To find Resource Lists click on **Search – Resource Lists**

Resource Lists can be managed (can be created, edited or deleted) and printed in **Controls – Resource Lists**

PRC Search

Keyword search for **PRC** shows all PRC books, **PRC 3-4** shows only that level.

Wizard Search

The Wizard search starts displaying results as you type.