



These instructions are for those library staff wishing to **email overdue notices** to parents. **See the Fact sheet (Bookmark main menu) 'Emailing Overdue Notices'** to add email settings.

Before performing these tasks always **do a backup first**. You should be using latest version of Bookmark.
UTILITIES - UPDATE

Change due dates

CONTROLS - due dates

Change any old dates. Click Staff borrower type number and change the date or click on Calendar. Check **Holiday dates** and **Final due date**

Delete borrowers who have left

BORROWERS - Delete borrowers You can delete one at a time by selecting and then clicking **Delete** follow the prompts to confirm and put any books on loan into Lost or Missing.

OR to mass delete all Year 6. Click on the Year Level heading to sort into Year Levels then scroll down to the 06 or 6 year level. Click on the first Year 6 student then hold down **Shift** and scroll down then click on the last Year 6 student which should highlight all Year 6. Click on **Delete** and follow the prompts. You can also use **Control** click to select multiple borrowers from the list.

Update student CASES ID numbers

All existing students must have their CASES ID number eg SMITH, John SMI0001 To check and update these numbers have your class rolls handy with the students CASES ID's.

BORROWERS - Rollover - Update borrowers list All borrowers displayed alphabetically, sort by clicking the Admin ID heading which will put all borrowers without Admin ID's at the top. (Note staff do not have ID's). Add ID number for any students without one. Highlight the borrower to be changed in the list then make the changes at the bottom of the screen. Add Admin ID if required then either click **Update** or press **enter** to save the change. **Do another backup**. Click on **Backup**.

Exporting from CASES21- Chess

Get your admin people to export the students to a USB following these steps exactly.

Select **STUDENTS – EXPORT - Library Systems by year level (third option on top right of window)** (The file name is **LByymmdd.txt** Export to a folder in U drive and then copy to a USB drive. You cannot export straight to a USB drive in Chess.

DO NOT open the file in Excel and **DO NOT** change the name of the file just copy it to the drive.

Importing Student Data into Bookmark.

BORROWERS - Rollover - Import borrowers

Change **Import format** to **CHESS exported(VIC)** from the drop down list.

Assign Borrower Types - leave as **Based on year level**.

Assign New Barcodes - choose **Assign new borrowers unused numbers and use normal barcodes**.

Match on Admin ID and Name

Set case - normally keep as imported (your choice)

Untick Print New Borrowers

Click on **Configure Borrower Types**, check your year levels are correct for each student borrower type (refer diag at right).

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If unsure of year levels use 0,00 for Prep (or F for Foundation, P for Prep) and 1,01 for year level 1 etc. Click **OK** when finished.

Click **Field Switches**, put ticks in **Gender, Birthdate, Group/Class, Year Level, Email and Name** (address details should not be imported). Click **OK**, click **Save Settings**

Import Borrowers

BORROWERS - Rollover - Import borrowers insert your USB, click on **Start** and choose the USB drive (probably E or F or J) . Choose the file **LByymmdd.txt** and **open** the first new borrower should appear on screen, check the displayed details if all details are in the correct fields click **Save** check the next borrower if all OK click **Mass Import**. Check the imported list **1 - Update borrower list** and **Close**.

Add new staff

BORROWERS - Add/Edit borrowers Choose the next highest number. Type name then choose Borrower type. Suggest Group be S (for staff) Click **Save** (or **Press F1**) to save the record.

Delete Classes no longer used.

BORROWERS - Authority Lists - Classes click on the Rebuild button.

No.	Borrower type	Year levels
1	PREP-GRADE 2	0,1,2,00,01,02
2	GRADE 3	3,03
3	GRADE 4-6	4,5,6,04,05,06
4	TEACHERS	
5	PARENTS	
6	STUDENT TEACHERS	
7		
8		
9		
10		
11		
12		
13		
14		
15		
16		

Print Borrower sheets from Bookmark

BORROWERS - Labels

1 - Print Barcode Labels

4 - Page Setup - DO NOT CHANGE if correct last year

Choose the Borrower Template that matches your current borrower labels. Standard Bookmark labels shown
The site ID should match your current labels (not 0000)
Make the top margin 20.

The stripe width should be 0.3

Close the page setup screen.

Choose 1. Class Sheets

Select a class or **ALL**

Choose a suitable layout.

Choose name format,

tick the following options Sort, Use alt. barcode and Top of Page and click **Proceed**.

Tick Show checksum digit on each label (normally)

Click **OK**, if Print Preview looks Ok just **Print**.