Advanced Training Course Manual Version 10

By Dean Hodgson

revised

© 2017

BOOKMARK

Bookmark

Advanced

Training Course Manual

Version 10

Government of South Australia

Department for Education and
Child Development

Contents

Course topics

Bookmark 10 basics

Networking

Reports

Stocktaking

Advanced Searching

Cataloguing – Global Change

Cataloguing – Authorities

Borrowers – Photos

Advanced Circulation

CPAC and WebOPAC Searching

- *Additional or alternative topics may be covered in the course depending on requests.*

Starting Bookmark
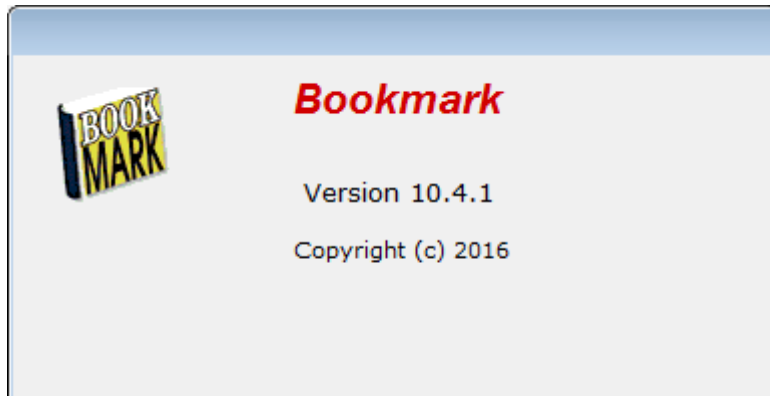
If it is the first time Bookmark has been started today, it may scan the database and provide a report showing the current due dates and other information. This presentation is optional and can be turned on and off in Controls.
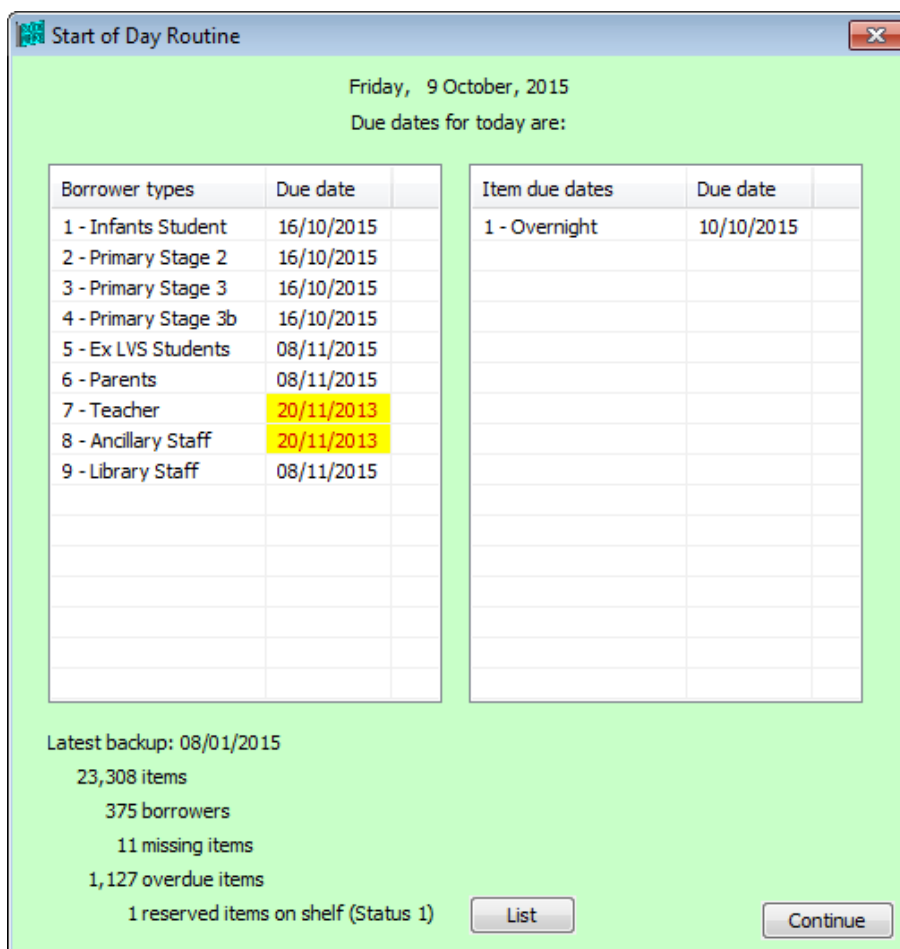
Main Menu

The Main Menu can be set to one of three different styles. This is also specified in Controls.
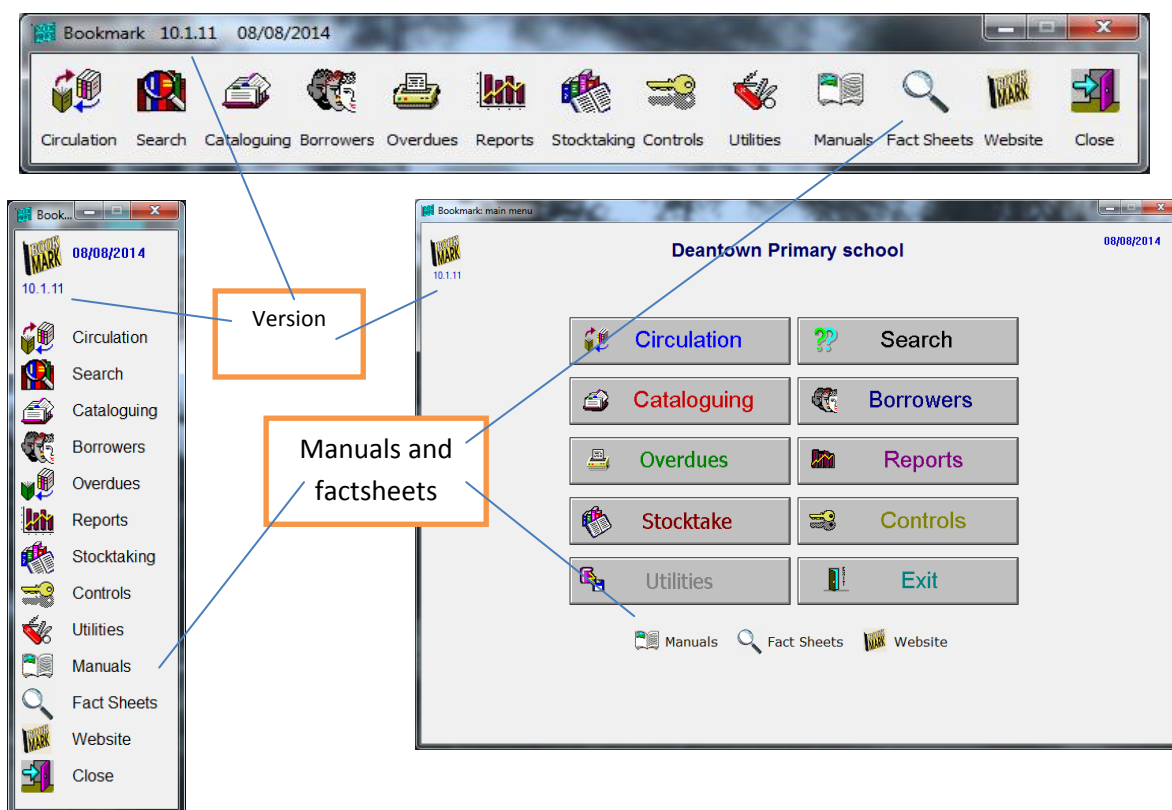
By default the largest window is used for the Main Menu.

The Bookmark version is listed on the top left corner.

Window Size and Screen Resolution
Bookmark's windows are sized to fit within a minimum screen resolution of 1024 x 768 pixels.

All windows are designed to fit within this parameter. Because of this size of windows cannot be changed. Circulation and Search are exceptions: they can be set for "Full Screen" or "Window" display modes in Controls. (Technical: 768 is a common maximum height on laptops, notebooks and tablets. Bookmark's windows are sized to fit within this maximum.)

Higher screen resolutions are an advantage – e.g. 1280 x 1024 or 1980 x 1080, etc. To change right-click on the desktop.

Popup Main Menu
When a module menu is open – e.g. Cataloguing - right click on an empty spot and a mini-Main Menu list is available. This allows you to open another module without having to bring up the Main Menu.

Menu Map

Circulation
Loans
Returns
Search
Reserve
News
 Exit

Search
Keywords
Subjects
Series
Titles
Authors
Barcode search

Borrowers
Add/edit borrowers
Delete borrowers
Update borrowers
Global change
Borrower lists
Labels

Cataloguing
Add/edit items
Import Items
Authority lists
Lists
Global Change
Linking
Delete items
Export items
Boxes
Labels
Search
Reindexing

Reports
Catalogue reports
Borrower reports
Circulation reports
Statistics reports.

Overdues
Overdue lists
Overdue notices
Overdue messages
Reset test date
Recall message

Utilities
Backup
Update
System info
The Batcave
Restore
Pinter info
Notepad

Controls
Borrower types
Passwords
Circulation Controls
General controls
Messages
Barcode settings
Bookmark website
Cataloguing lists
Due dates
Search controls
Review controls
Reservations
Stop Words
Edit news

Stocktaking
Log items
Missing items
Reset stocktaking
test date
Stocktake statistics

Factsheet, manual, website

Bookmark: main menu

Deantown Primary school   08/08/2014

Circulation   Search

Cataloguing   Borrowers

Overdues   Reports

Stocktake   Controls

Utilities   Exit

Manuals   Fact Sheets   Website

Barcodes

Each library system uses its own configuration for barcodes and some schools have inherited even a mixture of different barcode types. The standard "Bookmark" configuration is 11 characters in length and organised in a specific manner. Barcode Settings in Controls is used to tell Bookmark about the type of labels being used.
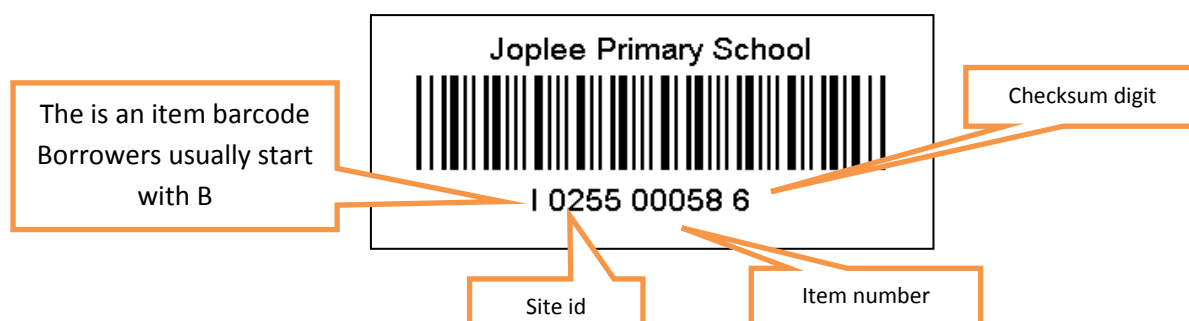
Label Header
Above the "stripes" is the label header. This is usually the name of the school or institution. For user labels, it may be the name of a person.

Label Identifier
The first character indicates whether the label contains a borrower's or an item's number. The letter B is normally used for *borrower labels* and I for *item labels*. (Some other configurations use different letters or numbers.) All borrower labels should begin with the same character, whether it is B or a 2 or anything else. Labels beginning with any other character are considered items. It is strongly recommended all item labels begin with the same character and not different letters – e.g. to denote different types of media.

Site ID
The next four characters – 0255 in the example – identifies where the barcode originates. It can be either 4 digits or 4 letters. The site ID is normally the school number.

Record Number
This is the most important part of the barcode. Every borrower and every item in the database is stored with a unique *record number*. The next five numerals comprise the record number. These values begin at 00001 and can go up to a maximum of well over 99999999 (5 digits on this type of label limits the range to 99999 but other types can have 6 or 8 digits).

Checksum
The final digit of a standard barcode is known as a *checksum digit.* It is used by the barcode reader itself to ensure the label has been read properly by the reader. It is *not* part of the record number.

Record Numbers vs. Barcodes
In normal use, an item's or borrower's record number is the same as that shown on the barcode and in many places either the whole barcode or just the record number can be entered. However, Bookmark allows storing a barcode against a number that is completely different to what is shown on the barcode. Mismatching record numbers and the number on barcodes should only be done in situations where the record number is not able to match the barcode's number – e.g. more than one type of barcodes or combined site IDs.

Item Numbers, Calculated Barcodes vs Stored Barcodes

Each borrower and each item record has a field that can hold ('store') the full barcode.

If this is blank, Bookmark automatically calculates the full barcode based on the record number and the settings in Controls/Barcode Settings. This means barcodes can be used even if they have not been physically entered.

When a barcode is scanned, Bookmark 10 first checks to see if it is physically stored against any borrowers or items. If so, it quickly retrieves the associated record number. However, if the barcode is not found, Bookmark then "extracts" the number from the barcode using values in Controls / Barcode Settings. This is why it can work for items and borrowers that do not have barcodes entered in the data. Because the list is checked first, it is better to enter the full barcodes against all borrowers and items rather than leave them blank. In the future, Bookmark may require this. Cataloguing and Borrower Lists provide a quick means of assigning full barcodes.

Functions for automatically filling all barcode fields can be found in Cataloguing – Lists and Borrowers – Borrower Lists.

Windows File Requester

When Bookmark needs to open an external file, such as a SCIS cataloguing data file, or it needs to save a file, a standard Windows File Requester is provided. The File Requester allows specifying the file to open or save. The File Requester is a built-in part of Windows itself and not custom designed.

Two "styles" of file requesters are available to users with Windows 7, 8 or 10. (Only one style is avaialble for Windows XP.) This choice can be made in Controls / General Controls. By default, Bookmark uses the default style for the version of Windows you are using.

Modern Windows Style
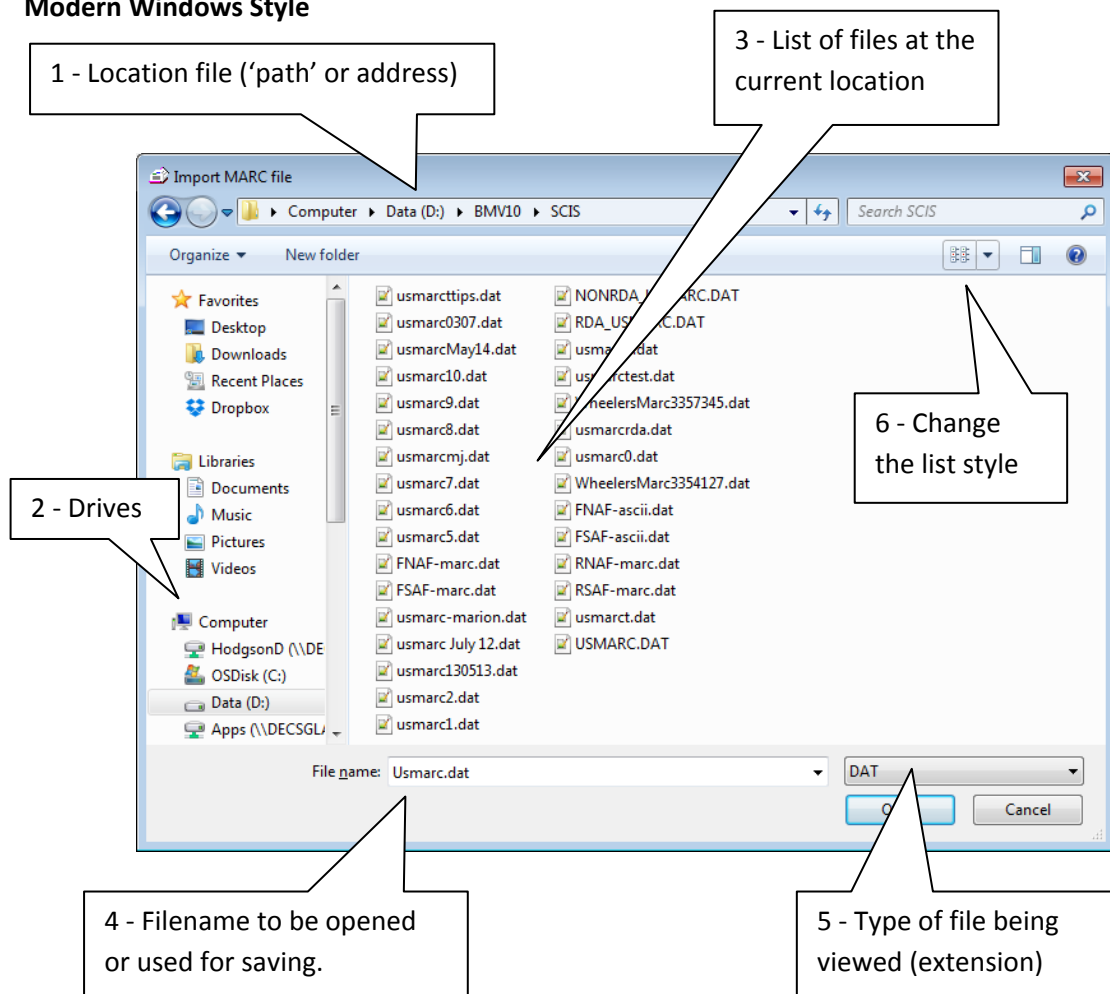
The line across the top is the most important part of the window. It tells you where you are. It is like the address of a house on a street and is sometimes referred to as a 'path'.

1 - *Paths* use the \ symbol to denote a folder and the : symbol before a letter to specify a drive. The path in the window above translates into D:\BMV10\SCIS. This means we are looking at "drive D:" in a folder called SCIS which is inside another folder called BMV10. The path to Bookmark can vary on every computer andit can change as well so it is best to keep track of it.

2 - Use the column on the left to select the drive to work from. It only requires a single click.

3 - The large middle area lists all files and folders at the current location.
To change the folder, *double click* on the one in the middle area.
To go back one layer, click on the left-arrow in the circle.

4 - The File name is the name of the file to be opened or saved. If opening, be sure you see the filename in the large middle area. Click on it to highlight and show on the file name line. If saving, the filename can be changed by typing. Only use numbers and letters, dashes (-) and underscores (_) in filenames as some symbols are reserved by Windows itself. Even though they can be used, it is better to avoid blank spaces. Keeping filenames short (8 or fewer characters) is also a good idea, although not manditory.

5 - The bottom right side filters the type of files being listed.

6 - The icon at the upper right can be used to change the way the list of files and folders is presented. Several styles are available ranging from icon to list to details.

Click on Open to open the file or Save to save it.

Older Windows Style

Windows XP used a different looking file requester and it is also available in Windows Vista, 7, 8 and 10. Some people find this style more comfortable. To activate it, go to Controls, General Controls and tick the box then OK to save.
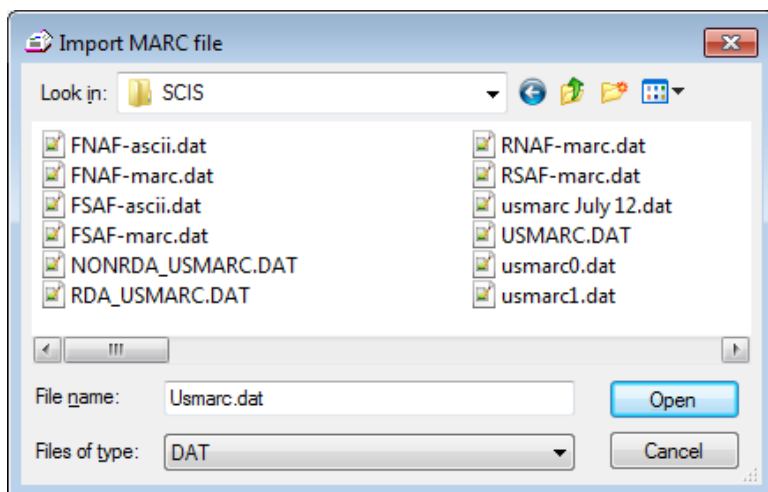

With this style, "Look in" is a dropdown list at the top that shows both drives and folders together. Use it to select the drive. Like the above, double-click in the middle area to select a folder.

Networking

Bookmark is designed to work across a school's local area network. This allows different computers to access the library's catalogue database. The database can contain information about physical and electronic resources – e.g. books, DVDs, CDs, kits, pdfs, Word documents, videos, audio and music files, ebooks and even Internet websites.

Bookmark has three parts. Each part has its own desktop icon.
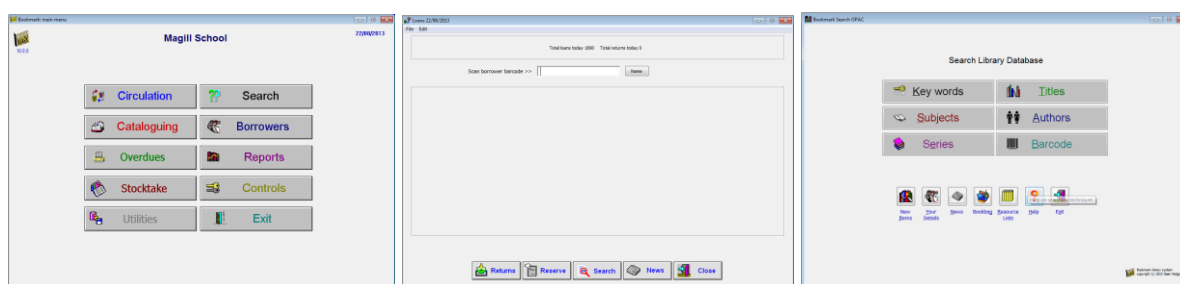
Main Menu	Circulation	Search
Librarians program	Loans and returns only	Search catalogue only

The **Main Menu** is for library staff and provides access to all three parts of the system. Each button opens other modules including the Circulation and Search parts. If you are using only one computer, this is the only part needed.

Circulation is used with a barcode reader to issue items on loan and to return them. This module is designed for use on a workstation where users there are not allowed to use the rest of the system.

Search allows users to search the library's catalogue database but not do anything else. It is like "Google" for Bookmark's database. Bookmark has three different types of Search modules.

The entire Bookmark program is installed on the hard disk drive of a **host computer.** Other computers are linked to it via a "mapped drive". A desktop icon is used to launch each part. Best speed and reliability is achieved if the host is the librarian's main computer. Hosting by a network server is possible but performance might be impaired if the server is a high-traffic zone. Speed is greatly reduced if Bookmark is hosted within a "Virtual Machine" and can also be affected by workstation background tasks.

The Search part of Bookmark is called an OPAC – "Online Public Access Catalogue". It is available in three forms:

- SEARCH – This is the standard OPAC. It requires an icon to be launched and only works on Windows systems (computers, laptops and tablets).

- WebOPAC – This is a "web enabled" OPAC. It is launched from a URL using an Internet browser such as Internet Explorer, Firefox, Chrome or Safari. It works on all types of computers and even smartphones but access may be restricted due to network firewalls.

- CPAC – This is another "web enabled" OPAC. It is Internet based and works with a copy of your catalogue. Any device that can go onto the Internet to a URL can access CPAC. CPAC also allows groups of schools to pool resource searching for sharing purposes.

Reports

Bookmark's Reports module is a powerful means of obtaining a wide variety of information from the database.
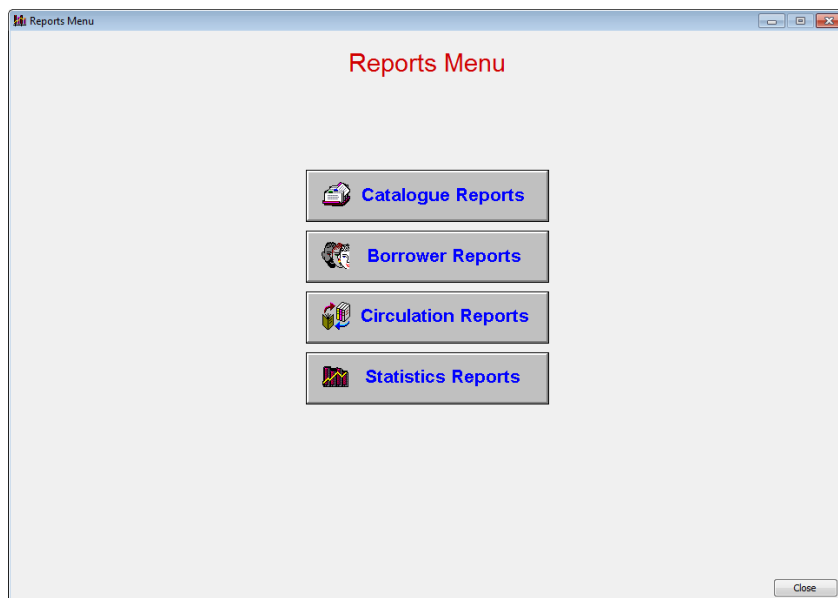
Each section can generate reports based on a major part of Bookmark.

- Catalogue Reports – Searches the Catalogue part of the database and generates a range of reports based on that area

- Borrower Reports – Searches the Borrowers part of the database only

- Circulation Reports – Searches the Circulation Log, which is a history list of all loans and returns

- Statistics Reports – Searches the Catalogue only but produces a range of numerically-oriented reports rather than lists

Reports have two parts:
- Query – this is the part used to search the database
- Report – this generates the output based on the query

The Query is used to find the items, borrowers or circulation records. It is like the yellow brick path through the Quadling Land which leads to the Emerald City. The Report itself is the towered city itself. Example: What is the cost of the picture books purchased this year? The Query (search) is for picture books purchased this year but the Report (output) is the cost.

Query

Click on the New Query button in the "Query criteria" section at the top to open the Define Query window.

An OPAC search, such as Key Word or Title, is fast but restricted to specific areas (fields) and simple search methods. A Query, however, can examine all of Bookmark's data fields individually or in combination and can use a variety of methods to locate date. It is complex but thorough.

Each line of a Query requires four parts:
- Field – the data area being searched (where to search)
- Condition – the method (how to check)
- Value – the words or numbers being sought (what to check)
- Link – And, Or or Not used if searching 2 or more lines

Field
Use the dropdown list to first select the field to be searched.

Condition

The condition is how the value will be compared to the data in the database. Many conditions are available:

- *Contains* – The value can be contained anywhere in the data of the field, possibly even in the middle or end of words. Blank spaces count as characters.
- *Begins with* – The value being searched for is matched only at the beginning of the data in the search field. Anything else can come after.
- *Is equal to* (=) – The value being searched for is the only thing in the data. This is a precise, exact match (although not case sensitive).
- *Is less than or equal to* (<=) – The data found in the search field is less than or equal to the value being tested, either alphabetically or numerically.
- *Is greater than or equal to* (=>) – The data is greater than or equal to the value being tested.
- *Is between* – The data being sought is between two values … this AND that. The word AND (surrounded by spaces) comes between the two values.
- *Is not equal to* (<>) – Any record not having the exact value being tested in the search field is found.
- *Does not contain* – Records that do not have the value as part of the field are found.
- *Does not begin with* – Records are found that do not begin with the value.
- *Is any of* (IN) – The records found can be equal to any one of a list of values. Each part of the list is separated by commas – e.g. 1,2,5,17,36 or red,green,blue
- *Is empty* – The field being searched is empty (no data). NULL is automatically entered as the value.
- *Is not empty* – The field being searched is not empty, it can contain anything.
- *Is less than but not equal to* (<) – The data in the field is less than but not equal to the value.
- *Is greater than but not equal to* (>) – The data in the field is greater than but not equal to the value.
- *Is not any of* (Not IN) – The data is not any of a listed set of values.
- *Ends with* – The data in the field ends with the value.

If more than one Query line is required, it first must be linked to the second by And, Or or Not from the right-most droplist. And means "as well as" or both, Or means "either or" and Not means "that but not this".

Queries can be **saved**. This allows queries to be easily retrieved and reused.

Catalogue Reports
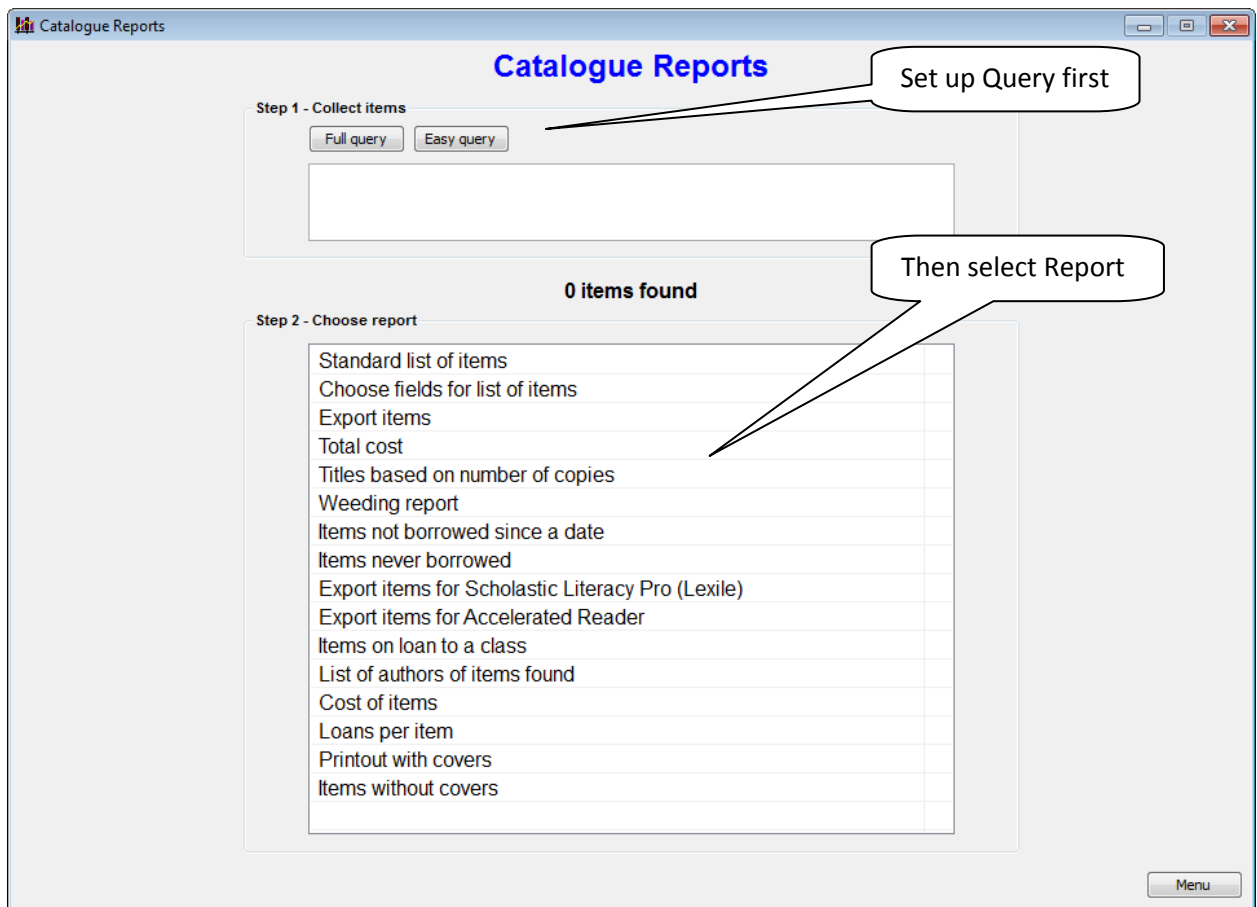
Once a Query has been defined, Bookmark runs it and returns the number of items found.

A report can then be selected.

The Report determines what is acutally seen or printed.

The most common type of report is a List.

Most list-style reports in Bookmark use a standard type of output window. In addition to viewing the results of the query, this window permits a variety of special actions:

- The widths of columns can be varied by dragging with the mouse
- The list can be sorted alphabetically by clicking on the heading at the top of a column
- The columns listed can be removed or changed
- Double-clicking on an item shows its cataloguing details or brings up an Add/Edit window that allows changing the record's information
- The list can be displayed either Portrait (normal) or Landscape (wider)
- The font and font size can be changed
- Printouts are exactly as seen – e.g. the columns, their widths, the font and size and the sort order
- The list can be saved as a tab-delimited text file, which can then be imported into Microsoft Word or Excel
- The format of the list (columns and widths) can be saved and retrieved for re-use. This allows custom "user reports" to be added to the list of reports.

Available reports are:
- *Standard list of Items* – a ready-made list showing the item number, title, call number, status number, item type number.
- *Choose fields for list of items* – select the fields (columns) to show in any order.
- *Export Items* – The list can be exported in Tab-delimited (txt), Comma-delimited (csv), USMARC and other formats. Tab and Comma formats can be opened in Excel.
- *Total Cost* – Shows the total cost of the items found by the Query.
- *Titles Based on Number of Copies* – Lists titles having more than, less than or equal to a specific number of copies.

- *Weeding Report* – Lists items found by the Query showing the item number, title, call number, accession date, due date, number of loans issued, the cost and status.
- *Items Not Borrowed Since a Date* – Lists items not borrowed since a specified date.
- *Items Never Borrowed* – Lists items for which the number-of-times-borrowed counter is zero.
- *Export Items for Scholastic Literacy Pro (Lexile)* – Generates a CSV file of items found suitable for uploading to Scholastic's Literacy Pro website. The resulting file of Lexiles can be downloaded and imported into Bookmark in Cataloguing/Import. (This report was produced with the co-operation of Ashton Scholastic Australia.)
- *Items on Loan to a Class* – Lists items found by the Query (such as a textbook title) that are on loan to borrowers in the specified classes.
- *List of Authors of Items Found* – Lists the authors of the items found by the Query.
- You can also make up your own list-style reports and add these to the list of reports.

Catalogue Report Query Examples

Example 1: Find all items with "dog" in the title (no quotes).

Click on **New Query**

Click on Field and select **Title**

Click on Condition and select **Contains**

Type the word **dog** in the top Value line

Click **OK** to set the query criteria

Click on the **List of Items** report to execute the query and view results. How many?

Example 2: Find all items with "dog" in the subject field.

Subjects CONTAINS *dog*

How many are found?

What happens if "dogs" is used for the value instead?

Subjects CONTAINS *dogs*

How many are found?

Why is it different?

Example 3: A teacher is doing a unit on cats and dogs and would like a list of resources.

This requires the same field to be searched for two different things.

Subjects CONTAINS *dogs*   OR

Subjects CONTAINS *cats*

How many are found? (155)

What happens if the OR link is changed to AND?

What happens if the NOT link is used?

Try the query **Subjects** IS ANY OF *dogs,cats*

What was the result?

Why is it different?

Example 4: List all Teacher Resources about Music.

This requires two fields. In the Training data, Teacher Resources is Location 4.

Subjects CONTAINS *music*   AND

Location equals *4*

How many are found?

Example 5: List all of the items with call numbers in the 560's.

Call number IS BETWEEN *560 and 570*

Catalogue Report Query Exercises

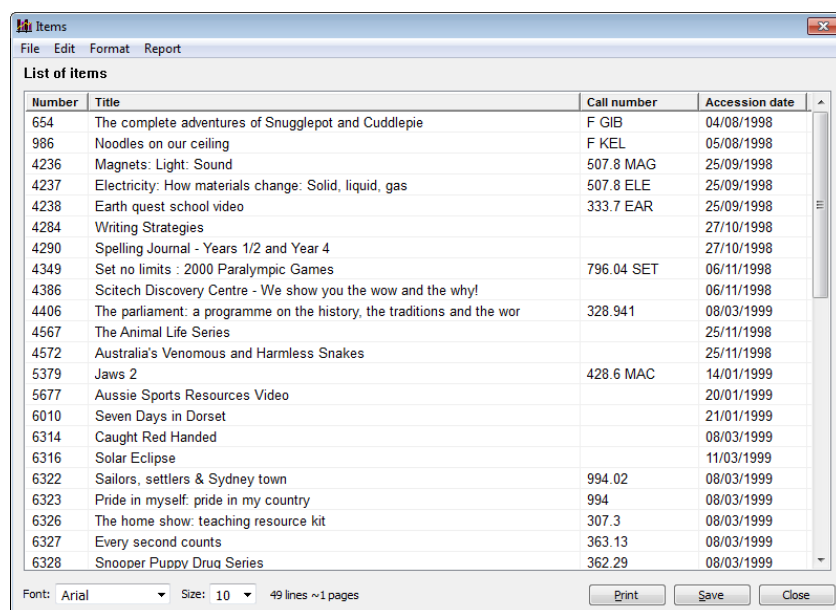Make up Queries for each of the following and write down the number of items found.

1. Items with the word SPACE in the title
2. Items about KITES
3. List all BIG BOOKS
4. Find all FICTION items using Call Number
5. Find all FICTION items by Item Type
6. Items written by Mem Fox
7. Items with call numbers in the 700's
8. List all items not used since the end of December 2000
9. List all items
10. All missing and lost items
11. A staff member would like a list of all the videos about CATS
12. What is the total cost of items accessioned in March 2005?

Catalogue User Reports

Make a Query to find all items with a location of 6 – Video shelf.
Use the Selected Fields Report and choose Number, Title, Call number, and Accession date.
When the list appears, make the Accession Date and Call number columns narrower and the Title column wider.

Use the Report option at the top to save the report with the title Video Shelf. It should appear in the list of Reports.

Extremely Advanced … Secret Hidden Catalogue Query Functions

A Query can be based on a "length of" criteria. Enter a ^ symbol before the number denoting length. For example, to find all 13-digit long ISBNs, enter a query like **ISBN is equal to ^13**.

Pressing F10 on the Catalogue Reports menu opens a hidden window. Bookmark 10 uses the SQLite database system and any valid SQLite Select command can be entered here. The resulting list includes the fields specified. Knowledge of the syntax and grammer of SQLite commands is required to do this. Example: **Select * from Items where subjects like '%ducks%'** returns 15 items. The asterisk must always be used for fields. The Bookmark help desk may, from time to time, ask users to enter a command here in order to conduct a query that is too complex even for the normal Query box.

After a Query has been defined, pressing F12 shows its translated SQLite Select command.

Borrower Reports
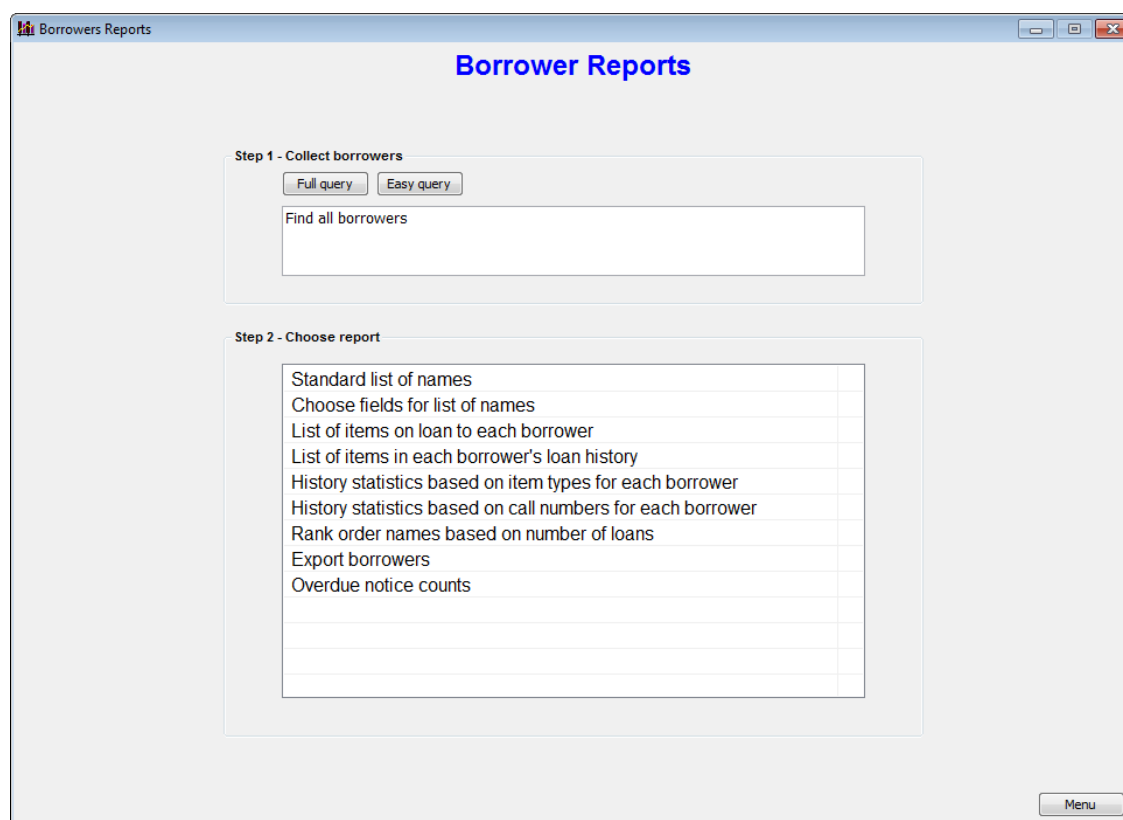
The Query for a Borrower Report is similar to that for the Catalogue Report. The Fields are different but the Conditions are the same.

Available Borrower Reports are:

- List of names – a list showing the borrowers' number, name, class, year level, type and gender
- Select fields to list – choose which fields to list
- List of items on loan to each borrower – lists items on loan to borrowers based on the query criteria; this is not a list report by a "free text" report which can be altered by typing
- List of items in each borrower's loan history – list of items previously borrowed for each borrower or just the number borrowed
- History statistics based on item types for each borrower – a useful summary showing how many items were borrowed by each person within each item type category
- History statistics based on call number categories for each borrower – similar to the above but shows the number of borrowed items within broad call number ranges
- Rank order names based on number of loans – lists borrowers in order based on the number of items previously borrowed from most to least
- Export borrowers – export selected borrower fields in tab-delimited (txt) or comma-delimited (csv) formats

Note: Borrower Lists in the Borrowers also provide a range of reports but use a restricted, simpler query system.

Borrower Report Query Examples

Example 1: Find all the borrowers with the name **Sarah.**

Click on New Query

Click on **Field** and select *Given name*

Click on **Condition** and select *Contains*

In **Value**, type **Sarah**

Click OK

Click on the *List of Names* report.

Example 2: Find all the borrowers in **Class 6F**.

Field is *Class/Group*

Condition is *is equal to*

Value is *6F*

List the names and sort alphabetically.

How many borrowers are there?

Example 3: List all the **year 3 girls**.

This requires two fields.

Field is *Year Level*

Condition is *Equals*

Value is *3*

AND

Field is *Gender*

Condition is *Equals*

Value is *F*

How many?

Borrower Report Query Exercises

Make up Queries for each of the following and write down the number of borrowers found.

1. Find all borrowers in year 5
2. Find all the boys
3. Find all students and list them in order of most items borrowed.
   Who is the student with the highest number of loans?
4. Who is the year 7 student with the least number of items in their history?
5. Who is the top borrower in year 6?
6. Which borrower has a privacy code?
7. Find all borrowers and list their histories in Dewey categories
8. Look for everyone who has not borrowed anything

Circulation Reports
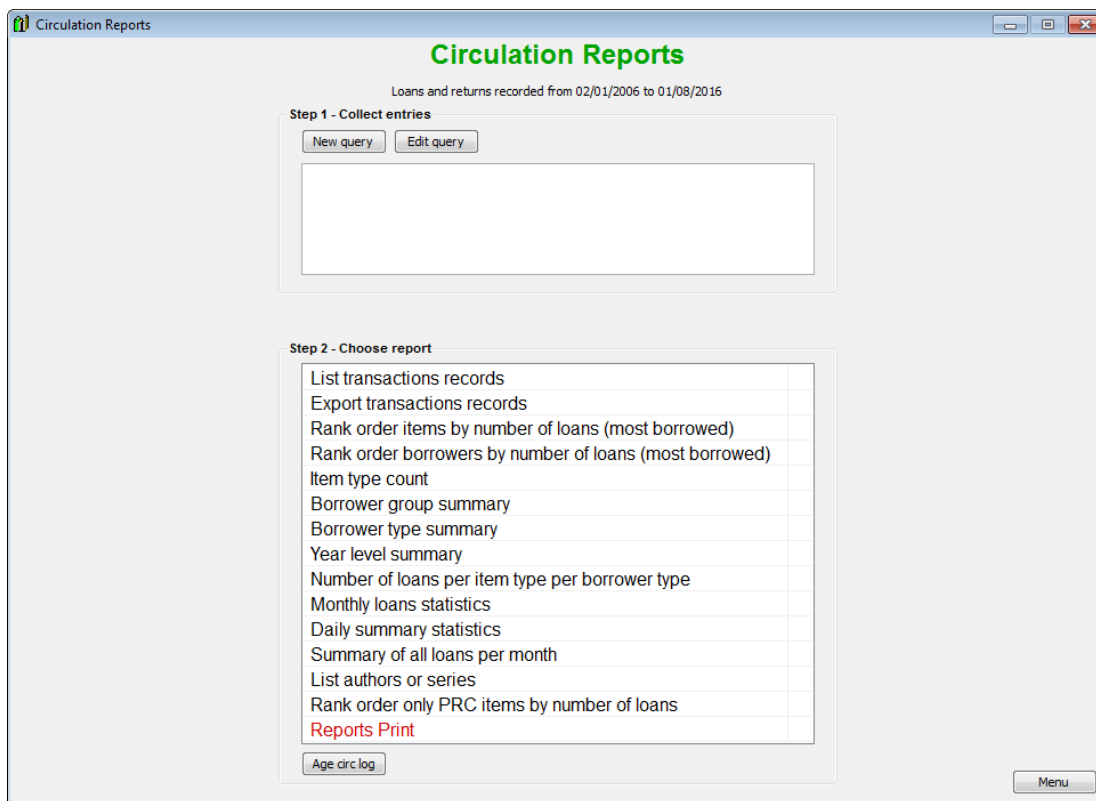
Circulation Reports allows the history list of loans and returns to be examined in a variety of ways. These include:-

- Simple list of loans and/or returns
- A list of most borrowed items in order
- A list of borrowers in order based on number of loans issued
- Lists of loans or returns based on item types
- Number of loans and returns for each class or year level for any given time period
- Detailed breakdown of loans for item types and borrower types
- Number of items borrowed each month or each day

A Query similar to Catalogue and Borrower Queries can be used to filter out the loans and/or returns bsaed on a specific criteria.

Clearing the Circulation Log

Older versions of Bookmark required a "clearing" exercise to be done every year. Bookmark 10 does not require this as it is capable of storing vast amounts of data. However, it may be practical to periodically remove old records. The "Age Circ Log" button on the Circulation Reports screen can be used to do this. Just enter a cutoff date and all records with dates prior to this will be erased.

Every borrower also has their own separate history list of loans. This can be aged separately or cleared in Controls - Circulation Controls.

Circulation Report Queries

Queries can be based on borrower classes or year levels, item numbers or types, locations, gender and more. In addtion, they can be easily restricted to a specific period of time – e.g. this year, last term, the last month. They can also be restricted to either just loans, just returns or both.

Circulation Log Query Example

Example: Find the most popular book in March 2005.

Click on **New Query**

Under field, set to ***All Records***

In the **Dates Range** section at the bottom, set the *Search from* date to **01/03/2005** and the *Search to* date to **31/03/2005.**

Make sure *Loans only* is marked.

Click **OK**.

32 loans should be found.

To find out the most popular book during that month, click on the *Rank Order Items* report.

What is the title?

Circulation Log Query Exercises

How many loans have been recored for item number 8193? (All dates.)
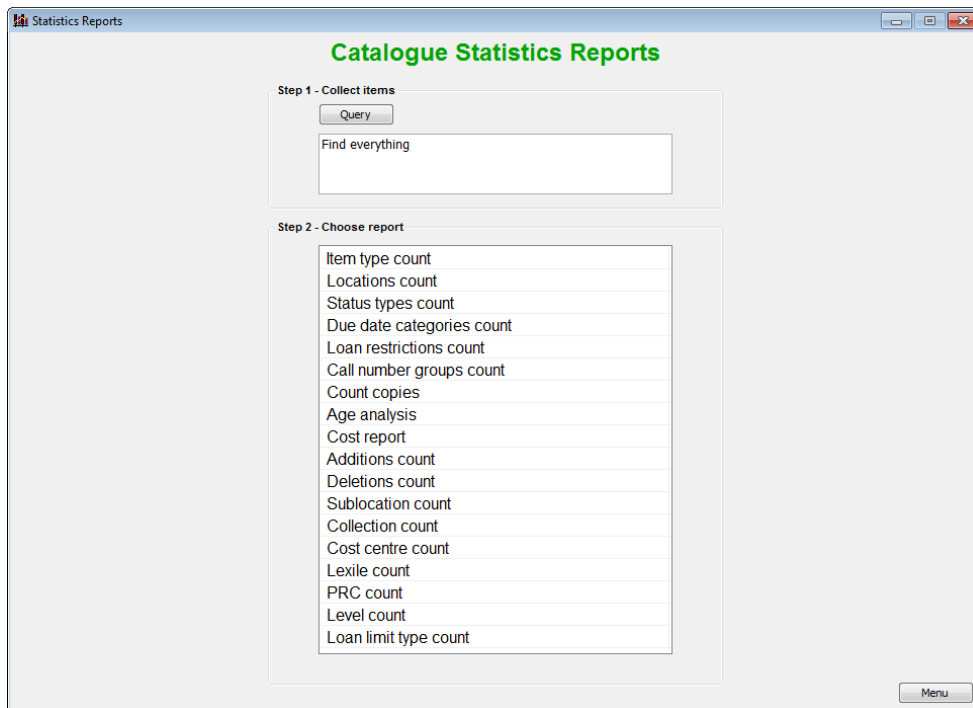What is the title?

How many loans and returns did borrower number 42 (Alice Walley) make during the year 2004?

Search for Non-fiction items, all dates. How many loans were found?
(Hint: which field tells you it is non-fiction?)

Which report would be used to show the number of items borrowed by borrower type 2?

Statistics Reports

These reports are used to provide statistics information or "counts" about the collection.

A Catalogue Reports Query is available to filter the reports.

How many fiction items are in the collection?
Which item type area has the biggest number?
How many items are in the Teacher Resource location?
How many items are in the Dewey 600 range?
How many items are currently on loan?
How many titles have 3 copies each? (Bonus: how could you get a list of the titles?)
How much is the Teacher Resource area worth?

Stocktaking

The purpose of stocktaking is to account for stuff. An ancillary task may be to winkle items back from those staff members who believe items to be their own personal property. It may also provide a chance to tidy the shelves, and most importantly, reduce the frustration level of students who can't find missing items.
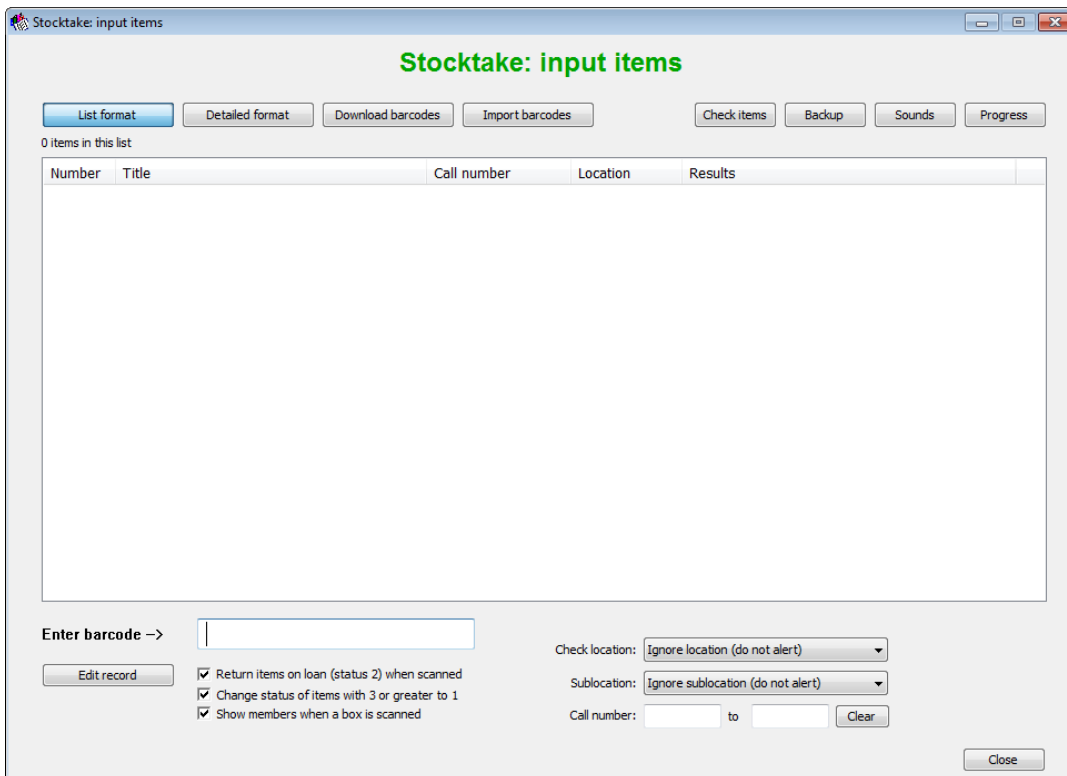
Refer to the Stocktaking Fact Sheet and Stocktaking Manual for more detail.
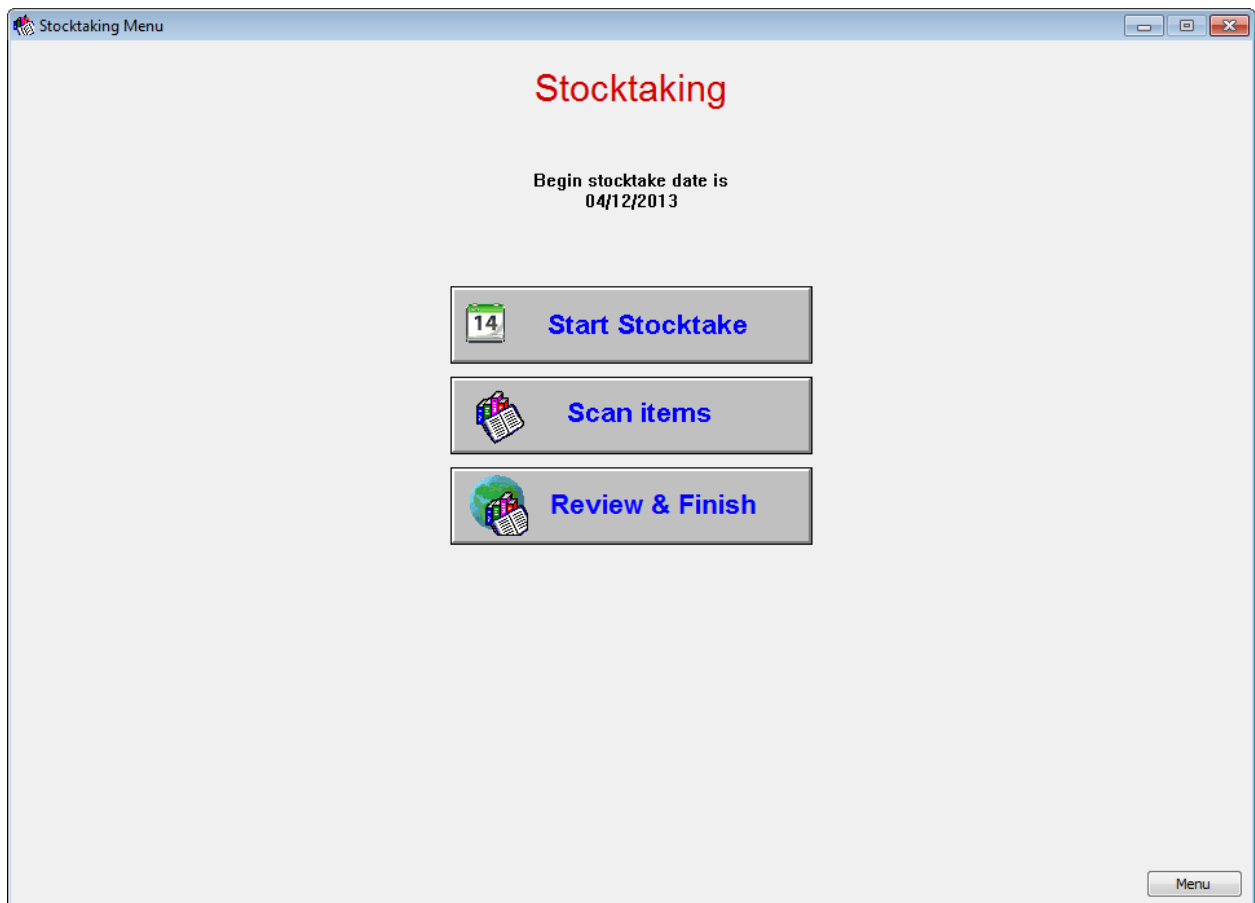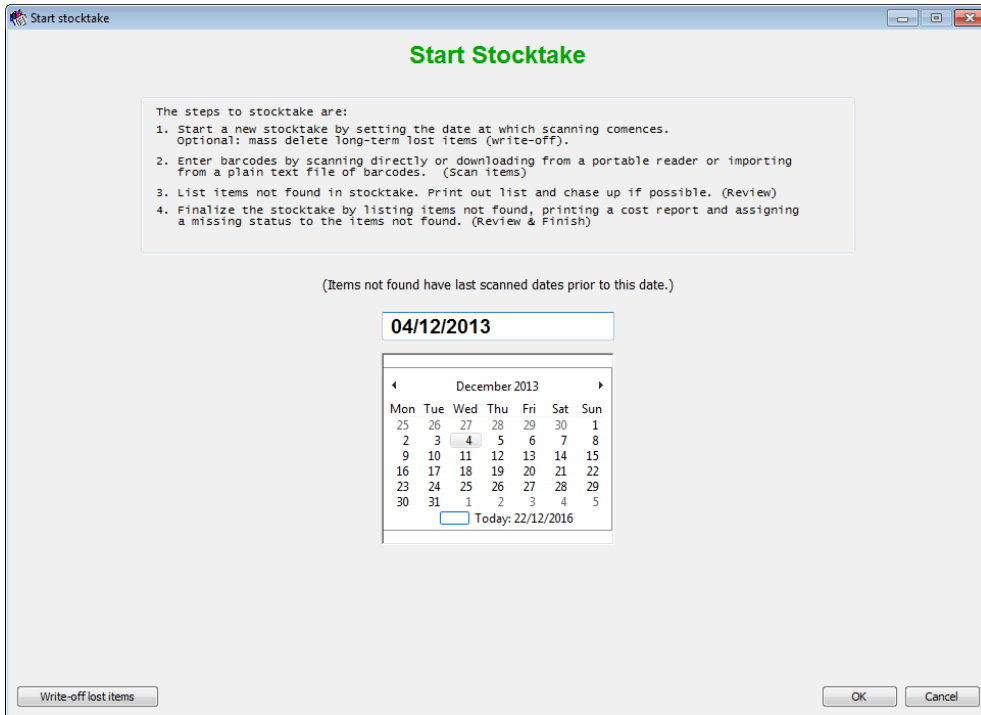
The first thing to do is set the date at which the stocktake begins. Do not change it after beginning to enter barcodes.

The "Write-off lost items" button can be used to mass delete items that have been flagged as missing for a long time. It performs a mass-delete based on status.

Entering barcodes can begin at any time. If you forget to set the beginning stocktake date, don't worry, that can be done later with no loss of data.

Barcodes can be directly entered in two formats:

- List format
- Detailed format

List format

This is similar to returning items. Just scan barcodes into the bar beneath the list.

As each item is entered, it is listed.

The tick boxes below can be used to set conditions.

After scanning an item, its cataloguing details can be edited by clicking on Edit Record.

On the right side, setting a location and/or sublocation creates an "alert condition". If an item is scanned that doesn to belong in the displayed location, sublocation or within the specified range of call numbers, a message is shown. The item is still marked.

Detailed format

This format displays the cataloguing information about each item as it is entered.

Download from portable reader

Portable barcode readers are not the same as "cordless" or "wireless" readers. Those send data immediately through a blue-tooth connection instead of a wire. Portable readers have a memory and can collect a list of barcodes which can then be later fed into Bookmark. Each type of reader has its own procedure for doing this. For Cipher-Lab readers, special control pages are available from Dataman that make the process easier.

Important: Only collect a bay/shelf at a time! Don't do more than a thousand at a time and less is much better. If something goes wrong it is only a small error, not a major catastrophe.

Very important!!! Practice on a small batch (half a dozen) with the reader first to make sure it is working ok and you have the steps nailed down.

At the correct moment, open the Download Barcodes window from Log Items and instruct the reader to send the barcodes.
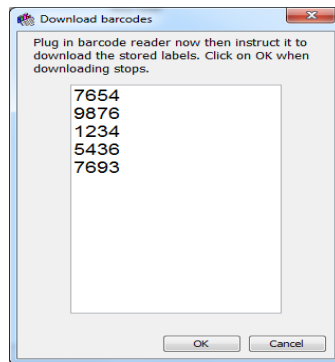
When downloading stops, click OK.

The next screen shows what has been downloaded. If there is a bad read it would pay to note the books either side and find the problem item and work out why it didn't scan.

It is possible to edit each item by highlighting it.

Nothing is processed until the button is pressed

Remove bad reads. Note the books either side to go back to the shelves to find the item

After you press process list, the large screen with a list of what is processed appears. The sounds don't work for this part of the program, but messages are on the screen.

Import barcodes

When using a laptop or tablet, save barcodes into a text file. The Windows Notepad program is suitable for this. It is easiest to save the file to a USB flash drive.

Then follow the steps as for portable barcode readers but use the Import Barcodes option as it allows you to open the file. Don't forget to process it.
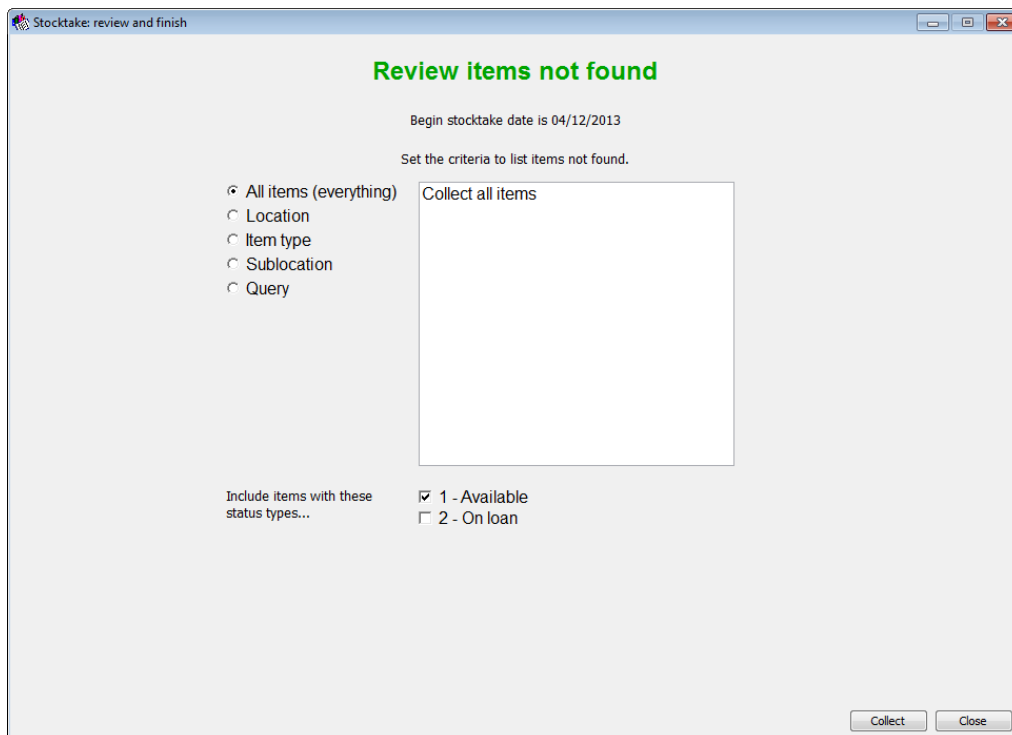
Backups

Do frequent backups! Every 15 to 30 minutes is recommended if a high volume of scans is being performed.

Do a regular backup to an external drive at the end of the day.

Review and Finish

After scanning an area, go to Review to obtain a list of items not found. These are possible missing items. At this stage Bookmark has not yet formally declared them as missing.
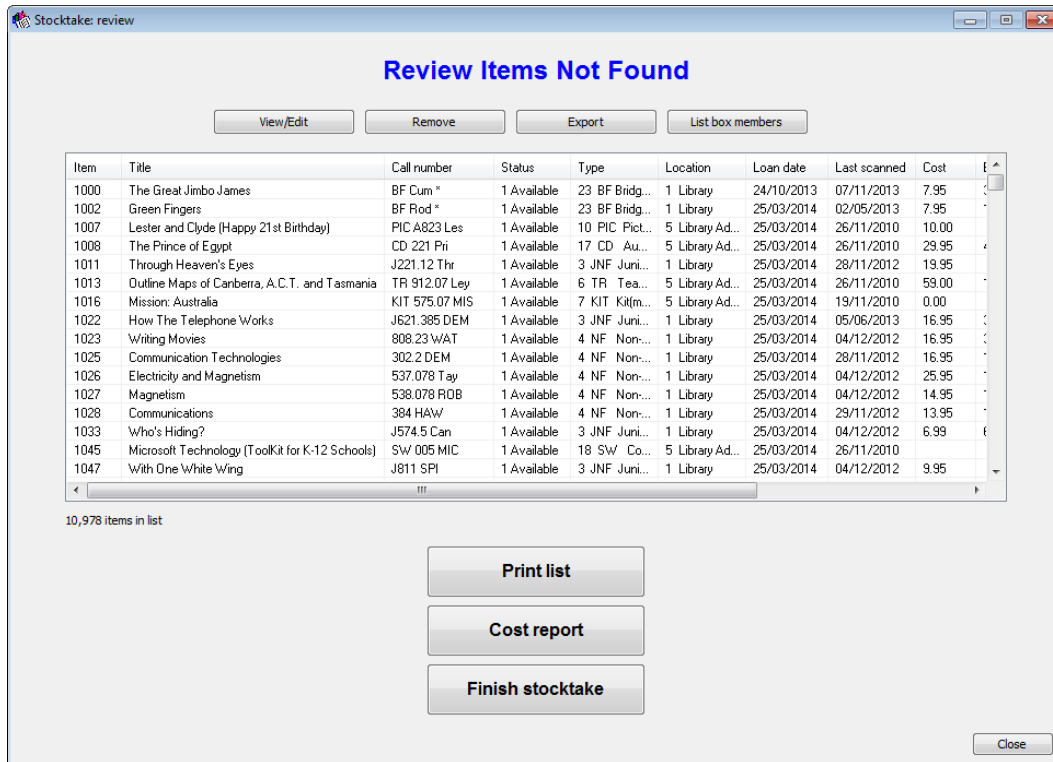

Work out your search to isolate the part of collection. Click on the method at the left.
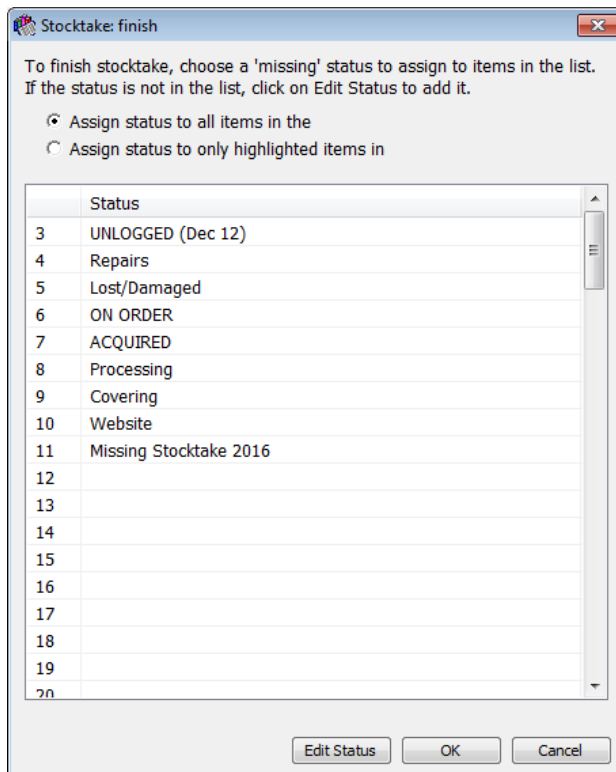
Click on Collect to see the list.

Print the list and chase up any items that can be found. Enter them in Scan Items. Go back to Review.

To finish the stocktake:

- Print a Cost Report.
- Finish Stocktake

Items are declared missing by assigning them a status.

If a missing status for the stocktake is not in the list, click on Edit Status to add it.

Select the status to assign the click on OK.

To see a list of the missing items, go to Cataloguing, Lists, Items by Status.

Phewww! That's done. The stocktake is over!

Congratulate all concerned on a job well done and thank goodness it is over for another year or so. Celebrate with chocolates, champagne or any leftover brandy and enjoy the sense of satisfaction.
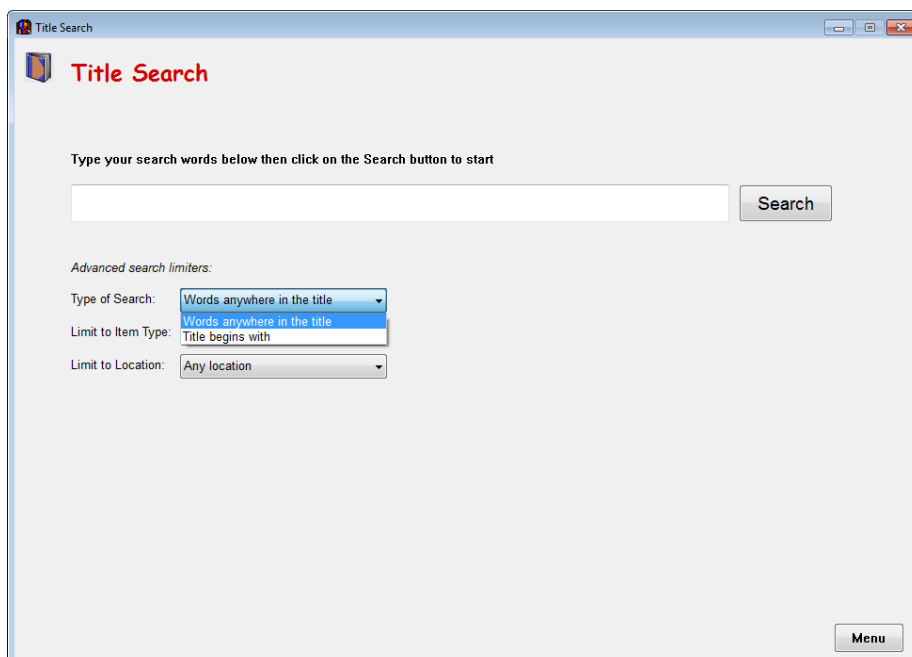
Advanced Searching

Bookmark's Search (OPAC) module is easy to use but it also offers a number of features for advanced searchers.
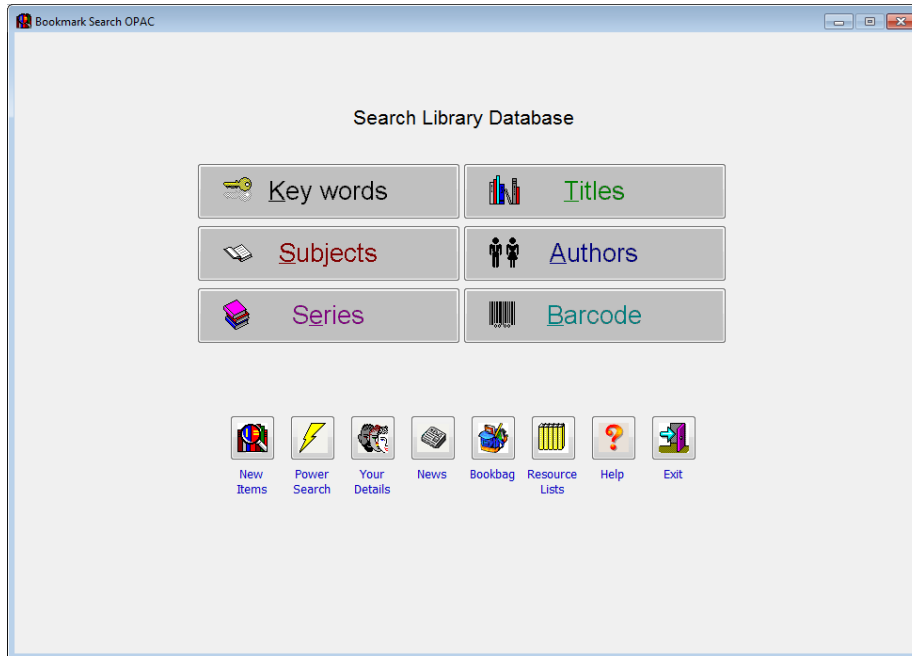
Word vs. Begins With Search Strategy

Title, Series, Subject and Author searches can allow either "Words anywhere" or "Begins with" styles as shown below.

Searchers can select which to use and, in Search Controls, the library manager can also set which one is the default and can even set one or the other without selecting being allowed.
To see the difference, select Title Search and set the search type to *Words Anywhere*.

Type **great pet sale**. Click on Search or press Enter to do the search.

(For those who like to know what happens under the hood, Bookmark uses the words to construct a Query, part of which looks like Title contains GREAT and Title contains PET and Title contains SALE. This is then turned into a SQLite select statement used by the database engine. To see that statement, press F12 when a list of items from the search appears.)

One item should appear: "The great pet sale", item number 6945.

Mixing the words around – pet sale great - shows the same result. With one exception (see below), the order of words in word type searches does not matter.

Now, change the search type to Begins with and enter **great pet sale** again. The book should appear.

However, change it to **pet sale great** and keep it as Begins and 17 titles appear, all beginning with Pet. In fact "The Great Pet Sale" is not even inthe list. Why? The title does not *begin with PET*.

Keeping the type as Begins with, search for Dra. How many are found? (17). Change it to Drag. Now how many? (11).

The Begins type searches look for the phrase which must start at the beginning, not the middle or end. The order of words matters. If the search cannot find anything it then tries using only the first three letters, hoping the search may have been a misspelling.

In Controls / Search Controls, the library manager can set the default for the search type.

With the exception of the wild card symbols below, both word and begins style searches ignore punctuation symbols. Upper and lower case are also treated as the same letter.

Note: unless set otherwise by the library manager, Search always lists entries from the authority files first for Series, Author and Subject searches.

Truncated Word Seaches

Truncated words can be used in all the word-type searches, including Keyword.

The asterisk * symbol means "find all the words beginning with" (up to the *).

Try the following Keyword searches. How many items are found for each?

Ways   8   (all items with the word ways anywhere)

Wars   13   (all items with the word wars anywhere)

Wa*   379   (all items with words beginning with wa including wallace and wait)

Boolean Word Searches

In addition to truncated and wild card, word type searches can also use the special connector words 'and', 'or', 'not'. These tell the search engine how to join two words. Here, the order of the words matters.

Examples:

Snow and white	3	Items with both the words snow as well as white
Show white	3	Same as above. If AND is omitted, it is assumed between words
White and snow	3	With AND, word order does not matter.
Snow or white	30	Items with either the word snow or white or both. Word order does not matter either.
Snow not white	5	Items with snow but do not have white. Word order matters.
White not snow	22	Change the word order and get a different result. Items with white but not snow.
Snow and white not seven	2	Omits one of the three items found with snow and white as it also has the word seven.

Try: dogs and cats, dogs or cats, dogs not cats and see the differences.

Phrase Searching

Surround phrases with "double quotes" – e.g. "old tom". This searches for the two words together.

Search Limiting

Normally searches return results from the entire database. However, searches can be restricted or "limited" to certain areas based on:
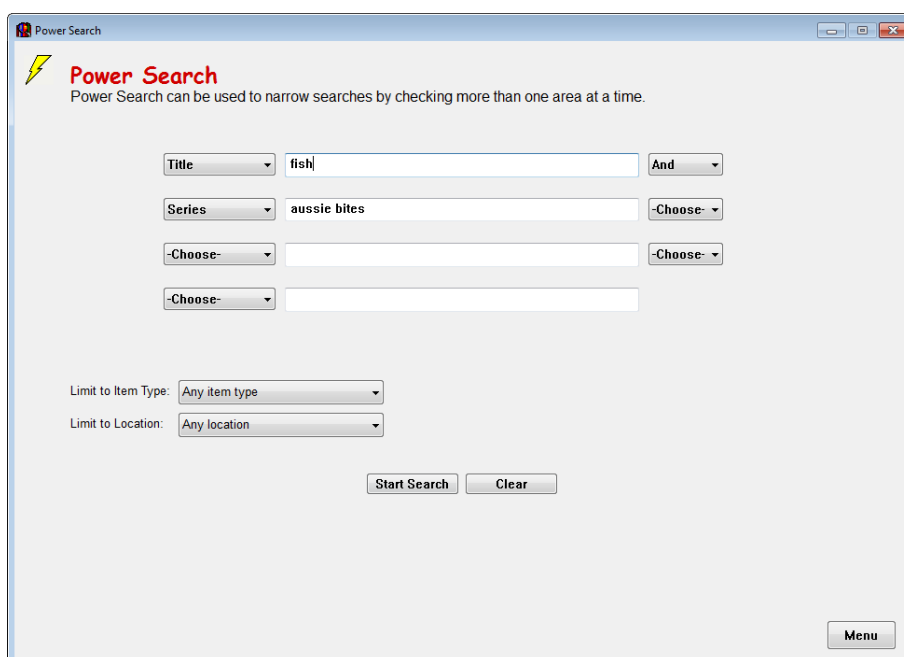
- Item Type
- Location
- Lexile
- Level

These are all optional, and the library manager can set defaults for these and whether these options even appear on the screen or not. See Controls – Search Controls.

Note: Searches can be set by default to omit certain areas, such as Teacher Resources. To bypass this, type a + symbol at the beginning of a search. The + indicates to ignore any imposed search limiting and always search the entire database.

Try: Keyword search for CATS with no limitation, then set Item Type to Fiction and repeat.

Power Search

In cases where the regular OPAC searches return too many results or a more complex strategy is needed, a Power Search might help. This option can be turned on or off by the library manager.

A Power Search allows searching several different fields at the same time, including the extra fields of Call number, ISBN, Publishing, Notes, Lexile, Level and Sublocation.

Try: Title fish AND
         Series aussie bites.

Try: Find Mem Fox books with the word Donation in the Notes field.

Note: Unlike the normal Word style searches, words entered here are treated as a phrase.
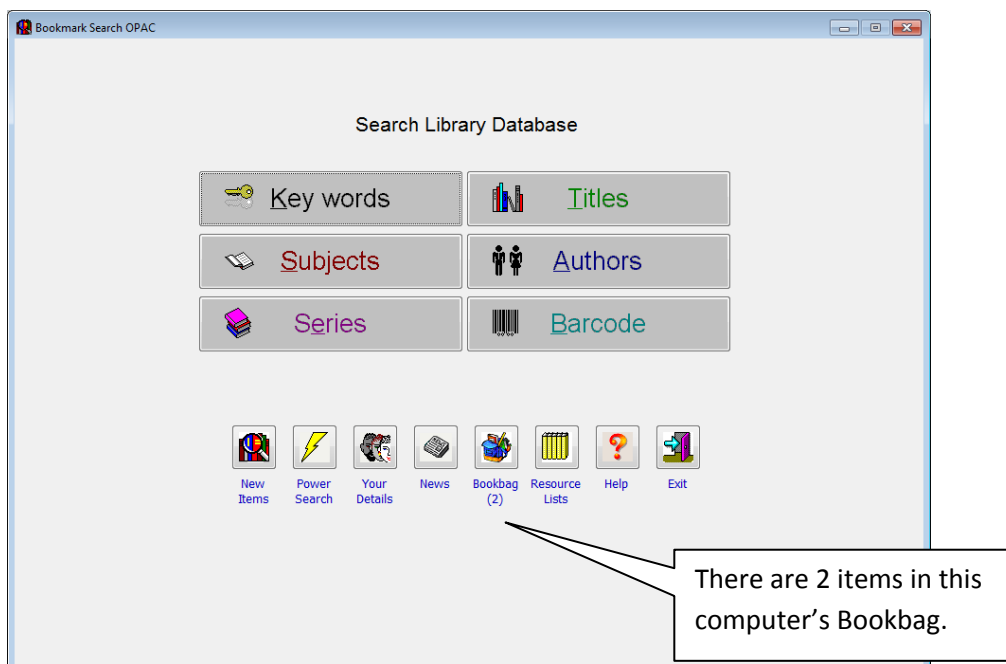

Bookbag and Resource Lists

Results of searches can be collected into a temporary holding area called the "Bookbag".
Contents of the Bookbag can be transferred into a Resource List.
Resource Lists can be private (you are the only one allowed to see it) or public (everyone can see it).

While searching, if you find anything you would like to keep track of click on "Add to Bookbag" on either the Row format display or the item's details.

The Bookbag is established in the computer's temporary memory, so its contents are not available to other computers. It is not possible to start a Bookbag on one computer then switch to another. It is also not possible to start a Bookbag, leave searching and then come back to it. To keep track of things, items must be transferred into a more permanent Resource List.
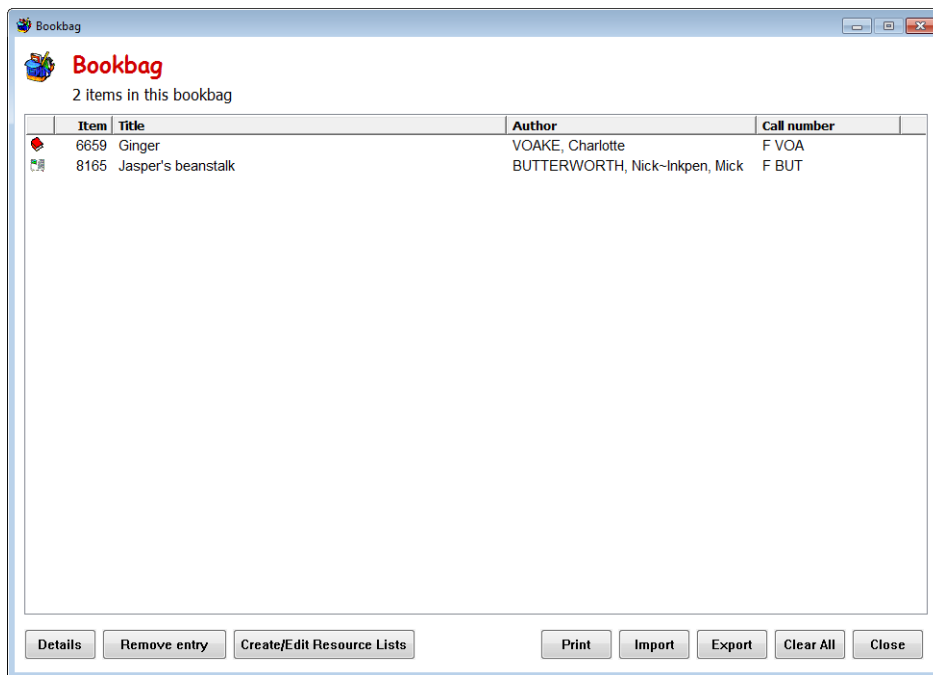
To create a new Resource List, first put somethings into the Bookbag.
Click on *Create/Edit Resource Lists*.

Give the list a name such as BOOKS ABOUT CATS. This is not the name users will see if the list is to be made public. This is the lists private name.

For training purposes, use borrower number 1 with the password password.

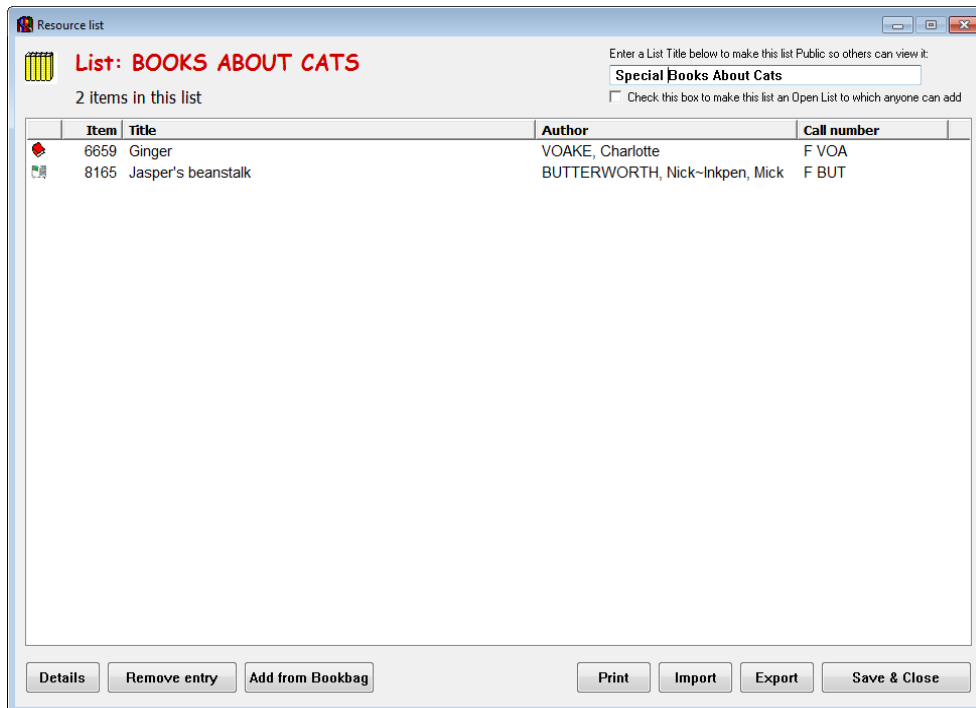The Resource List window for BOOKS ABOUT CATS appears.
At the bottom, click Add from Bookbag to copy the contents of the Bookbag to this Resource List.
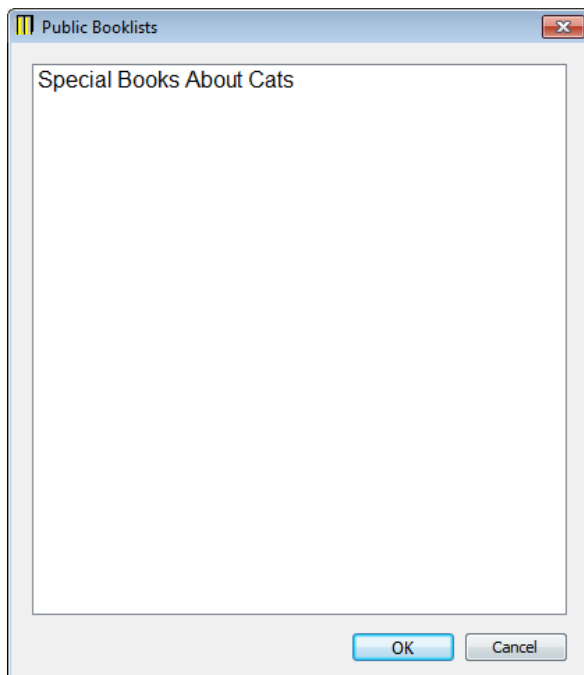The items are added.

Click on Save & Close.

To make the list *public* so others can view it, give the list a public name at the top of the window then save.

A resource list can become public by entering a title at the top and then saving.

A public list can also become "open", which allows others to add to the list via their bookbags.

Try: Create a public resource list about Dinosaurs. Have at least 3 items.

Book Reviews

The library manager may choose to enable Reviews.

Reviews about items can be entered by borrowers from searches or in the library manager's Search Controls area.

If an item has a review, it is marked with a * in the column display format or the word Review appears beneath the Details option in row format. Bring up the items' details and click on the Review button to read or write.
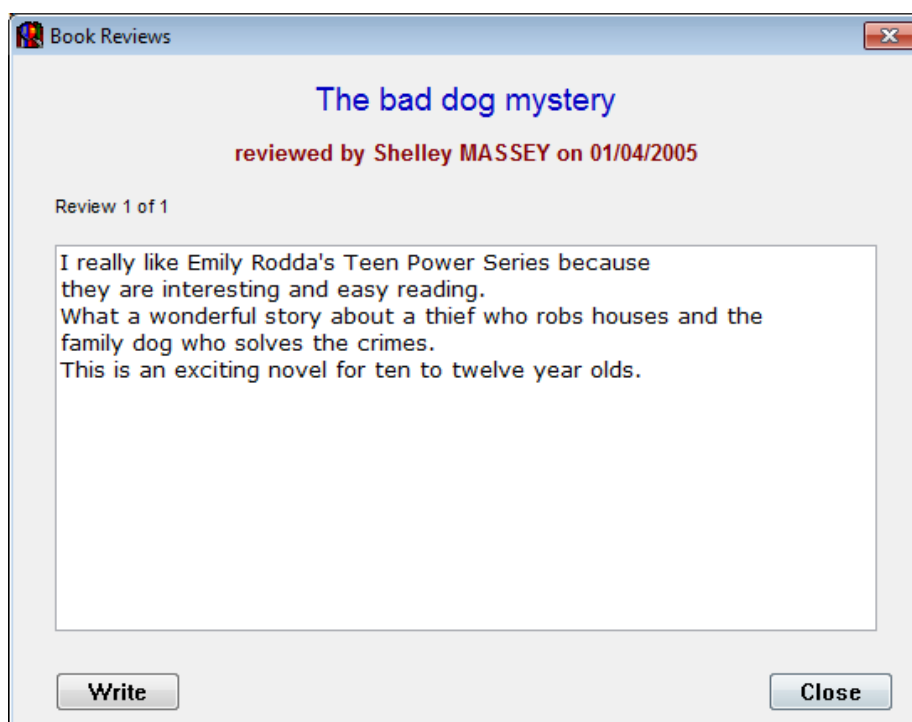
Items can have multiple reviews.

Borrowers can be restricted as to who is allowed to write a review.
Special words can be listed that are automatically removed when the review is saved.
Reviews may also have to be vetted by the library manager before they are made public and can be read by others.

Managing reviews is done in the Controls module.

Synopsis vs. Reviews

A synopsis is a description of what the item is about. It is entered in Cataloguing. Users cannot change this, only library staff.

Reviews are opinions users write about items and are in addition to a synopsis.

Stop Words

Bookmark can be set to ignore certain words if they are entered as a word type search. These are known as "stop words".

By default the following words are ignored:

A, AN, AND, AT, BY, IS, NOT, OF, OR, S, T, THE

If it is important to be able to search on one of these words, the stop word list can be changed in Controls. Simply remove the word from the list or add others.

Search Controls
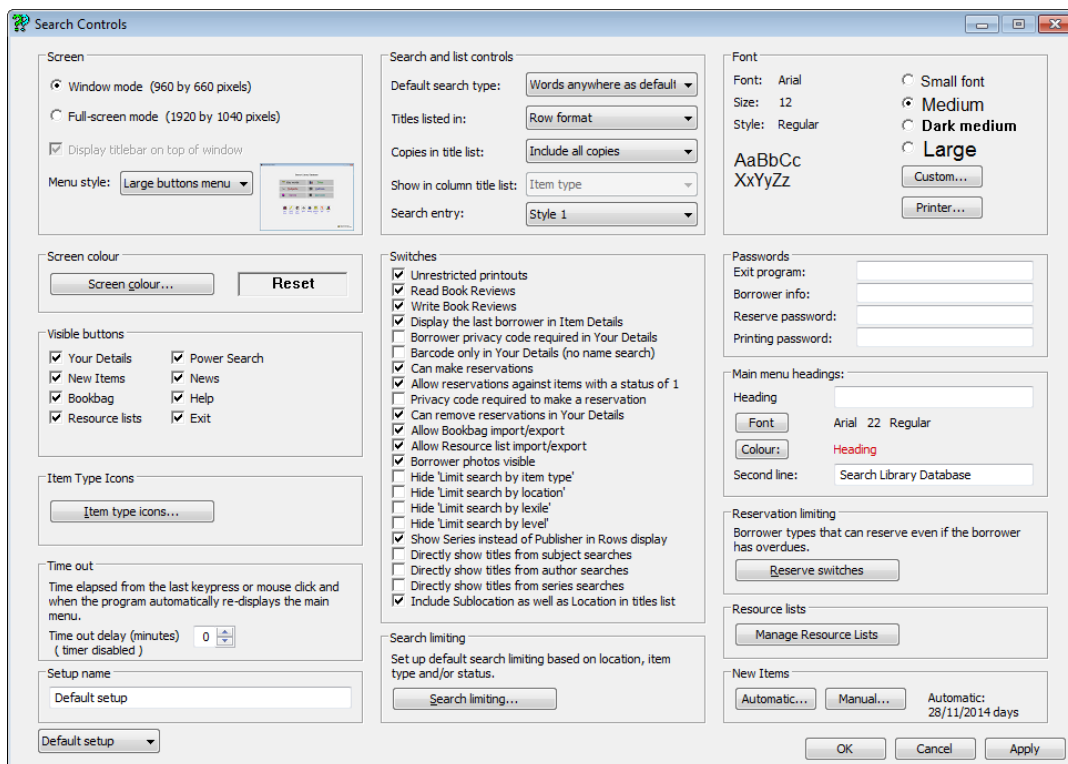
Search Controls can be found in the Controls module.

This is the library manager's area and is used to both control the OPAC and to customize it.

Screen – used set to either window or full-screen mode, and one of two different presentation styles.

Screen colour – used to set the background colour of the screens used by Search. Keep in mind that text is always black, so a light colour is best to use.

Visible buttons – determines which buttons appear on the Search screens. Can be used to hide functions like News or Power Search.

Item Type Icons – Allows changing item types and assigning icons to each one.

Time out – If a search results display is left unattended for a certain period of time, the program automatially pops back to the Search menu. This sets the time delay. Set to 0 to disable.

Setup – Four different configurations can be set up and each used on different computers.

Search and List Controls – Used to configure the search screen displays.

Switches – Self-explained on/off controls used for customizing.

Search Limiting – Allows restricting default searches to certain areas.

Font – Change the size of the font displayed.

Passwords – Optional passwords can be set to restrict leaving the program, obtaining borrower information, making reservations or printing. Leave blank to be inactive.

Main Menu Headings – The heading is text that appears at the top of the Search window. By default it is blank.

Reservation limiting – Borrower types that can make a reservation even if they have overdue items. By default everyone can.

Resource Lists – This is where resource lists can be managed.

New Items – Controls the New Items listed.

Borrower Privacy Controls

By default, users information is publically available. However, Bookmark contains a comprehensive set of privacy controls to restrict who has access to anything about borrowers.

Viewing Borrower Information in Search

The Your Details icon allows borrowers to see what they have on loan, reserved and previously borrowed. Hide this icon if you do not want anyone doing this from Search.

To allow the use of Your Details but protect borrower information, tick the Switch "Borrower privacy code required in Your Details". A password is then required in order to bring up a borrower's information. This can be the Main password or the Borrower Info password or the borrower's own individual privacy code. The code is entered in Add/Edit Borrowers and the passwords in Controls.

Accessing borrower information in Your Details can be done via barcode or name but it can also be restricted to barcode only in Search Controls.

Restricting Borrower Information in Circulation

Loans and Returns are other areas that display borrower information.
In Circulation Controls, finding borrowers by their name can be turned on or off.
A borrower privacy password can be entered and borrowers can be asked to provide their privacy code in order to see what they have on loan or to borrow.
A password can also be required for making reservations.

## Restricting Who Can Change Borrower Information

Borrower data is changed in the Borrowers module. A password can be set so it is requested in order to access this module. This is done in Controls – Passwords.

Tip: passwords can be printed as barcodes and scanned where necessary.

Online Searching - CPAC

CPAC stands for "Combined Public Access Catalogue". It is one of Bookmark's three OPAC modules.

CPAC is *Internet based* – i.e. the catalogue can be searched by anyone going onto the Internet from anywhere provided they know the URL. Searches can be made by any computer, tablet or smartphone.
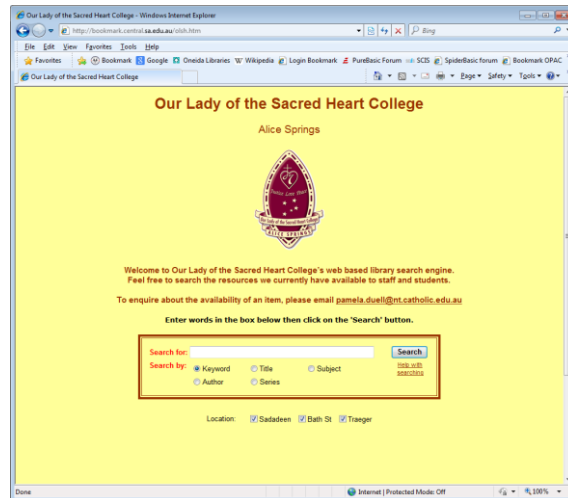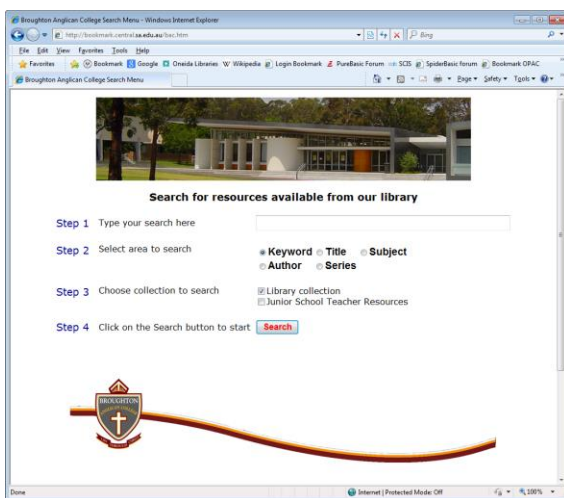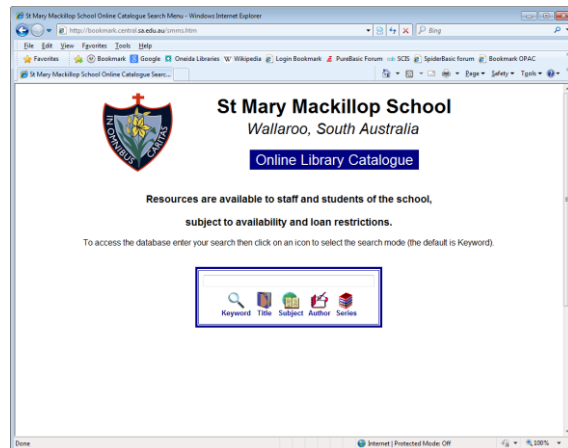
CPAC operates with a copy of your database, not the live data. Data is periodically exported and uploaded to the CPAC server through a special webpage.

The design of CPAC screens is made by library staff following choices provided in the documentation and application form.

Multiple sites (schools) can share one CPAC search page, and results can indicate which school or campus has each particular resource.

See the CPAC section of the Bookmark website for more information.
http://bookmark.central.sa.edu.au

Advanced Cataloguing

Global Change

In Bookmark, a Global Change is an action that can change data across many records. It is similar to the "Find and Replace" function in Word but allows for "Find and Change Other", too.

Global changes can be made in Cataloguing, Borrowers and Stocktaking.

- Cataloguing – Global Change allows searching and changing all cataloguing fields and
- Cataloguing – Authority Lists includes the ability to change an authority entry which also changes that entry globally in the Items database.
- Borrowers – Add/Edit Borrowers includes Name Format which globally changes how borrower names are displayed throughout the system
- Borrowers – Update Borrowers includes a Mass Change method for assigning groups of borrowers to classes, year levels and types
- Borrowers – Global Change allows searching and changing all borrower fields
- Stocktaking – Missing items can have a Lost or Missing status assigned globally.

With Cataloguing Global Change, you can assign values to any group of items. The values can be assigned in different ways.

Special Backup.
It is a good idea to make a backup before doing a big global change. Restoring the backup is like "undo" in word. If you muff it, restoring a backup immediately is the only want to put things back. This is not a mandatory step but is recommended.

Step 1 – *List items to be changed*.
A list needs to first be created of the items which will receive the global data change. There are three ways to make the list:

- Perform a Query to find items based on a common criteria.
- Scan the barcodes or type the item numbers of each item
- Import a list of barcodes or item numbers from a text file.
- Download a list of barcodes from a portable barcode reader.

The last three are identical to the same activities in Stocktaking – Log Items.

Double clicking on any title opens a window showing the item's details.

Step 2 – *Specify the change*.
This is where Bookmark is told where and what to change.

First, select the field to be changed.

Next, select the "change method".
1. Only Replace 'Find what' text with 'Replace with' text. Only that bit of text specified by "Find what" is replaced. Any other text in the field remains. This is like "Find and Replace" in Word or Excel. This method can only be used with text fields, not number fields like Location.
2. Replace entire contents of Change field with 'Replace' text. All the data in the field is replaced regardless of what it is. This method can be used with any field. The "Find what" entry is ignored.
3. Add 'Replace with' text to the beginning of field (prefix). The Replace With text is inserted at the start of the field and any other test is pushed to the right but not deleted.
4. Add 'Replace with' text to the end of the field (suffix). The Replace With text is added to the end of data already in the field.

Next, fill out "Find what" if using the first method. It is not case sensitive but punctuation and spaces are important.

Then fill out "Replace with". This is the text or value you wish stored against all the items listed.

Finally for this step, decided whether you want to stop and examine each entry – with the option to change or not change – or just have it blindly go though and change everything. It is a good idea to leave this ticked as you can defer that decision until viewing one or two records.

Step 3 – *Start search and change*.
Finally, click on the Start button to begin the process.
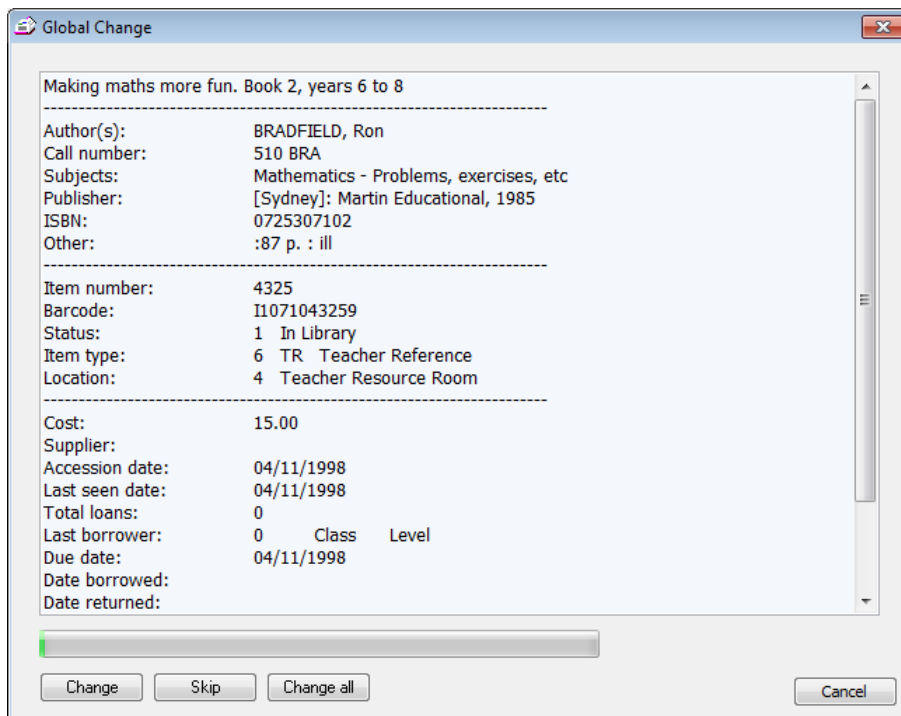
If the "Stop at each entry" checkbox is ticked, the first item in the list is displayed with the options to make the change, skip and not make it, or continue and change everything without further stopping.

When the changes are finished, the first record changed is displayed for examination.
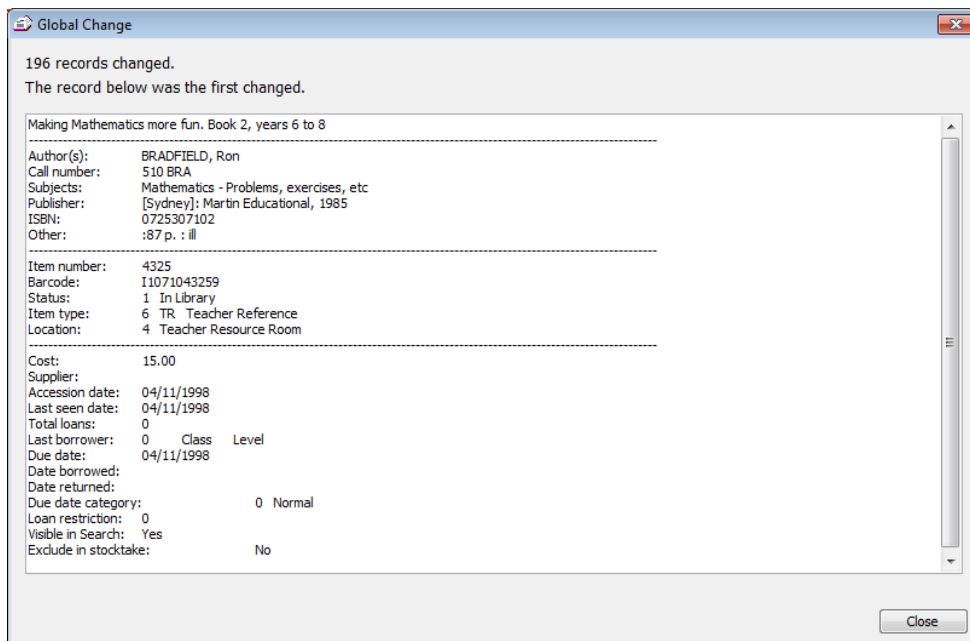
Example 1: Change the term "maths" to "mathematics" in titles.

(Technically this change would be incorrect. If "Maths" is a word in the title, it should remain so. It is used here as an example ony.)

Step 1 – Use a "Query" like **Title Contains Maths** to list 98 items.

Step 2 – Set the "Change field" to **Title**.

   Set the "Change method" to **Only Replace 'Find what' text with 'Replace with' text**

   Type **maths** for "Find what"

   Type **Mathematics** for "Replace with".

Step 3 – Click Start.

Try:

1. Change all books with Olympic in the subject area to Due Date Category 2 (Overnight loan). First three items: 3318, 4344, 4349

2. Change items stored at Location 11 (Junior Room) to Location 4 (Teacher Resource Room). First three items: 3868, 3873, 3874

3. The Teacher Aid materials (Item type 3) have been moved to the Staff room (Location 17). First three items: 6283, 6739, 6909

4. Restrict items in the Senior Room (Location 12) so they can only be borrowed by Staff (Borrower type 4). First three items: 3852, 4678, 4679

5. Find the Teacher Reference items and add "TR (space)" to the beginning of their Call Numbers. First three items: 3787, 3826, 3827
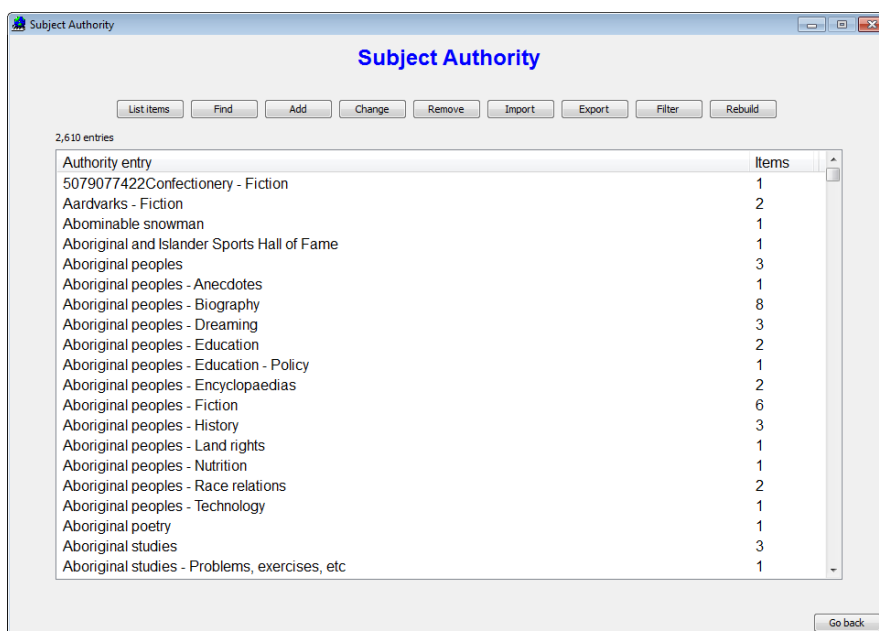
Authority Lists
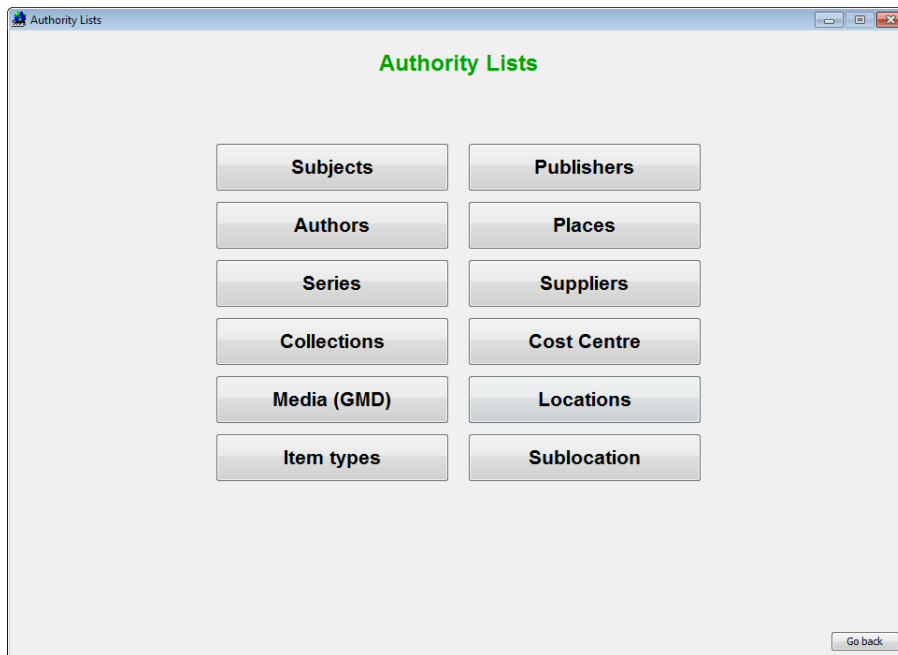
Bookmark automatically keeps special lists of data entered into several Catalouging fields.

These "authority lists" can be referred to when cataloguing, assisting with consistency.

Subjects, Series and Authors searches using the OPAC query the authority lists first and then present a list of items found based on the entries selected. This step can be bypassed as set by the library manager in Search Controls.

Subjects, Series and Authors lists are more comprehensive than the others as they contain additional functions.

Global Change in the Subject Authority Lists

Changing an authority list entry also changes the data stored against all items.

Example 1:
The first entry in the training data is incorrect.
First, check the item which has this entry. Click on the first entry to highlight then click on the *List items* button at the top.

It is item 7742. Double click on the line to see the item's cataloguing details.

Close this window and the List Items window.

To correct the entry, keep it highlighted then click on the Change button.

On the "To" line, type in the correction.
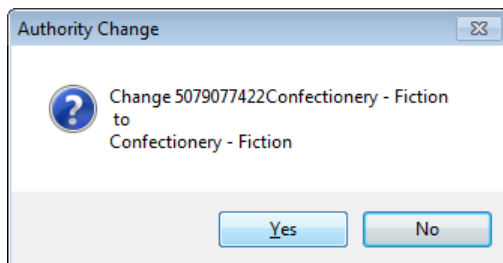
Click OK.
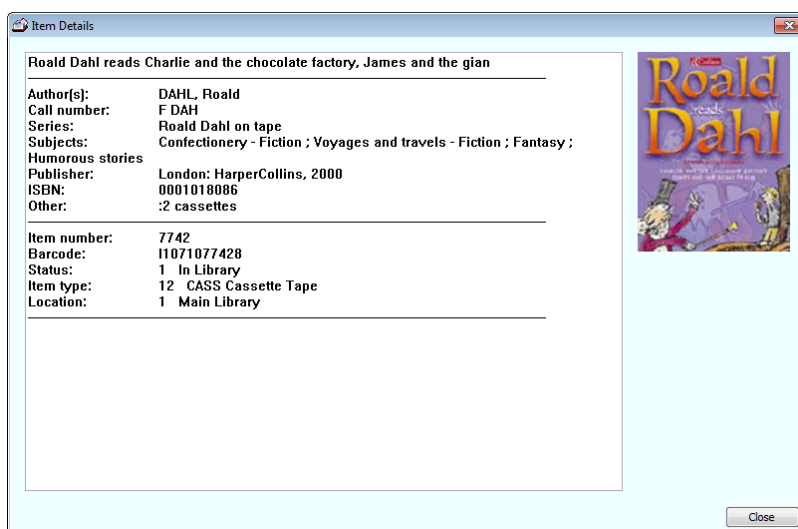
Click Yes.

The entry is changed but it appears at the bottom of the authority list. This is temporary. When the Subject Authority is viewed again, the entry will appear in the correct alphabetical position.

To see if the change has been made, highlight it, click List items then double click on the title.

Example 2

Find the entry Bears. There are two entries: one is "Bears" and the other "Bears." The second has a full-stop at the end. Each has two items.
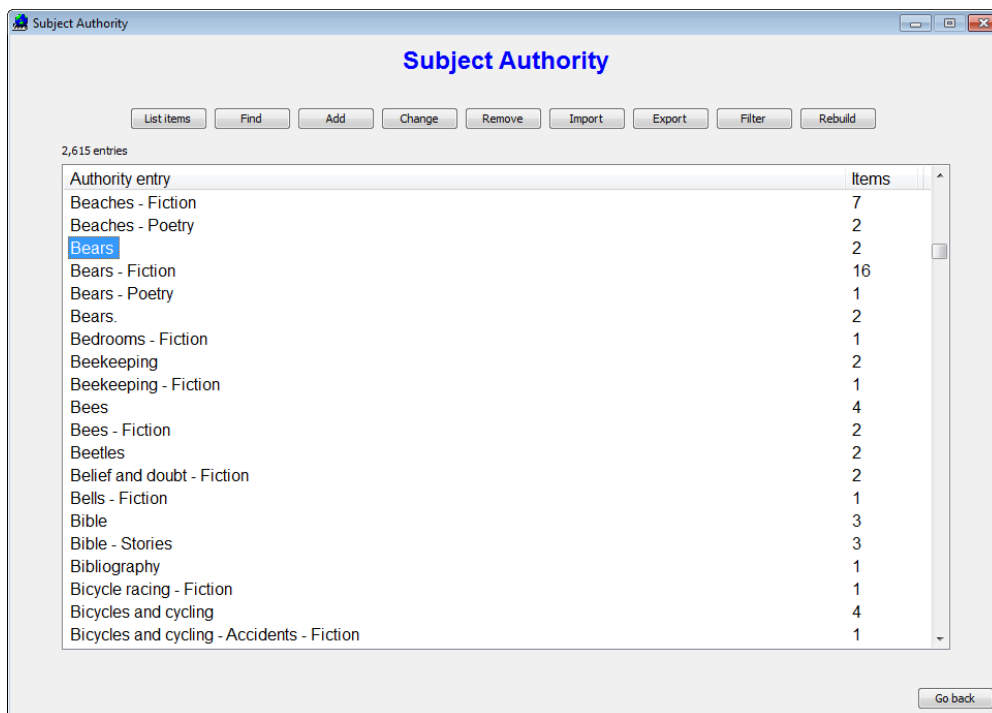
Here is how to correct this.

Highlight the wrong entry: Bears. (with the dot)

Click Change.

Type in the correction and click OK.

Click Yes.

<u>Try:</u>

Correct the entry Barbequoos.

Authority Lists - See and See Also References

See and See Also references in authority lists assist users with their searches by offering alternatives.

SEE references refer the user from an incorrect entry to a correct or preferred entry.
Rocket Flight *SEE* **Space Flight**

SEE ALSO references refer to other related authority entries. Both entries need to be in the authority list.
Astronomy *SEE ALSO* **Space**
Space *SEE ALSO* **Astronomy**

See and See Also references are not normally catalogued with items (although they can be) but they can be added to the Authority List.

Example 1: Add **Flags See Also Heraldry**

First, check to make sure both Flags and Heraldry are in the authority list.

Click the Add button.

Type the line exactly as it should appear:

Flags SEE ALSO Heraldry

The line will be added to the authority list.

The case of the words "See Also" does not matter but it helps users if it stands out.

Now go to Search, and do a Subject search for either Flags or Heraldry.

Selecting the See Also line brings up items with the second, referred-to heading.

Example 2: You notice several children using the term **"Chooks"** to unsuccessfully search. The correct term is **Poultry**.

Click the Add button.

Enter **Chooks SEE Poultry**

Do a Subjects search for Chooks.

Filter

The Authority List does not normally display See and See Also references. To view these, click on the Filter button and select *Display All Entries*.

SCIS Authority Files

The entire SCIS subject and author (name) authories can be included in Bookmark. These provide a large listof additional headings, including thousands of See and See Also references.

The SCIS authority files are available from SCIS.
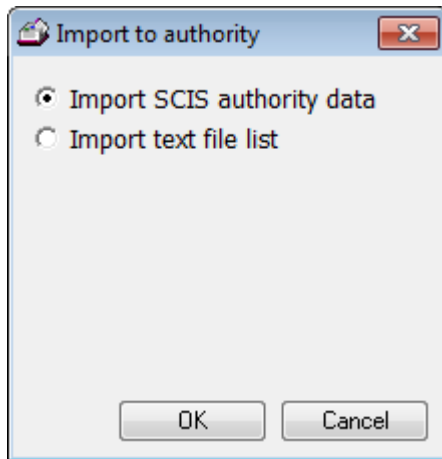
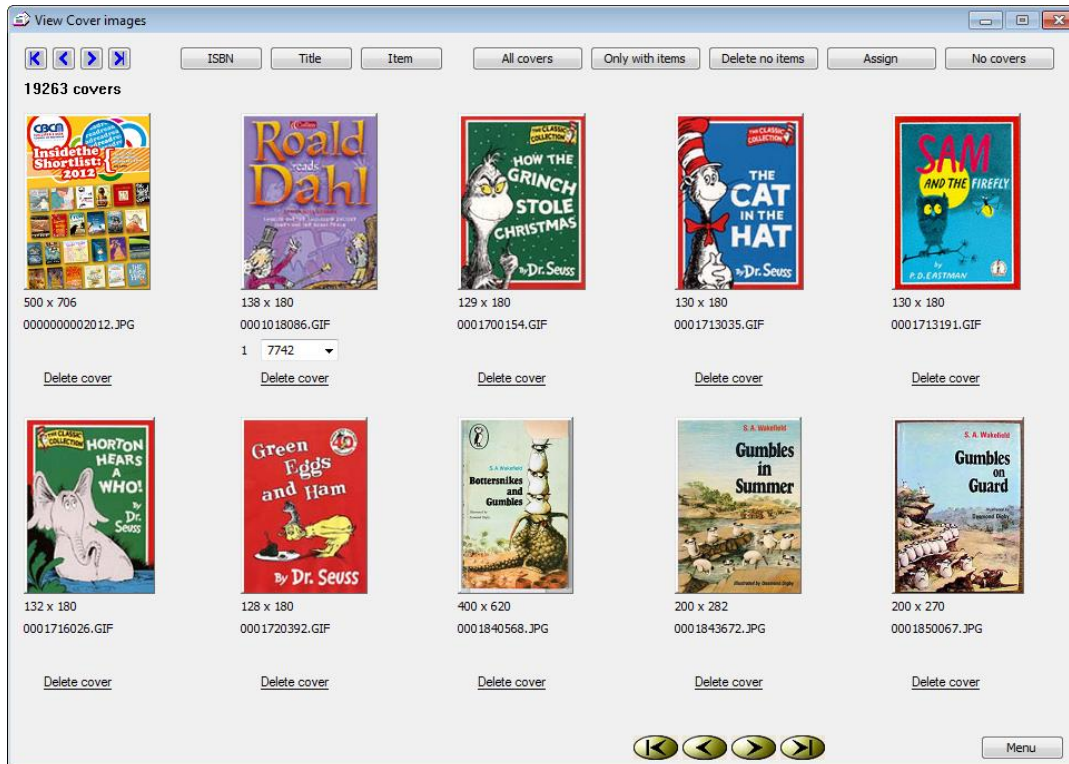After importing, click on the Filter button to display all of the headings.

Searches in the OPACs only list authority entries to which items have been catalogued. Authority entries having no items are never shown in the OPAC, therefore it is safe to include many in the authority files.

Advanced Cataloguing

Book Covers

Cataloguing – Covers / Images

Bookmark can display images associated with items in Search, Loans, Returns and on Overdue notices. It also shows on the Add/Edit cataloguing screen.

The Covers section in Cataloguing Lists is used to manage the images.

An image file is stored in the Covers folder at Bookmark's location. It is attached to an item in one of two ways:
- The filename of the image file is the same as what is entered for the ISBN for the item
- The filename of the image has been specified in Add/Edit Items (lower right corner). In this case, the filename does not have to be the same as the ISBN field, although it can be.

The second method is preferred if possible as it is quicker to retrieve the cover. The "Assign" button on the View Covers screen can automatically do that for all covers.

No Covers
The "No Covers" button is used to generate a list of files containing the ISBNs of items that do not have book covers. These text files can then be uploaded one at a time to SCIS in order to generate Images zip files.

Adding Covers and Other Images to the Database

Covers and images are not technically part of the database as they are stored separately. Bookmark instead references them. This makes it easy to add images.

1. Multiple images provided by SCIS are contained in ZIP type files. To unzip the covers, go to Cataloguing – Import Items – Import Covers.

2. Individual images can be copied into the Covers folder. Put the image file's filename either on the item's ISBN line or (better) the Covers filename field.

Individual images can be photos or any valid Bmp, Jpg, Gif or Png format file. Normal covers are approximately 120 x 180 pixels in size. Bookmark resizes images for display.

There is no facility within Bookmark to copy a cover from one location to Bookmark's Covers folder. This must be done externally.

Covers from Internet sites such as Amazon and GoogleBooks can be used. (Check copyright issues.) Just save them to the Covers folder, taking note of or changing the filename and then including it in cataloguing.

Multiple covers can be added from elsewhere provided they are compressed into a ZIP format file. The Import Covers function can then unzip them to the correct location.

Multiple Copies: Linking and Unlinking

Each copy of every item has its own catalogue record. Multiple copies in Bookmark are "linked" so reservations can be placed against a title instead of a copy.

Only identical copies with the same title should be linked. Do not link items belonging to a series but with different titles.

Items are automatically linked when the Copy function is used to create them from an existing entry.

Sometimes, items are catalogued without being linked. The Linking function in Cataloguing can be used to correct this.
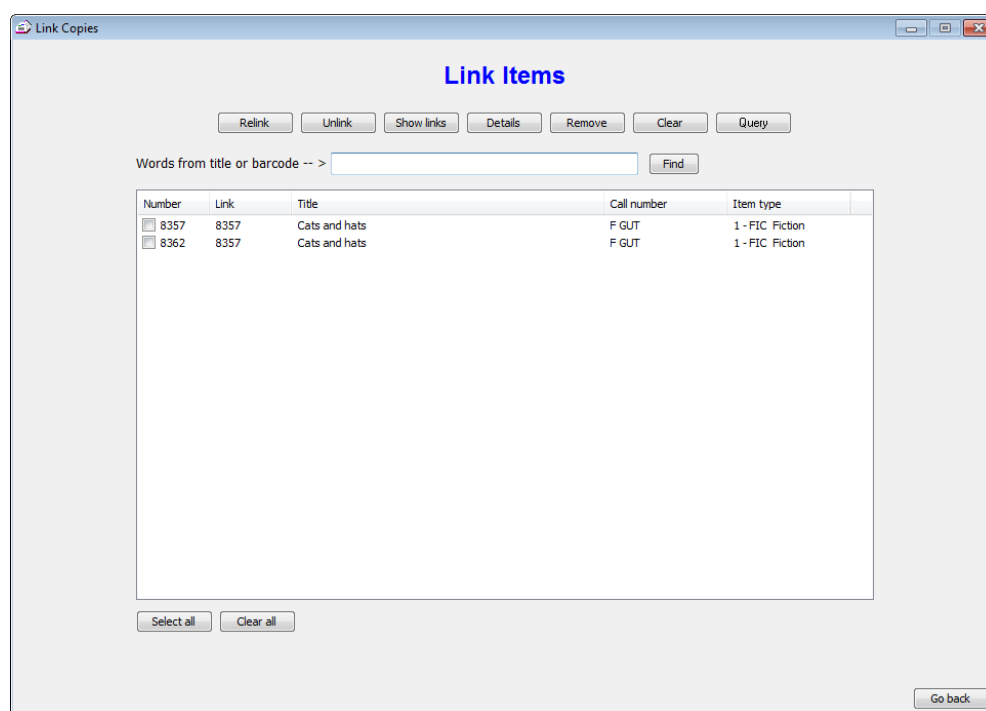
On the Link Items screen, enter a word or words from the title or barcodes or item numbers. Items to be linked are listed.

Tick all common items that should be linked. They should have the same exact title. Separate volume numbers are not the same title.

After ticking, click on the *Relink* button at the top.

Bookmark will give all the ticked items the same "Link" number. This may be a huge number. It does not matter as long as it it the same for all copies. (All copies share the same link number.) Repeating for the same items may change the Link number to the first item number in the list. That is not necessary.

Advanced Borrowers

Importing Student Data

In Borrower Control, the Update Borrowers section is used for class rollovers and general updating of borrower information.
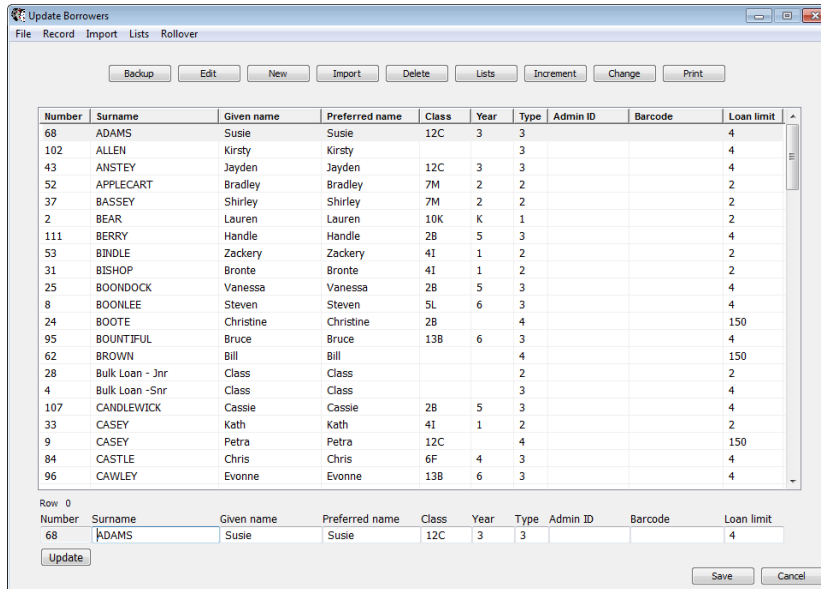

The list can be sorted by clicking on a column heading.
Each line in the list can be edited at the bottom. This is one way to change borrower information.

Bookmark can read borrower data from a number of common school office administration systems, such as EDSAS, SIS and CASES. Note: this process does not remove borrowers who have left, it only updates existing borrower data and adds new borrowers.

Click on the *Import* button at the top.
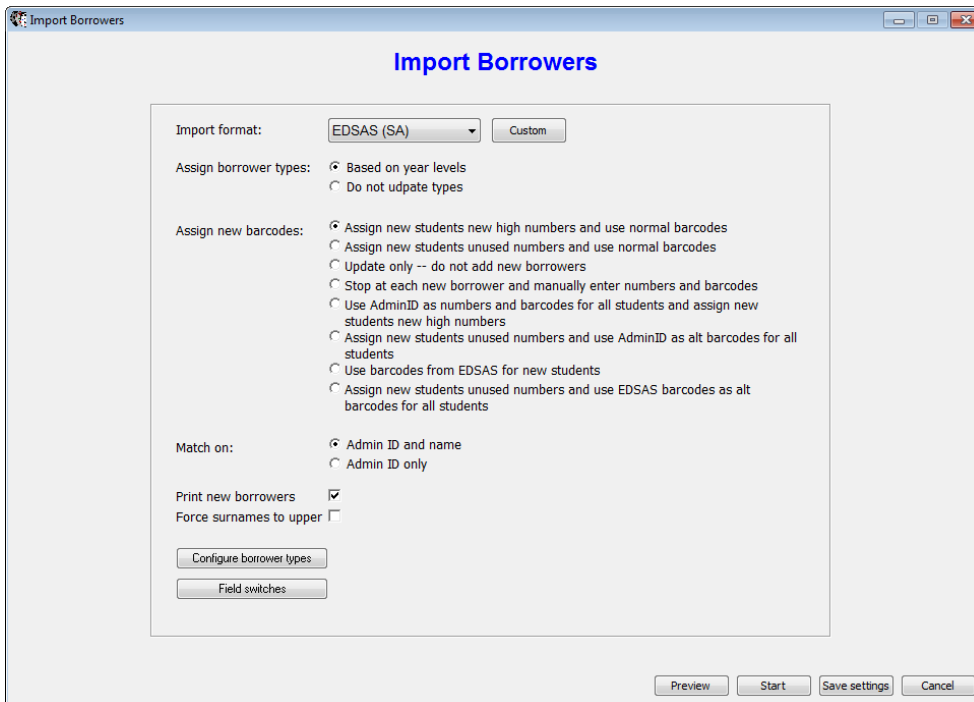
The Import Borrowers window is used to specify from which system the data has been exported and how barcodes are to be assigned to new borrowers. *Configure borrower types* must be set up correctly to do this. Do this before importing.
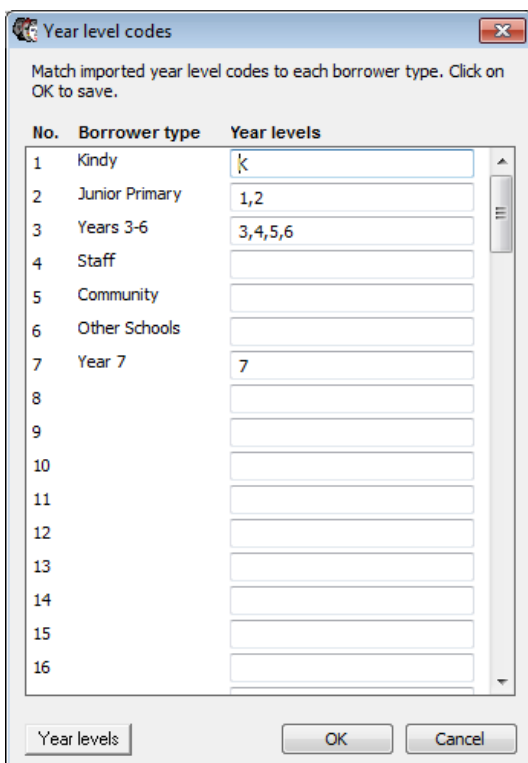
The Preview button loads all of the data from the file and displays it. This can be useful for checking. It is assumed the data is in either Tab-delimited (txt) or Comma-delimited (csv) format.

Once everything it set, click on **Start**.

The first record is displayed. Anything shown can be altered before saving.

Records can be saved individually or en-mass.

If all looks good, click *"Mass Import"* to bring everyone in without stopping.

When finished importing use the Update Borrower list screen to tidy up then click SAVE.

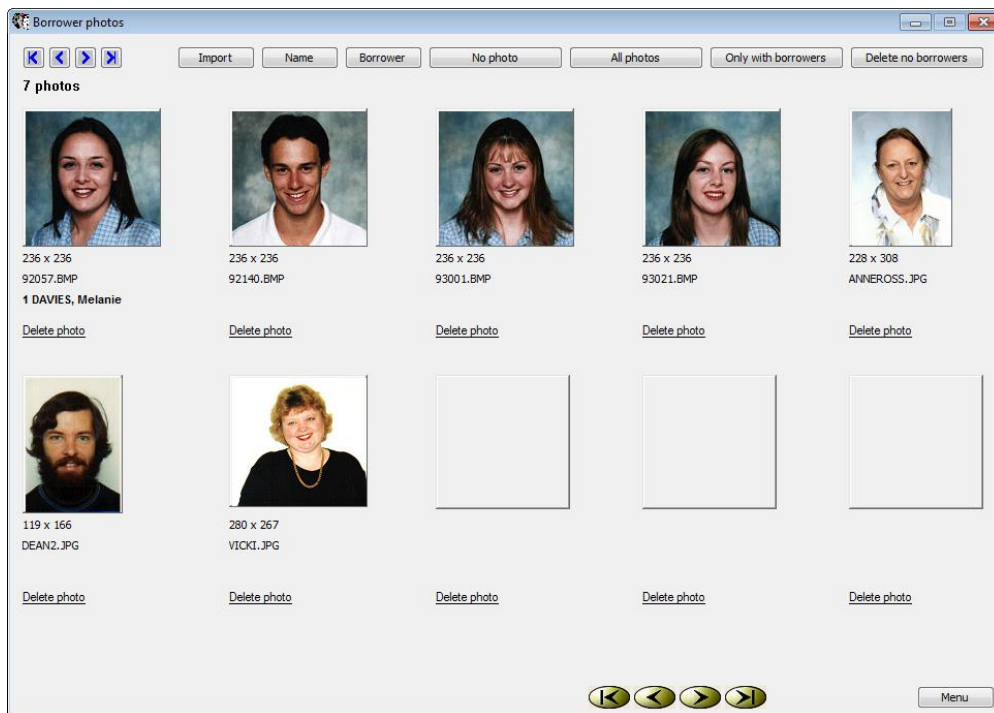Nothing is finally saved until the SAVE button is clicked on this screen!

Borrower Photos

Borrower photographs can be included. These are displayed on the Borrower Add/Edit screen, and can optionally be shown on the Loans screen in Circulation and Your Details in Search.

Borrower photos are stored in the folder Photos at Bookmark's location.

The filename of the photo must be the same as stored in the AdminID field. There is no alternate filename system like there is for book covers.

In Borrowers – Borrower Lists, select View Photos.

Click on the Import button at the top to copy all photos from a specified location (drive and folder) to the Photos folder in Bookmark.

Unlike importing book covers, Import Photos does not work with a ZIP file.

Advanced Circulation

Bookmark's Circulation module is designed so primary students can borrow their own items with little training. To allow this, it contains many security and configuration features. It also contains other functions useful for library staff if they are supervising or performing loans and returns.
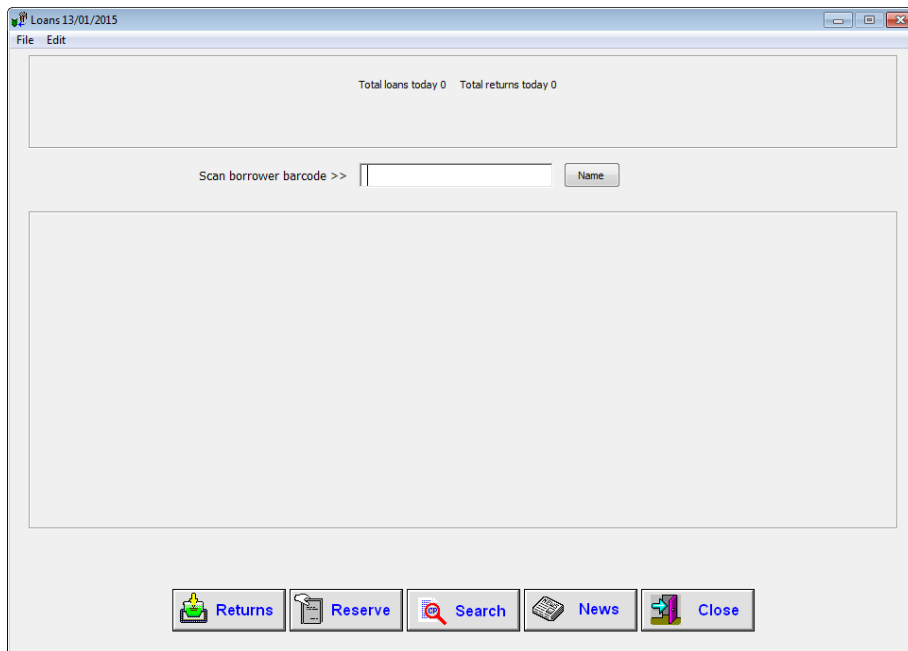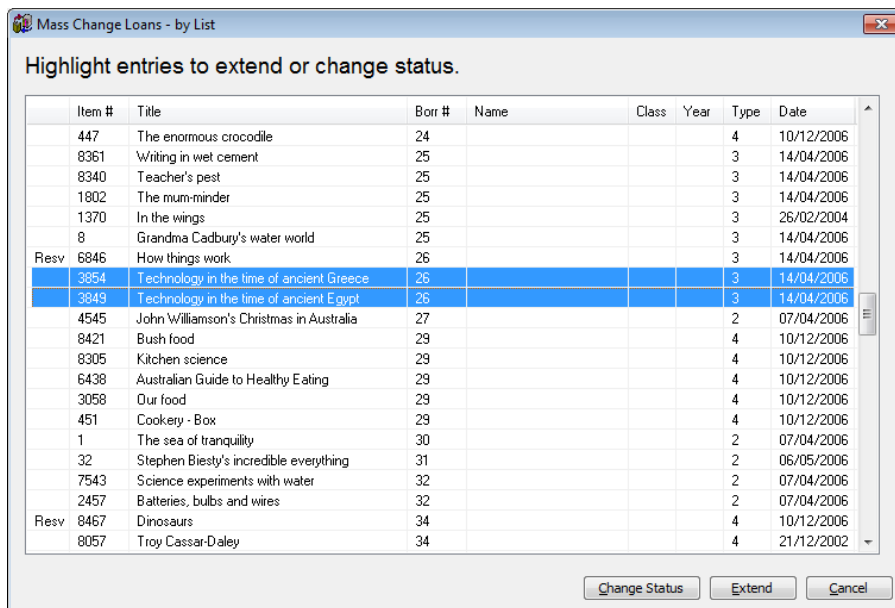

Change the Due Date of many items on loan

Click on the Edit dropdown menu at the top.
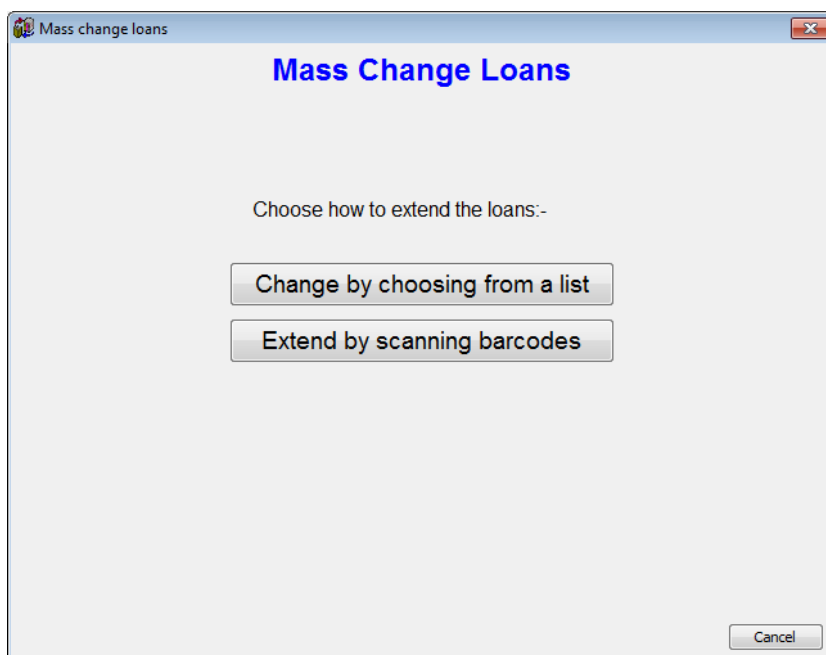
Item due dates can be extended by either selecting from a list or by scanning barcodes.

The order of the list can be changed by clickingon a column heading at the top.

To extend from a list, highlight all items that are to have their due date extended. Hold down the CTRL or SHIFT keys while clicking to highlight multiple lines.

Then click on *Extend*. The due dates assigned are those that would normally be issued if the items were borrowed.

The Change Status button can be used change the status of highlighted items from 2 to another value, such as Lost.
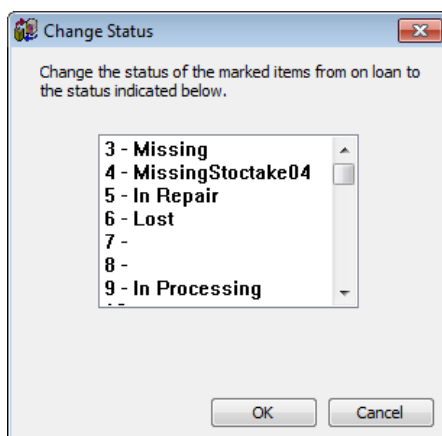
Extending loans by scanning can be done by either scanning each item or importing from a list of barcodes or downloading from a portable reader.
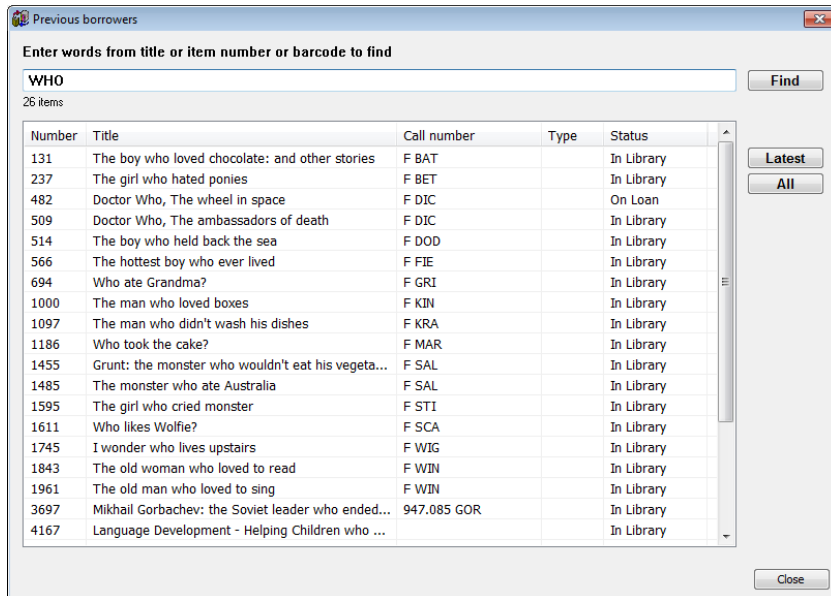
List an Item's Loan History

There are three ways in Bookmark to see the loan history of an item:

- Previous Borrowers in Circulation
- Loan History in Add/Edit Items
- Search in Circulation Reports

In Circulation, click on Edit then select *Previous Borrowers*.

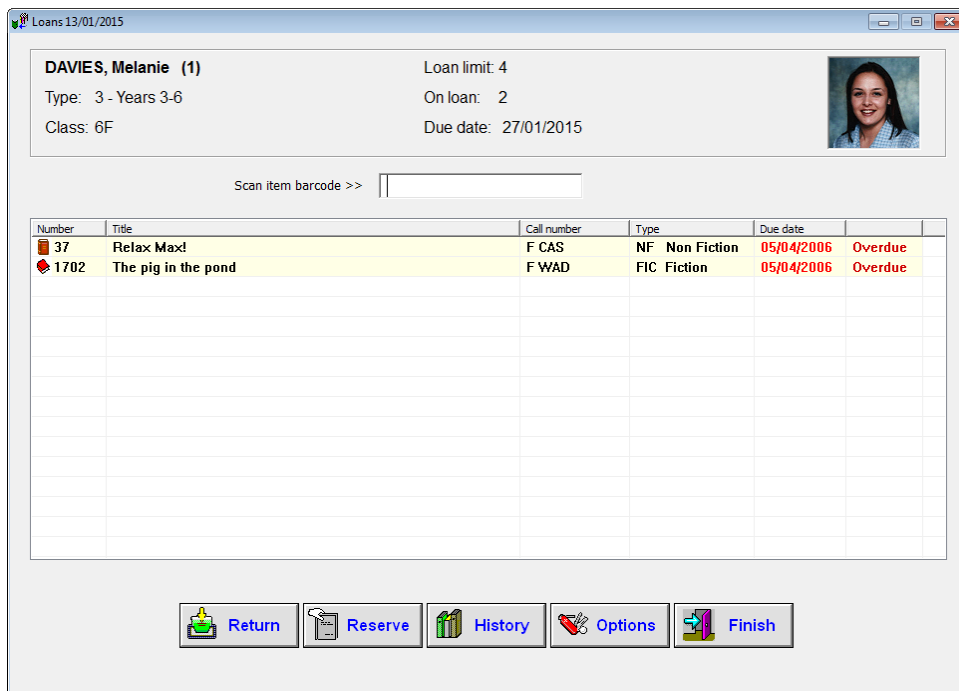Search for the item. It is similar to the make reservation window.

Highlight the item then click on either Latest or All. (The Loan History in Add/Edit is identical.)
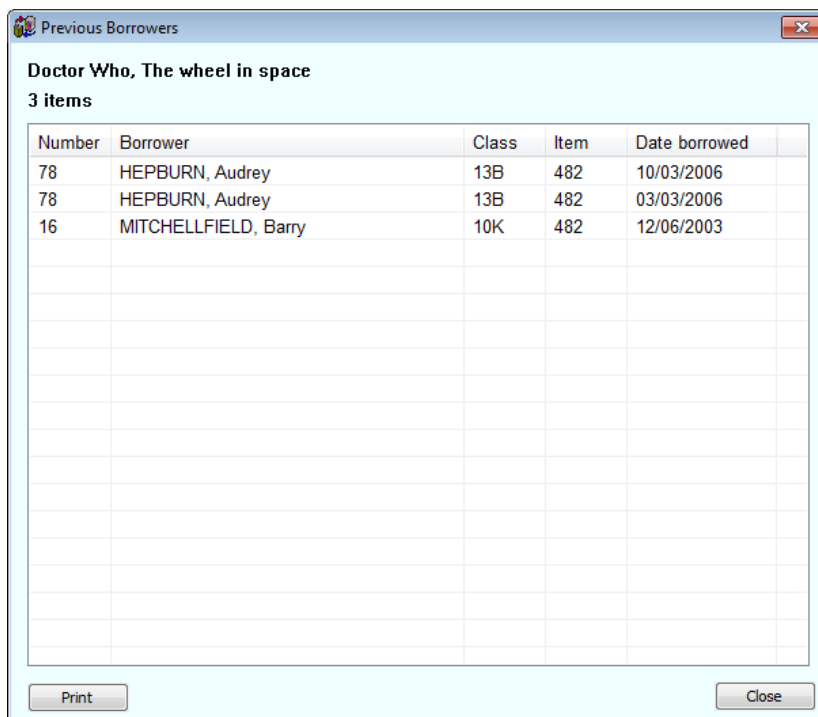
Return an Item in Loans

Sometimes it is not practical to go to the proper Returns screen. You might want to keep a borrower on the Loans screen but return items on loan to them or someone else.

To return an item on loan to the borrower, click on it to highlight then click on the Return button. (Note, this button is often hidden. To show it, go to Circulation Controls.)

To return other items, click on Options then Returns. The normal Returns window appares. When closed, the previous loans screen reappears.

Pressing the F1 key or entering the word SWAP instead of a barcode also opens the Returns window.

The SWAP / F1 function can be turned off in Circulation Controls by removing the tick next to Swap.
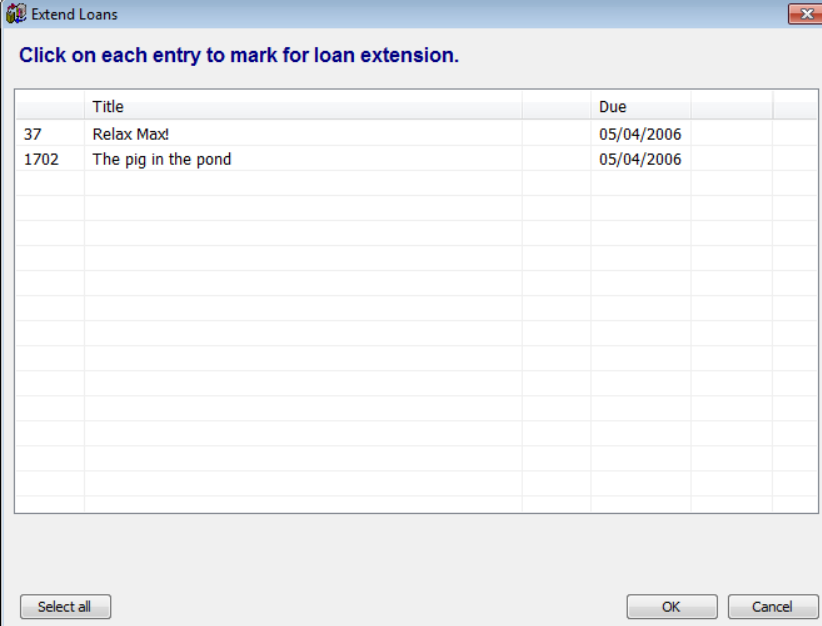
Extend Loans

Items on loan can have their due dates extended without having to be returned.

Enter a borrower as if they are going to borrow.

Extend Window method

Click on Options then Extend, or enter the command word EXTEND.

Click on each it to be extended or click on the Select All button.

Click OK. All of the marked items will be extended.

Direct method

The second method to extend loans is to simply issue the loan again to the same borrower. This only works if the "Extend loan by entering existing loan" checkbox is marked in Circulation Controls.

Changing the Due Date

If you wish to use a different due date to the one shown for the borrower, click on Options then on SETDATE or issue that command word. This resets the duedate for this borrower.

All loans and extensions to that borrower will then have the other date until the borrower is closed.

Issuing an Overdue Notice while in Loans

In Loans, click on Options then Overdue Notice.

The overdue notice printed is only for the one borrower.

The entire Overdues module can be accessed from Circulation by clicking on Edit then Overdues.
Or right-click on the Circulation menu for the popup main menu.

Overdue notices can also be emailed from the Options menu.

Printing a Loan Receipt

Bookmark can print a list of items just borrowed. This is known as a "loan receipt". As it is optional, this function must be switched on. There are two ways to do it:

- Type the command word SLIP or the word DUMP or click on Options on the Loans screen. This allows a "one off" receipt to be printed.

- In Circulation Controls, click on the Loan Receipt Controls button. (Below.)
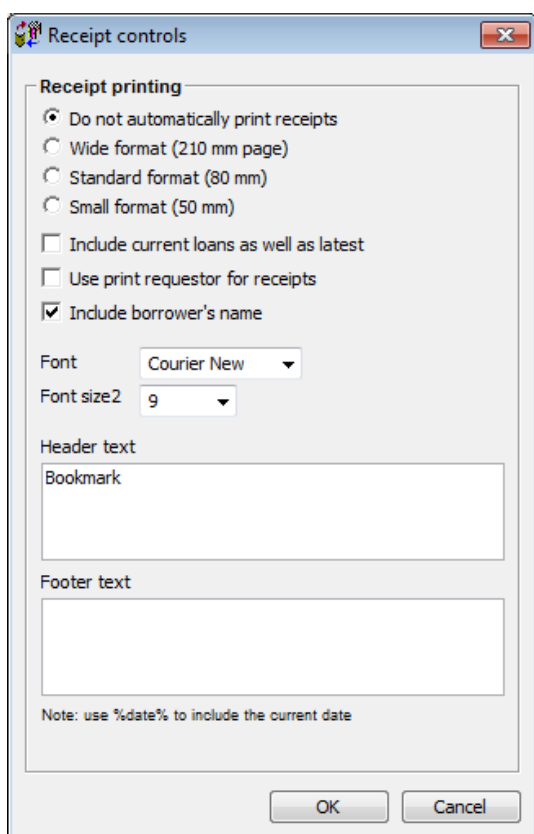
The controls button determines how the receipt looks.
The Standard and Small formats can be used with narrow receipt printers such as the Star brand.

Quick Search in Circulation Loans

On a borrower's Loan screen, press the F8 key or enter the command word SEARCH or click on Options then Search. This provides a quick and easy catalogue search while still in Loans.
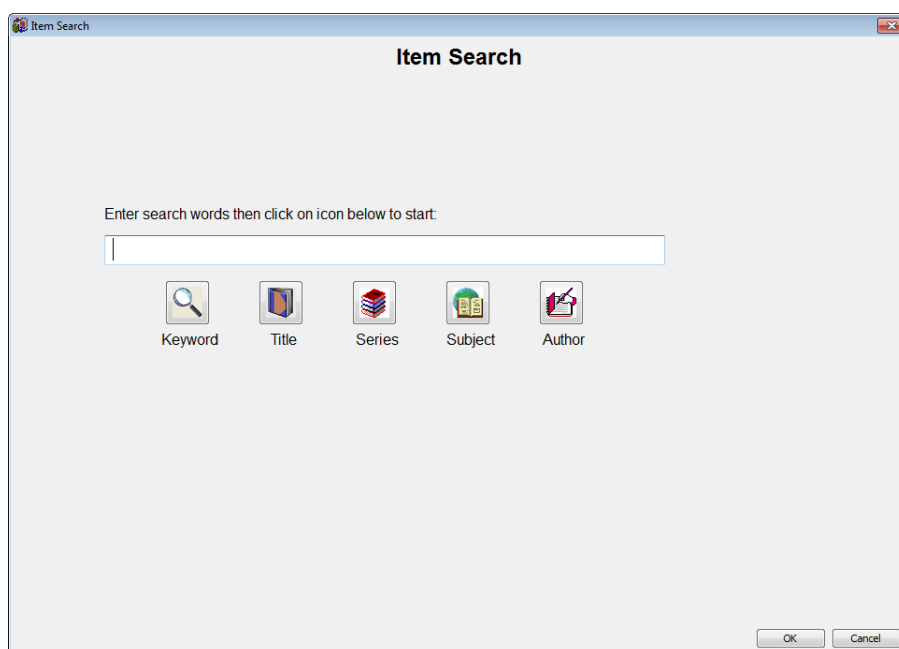
A simple search window opens. All searches are of the Word variety.
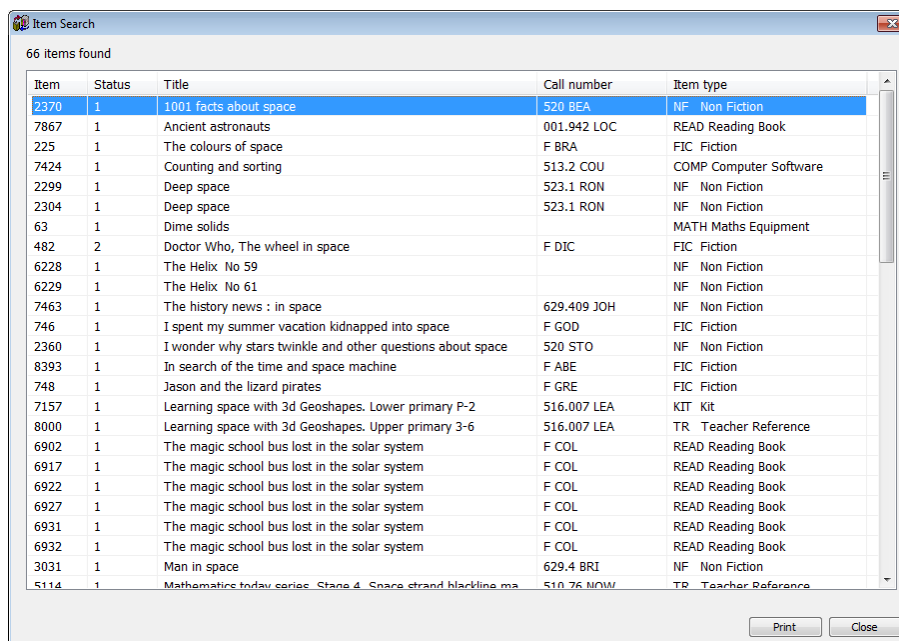
Double click on a title to see its details.

Circulation Controls
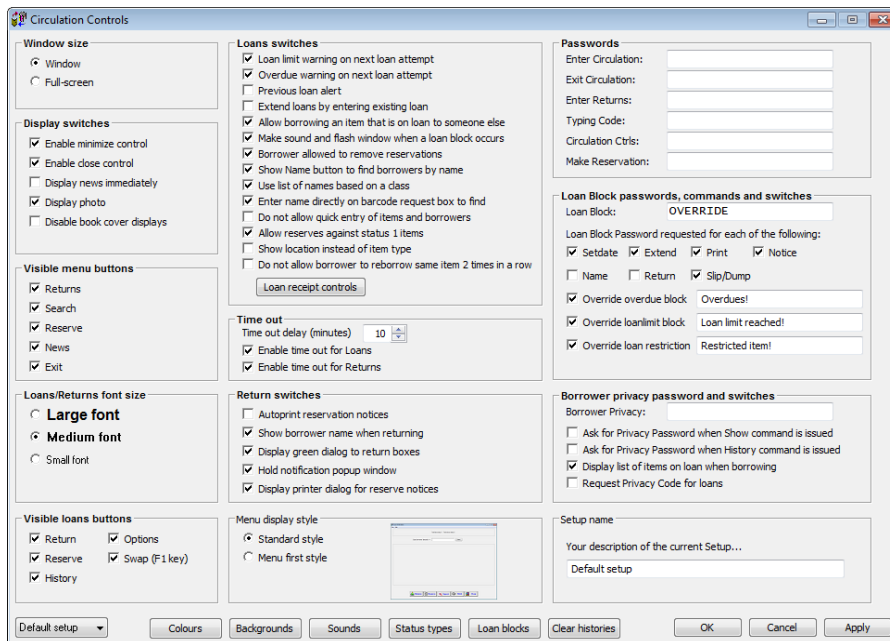
The Circulation Controls window can be accessed either from the Controls menu or the Edit menu in Circulation. It allows extensive customizing of Circulation.

Note: a password should be placed against "Circulation Ctrls" to prevent students from easily accessing these controls.

Four different "Setups" can be made and each computer that opens Circulation can be set for a particular setup.

To specify a Setup for an icon, open the icon's properties window and, after Bmcirc.exe on the Target line, put a space then the number of the Setup 0, 1, 2 or 3. Click OK to save.
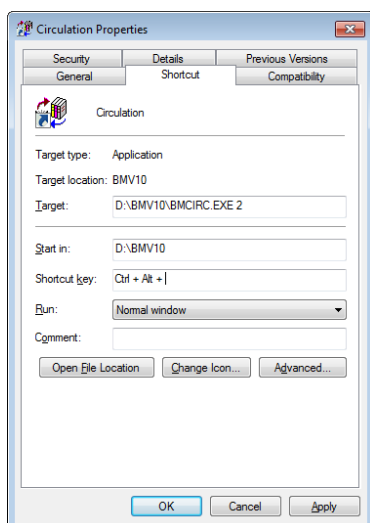
Answers to Exercises

Catalogue Report Query Exercises

1. Items with the word SPACE in the title   49
   Title CONTAINS space

2. Items about KITES   7
   Subjects CONTAINS kites OR
   Title CONTAINS kites

3. List all BIG BOOKS   61
   Item type = 9

4. Find all FICTION items using Call Number   2,175
   Call number BEGINS WITH F

5. Find all FICTION items by Item Type   1,675
   Item type = 1
   Item type IS ANY OF 1,2,9   gives 1,791

6. Items written by Mem Fox   22
   Author CONTAINS Fox AND
   Author CONTAINS Mem

7. Items with call numbers in the 700's   244
   Call number BETWEEN 700 and 800

8. List all items not used since the end of December 2000   3,654
   Date borrowed IS LESS THAN OR EQUAL TO 31/12/2000

9. List all items   6,261
   Find everything

10. All missing and lost items   13
    Status IS ANY OF 3, 4, 6

11. A staff member would like a list of all the videos about CATS   4
    Subjects CONTAINS cats AND

Item type IS EQUAL TO 11

12. What is the total cost of items accessioned in March 2005? $1,014.00
    Accession Date BETWEEN 1/3/2005 and 31/3/2005

Borrower Report Query Exercises

1. Find all borrowers in year 5   16

2. Find all the boys   54

3. Find all students and list them in order of most items borrowed.   11
   Who is the student with the highest number of loans?
   Emma Clarkson, borrower 11

4. The year 7 student with the least number of items in their history is   13
   Colin Lanecove 13

5. Who is the top borrower in year 6?   54
   Julie-Ann Rowan 54
   Year level = 6 and list rank order

6. Which borrower has a privacy code?   120
   Dean Hodgson 120
   Privacy code IS NOT EMPTY

7. Find all borrowers and list their histories in Dewey categories
   Use History Statistics based on Call Numbers report

8. Look for everyone who has not borrowed anything   45
   Last loan date IS EMPTY

Circulation Log Query Exercises

How many loans have been recored for item number 8193? (All dates.)
One
Item number IS EQUAL TO 8193. Set to all dates.

What is the title?
The Potato People

How many loans and returns did borrower number 42 (Alice Walley) make during the year 2004?
10
Borrower number IS EQUAL TO 42
Set date range from 01/01/2004 to 31/12/2004
Set to Loans only

Search for Non-fiction items, all dates. How many loans were found?
(Hint: which field tells you it is non-fiction?)
771
Item type IS EQUAL TO 4

Which report would be used to show the number of items borrowed by borrower type 2?
278
Borrower type summary
Set Query to Find everything and all dates

Statistics Reports Exercises

How many fiction items are in the collection?   1,676
Item type count, look at number 1

Which item type area has the biggest number?   1
Item type count. Item type 1

How many items are in the Teacher Resource location?   1,209
Location count

How many items are in the Dewey 600 range?   256
Call number groups count

How many items are currently on loan?   193
Status types count

How many titles have 3 copies each?   26
Count Copies

Bonus: how could you get a list of the titles?
Catalogue Search.
Query is Find Everything but restrict to "Titles Only"
Choose Titles based on number of copies report. Set to 3

How much is the Teacher Resource area worth? $25,341.86
Cost analysis report
Choose location and ignore dates

Search Limiting

Try: Keyword search for CATS with no limitation, then set Item Type to Fiction and repeat.
Without limiting, there are 77 entries
Limit by Fiction, there are 38 entries

Power Search

Title fish AND Series aussie bites
3 titles found

Find Mem Fox books with the word Donation in the Notes field
Hattie and the Fox (6518)
Possum Magic (611)