






# Stocktaking

Stocktake date is Not yet set

-  **Setup stocktake**
-  **Scan items**
-  **List items not found**
-  **Finish stocktake**
-  **List missing items**

## Weeding books

(Fact Sheet)

**Reports – Catalogue Reports – New query**

*Step 1:* In the field column, choose **Item type**, under Condition choose **Is equal to**, under Value type click **List** and choose **Fiction**, - OK

Field	Condition	Value
<b>Item type</b> ▼	<b>Is equal to</b> ▼	<b>1 (FIC Fiction)</b>

*Step 2:* Choose Report Click on **Weeding Report**

- Enter a date.

If too many results, repeat using an earlier date.

Click the **Call number heading** to sort in shelf order.

Collect the books listed in the Weeding Report from the shelf and then from main menu go to **Cataloguing - Delete items - Delete items** and scan books to delete them.

Tick to  **Store in Deleted Items List** (to keep a record or for replacement)

**Delete listed items**

## Delete items from a Missing Status

**Cataloguing- Delete items-Mass Delete items**

Click on **Status** button and select a **Missing** status.

Select a **date** Click on **Delete listed items**

## Stocktaking

**Stocktake - Fact Sheet**

The purpose of stocktaking is to check items on the shelf agree with Bookmark. It's also a good way to get items back from staff. Stocktake is also used to value assets in the library. You can stocktake a section at a time eg Fiction. You can stop and start as needed and continue doing loans & returns.

During Stocktake it's a good idea to do a normal backup each night. In fact, extra hard disk backups during the day are also a good idea. There is a backup button at the top of the **Scan Items** screen for hard disk backups. People can still borrow from the library while the Stocktake is in progress.

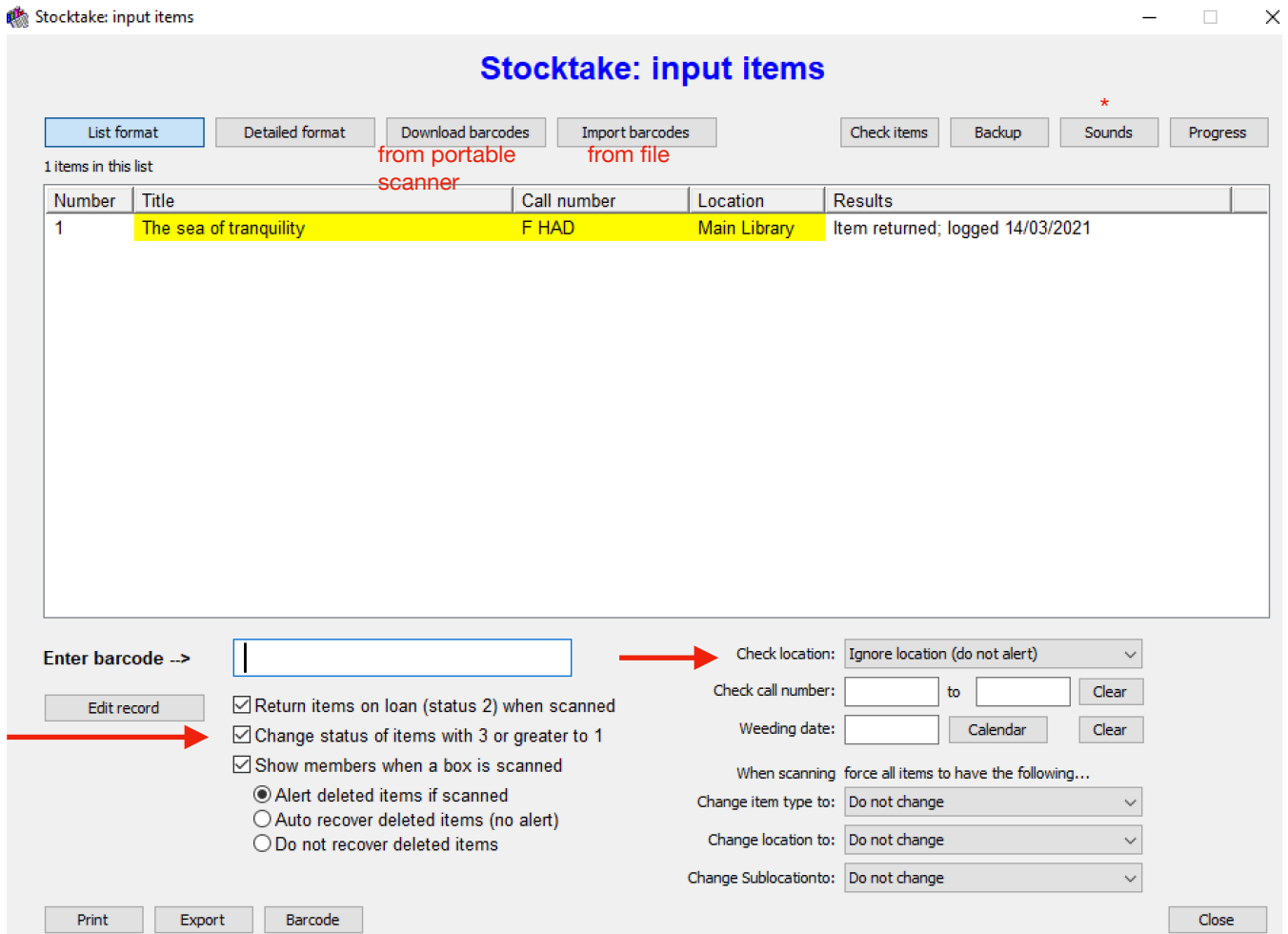
There are several ways to count (scan) all your items:-

- 1) use a portable (bluetooth) scanner, note these scanners can send scans immediately to the computer or set to store scans to download later (see your scanner manual)
- 2) use a laptop, sign in to Windows as you would on the library computer and you should see Bookmark, attach a scanner and go round the shelves (alternatively scan into Wordpad or Word and save the file to a usb for transfer to Bookmark)
- 3) bring the books to the computer

Bookmark keeps track of the "last scanned date" and this date is checked against the date the stocktake was started to find what has not been scanned since the stocktake start date. For this reason you cannot "pretend" to scan a book eg to get a lost books off a borrowers name because Bookmark will think the book is present.

1. **Update** to the latest version of Bookmark.
2. **Stocktake -Setup Stocktake** Enter the date Stocktake will start.and also click on **Edit Status list** button at the bottom of screen . Create a new **Status** eg Lost 2021 and **Update**. Close and OK
3. Click on **Scan items**

**4. Review settings eg Sounds .**



**5. Start Scanning books.**

Note: The scan items window only shows scans for the current session, not for yesterday. Use Check items to review previous days

**6. To review missing items click on *List items not found - Collect* Scroll list to check all shelves have been scanned & look for missing items.**

**7. *Finish Stocktake - Collect***

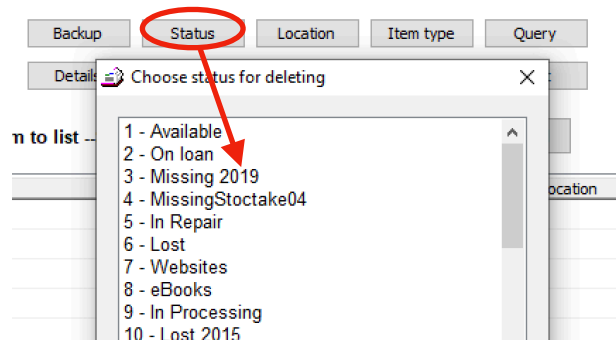
***Final Step: Assign missing status to finish stocktake***

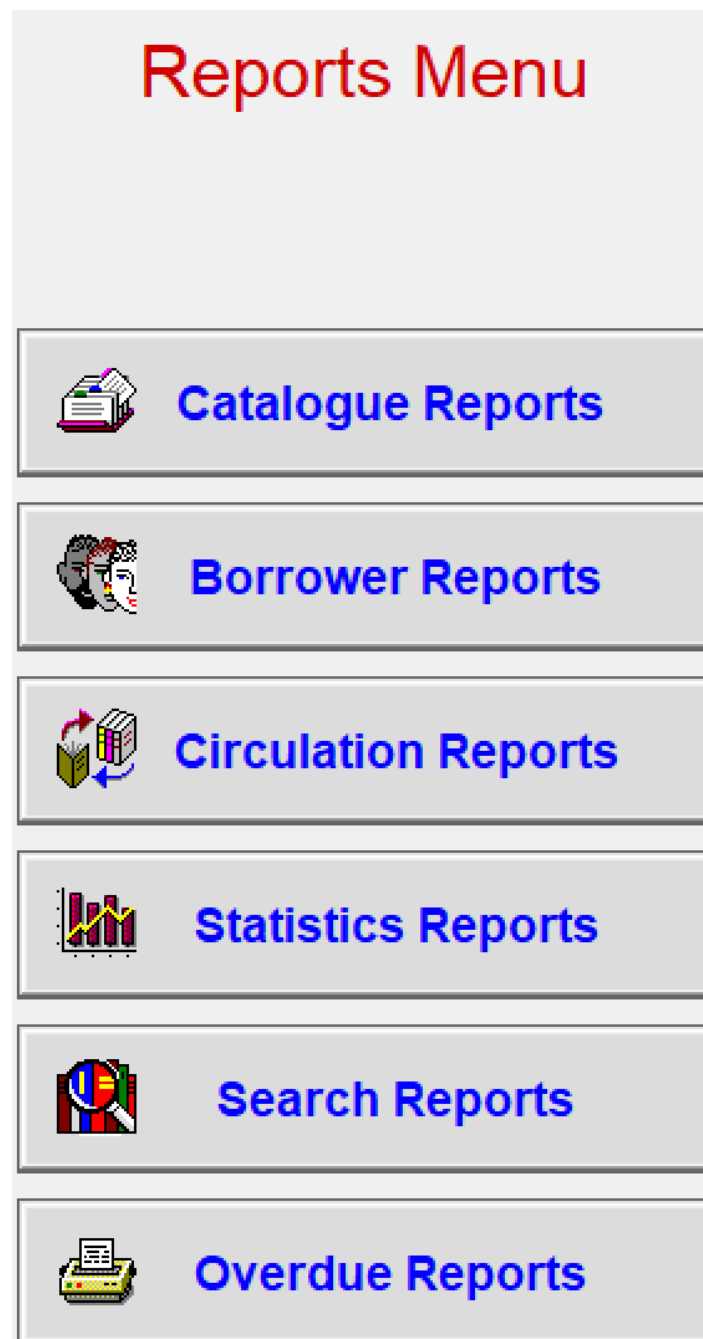
Choose a missing Status eg Lost 2021 - OK.

**8. *Delete* old Missing Items**

**Cataloguing - Delete Items - Delete Items**

**Delete Items**





## **Reports and Queries**

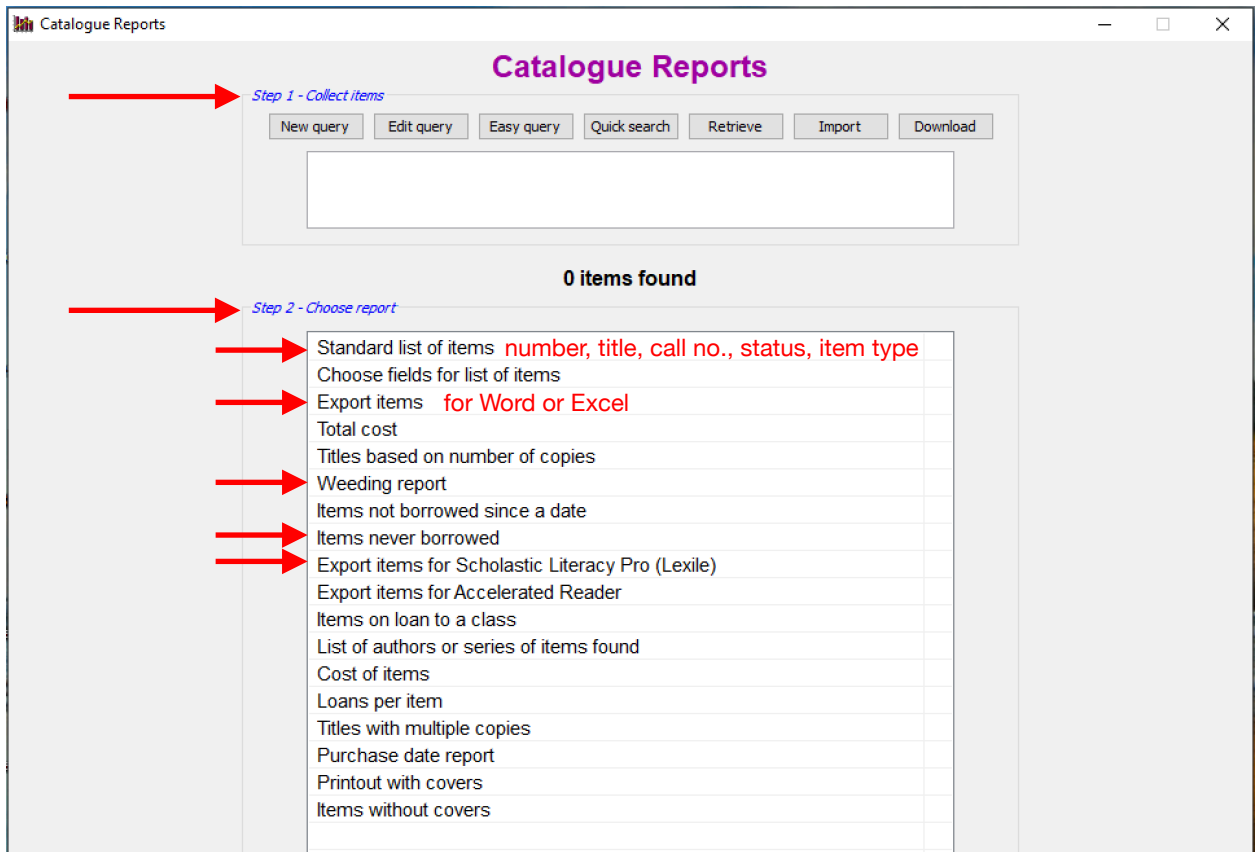
*Step 1 Find the things you want to report on*

*Step 2 Choose your report style*

*Queries can be **Saved** and **Retrieved** later.*

*Queries can be **Ordered** (ie sorted by multiple criteria).*

*Items can be **Imported** (from a file or a barcode reader) to produce a report on them.*



**Easy query**

Example: Search for all Picture Story books and sort by Call No

**Reports - Catalogue Reports - Easy Query - Search by Item Type**

**Tick  PICB Picture Book - OK** Note the number of books (55)--

**Step 2 Choose Report** Click on **Standard List of items** to view titles of Picture Story books.

You can sort the list by clicking on any column heading eg **Call No.**

**EXAMPLE:** Find all books never borrowed (hint: Find All Items then Step 2 Choose Report – Items never borrowed)

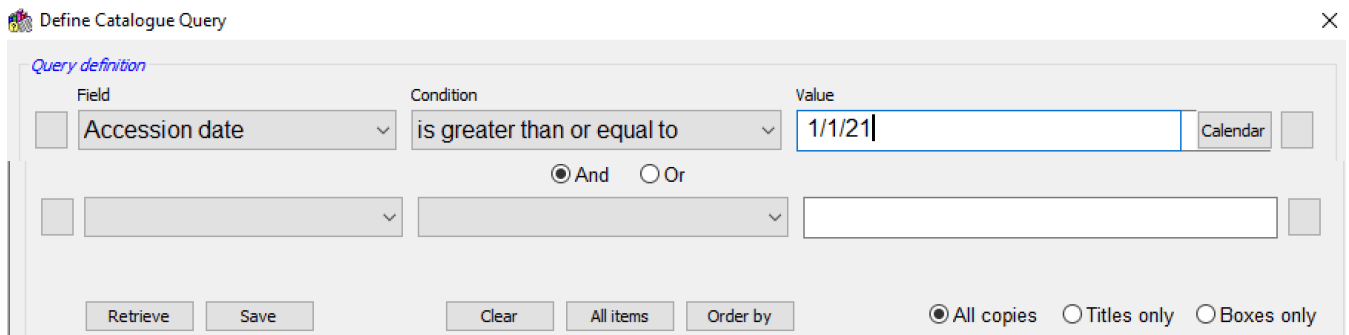
**More complex queries**

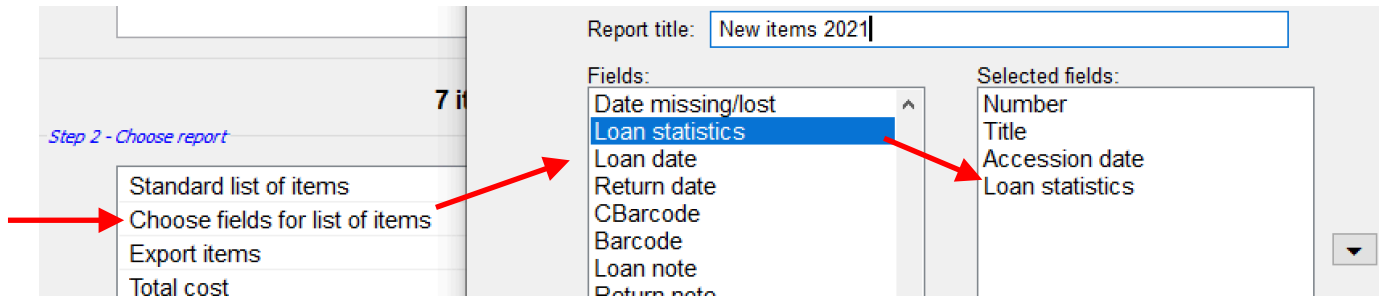
**Reports - Catalogue Reports** Click **New query** and define your queries.

Below are searches which may require multiple fields to be searched at the one time.

**EXAMPLES:**

1. Find all of the books catalogued since 2021 (hint Accession Date > 1-Jan-21) and produce a report in date order.





2. Find all books about **Bullying** that are not on loan .(use 2 searches as below 1= Available)

**Query definition**

Field	Condition	Value
Subjects	contains	Bullying
<input checked="" type="radio"/> <b>And</b> <input type="radio"/> <b>Or</b>		
Status number	is equal to	1
		<b>List</b>

3. Find non-fiction books in call numbers 700's (Hint-Item type, NF -is between 700-799.99)

**To find replacement cost of items in a Library**

*Reports - Catalogue Reports – Easy Query – All Items - Step 2 – Cost of items ( total cost at top)*

**To print a list of books** (Handy as a list of books going on display.)

*Cataloguing - Item Lists - Collect List of Titles*

Scan items or type item numbers and then **Print** – you can choose to print with covers.

**To find the number of each item type (eg videos, picture story) in the catalogue-**

*Cataloguing - Authority lists - Item type*

## BORROWER REPORTS

### Similar to Catalogue reports

**EXAMPLE:** Items on loan (or History) of all borrowers in a class.

#### Easy query

choose **Class**

Choose report

Items on loan or Items in history

**Borrower Reports**  
11 borrowers found by query

*Step 1 - Collect borrowers*

New query Edit query Easy query Retrieve

Class is equal to 3M

*Step 2 - Choose report*

Standard list of names	
Choose fields for list of names	
List of items on loan to each borrower	
List of items in each borrower's loan history	
History statistics based on item types for each borrower	
History statistics based on call number categories for each borrow...	
Rank order names based on number of loans	
Export borrowers	
Overdue notice counts	
Last overdue notice items	

Borrower History Statistics based on Item Type

File Edit Format

**Borrower History Statistics based on Item Type**

DAVIES, Melanie (1)	Class: 5M	6 items in history
4 FIC Fiction		
1 PICB Picture Book		
1 NF Non Fiction		

## CIRCULATION REPORTS

The Circulation Log keeps a record of every loan, return and extensions. The log can be searched to find a variety of reports based on loans and returns for a class, year level

**EXAMPLE:** Find most popular books for this year.

The screenshot shows the 'Define Query' window with the following settings:

- Field:** All records (indicated by a red arrow)
- Condition:** (Empty)
- Value:** (Empty)
- Date range:** Search from: 01/01/2018, Search to: 12/10/2018 (indicated by a red arrow)
- Type of record:** Loans only (indicated by a red arrow)

**Step 2 - Choose report**

- List transactions records
- Rank order items by number of loans (most popular)
- Rank order borrowers by number of loans (most popular) (indicated by a red arrow)
- Item type count
- Borrower class summary
- Borrower type summary
- Year level summary
- Number of loans per item type per borrower
- Monthly loans statistics
- Daily summary statistics
- Summary of all loans per month
- List authors or series
- Rank order only PRC items by number of loans
- List only lexiled items

**Most Found Items**

Rank	Count	Borrower	Name
1	8	69	LAVEN, Rodney
2	3	114	HAGAN, Harry
3	2	1	DAVIES, Melanie
4	1	12	SOUTHFIELD, Ken
5	1	10	SOUTHPORT, Karen

**To find number of loans/returns in a specified period**

**Reports - Circulation Reports - List transaction records**

All records– *Set the Date range - Both loans and returns – OK*



## **STATISTIC REPORTS**

**To find the number of items catalogued in a year**

*Reports – Statistic reports – Additions count - OK*

## **SEARCH REPORTS**

**Search Statistics** shows the number of searches done each month.

**Search query report** will only be available if the recording of searches is active. It can be turned on **Controls - Search controls - Search results TAB - tick** Keep a record of every search.

**Search log maintenance** to clear old search records.