Introductory Training Course Manual Version 10

By Marion Mitchell
Ruth Loudon
Anne Ross
Dean Hodgson
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Introduction

Course topics
Controls (system parameters)  Stocktaking
Borrowers  Housekeeping
Cataloguing  Backing up
Circulation  Updating
Searching  Regular tasks
Overdues

Starting Bookmark

Bookmark version is listed on the top left corner of the main menu. Also in Update and System info in Utilities.
Windows 7 does not allow full screen mode. It is designed for a screen resolution of 1024x768 (minimum)  1280x1024 (optimum) Circulation and Search can be set to almost full screen mode.

Main menu

There can be three different looks to the main menu (as determined by Controls/ General Controls)

Then the program does some scanning, and other things happening while it is opening. Then the start of day routing pops up to allow checking of due dates.
If the date needs to be changed, go to the Due dates screen in Controls.

When you are in a submenu, e.g. Cataloguing if you right click on an empty spot on the window, you should see a main menu. Must have “Allow many modules open at the same time”, ticked in Controls/ General Controls.

**Passwords**
Passwords can be set for each module.
The main password will work everywhere.
Turn the password into a barcode for greater security, and to save having to constantly type it in.

A neat trick is to use the first and last letter of the main password for all the other passwords. Make it easier to remember and shorter if you have to type.
Barcodes

Barcode labels are used to make the process of issuing and returning loans quick and easy. Bookmark can work with different types of barcode labels and in some cases mixtures of labels, although it is strongly recommended that all barcodes should be of the same configuration.

The standard "Bookmark" configuration is 11 characters in length and organised in a specific manner. Other label standard may have a different configuration. This is determined in Controls/Barcode settings.

There are Item barcodes, borrower barcodes, and system barcodes.

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. This character can be either a letter or numeral such as a 3 for items and 2 for borrowers. All borrower labels must begin with the same character, whether it is B or a 2 or anything else. Labels beginning with any other character are considered items. For consistency, it is strongly recommended all item labels begin with the same character and not different letters denoting 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
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 over 2147483647 (5 digits on this type of label limits the range to 99999).

Checksum
The final digit of a standard barcode is known as a checksum digit. It is used to ensure the label has been read properly by the reader and is not part of the record number.
System parameters
The introductory course will cover General Controls, Circulation Controls, Passwords, Search Controls, Borrower Types, Cataloguing Lists and Due Dates.

Controls
General Controls

If slow choose first listed
Simple is best.
Some Windows functions do not work.
Default locks in 1 printer only
Default limits options for printing
Some Windows functions do not work

Allow mixed case is recommended by SCIS
Lighter colours are easier to read
Does not work with portable readers
Set in a sound that will be tolerated

Fill in these for emails and overdue letters

Set up emails server

Do not turn these off

Start of day process:
- Show due date summary only
- Show due date summary and statistics
- Do not show start of day dialog

Simple is best.
Some Windows functions do not work.
Default locks in 1 printer only
Default limits options for printing
Some Windows functions do not work
Circulation Controls

**Full screen to hide the rest**

**Loan and return switches** determine how it behaves (see next page)

**The less passwords the easier to use**

To stop anybody just typing in numbers. Must have barcodes

Must set to protect the circ Controls

Important to set this one. Tick those to which it applies

Should be set

Don’t touch unless you have to

| Display switches, visible menu buttons, visible loan buttons and font size, menu display style determine how it looks |
| Can set up different setup for different screen on different workstations |

| Loan and return switches determine how it behaves (see next page) |
| The less passwords the easier to use |
| To stop anybody just typing in numbers. Must have barcodes |
| Must set to protect the circ Controls |
| Important to set this one. Tick those to which it applies |
| Should be set |
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| Display switches, visible menu buttons, visible loan buttons and font size, menu display style determine how it looks |
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| Loan and return switches determine how it behaves (see next page) |
| The less passwords the easier to use |
| To stop anybody just typing in numbers. Must have barcodes |
| Must set to protect the circ Controls |
| Important to set this one. Tick those to which it applies |
| Should be set |
| Don’t touch unless you have to |
Turning these on makes it quicker to find people without using the barcodes. Enter name directly may be passworded with the loan block password.
Passwords
The general rule is the fewer the better, but it depends on the size of the school and the need for security within the school. The more passwords there are the harder it will be to operate simply. But the school determines what is required in the way of passwords. One useful supporting feature is to turn the passwords into barcodes, which can be issued on a needs basis.
One reason it is so strongly passworded is so that the students can issue and return their own materials without damaging anything.
In the past there was the password and the access code. The access code was the first and last letter of the main password. It is easy to remember. When converting from version 9 it is carried over in the same way.

Print the barcode for the passwords here.

There are also passwords in Circulation Controls and Public Access Controls.
The ticked boxes are where it will ask for the password. It will also ask for the loan block password for overdues for blocked borrowers. Usually students are blocked and staff aren’t stopped from borrowing if they have overdues, but that is a school decision, and dependent on what is set in Borrower tables. (the main password will work too)
It will also ask for an override password if someone tries to borrow a book that is not allowed to be borrowed, as set up by status types. (The main password will work here too.)

Some schools will make up a card with the override password and put it on a lanyard to be passed out, then returned, on a “needs” basis. The teacher does not need to know the word and no one can “adjust” the system when no one is there.

Different states have different rules about borrower privacy. Read the manual and find out the requirements that apply to the individual situation. The password in this section apply to Circulation and Public Access

**Public access passwords**

To make it easier to remember passwords make the borrower info the same as for Circulation Controls.
Make the reserve password the same as for Circulation Control “make reservation” passwords. There are switches which will turn on or off the need for the various passwords. E.g. To restrict printing from Public access

Remove the tick from the switch Unrestricted printout, and it will ask for the printing password.
Search Controls

- Full screen
- 2 different style menus
- How it looks
- Different setup for different computers
- Things you can turn on or off

How it works and looks

- If you make the passwords for borrower info (.borrower privacy) and reserve password the same it will be easier to remember. Make a barcode for printing password for the teachers.
- Set up who can reserve. How many they can reserve is set in Borrower types. Don’t forget the switch
- Set up who can make resource lists
- What appears in the new book list
Borrower types.
These set the limits of what people can borrow and what they are allowed to do within Bookmark.

- Maximum number of items allowed to this borrower type at the same time
- If set this will prevent loan until overdue books are returned
- How long items are allowed to be borrowed

1 type for each different loan scenario

You can set two types of Due Dates - 'fixed' or 'duration'
Duration automatically changes the date each morning and is set for a specified number of days ahead of Bookmark’s recorded date. For example 7 or 14 days for student loans. Type in the number of day to set.
Fixed dates do not change from day to day and are useful for bulk loans or staff loans.
To set a fixed date, highlight the one to be changed, and use the calendar or type it in.

Highlight the one to be changed. Change in the box then press Update

Put in the year levels for future use with updating more easily.

Tick the box to stop people from borrowing these item types

Controls the types of item able to be borrowed
Cataloguing lists

Statuses

The status indicates the items current state or condition. 1 is on the shelf. 2 is on loan and 99 is not for loan. Status 100 is on hold for reservations.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Available</td>
<td>Yes</td>
<td>Yes</td>
<td>21721</td>
</tr>
<tr>
<td>2</td>
<td>On loan</td>
<td>No</td>
<td>Yes</td>
<td>1160</td>
</tr>
<tr>
<td>3</td>
<td>UNLOGGED (Dec 12)</td>
<td>No</td>
<td>Yes</td>
<td>15</td>
</tr>
<tr>
<td>4</td>
<td>Repairs</td>
<td>No</td>
<td>Yes</td>
<td>6</td>
</tr>
<tr>
<td>5</td>
<td>Lost/Damaged</td>
<td>No</td>
<td>Yes</td>
<td>11</td>
</tr>
<tr>
<td>6</td>
<td>ON ORDER</td>
<td>No</td>
<td>Yes</td>
<td>5</td>
</tr>
<tr>
<td>7</td>
<td>ACQUIRED</td>
<td>No</td>
<td>Yes</td>
<td>6</td>
</tr>
<tr>
<td>8</td>
<td>Processing</td>
<td>No</td>
<td>Yes</td>
<td>313</td>
</tr>
<tr>
<td>9</td>
<td>Covering</td>
<td>No</td>
<td>Yes</td>
<td>64</td>
</tr>
<tr>
<td>10</td>
<td>Website</td>
<td>No</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td></td>
<td>No</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td></td>
<td>No</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td></td>
<td>No</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>14</td>
<td></td>
<td>No</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>15</td>
<td></td>
<td>No</td>
<td>Yes</td>
<td></td>
</tr>
</tbody>
</table>

Gives permission for loans and returns

How many in each status

Move 1 status to another holus bolus

Turn the status into a barcode by typing Status space and the number.
E.g. status 3
Use in returns to instantly mark an item as missing after it has been returned

Location

The location is where it is. There are 199 locations.

How many in each location

To change the name or add a new one
Click on the one to be changed and change it here then press update

Shift 1 location’s content into another
**Item types.**
An item type is what it is. There are 199 item types.

<table>
<thead>
<tr>
<th>No.</th>
<th>Description</th>
<th>Icon</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>FIC Fiction</td>
<td></td>
<td>4034</td>
</tr>
<tr>
<td>2</td>
<td>JF Junior Fiction</td>
<td></td>
<td>1924</td>
</tr>
<tr>
<td>3</td>
<td>INF Junior Non-Fiction</td>
<td></td>
<td>2428</td>
</tr>
<tr>
<td>4</td>
<td>NF Non-Fiction</td>
<td></td>
<td>2428</td>
</tr>
<tr>
<td>5</td>
<td>REF Reference</td>
<td></td>
<td>1090</td>
</tr>
<tr>
<td>6</td>
<td>TR Teacher Reference</td>
<td></td>
<td>1321</td>
</tr>
<tr>
<td>7</td>
<td>KIT (multi item types A4)</td>
<td></td>
<td>0.17</td>
</tr>
<tr>
<td>8</td>
<td>MAP Map/Chart</td>
<td></td>
<td>55</td>
</tr>
<tr>
<td>9</td>
<td>BB Big Book</td>
<td></td>
<td>91</td>
</tr>
<tr>
<td>10</td>
<td>PIC Picture (individual)</td>
<td></td>
<td>128</td>
</tr>
<tr>
<td>11</td>
<td>V/DVD Video Tape/DVD</td>
<td></td>
<td>8</td>
</tr>
<tr>
<td>12</td>
<td>HVR Hardware</td>
<td></td>
<td>47</td>
</tr>
</tbody>
</table>

How many in the item type
Click on the icon to choose or change

Move all of 1 item type into another.

**Due date categories**
This applies to individual books and override the borrower’s due date.

Fixed and duration dates. To change, click on the duration column and either type or use the calendar to set the date. Can also be set in Due Dates

Move the content of the due date category to another category
Due Dates in Bookmark

The primary determinant of the due date is the borrower. There can be two sorts of due dates. Fixed dates, or duration dates (rolling, daily changing) dates. These are set in Due dates in Controls, Due dates, and there can be a reminder every morning for checking purposes. They can also be set in various other parts of the program. e.g. Circulation, Borrower tables and dates, Due date categories.

Click on the date to be change. Fill in the box at the bottom and press update to change them. Don’t forget to save at the end. This screen also appears at the beginning of each day, the first time Bookmark is turned on.
Barcode Settings
Most schools have a standard setting, but for schools converting from other library programs, the setting may be different. If the barcode reader does not work, check that the site ID is correct. Ring the Help Desk rather than playing in this area.
Entering Borrowers

This section covers entering borrowers in Add/edit, deleting borrowers, updating borrowers and labels.

*Add/edit borrowers*

If in doubt leave it blank for anything except borrower type, surname and either given name or preferred name.

- **Scan barcode**
- **Year level and loan limit should flow through for the chosen borrower type**
- **Include for easy updating from the admin system**
- **Can just type in date**
- **Can delete individual borrower**
- **This determines the appearance of the name format**
- **Change a borrower’s number**
- **Type in or choose from the list. Used for overdues.**
- **Use privacy code only if you have to**
- **If ticked the word comment appears on the circulation screen and the COMMENT barcode must be swiped**

Loan and return notes will appear for this person every time a book is borrowed or returned.
Deleting borrowers

To delete the students leaving the school.

It is not a good idea to delete the students during the year. Just put them in a group called Left. At the end of the year, do the archive backup then delete the group called Left. That way there is a long term record of their presence and loans.

To delete the group called left or the top year leaving the school.

Go to Borrowers Delete borrowers

Highlight the borrower/s to be deleted. Use the SHIFT key or the Control key to highlight “blocks” of borrowers. Those highlighted with be deleted.

Press the delete key. Are you sure? Yes.

The screen will then ask

What to do with the books on loan? Mark then as missing.....

When it is done those borrowers will no longer be on the list.
In Borrowers, Update borrowers people can also be deleted, one at a time.

Highlight the one to be deleted. Change it in the box along the bottom press Update and it is done.

In Add/Edit there is also a delete button.

Updating borrowers/Rollover

The three borrower fields that require change are:

a> The borrower type determines the number of loans and the length of time borrowed. So you only need one type for each loan period and loans.

b> The group name is the class into which they are going, and is used for overdues. When there are no longer any borrowers in a group it will disappear. If you have “leftover” students, make up a group called odds or left, and put them there.

c> The year level is their standard of academic achievement and is used for statistical reasons. Check to see that the term of entry is standardised. e.g. 1, or 01 etc.

There are different ways of doing this: manually, or through the school admin system data.

Reminder: BACKUP before you start doing updating or importing information!

Delete departed students manually.

To update Borrowers manually.

Do not update the entries one by one in add/edit.
1. Go to update Borrowers

2. Simple change
Click on the one to be changed. Change in the box along the bottom of the screen and click Update. At the end click Save to save them all.

2. Increment

Make sure that the correct year levels are in the correct borrower types. Say ok.
Say yes and everybody will be a year level higher. That takes care of the year level and borrower type. The student must then be put into classes.

OR

Click Change to do this.

1. Fill in what needs to be changed. Not all fields need to be filled in. It only changed what is filled in.

2. Highlight the borrowers to be changed.

3. Click Assign and the borrower will disappear from this list

To update borrowers using the school admin system data

Getting the file from the admin system. Each administration database has a different set of steps for producing. Refer to that education system’s information on how to export the data. For EDSAS and RMSIS, fact sheets are available from the respective education authorities. For CASES 21, use the "Bibliotech" export. It works for Bookmark, too.

A Factsheet is available on request containing detailed information about each of these formats.

1. In Bookmark the student admin ID must be filled in (in Update borrowers).
2. Then the system must be tuned so that the right data goes to the right spot.
3. Then import the data.

In Update Borrowers click Import

3. Choose the system from which the data is imported.

2. Tune the system

Print out the new people

GO!
Preview show a list of who is in the file. Start asks where the file is and then shows the first borrower with the option of save, Mass import or next.

Save will save the person whose details appear on the screen. Mass import will import everybody. Before this button is pressed check that the right information is in the right field. Next will move to the next borrower without saving.

Lists

Borrower labels/barcodes.

Page setup In print barcode labels first, the page setup has to fit the labels in stock if printing to labels.
If not using any of the default labels much playing around on paper first to get them right, needs to be done. Ring the Help Desk for assistance. If printing class sheet only the header and barcode style are critical. Once setup the only time it needs changing is if different size labels are ordered.

To print a class sheet.
Go to Borrowers, labels, Print Barcode labels, Print class sheet

1. Work out which classes
2. Work out the layout
3. GO!

Next show check sum (yes is the answer) then a print preview pops up. Press print, and it is done.
Cataloguing

This section will deal with Add/edit, Import items, Delete items and spine labels.

Cataloguing is done according to AACR2 (Anglo-American cataloguing Rules), and more recently RDA. RDA has added fields, media type, content types, media type and carrier type. Click on the down arrow on the right of these fields to see the options available. RDA does not have abbreviations e.g. ill. Or illus for illustrations or illustrator. Instead of Bible. O.T. for Old Testament it is now the full word e.g. Bible. Old Testament.

For punctuation pedants  http://www.rda-jsc.org/docs/BCLAPresentationWithNotes.pdf

For those who just want to make the item findable the rule is fill in what you understand. If you don’t know what it is leave it out. The fields that must be entered are title, number item type, location, status and. The field that should be entered as well are barcode, author (if it has one), isbn and cost  However try to add as much as you can. eg isbn is very useful for adding covers.

Go to Cataloguing/Add/edit items and scan the barcode or type in the item number

If there isn’t a number, Go will take you to the first catalogued record

The list of available numbers to use. Click here to find the next number if not known
The arrow keys on the end of fields allow checking or options. The buttons with the dots allow amendment of the fields presented. It may be slightly slow as it must load the file into the system.

Here is an example of the simplest form of cataloguing. Press either F1 or the save button and the program will say items saved. If you have not filled in required field a message will pop up informing you. Clicking ok on the item saved screen should then drop back then click new for the next item to be catalogued. If you wish to add details they can be added later. Just enter the number change and press save again. However many more details can be added as required. E.g. where you bought the item, which book, how paid for it, and a replacement cost for insurance purposes.

Premier's Reading Challenge, Lexiles, or reading level.

RDA

Visible in search and exclude from stocktake

Loan return notes, synopsis, and contents, and Reviews if turned on in Controls
If it is part of a reading scheme or even a grade level, there are extra fields for this. Collection is for instance if purchased by the parent’s club, or for the History Department, the Bert Fitz archival collection. Synopsis is a summary of the story. Notes is there for whatever. Contents is useful if for instance there is a single chapter that is very useful, but nothing else covers it. E.g. a kit with three books with different titles enter the titles in the Contents field so they are keyword searchable. Loan and return notes can be used e.g. check the cd is inside the back cover envelope; this is only available for short term loan. Visible in search should usually be ticked. Exclude from stocktake is useful for websites, catalogued computer documents, Authors, subjects and series are entered into an authority file so that they are the same each time they are used. Press F5 to check. Periodically (preferably once a term) the authority files should be reindexed and rebuilt to speed searching and to help accuracy in searching in public access. For more information on the fields read the version 10 cataloguing manual

**Multiple copies of a book.**
There are three ways of cataloguing copies. It really depends on how many copies and what barcodes were used.

**Two simple ways for one or two or three copies.**

This applies to close copies, but the close copy must be unlinked.

*The first way.*
Catalogue the first one.
Go to the empty screen of the barcode attached to be used for the next copy. Press the copy button.
The following notice appears.

If a barcode number is typed or scanned the record will be copied to the new number. Make any additions, alterations, or other changes, and press save. Typing a single word it will bring up a list of all books with those words in the title.

Choose the one that corresponds, to the search, and press enter and the record will be copied to the new number.

Press save.

These items are now linked for reservations purposes.

The second way.

Go into the record of the item already catalogued and press the copy button. Type in the record number of the new copy. The record will be copied into the new number. Change to suit and press Save.

Block copy

This is where there are 20 copies of the same reader with consecutive barcodes. Catalogue the first item, pressing save . Then Click onto Block copy
Enter the next items number. Enter the last item number and press \[ \text{Tab} \] to catalogue all records between the two numbers.

**Close copy cataloguing.**
This is similar to copy cataloguing except that you unlink before saving. Linking is only for exact copies.

**Boxing**
This is used for item to be lent as 1 e.g. reading boxes.

Catalogue the container. Catalogue the individual parts. Then put the parts into the container, by clicking make a box in the container’s entry in Add/Edit. When it is lent scan the container barcode to issue out all items. When returning the item scan the container barcode, count the items, and type or scan the word BOX to return the contents. If they are items missing, return each item individually and the missing ones will still be issued out to the borrower.

**Importing from SCIS**
Check Controls / General Controls for the default switches which determine how the data is imported.

For problems creating or downloading the file to the system ring SCIS on 1800 337 405
For problems importing the data ring the Bookmark help Desk. There is a file requestor fact sheet on the webpage.
The files to download from Scis are the USMARC files, and the images.zip files from the orders table. Double click the files to save them. Put them somewhere where you can find them again.
Import the covers first, so that it is possible to see which books have covers as the books are imported.

**Importing the covers**

Go to Cataloguing, Import items, 3 Import covers.

Click on **Open file**

The name will be something like `images4850012.jpg`
Click open

There is a way to catch up on all the covers from earlier cataloguing. Advanced course.

**Now to catalogue the books.**

Go to Cataloguing Import items.
The next box will appear. Choose 1 Import Marc records.

Use to import large numbers of websites, or urls from an ebook supplier

The titles in this file can be viewed without importing the items

Go straight to SCIS from here if the firewall permits this

Import the covers first so the cover is seen when the book is catalogued.

After pressing 1. Import MARC records. The program can set further defaults if importing the same item type, location and status Trailing punctuation e.g. some data from SCIS may have extra punctuation eg. SCIS recommends leaving it unticked.

Tip Try to download the same item types in the same SCIS file and fill them in to make cataloguing faster. Only need to add number price and save.

Then to find the file….This all depends on where it was saved and the security on some systems does not allow the user to choose where to save the file. The easiest place to save and find the file again is on a usb. There is also a folder in the Bookmark folder labelled SCIS. The file can be stored there. (These files are not backed up).
The next screen will hopefully be

SCIS will fill in the information as much as it can, but the parts pertaining to the specific library must be filled. *The barcode number, the item type, the location, and the cost* and any other missing information. Check for copies and link them. This is done for reserving items only. Press the *Save button* to save. *DONE*. If successful the next record will appear. If unsuccessful, an error message will appear.

**Deleting items**

**Deleting and undeleting items**

Before deleting an item. Or multiple items check with the auditor about reporting requirement. Do **not** delete a book by erasing the information in *Add/Edit*. Weeding has other considerations. See the weeding factsheet for version 10.
Method 1.
Choose Cataloguing, Add/Edit press the delete button.

Say yes and it is done.

Method 2.
Go to cataloguing, delete items

To delete a single book

Choose 1 delete individual item
Type in the number to be deleted, and the record will be shown. Choose delete this item and it will be deleted. It should be stored in the deleted items list. Different states/system have different rules about how long data should be stored e.g. SA says 7 years for state schools. Once the item is in the deletion list it is no longer part of the library collection.

Method 3.
**Mass deleting**
Go to Cataloguing, Delete items, Mass delete.

It is possible to delete by:
- item type
- location
- status
- formulating a query
- scanning in a pile of barcodes of items.

Backup before you do anything here.

Scan more to the list.

Should be ticked for auditing purposes.

How many in the list.
The items to be deleted will be in the list.

Items can be removed from the list by highlighting the item/s and clicking remove. When the list is complete press the delete listed items button.

The program will show each item as it is deleted, and the previous screen will appear when it is done. These items will then be in the deleted items list.

Restoring a deletion.

Go to Delete items/The deleted items list

Tick the items to be undeleted and click undelete. This will put the item back into the same number. If the number has been reused it will not be undeleted. Double clicking the item will show item details.
Check the number by clicking the Check box. Click Ok, then undelete. If the number has been reused by another item a message will appear and the item will not be undeleted.

![Image](Check form number)

If a number of items are to be undeleted, tick the entries to be undeleted. Click undelete and they will be done.

**Printing Spine labels.**

The easiest way is to order the pre-set sizes listed in default settings. There is an order form for spine labels under barcode label ordering form on the Bookmark web page. In Cataloguing/Labels Print spine labels.

![Image](Labels Menu)

There are then 3 choices...

![Image](Print Spine Labels)

Check the Spine labels page setup the first time, after which it should not have to be touched again unless the label type is changed. Test prints can be made on paper and line up the paper on top of the labels until it is correct.
TIP Go into spine labels page setup, and barcode labels page setup and do a ALT-Printscreen, and control V to paste it in a Word document to save it for future reference, in case the setting are lost.

Setting up (4. Spine label setup).
The type of spine labels to be used must be set up so that it prints them in the right spot. Until new spine labels are bought this is usually only done once.
If non-default labels are to be used. It will require patience to set it up. The setting that is most confusing is horizontal and vertical pitch. Ring the help Desk for assistance.

Once it is set up it would be good for the setting to be recorded on paper somewhere so that it perchance they are lost they can be re-entered easily.

Print spine labels.

The item that will have printed spine labels will appear on the screen. The label will not print if there is no call number.
Make decisions about the way the numbers are to be printed
Click the print button.
Done.
**Printing spine labels manually**
Type in the numbers. Tell the program how to print them, e.g. multiple lines, etc, and press print. The spine labels setup page applies to this screen as well.

![Print Spine Labels](image)

Press print. What you see is what you get. Done.

**Printing a page of the same label**
The spine label printing system can also print the same label in every cell on a page. This can be used to create a page of "stickers" for example.

To do this, tick the box labelled "Print one whole page per line".

Each line typed into the white box is printed on an entire page.
Circulation
This section deals with borrowing, returning, extend and reserving a book

Borrowing a book.
The basic action is simple. In loans Scan the borrower name, scan the item and it is done.
Circulation is controlled by the Circulation Controls in Controls and Borrower types.. This determines what appears on the screen. Things can be easily hidden .If the screen on the computer looks different to the illustrations, check out the Controls.

Set as few as possible
This one makes the user use the barcode scanner
Set the main password for Circulation Controls to prevent student access from Circulation

Borrower types determine how many books can be borrowed by a borrowers and the length of time for which they can be borrowed.
Item due date categories can override borrower due dates. This is set in cataloguing add/edit against specific items.

The date screen reads from the computer it is appearing on, to determine the current date, and time.

The barcode setting determines what the barcode scanner reads. This is set up depending on the types of barcode used in the school.

*Hint In Controls, do a screen dump of the barcode setting and print them out, when it is known that they are working to give a comparison basis if they stop working.*

If Circulation is clicked and it doesn’t even go to loans **RING the Help Desk**. Either the program is having a hiccup or the data has a problem.
Borrowing the item
The screen that appears may come up in either format depending on the switches

Step 1. Scan the borrower number...
Don’t have the borrower number.
Click Name. This may or may not be passworded depending on the Controls in Circulation Controls.
The override password may have to be entered. The name entered may be the given name or the surname.
Highlight the person required and press ok. If name and/or class button doesn’t appear check the switches.

What can go wrong with the borrower number?
The number flashes up then disappears.
Cause
The borrower is not registered? Check Borrower/ add/edit to make sure the borrower is registered.
If the number is typed in, does it work? If so, check the barcode specification in Controls Barcode setting to check for corruption.
Scan the barcode again in a program called Notepad. If the numbers appear on the screen and just sit there the scanner is ok. If they do not appear there is a hardware scanner problem.
Did that barcode work before? Or is it a new one just printed? If the number is typed, does it work?
If there is an error message? Ring the HELP Desk having written down the full message.
Doing class loans?
There is a switch in Controls/Circulations Control that allows a class list to be displayed.

Click on the button to list the classes.
Choose the class.
The students will be listed. Choose the student.

Assuming the borrower number.
This borrower has two books overdue- 4 books is the limit for this borrower.
After scanning the item barcode for the next book this message may appear, depending on the loan block settings in Borrower types. This is a chance to notify the person about returning their books, refuse to lend more until they do, or use the override password to allow them to borrow more books. That is an administrative decision.

Other stops to borrowing-
Restricted item. There are two ways to restrict items.
1. Using the loan restriction against a book in Add/edit.
2. Or using the restriction button against borrower types in Borrower type categories.
3. Book is reserved for someone else.
4. Book has a different status and the Controls Circ Controls switch is OFF
The Loan Block password to override these restrictions is in Controls in Circulation Controls
HINT Turn this into a barcode so it may be scanned In Controls, passwords, Print passwords barcodes. That way the use of this password is controlled, and the word is not known, to increase security.

If the sounds are infuriating, turn them on or off except for the important ones. E.g. Loan blocked. Controls/Circulation Controls /Sounds.

Wrong due dates for items. The dates are set up in three places.
1 In the computer clock itself.
2. Or the due date for the borrower may be incorrectly set in Controls, Borrower tables and dates.
3. Or the book itself may have a due date category. Due date categories are set on Controls Item tables and dates, due date categories. Which due date category assigned to a book, is set in add/edit.

No barcode.
Type in the significant digits of the borrower or item barcode. E.g. B 1234 00234 8 the significant digits are 234
Providing the typing code is not set that should work. If the typing code in set in Controls, Circ passwords, type the code in front of the number to lend or return the book.
If the above message appears the book is not catalogued. You can create a quick entry for the book giving minimum details. When the book is returned it will say it is a quick entry so that it can be picked up for correct cataloguing.

*HINT* Set a different sound in Controls Circ Controls Sounds button so that there is a sound warning when it is returned.

A quick entry is marked in the Other field with the words quick entry.

So a student can’t do it.

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**Loan notes and return notes.**

A loan note can be set against the item (In cataloguing/Add/edit) or the borrower (in Borrower/Add/edit).

Just press enter or OK to get past it.

If it is a private note the word comment will appear under the person name. Scan the Comment barcode, or type the word COMMENT to see the note. It may also be passworded.

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**Borrowing a box.**

A box is specially catalogued so that the whole box with its contents are lent in 1 action.

Borrowing the box just involves scanning the container’s barcode.

Returning is different. Scan the container’s barcode, check the contents, and then scan the word BOX or type in BOX to return the contents, or alternately work with the popup window.

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**Security**

If you have a problem with children using other people’s barcodes you can set up extra security.

Check the manual for the security settings.

It the children sneak in to return the books by just typing in the number this can be stopped by setting a typing code in Controls, Circ controls. Turn it into a barcode.
Circulation barcode labels

A copy of these labels may be obtained by printing them from Cataloguing, Labels Print barcode labels: circulation labels. It is best to print from a laser printer as an inkjet may not print them finely enough for the barcode reader to be able to read them.

They can be used by scanning with the barcode reader or just typing in the letters of the word. They can also be turned on or off in Controls/Circulation Controls/Loan Block passwords.

Swap
If in Loans in general it will go to the general returns screen and back again when you scan it again. Any item can be returned whilst in the returns screen.
This option may be turned on in Controls Visible buttons.

Finish
If in a specific borrower it will “finish” using any messages e.g. the following reserved item is available. If there are no messages it will take the screen back to the circulation menu.

Name
A child comes up to the library and the borrower barcode is not immediately available, and the name button is turned off, scan the NAME barcode. A password may be required if the switch in Controls is set.

Then type in either the given name, the surname or the first two or more letters of the name and the screen will list all borrows with that combination of letters. Highlight the one required and press enter to go to this person and continue with a loan etc.

**Comment**

There are two different types of borrower comment available in Bookmark, public, private. A public comment flashes immediately the user goes into loans. A private comment does not need to be readily displayed, but one that could prove helpful to the librarian. E.g. make sure this borrower reads books that are not too easy. In Borrower add/edit next to the loan note field, tick the make private box. Then when that borrower’s name is opened in loans there will appear the word Comment and clicking on the word will bring up the password depending on the setting in Controls, Circulation Controls.

**Slip and dump**

These are turned on or off for continuous use in Controls Circ Controls Loan receipt controls. If you don’t want to print from the circulation menu, password it in the Loan Block passwords. For occasional use go into the borrower and type in either slip or dump to activate it. Issue loans and on exiting the borrower the current loans will print out if the printer is turned on. Slip prints out the current transactions in narrow format for the small transaction printers. Dump prints out the current transactions in standard format.

**Print**

PRINT prints out all loans of a particular borrower. In loans enter the borrower number scan or type PRINT to get a printed list of all items on loan to that borrower. Password it to prevent indiscriminate printing.(Loan block password, tick print box)

**List or Show**

If the privacy switches in Controls is turned on, a user’s loans are not shown in loans. But by typing in LIST or SHOW and then supplying a password these items are then visible.

**Extend**
In loans after calling up a specific borrower scan or type EXTEND to bring up a list of all loans to this borrower. Press the button that says Select ALL to mark them all then OK to extend them all. If you only wish to extend some items, highlight the selected items to mark them and press OK. A password may be requested after scanning EXTEND depending on current switch settings.

**Status**
Someone reports a book on loan as missing. Return the book, by manually typing in the password(with typing code if set). Scan the status barcode and type in the status number for lost, and change the item’s status to lost without leaving the return’s screen. A message confirming the change will appear on the screen. Typing the word STATUS space, and the number will also do the same thing. This method will also work for In repair status, or Weeding status.

To turn the lost status into a barcode, where there is no need to type in the number, go to Cataloguing <B>Print barcodes <3>print barcode labels. Type in the word STATUS followed by a space and then the number for missing status (specific to the site) and press enter. This creates the barcode. Then return the book manually and straight after and scan the ‘lost status barcode’. The book is quickly and easily marked as lost without leaving the circulation returns screen.

**History**
In Circulation, Loans go into a borrower’s screen and scan the HISTORY label or type the word HISTORY to see the books read by this user.

**Setdate**
A borrower wants items for a time period other than usual loan period. Go into Loans into the borrower’s name and type or scan SETDATE. Override passwords are required for this to work. Enter the required loan period. Scan the books. All books borrowed at this point in time will be due on the set date. Dropping out of the borrower will complete the process and the due dates will then be the normal dates relevant to that borrower.

**Box**
If a box container barcode is scanned, only the container will be returned. On it is ascertained that all content are present scan the BOX label to return the contents of the boxed item. In stocktaking, once it is ascertained that all content are present scan the the BOX label to stocktake the contents.

**Main/override password barcode.**
Turn this into a barcode, to save having to type in constantly. Laminate a card, and keep it secure. This increases security as you don’t have to tell anyone the main password, just give them the card, and retrieve it after. Same with the override password card.

To make the card, go to Passwords, an press the Barcode button, type in your password, press enter/OK and it will print out a sheet of barcodes (without the word being written underneath)

**Extending a book.**
The Controls covering this area are in switches, and the Loan Block passwords in Circulation Controls. The switches are “Extend by entering and item” and “Do not allow borrowing same item two times in a row.” At the beginning of the year make sure the due dates have been changed first.
In Circulation, go into a borrower. If the correct switch is set the book can just be re-scanned or the item number re-entered to extend it.

OR
Click on Options highlight Extend.

The alternative is to type the word Extend (may be passworded), where it says Scan barcode

Click each item to be extended, and the word Extend will appear on the right. Press OK to extend the marked items, and providing the due date is correct they will be extended.

**Reservations**
To reserve a book the settings must be right and there are a lot of settings. The borrower has the number of reservations set in Borrower tables. There are different settings for Circulation and for Searching, since reservations can be made from both, either or not at all. It can be passworded or not. There are also settings against the items for the number of reservation that can be made against an item.
Control Borrower types

Controls, Circulation Controls

1. Borrower is allowed to remove reservations
2. Allow reservations against status 1 books.
3. Visible button
4. Auto print reserve notice
5. Hold notification popup windows
6. Reservations password. Use same password in Search Controls to reduce confusion.

Sounds can be set for return reservations, and item on hold. Make sure play sounds is ticked. Highlight the action. Choose a sound for the drop down list at the bottom. Set.
Controls/search Controls.

1. Can make reservations
2. Reserve against status 1 item
3. Privacy code required to make reservation
4. Remove reservations
5. Reserve password. Make same as Circulation reserve password.
6. Borrower types allowed reserves even if overdue books.

Controls, reservation Controls
This screen can also be accessed from Circulation Loans, Edit in the top left corner.
To reserve a book.
In Circulation go into the borrower and press the reserve button.

Enter the item number.

Done. It is reserved.
In Search, go into the book and go to details and press the reserve button. Enter the borrower barcode number.

![Make a Reservation](image1)

If any book cannot be reserved a message will pop up. It is possible to see if a book is reserved in Search in Rows format, but not in columns format.

In Circulation message will remind a borrower that there is a book on hold.

![Make Reservation](image2)

When a reserved book is returned a message will show, and if a sound has been set it will make the noise.

![Returning](image3)
Search

How this works and appears is determined by Search Controls
 Depending on the search screen type in your search and press enter. The buttons of the screen are determined in Search Controls.

Keywords searches are the easiest.
Title, subject, author, series and barcode are more specific.
When doing specific searches using the asterisk will increase results
Dog versus Dog*

Also using a Boolean search is possible
Dogs or cats : OR means either word
dogs and cats : AND mean both words
dogs not cats. : Not will exclude any book with cats

More refinements.
The buttons along the bottom are determined in Search Controls

New items are added in Controls/Search controls.

Power search is taught in the Advanced course.(Read the annual)

Your details can be turned off for privacy reasons or passworded.

News is written in the Control/edit news

The bookbag will only be active for 30 minutes on the computer on which it is created.

Resources lists permissions are set up in Controls, and created from the bookbag. Read the factsheet on the webpage. Advanced Course.
The result will show in either column format or row format.

There are advantages and disadvantages to each.

Columns show more, and are scrollable. Columns can be sorted by clicking on the chosen heading. Show either item type or location.

Rows give more information, but less titles per page, and show the covers straight away. Shows both the item type, location and status. Items can be sent to the bookbag from this screen.

Clicking on the entry in both screen with show details, and allow reservations if turned on.

Icons set in Controls/Cataloguing list/Item types

What buttons appear is determined in search controls.
If a search does not show something that is known to be in the collection, check the search strategy, and then rebuild and reindex the authorities and indexes in Cataloguing /Rebuild and Reindex. Rebuilding and reindexing should be done each term.

**Overdues**

Overdues can be in the format list, or notices or an individual note.

Tick the groups, year levels or borrower type you want, or scan the barcodes of the borrowers of interest. Then click view.

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**Overdue lists**

Overdue date

Classes
Year levels
Borrower types
Miscellaneous
list people

Overdue date

Tick the groups, year levels or borrower type you want, or scan the barcodes of the borrowers of interest. Then click view.
Overdue notices
Set up the wording of the messages first in messages.

Set the number of overdue days applicable to the message if you set the messages to automatic. 999 is the last message.

Click on the message number to read or write the complete message.

Click on heading to sort.
Highlight one and click REMOVE to take it from this list.

Prints out the overdues in list format to all borrowers in the grid or only those highlighted.

Creates a text file format of the overdues list. This is displayed in a standard report window. The contents can be edited, printed and saved.

Double click an individual to see the titles of the overdue books.

Page layout
Prints out the overdues in list format to all borrowers in the grid or only those highlighted.
Overdue notices

Work whether it is to be done by group, year level, or type, and put the blue dot in the circle of choice. Click View.

- Click on heading to sort list
- Add the school's logo
- Work out which message and how the notice should look
- Remove takes the person from the list it doesn’t change anything else.

If the school's logo is to be used it should be stored in the Images folder in the Bookmark folder

Highlight if only wishing to print some of them

This will set the wording of the message to the number of days by which the book is overdue, as previously set in messages.
**Single overdue for just 1 person**

In *Circulation* call up the borrower. Choose Options. (If the overdue option does not show check the switches in Controls, Circulation Controls.)

1. **EXTEND** Extend items on loan to this borrower
2. **SET DATE** Set a different due date
3. **PRINT** Print items on loan
4. **OVERDUE** Print overdue notice
5. **SLIP** Activate narrow receipt printout (slip)
6. **DUMP** Activate wide receipt printout

**Personalise the message.**

**Decide how message should appear.**

**Here**

**Here**

**It can be saved for Word as a straight text file to attach, or put into an email.**
Stocktaking

The purpose of stocktaking is to account for resources. An ancillary task may be to winkle items back from those staff members who believe items to be their own personal property. But books don’t necessarily have to be returned. It may also provide a chance to tidy the shelves, and most importantly, reduce the frustration level of students who can’t find the items on the shelf by marking them as missing.

During stocktaking, it is a good idea to do at least a normal backup each night. In fact, extra hard disk backups during the day are even better. Mark the last book entered, then, do a special backup before recess time, and another mark on the book for the different lunchtime special backup to reduce repeat effort, should the computer have an unexpected hiccup. There is a backup button at the bottom of the screen for local disk backups. Then at night before leaving for the day, do the normal backup from Utilities. Important: never back up if there is a problem!

People can still borrow from the library while the stocktake is in progress. Turning the machine off at night will not lose anything. Make sure a normal usb backup is done each night. Several computers can be used at the same time to stocktake, but that also depends on the strength of the network.

A suggestion is to either tip up the books on the side and straighten them as you go, or vice versa, so that there is a ready visual cue as to what has been done or not done. As an added incentive, put a chocolate on the end shelf of each bay. Brandy might even be better, but it could produce skewed results by the end of the day and principal might frown on this practice. (Tip: invite him/her in to help).

If there isn’t a portable barcode reader, plug the standard reader into a laptop, and scan the numbers into Notepad (in Accessories. Do not use Word) Save the file to a USB and download the items following the instructions in Import Items.
Step 1. Make sure you update to the latest version of Bookmark.

Step 2. Set "Can be returned" checkboxes in Controls / Cataloguing Lists / Status types so items can be returned when scanned. Create status for missing items from stocktake.

Step 3. Start stocktake by setting the stocktake date to the date on which this stocktake is started.

Step 4. Input barcodes.

Step 5. Review the list of items not scanned. Chase up items not scanned.

Step 6. Mark the missing items into the new status.

Step 7. Clean up the mess.

Step 8. Relax.
Appendix

Backups:

The Bookmark mantra. Backup! Backup! Backup!

Backing up is the most important part of the Bookmark program. Backups are your lifeline in case disaster strikes. It always hits when least expected.

It is possible to set up an automatic data backup to a server or another location.

**Backing up is the librarian’s responsibility.**

*Do not rely on the server backup.*

*Keep the backups safe!*

From within Bookmark there are 3 different sorts of backups:

1. Normal quick (less than a minute) **data** backup. (data only),
   - to a USB flash drive or a formatted CD
   - to another part of the computer or another computer on a network,
   - to Bookmark’s location (”hard drive”)

2. monthly(1-2 minutes) backup. Includes book covers and sounds.
When External Drive is clicked...

Mark the drive on which the backup is to be stored. Can do more than 1 at the same time.
Server Backups

Many server backup systems are complex and require the services of a technician for restoring data. Invariably on the day disaster happens, the tech is unavailable. No matter what anyone says, relying on someone else to restore data can be a problem, particularly with server backups systems. Even if you are instructed by the network manager or technician not to bother, we strongly recommend backing up in Bookmark (Utilities) anyway.

Where to Backup?

Backing up to a usb flash drive is easiest. Have three flash drives, two for a normal backup and one for the monthly backups. Know the drive letter of each flash drive. This can change between different computers and even different flash drives or if the hardware configuration is changed on the same computer. The backup files are not large. (20-150 mg each backup), so the flash drive does not need to be high-capacity (2 Gb or more is fine). The size of backups depends on the size of the database.

The next easiest is an external hard drive.

Backing up to Bookmark’s location
Every time a backup is made, it is first created at Bookmark's location and then copied to the destination, even if an external location is selected.

A Bookmark's location backup is also useful for quick, middle-of-the-day backups.

Backing up to CD
Windows 7, 8 and 10 can both read and write to ordinary CD-R and DVD-R discs. These discs are more durable than any other media. To back up to a CD or DVD, first format it for read/write. Then simply select it from the list.

Backup Strategy
Back up each day to one flashdrive. The next week swap to another and do all backups for that week. Swap back the following week.

At the end of each month, do a special "Monthly backup" to a different external drive.

At the end of the year, backup to a special flashdrive, CD or other save location.

Checking Backups
This should be done once a term.

Giant Rule: DO NOT BACKUP IF THERE IS AN ERROR OF ANY KIND!!!!
Updating.

Bookmark is changed quite frequently. It is recommended that you update regularly.

There are 2 main ways to update.
1. Through the program (the easy way) or
2. Downloading from the internet then processing the downloaded file.

Method 1. Go to Utilities and choose Update.

Click on the top button "Download and process update in one step". If this method can be used (it may be blocked), a small program is downloaded from the Internet and opened.

If you see this, click Start Download and proceed. If not, this method is blocked, in which case use Method 2.
Method 2.
Go to the Internet and download the update file from the Bookmark webpage. Download it by saving it to somewhere you can find it again. The easiest place would be to a usb flashdrive.

The "Download an update file only via browser" button can be used for this.

After downloading and saving, back in Update, choose Process a previously downloaded update file.

Find the file using the file requestor box. Highlight it, and click OK. The process described above will take place. There is a fact sheet on file requestors on the webpage and in the factsheets.
Daily, Monthly, Annual Tasks

Daily:
Start of Day:
- Turn on server computer (Bookmark host) first
- Start Bookmark on the main computer
- Check date screen. Change due dates in Controls if required.

End of Day:
- Close modules on workstations first
- On the librarian's main computer, go to Utilities and make data backup
- Close Bookmark
- Switch off

Monthly:
- Adjust any end-of-month due dates if required

Each Term:
- Adjust any end-of-term fixed due dates

Half Yearly:
- Re-index key words (not absolutely necessary but useful)
- Rebuild series & subject authorities
- Check quality of backups

End of Year (See the end of year factsheet)
- Print useful statistics
- List of titles not borrowed may be useful
- Stocktake collection: can be done in sections, over the year, too
- Do archive backup
- Remove borrowers who have left
- Send a backup to Bookmark to keep in our Backup Bank as added security

Beginning of Year:
- Add new borrowers, either by importing or manually
- Adjust borrower classes and types
- Reset fixed due dates
- Clear all reservations or remove old reservations and holds
- Tidy the Deletions List (check with the auditors first about Departmental or school policy).
- Manage the Reviews as per school policy for students who are leaving (if you use them)
Sources of Help.

- **The Bookmark manual and factsheets**
  It is in the program, accessible from the Main Menu.

- **The Help desk. (from Magical Marion or Diligent Dean)**
  08 8226 1541 or 1800 26 1541
  If you have mobile reception we are happy to ring you back on your mobile so that you are next to the machine.
  decd.bookmark@sa.gov.au

- **The Bookmark website**
  The most update source of information
  http://bookmark.central.sa.edu.au

- **SCIS helpline – downloading catalogue records**
  1800 337 005 for downloading from SCIS

- **Dataman – labels and scanners**
  08 8322 7675 or 0 212 84 0637

- **Usergroups**
  WA and in SA. Check the website or ring the Help Desk for more information.

- **A neighbouring school pal.**