



# Borrowers

Revised 21/07/2023

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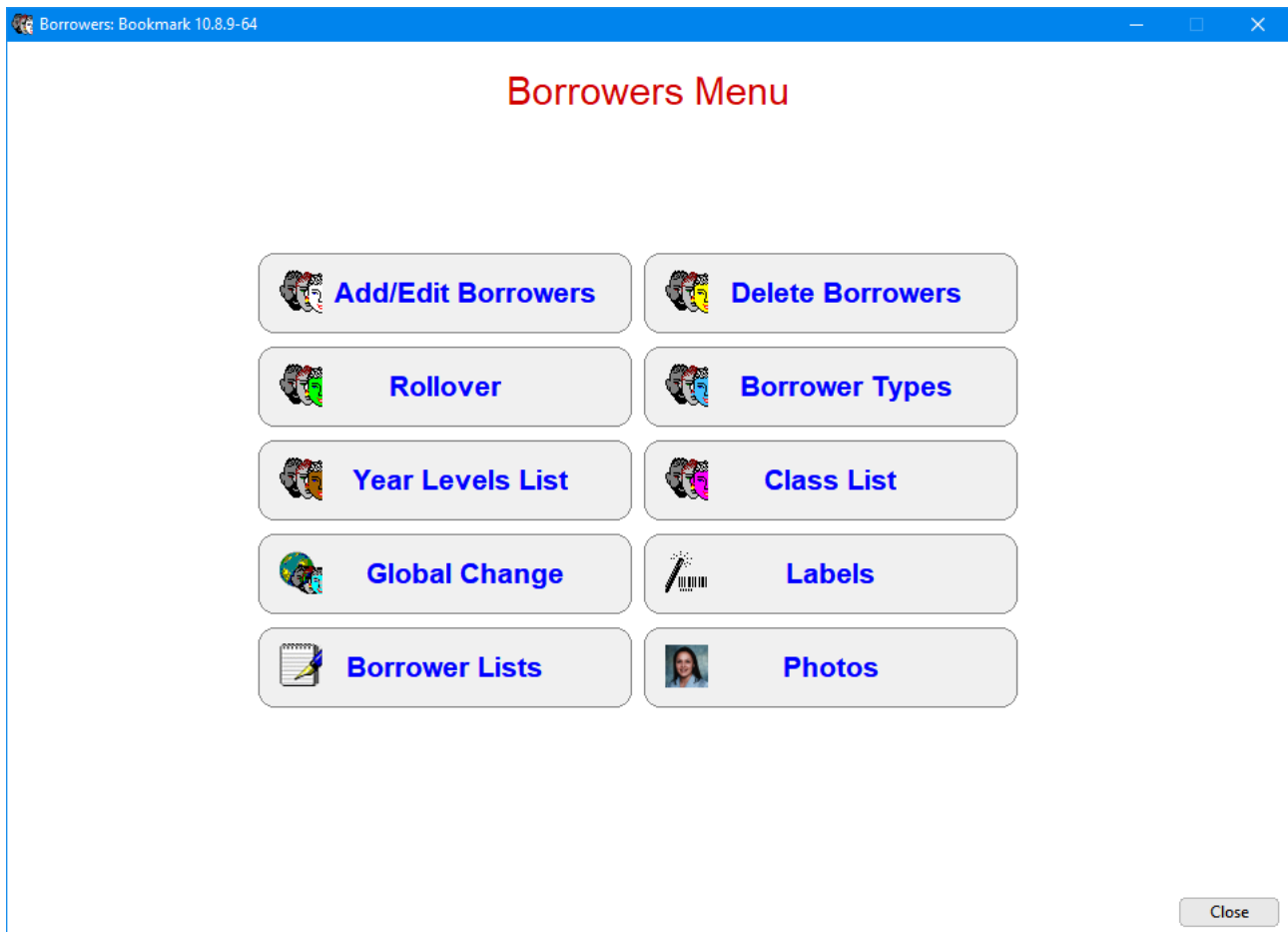
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# BORROWERS

The Borrower module is used to enter, remove, and update data about people who use the system.



From the Main Menu, the Borrowers Menu appears.



# Borrower Authority Lists

Bookmark maintains three special lists related to borrower data. These are technically called Authority Lists. Borrower Types, Classes, Year Levels.

The Borrower Types and Class lists should be set up before entering any borrower data. Year levels are automatically generated from the borrower data as it is entered. The lists can be changed after initial set up.



## Borrower Types

Each borrower has a "Borrower Type", which is a number from 1 to 99.

Borrower Type categories determine loan restrictions and conditions allocated to the borrower and may also be used in other functions. Every borrower has a type. Types are mandatory.

Bookmark allows up to 99 Borrower Types. Each is numbered.

*Borrower Types must be set up before entering any borrowers.*

Borrower Type Categories											
Click on a row to highlight. Press Enter or double-click to											
No	Description	Loan limit	Resv limit	Ovd block	Year levels	Duration/date	Due date	Restriction	Ovd limit	Count	
1	Years P, 1, 2	2	10	blocked	P,1,2	7	26/07/2023			135	
2	Year 3,4	3	10	blocked	3,4	7	26/07/2023	Restricted		56	
3	Year 5	3	10	blocked	5	7	26/07/2023	Restricted		21	
4	Year 6	5	10	blocked	6	7	26/07/2023	Restricted		30	
5	Ex LVS Students	4	2	blocked		30	18/08/2023			7	
6	Parents	30	5	no block		30	18/08/2023			3	
7	Teacher	400	10	no block		Fixed date	01/12/2021			17	
8	Ancillary Staff	300	5	blocked		Fixed date	20/11/2021			12	
9	Library Staff	300	5	blocked		30	18/08/2023			6	
10	Ten	4	5	blocked		14	02/08/2023			1	
11		10	5	blocked		14	02/08/2023				
12		10	5	blocked		14	02/08/2023				
13		10	5	blocked		14	02/08/2023				
14		10	5	blocked		14	02/08/2023				
15		10	5	blocked		14	02/08/2023				
16		10	5	blocked		14	02/08/2023				
17		10	5	blocked		14	02/08/2023				
18		10	5	blocked		14	02/08/2023				
19		10	5	blocked		14	02/08/2023				
20		10	5	blocked		14	02/08/2023				
21		10	5	blocked		14	02/08/2023				
22		10	5	blocked		14	02/08/2023				
23		10	5	blocked		14	02/08/2023				
24		10	5	blocked		14	02/08/2023				
25		10	5	blocked		14	02/08/2023				
26		10	5	blocked		14	02/08/2023				

EditPrintLoan limitsNamesMove

Close

Each Borrower Type requires six settings:

1. A *description* of the borrower type category.
2. The *loan limit* for all borrowers in that category.
3. The *reservation limit* for all borrowers in the category.
4. The *overdue block* condition.
5. The *year levels* associated with each type. (Not classes.)
6. The normal due date for each borrower category.
7. An optional *restriction* to the types of items this category of borrower may borrow.
8. The overdue limit determines the number of overdue items a borrower in this category may have before an alert is given during the loans process.

It can be easier to group all the levels which have the same loan limit and due date into one Borrower Type. In the example above Types 2 and 3 could be combined as they both have a loan limit of 3 and due date of 7 days.

## Adding and Editing Borrower Types

To add a new borrower type or edit an existing type, double click on the row, or click once to highlight then click on the *Edit* button.

The data from the row is copied into a popup editing window.

The screenshot shows a 'Edit Borrower Type' popup window with the title 'Edit Borrower Type 2'. The form contains the following fields and sections:

- Description:** Year 3,4
- Loan limit:** 10
- Resv limit:** 10
- Overdue block:** blocked (dropdown menu)
- Overdue limit:** (empty text box)
- Year levels:** 3,4 (with an 'Edit' button)
- Due date:** 7 days (26/07/2023) (with an 'Edit' button)
- Restriction:** Restricted (with a 'Restriction' button)
- Item type due dates:** A table with columns 'Icon', 'Description', and 'Due date'. It has 3 empty rows and an 'Edit' button.
- Item type loan limits:** A table with columns 'Icon', 'Description', and 'Loan limit'. It has 3 empty rows and an 'Edit' button.
- History cut-off date:** (empty text box) with an 'Edit' button.
- Loan alerts:** Three checkboxes:
  - ☐ Pop up alert in loans if borrower has previously loaned the item
  - ☐ Do not allow borrower to reborrow same item 2 times in a row
  - ☐ Allow one loan extension even if item is on hold to a diff borrower

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

- Press the Up/Down arrow keys or Tab key to jump down to the next row. Do not press Enter to go to the next line.
- Press Esc or Enter or click on Close to close the window. Data is automatically saved.

### Description

This describes the borrower type category. Required.

The following are examples of borrower types created by Bookmark users:

1	STUDENTS JP R-2	JUNIOR PRIMARY	STUDENTS
2	STUDENTS MP 3-5	UPPER PRIMARY	STAFF
3	STUDENTS UP 6-7	STAFF A (YR LOAN)	PARENTS
4	STAFF	STAFF B (10 WEEKS)	REFERENCE
5	PARENT	PARENTS/COMMUNITY	RESTRICTED
6		VISITING TEACHERS	FACULTY
7		HIGH SCHOOL STUDENTS	
8		HIGH SCHOOL STAFF	
9		EX-TEACHERS	

Upper case letters are optional. Mixed case is allowed and easier to read.

### Loan Limit

This is the maximum number of items any borrower of this type is permitted to have on loan. The value here can be from 0 to 10000. If a value already exists and you wish to change it, click on the editbox, use the **Delete or Backspace** key to rub it out and type in the new value. All borrowers of that type having the previous value will have their loan limit revised to the new value.

- Each borrower also has their own individual loan limit, which over-rides the global limit set here. This individual loan limit is set in Borrowers Add/Edit (see below).
- When changing the loan limit, borrowers with individual different limits are not changed.

### Reservation Limit

This is the maximum number of reservations a borrower of this type may make. This value can be between 0 and 255.

### Overdue Block

This droplist tells Bookmark to stop loans if a borrower of this type has overdue items. Set to No Blocked to allow borrowers to borrow even if they have overdue items.

### Overdue Limit

This is the number of overdue items a borrower of this type can have before they are blocked from borrowing. If this field is blank or 0, then an overdue block is triggered even if they have one overdue item. This is the default condition. However, a number entered here determines when the overdue block occurs. A value of 2 means this type of borrower can have 2 overdue items without a block being issued.

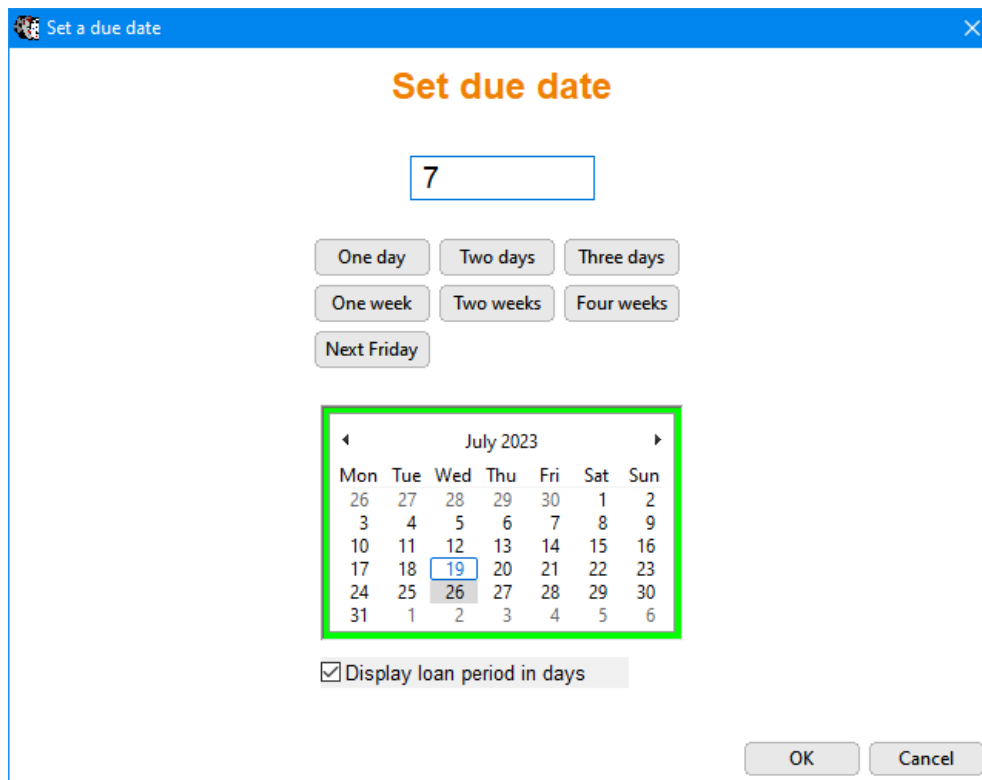
### Year levels

List the year (grade) levels associated with the borrower type. Separate multiple entries with a comma. Numbers can go from 0 to 12. Do not put a 0 (zero) at the front – e.g. do not use 03, just 3. Staff and others can be left blank or an identifying term entered like S.

The Year Levels button can be used to pop up a dialog for entering levels.







**Set a due date**

7

One day Two days Three days

One week Two weeks Four weeks

Next Friday

July 2023						
Mon	Tue	Wed	Thu	Fri	Sat	Sun
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

☒ Display loan period in days

OK Cancel

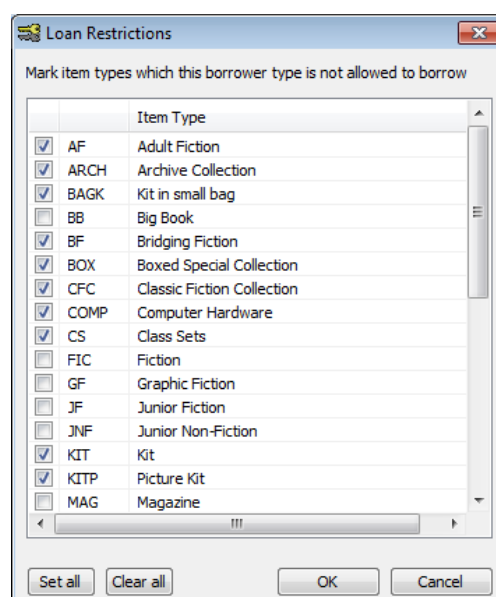
To specify a due date, enter either the number-of-days loan period or the desired fixed date, or use the Calendar button to pop up a calendar window.

The “Display loan period in days” checkbox is the difference between the type of due dates. Tick the box for number-of-days loans. No tick = fixed date type.

With the calendar, click on the desired due date relative to today. This is marked in grey. (The current date remains outlined in blue.) Tick the "Fixed date" checkbox if the date is to be fixed instead of floating. Click on OK to set.

## Loan Restriction

This feature controls the types of items that a certain Type of borrower can borrow. It is rarely used. Click on the button which says *Unrestricted*.



**Loan Restrictions**

Mark item types which this borrower type is not allowed to borrow

	Item Type
<input checked="" type="checkbox"/>	AF Adult Fiction
<input checked="" type="checkbox"/>	ARCH Archive Collection
<input checked="" type="checkbox"/>	BAGK Kit in small bag
<input type="checkbox"/>	BB Big Book
<input checked="" type="checkbox"/>	BF Bridging Fiction
<input checked="" type="checkbox"/>	BOX Boxed Special Collection
<input checked="" type="checkbox"/>	CFC Classic Fiction Collection
<input checked="" type="checkbox"/>	COMP Computer Hardware
<input checked="" type="checkbox"/>	CS Class Sets
<input type="checkbox"/>	FIC Fiction
<input type="checkbox"/>	GF Graphic Fiction
<input type="checkbox"/>	JF Junior Fiction
<input type="checkbox"/>	JNF Junior Non-Fiction
<input checked="" type="checkbox"/>	KIT Kit
<input checked="" type="checkbox"/>	KITP Picture Kit
<input type="checkbox"/>	MAG Magazine

Set all Clear all OK Cancel

Tick the Item Types which a borrower is *not allowed to borrow*. Leave blank the ones which can be issued.

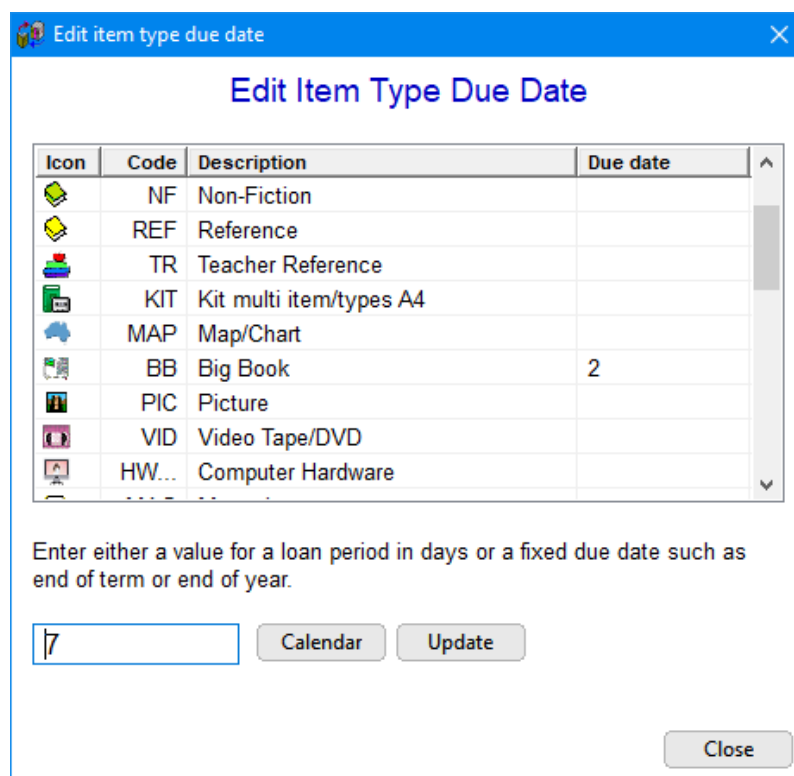
To unrestrict all, click on *Clear all*.

- Items can be individually restricted to different types of borrowers, too. That is the regular way to set up a loan restriction. This method is global.

## Item Type Due Dates

In addition to the normal due date, different types of items may have special due dates for each borrower type. DVD's could be one day to a borrower category, and one week or normal to another.

Click on Edit to bring up the Item Type Due Date dialog.



Icon	Code	Description	Due date
	NF	Non-Fiction	
	REF	Reference	
	TR	Teacher Reference	
	KIT	Kit multi item/types A4	
	MAP	Map/Chart	
	BB	Big Book	2
	PIC	Picture	
	VID	Video Tape/DVD	
	HW...	Computer Hardware	

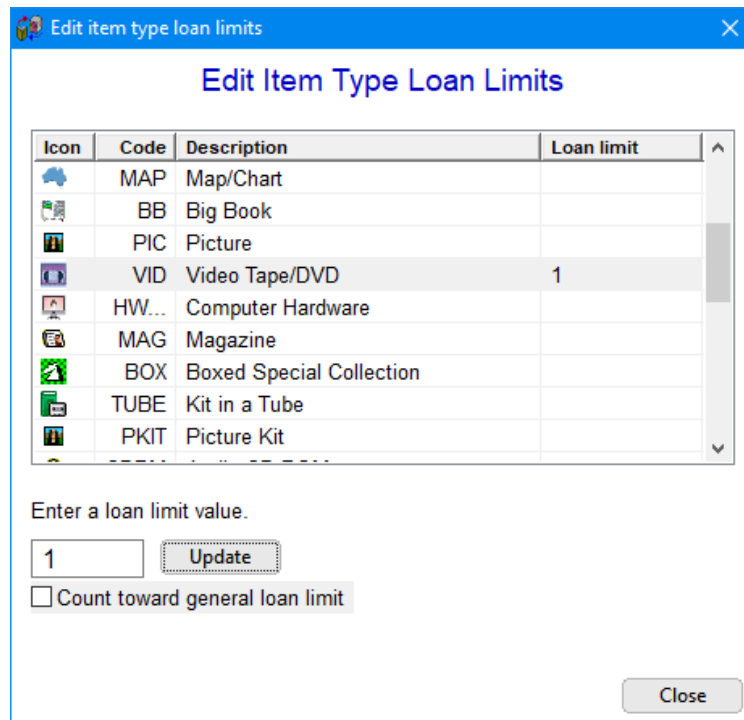
Enter either a value for a loan period in days or a fixed due date such as end of term or end of year.

Click on the item type to highlight.

In the editbox next to the "Calendar" button, either enter the loan period or the fixed due date. Or use the Calendar button to set.

## Item Type Loan Limits

This controls allows setting a special loan limit to selected item types for this borrower type. Example: 1 DVD is allowed to be issued per person.



Icon	Code	Description	Loan limit
	MAP	Map/Chart	
	BB	Big Book	
	PIC	Picture	
	VID	Video Tape/DVD	1
	HW...	Computer Hardware	
	MAG	Magazine	
	BOX	Boxed Special Collection	
	TUBE	Kit in a Tube	
	PKIT	Picture Kit	

Enter a loan limit value.

☐ Count toward general loan limit

Click Close to save.

## Loan Limits

The *Loan Limits* button at the bottom of the Borrower Types list will force all borrowers to have the loan limit specified by the borrower type. Borrowers who have individually set loan limits different to the type will have them reset.

## Names

The Names button lists borrowers with the highlighted type.

## Move

The Move button can be used to shift all borrowers from one BT number to another. It can combine two types. After combining, be sure to Edit.

## Arrows

The up/down arrow shifts the borrower type up or down the list. All borrowers in the database are updated when this happens.



## Class List

Every borrower can belong to a class or group. This is optional as the class field can be empty. Some schools only put classes against students. Others have a 'Staff' class. Classes are used for overdue notices and reports. They are not normally related to Borrower Types.

Use the Class List button to open a window that is used to manage the list of classes.

Class	Class name/Teacher/Description	Email	Count	
1SB			30	
2MB			26	
3ST			28	
4LV			27	
5RT			21	
6SR			30	
DIT	Dean Hodgson	Dean.Hodgson@sa.gov.au	4	
ELVS			8	
KAG			13	
KEC			13	
LO			11	
PRNT			28	
STAF			21	
TELC 3DM			9	
TELC 3DW			9	
TELC 5D			10	

Class code:  Class name:  Class email:

To add a new class to the list, type its code in the editbox at the bottom. Entering a class (teacher) name and email is optional. Click on Update or press the enter key.

Use the Rebuild button to make sure the class list reflects the classes against borrowers.

Tip: at the start of the year, go here to change the class list.

Note: this area does not "assign" students to new classes. That is done in the Rollover area.

- Remove. This deletes a class from the list and against all borrowers.
- Change. The name of a class can be changed. Click on it in the list first to highlight. Type the change in the editbox then click on the Change button last.
- List. Shows all borrowers with that class code.

- Print. Outputs the class list to a printer.
- Rebuild. Clears the class list and makes a new one using the classes against all borrowers. It will automatically remove all classes in the list with no borrowers. This is a housekeeping task that only takes a few seconds.



## Year Levels List

### Year Levels

The Year Levels list is similar to classes, but these are the grades for students and not necessarily the classes (rooms).

Year level	Count
1	28
2	29
3	30
4	26
5	20
6	30
E	8
K	27
P	27
S	34
T	27

Buttons: Remove, Change, List, Print, Rebuild

Input field:  Add

Close

This window works the same way as the Classes one described above.

# Add / Edit Borrowers



**Important note:** *Borrower Types must be established before entering any borrowers. See the Borrower Type section earlier in this document.*

The Add/Edit Borrowers function is used to add new borrowers, edit and modify data against existing borrowers, view information about a specific borrower such as their loans or history, and it can also be used to delete an individual borrower.

Add/Edit Borrowers works with one borrower at a time. It is ideal for adding borrowers but can be time-consuming when changing classes for students. The "Rollover" section can help speed up that process.

Add / Edit Borrowers

Add/Edit Borrowers

Enter borrower number or barcode or any part of a name:  
  
Highest number is 497

Unused numbers

Find by name

Select from list of all borrowers

Defaults for new borrowers

Borrower type0 - Choose

Class/Group

Year level

☒ Remember these settings

Go back

## Enter Borrower Number or Barcode

Every borrower stored in the database has a unique "borrower record number" or *borrower number*. This is a value from 1 upwards. Numbers up to and even beyond 1 million can be used.

*Bookmark does not automatically assign this code.*

Further, these numbers should not be assigned randomly. Reusing deleted numbers can be done but is not recommended.

Borrower numbers are strongly related to the borrower barcode.

The borrower number is *part of the barcode* label. A complete borrower barcode can be scanned or just the record number can be typed. For example, a typical borrower barcode label might show:

**B 0225 00135 6      or      2 0225 000135 3      or      B 00135 X 0225**

(The format of a barcode can vary depending on the type you are using. The left is the standard Bookmark type, but there are other types and Bookmark can use them, such as the others. The text beneath barcode stripes may not show the gaps between sections of a barcode. See the Getting Started manual for an explanation of different barcode types.)

The borrower's record number on the examples is 135. Bookmark accepts either the full label or just that "short-hand" number. The leading 0's (00135) do not have to be included when typing a borrower number. Bookmark often shows just the number rather than the full barcode.

*Either scan the entire barcode or just type in the borrower's number. Scanning is recommended.*

- Different format barcodes may show the borrower number in a different position or with more leading zeros. Some may start with a 2 or other characters, too. The record number is retrieved from the barcode based on criteria set in Controls / Barcode Settings discussed in the Controls chapter.
- The first character of the barcode indicates if it belongs to a borrower or an item. For borrowers this may be the letter B or the numeral 2 or something else, depending on the type of barcodes, and is specified in Controls / Barcode Settings. Any leading character in a full barcode which is not for the borrower is considered an item.
- The *site ID* is ignored, even if present on the label.
- The school administration system number can be used as the borrower number and barcode, provided it is all digits (no letters) and below 1,000,000 in value.
- Borrowers *can* have a barcode that is nothing like their record number. Their record number might be 67 but the barcode is ABCD12. Some schools use the student ID as the barcode, especially if they have ID cards. However, there is normally no advantage in doing this.
- Bookmark does not automatically allocate numbers to new borrowers unless it is importing (see below). You must choose the number to use for each borrower.

For a new borrower, a new, as-yet unused borrower number (or barcode) can be entered. If a number is entered for an existing borrower, their data will appear and can be edited.

Beneath the inputbox the highest number so far entered is displayed for reference.

When entering a new borrowers you can:

1. Use the "next highest" number above the highest used so far. Strongly recommended.
2. Find an "unused number" and re-use it.
3. If you have a borrower barcode, that can be scanned.

*Note: If a barcode or borrower number is not types and Enter is pressed, then the first borrower already in the database is presented.*

Click on GO or press Enter to proceed.

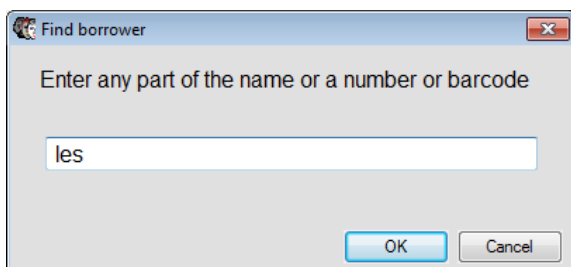
Click on Go back, close the window or press Esc to go back to the Borrowers Menu.

## Find by name

Borrowers can be located by searching for their name as well. There are three ways to do this:

- Type any part of a name on the line where the barcode is normally scanned, or
- Use the Find by Name button.
- Select from a list of all borrowers.

Find by name allows entering a few letters or a name. This is identical to typing the letters in the barcode entry inputbox.

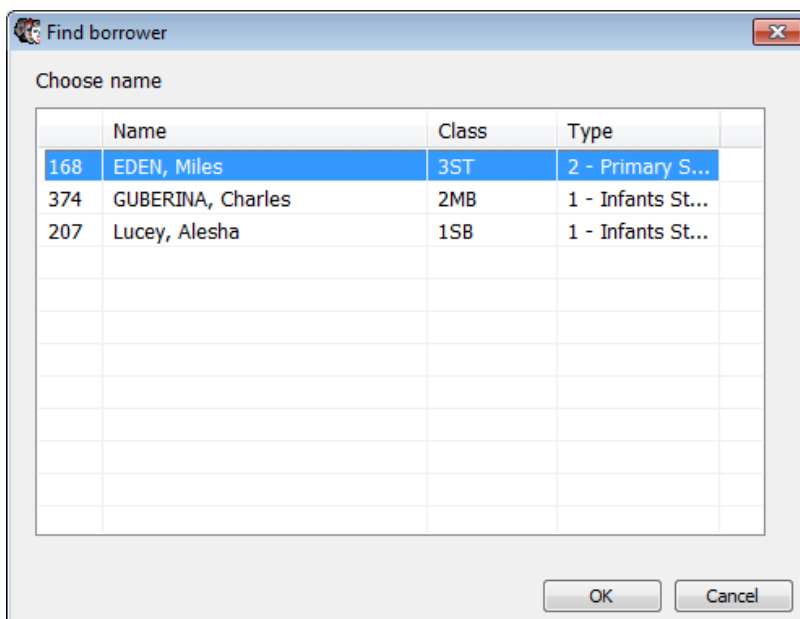


Find borrower

Enter any part of the name or a number or barcode

les

OK Cancel



Find borrower

Choose name

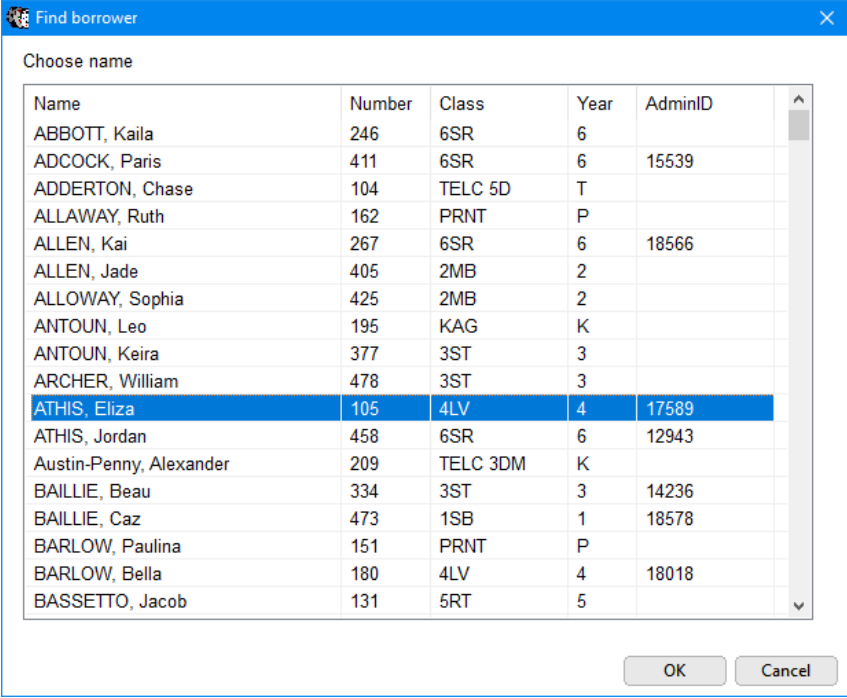
	Name	Class	Type
168	EDEN, Miles	3ST	2 - Primary S...
374	GUBERINA, Charles	2MB	1 - Infants St...
207	Lucey, Alesha	1SB	1 - Infants St...

OK Cancel



## Select from a list of borrowers

Sometimes it is easier to locate a borrower by their name.

A dialog box titled "Find borrower" with a close button (X) in the top right corner. Below the title bar is a label "Choose name". Underneath is a table with five columns: "Name", "Number", "Class", "Year", and "AdminID". The table contains 18 rows of borrower data. The row for "ATHIS, Eliza" is highlighted in blue. At the bottom right of the dialog are two buttons: "OK" and "Cancel".

Name	Number	Class	Year	AdminID
ABBOTT, Kaila	246	6SR	6	
ADCOCK, Paris	411	6SR	6	15539
ADDERTON, Chase	104	TELC 5D	T	
ALLAWAY, Ruth	162	PRNT	P	
ALLEN, Kai	267	6SR	6	18566
ALLEN, Jade	405	2MB	2	
ALLOWAY, Sophia	425	2MB	2	
ANTOUN, Leo	195	KAG	K	
ANTOUN, Keira	377	3ST	3	
ARCHER, William	478	3ST	3	
ATHIS, Eliza	105	4LV	4	17589
ATHIS, Jordan	458	6SR	6	12943
Austin-Penny, Alexander	209	TELC 3DM	K	
BAILLIE, Beau	334	3ST	3	14236
BAILLIE, Caz	473	1SB	1	18578
BARLOW, Paulina	151	PRNT	P	
BARLOW, Bella	180	4LV	4	18018
BASSETTO, Jacob	131	5RT	5	

Locate the borrower in the list, click on their row to highlight then click on OK or press Enter. Their number is entered.

## Add/Edit Borrowers Display and Fields

This display is used to enter or edit a single borrower's data.

If the record is empty -- i.e. deleted or not yet used or a new borrower -- no data appears next to the headings.

### Fields and Records

Data is spread across a number of *fields*.

- A *Record* is the entire set of data about one person (or one item). Everything shown above is one record.
- Records consist of *fields*. A field is one part of a record's data. It is the places where data is put. On the screen, it is one line or a data entry box.
- *Field headings* describe the contents of the field. These are to the left of the space in which data is entered.

The space into which data is typed is called an inputbox, an editbox, a textbox, an input line and probably many other things.

The example above shows one person's set of data, or one borrower record.

## How to Use the Controls

The Borrower Add/Edit window contains many special controls.

Across the top of the window is the *Titlebar*. It shows the name of the window.



At the right side of the titlebar are three small buttons.

The left button is the *minimize control*. Click on this *minimizes* (hides) the window and pushes it into the Taskbar. (Usually across the bottom of the screen.) It allows the window to be temporarily put aside and then brought back.

The middle button is a *maximize control*. Click on this to make the window fill the screen. This control has been disabled on most Bookmark windows as changing a window's size can disrupt the carefully designed display.

The right button is a *close control*. It is usually a white X within a red box. This closes the window.

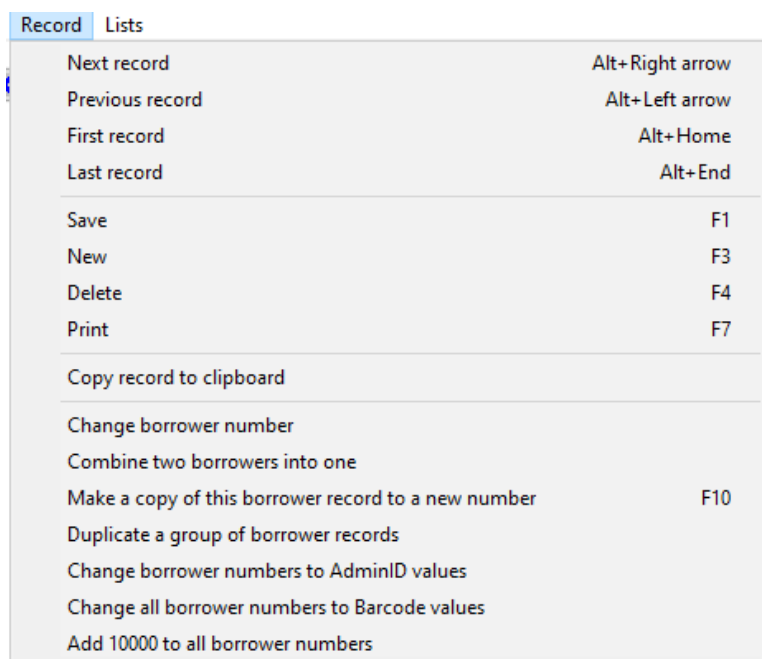
- *ALT and F4* keys held down together also closes any window.
- Many Bookmark windows can be closed by pressing the Esc (escape) key as well. In most cases, data is not saved.

Beneath the Titlebar may be a *Menubar*.



Most windows in Bookmark do not have a menubar but the Borrower Add/Edit window does.

Each word presents a drop-down menu with other selections. Many of the selections are available on the window as buttons, too, but not necessarily everything. Some functions are only in the dropdown menus. Each selection represents an action. Special "hot keys" are often assigned to an action so a keypress can act as a shortcut to the same action.

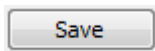


Below the Menubar are various *buttons* or pushbuttons. Clicking on these causes an action. Many of these buttons can also be found in the Record dropdown list.

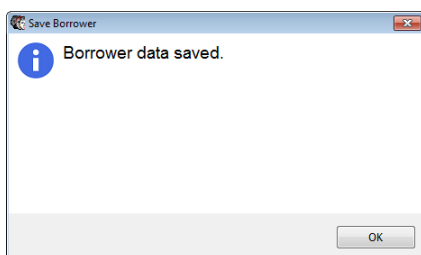


These buttons navigate through the records without saving. Click on the first button to jump to the borrower record with the lowest number. Click on the < button to go to the previous record. Click on > to go to the next record. Click on the rightmost button to jump to the record with the highest number.

- Hovering the mouse over a button often displays a "tool tip" briefly describing the action.

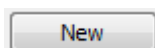


Click on this button to save any changes made to the data. After saving,



appears. When this notice dialog is closed, the previous window re-appears ready to receive another barcode or number.

- Hotkey F1 does the same thing as clicking on the Save button.
- Hotkey F2 saves the record but does not pop back to the previous window. Instead, the current record remains onscreen.

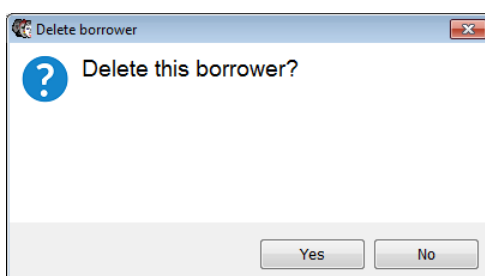


This button can be used to create a new borrower record. It first opens the window showing the unused numbers. Select a number or enter the new borrower's number or barcode. A blank form is presented which can be filled out and saved. You can also obtain a blank record by entering an unused number on the previous window.

- Hotkey F3



The Delete button can be used to remove the visible borrower from the database.

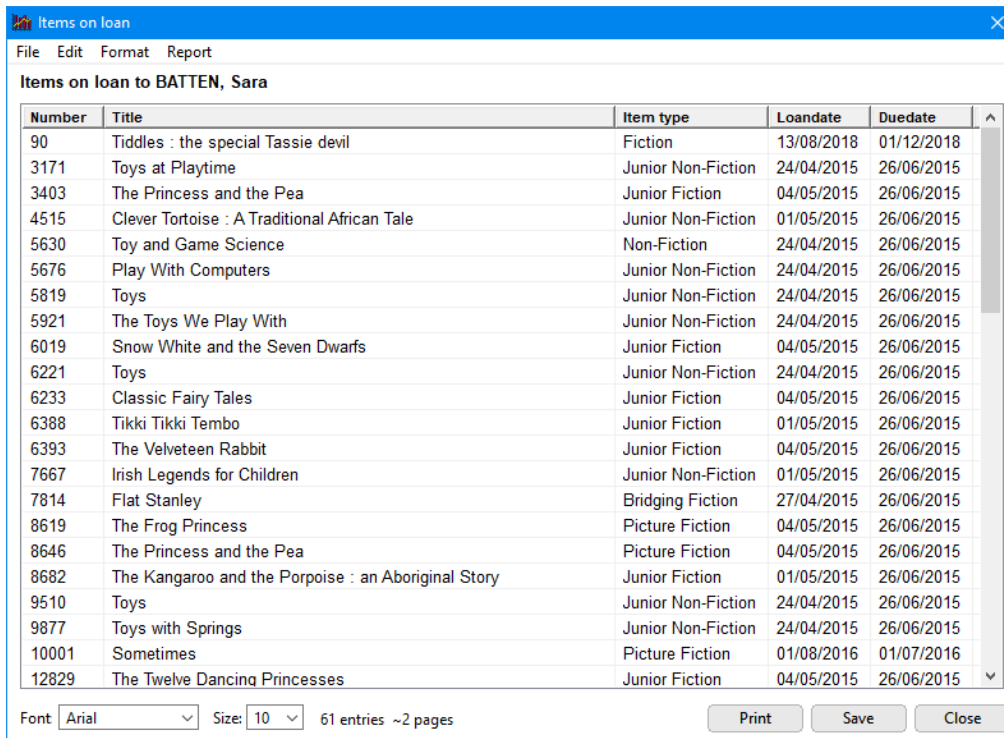


- Hotkey F4

## Loans

- Hotkey F8

The Loans button opens a dialog that lists all items currently on loan to this borrower.



Items on loan to BATTEN, Sara

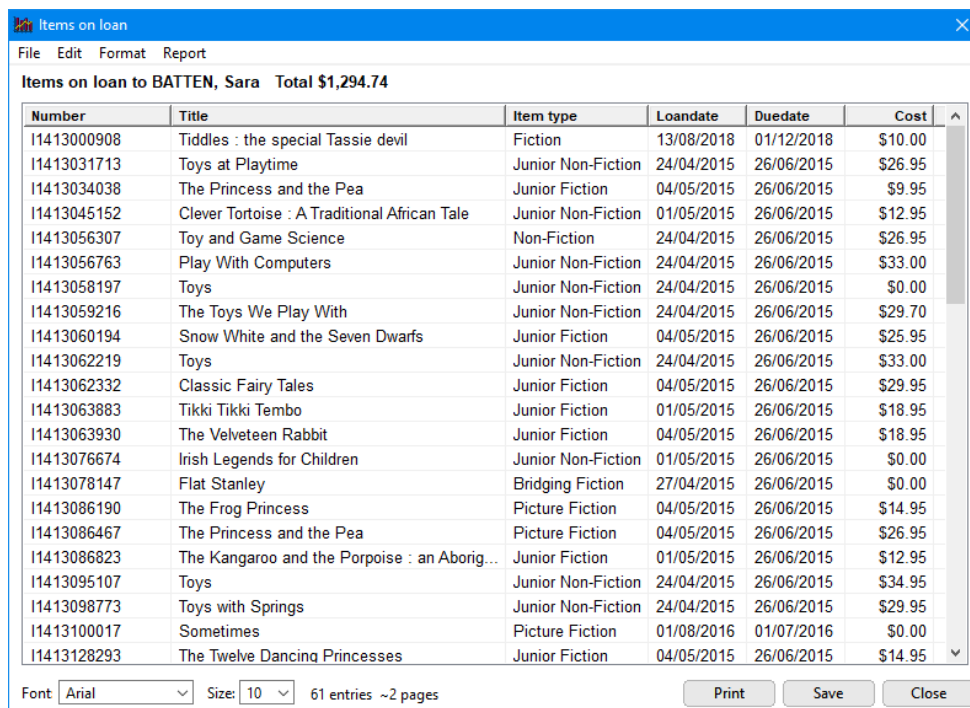
Number	Title	Item type	Loandate	Due date
90	Tiddles : the special Tassie devil	Fiction	13/08/2018	01/12/2018
3171	Toys at Playtime	Junior Non-Fiction	24/04/2015	26/06/2015
3403	The Princess and the Pea	Junior Fiction	04/05/2015	26/06/2015
4515	Clever Tortoise : A Traditional African Tale	Junior Non-Fiction	01/05/2015	26/06/2015
5630	Toy and Game Science	Non-Fiction	24/04/2015	26/06/2015
5676	Play With Computers	Junior Non-Fiction	24/04/2015	26/06/2015
5819	Toys	Junior Non-Fiction	24/04/2015	26/06/2015
5921	The Toys We Play With	Junior Non-Fiction	24/04/2015	26/06/2015
6019	Snow White and the Seven Dwarfs	Junior Fiction	04/05/2015	26/06/2015
6221	Toys	Junior Non-Fiction	24/04/2015	26/06/2015
6233	Classic Fairy Tales	Junior Fiction	04/05/2015	26/06/2015
6388	Tikki Tikki Tembo	Junior Fiction	01/05/2015	26/06/2015
6393	The Velveteen Rabbit	Junior Fiction	04/05/2015	26/06/2015
7667	Irish Legends for Children	Junior Non-Fiction	01/05/2015	26/06/2015
7814	Flat Stanley	Bridging Fiction	27/04/2015	26/06/2015
8619	The Frog Princess	Picture Fiction	04/05/2015	26/06/2015
8646	The Princess and the Pea	Picture Fiction	04/05/2015	26/06/2015
8682	The Kangaroo and the Porpoise : an Aboriginal Story	Junior Fiction	01/05/2015	26/06/2015
9510	Toys	Junior Non-Fiction	24/04/2015	26/06/2015
9877	Toys with Springs	Junior Non-Fiction	24/04/2015	26/06/2015
10001	Sometimes	Picture Fiction	01/08/2016	01/07/2016
12829	The Twelve Dancing Princesses	Junior Fiction	04/05/2015	26/06/2015

Font: Arial Size: 10 61 entries ~2 pages

Print Save Close

The cost column can be displayed or hidden.

The borrower numbers can be replaced with full barcodes.



Items on loan to BATTEN, Sara Total \$1,294.74

Number	Title	Item type	Loandate	Due date	Cost
I1413000908	Tiddles : the special Tassie devil	Fiction	13/08/2018	01/12/2018	\$10.00
I1413031713	Toys at Playtime	Junior Non-Fiction	24/04/2015	26/06/2015	\$26.95
I1413034038	The Princess and the Pea	Junior Fiction	04/05/2015	26/06/2015	\$9.95
I1413045152	Clever Tortoise : A Traditional African Tale	Junior Non-Fiction	01/05/2015	26/06/2015	\$12.95
I1413056307	Toy and Game Science	Non-Fiction	24/04/2015	26/06/2015	\$26.95
I1413056763	Play With Computers	Junior Non-Fiction	24/04/2015	26/06/2015	\$33.00
I1413058197	Toys	Junior Non-Fiction	24/04/2015	26/06/2015	\$0.00
I1413059216	The Toys We Play With	Junior Non-Fiction	24/04/2015	26/06/2015	\$29.70
I1413060194	Snow White and the Seven Dwarfs	Junior Fiction	04/05/2015	26/06/2015	\$25.95
I1413062219	Toys	Junior Non-Fiction	24/04/2015	26/06/2015	\$33.00
I1413062332	Classic Fairy Tales	Junior Fiction	04/05/2015	26/06/2015	\$29.95
I1413063883	Tikki Tikki Tembo	Junior Fiction	01/05/2015	26/06/2015	\$18.95
I1413063930	The Velveteen Rabbit	Junior Fiction	04/05/2015	26/06/2015	\$18.95
I1413076674	Irish Legends for Children	Junior Non-Fiction	01/05/2015	26/06/2015	\$0.00
I1413078147	Flat Stanley	Bridging Fiction	27/04/2015	26/06/2015	\$0.00
I1413086190	The Frog Princess	Picture Fiction	04/05/2015	26/06/2015	\$14.95
I1413086467	The Princess and the Pea	Picture Fiction	04/05/2015	26/06/2015	\$26.95
I1413086823	The Kangaroo and the Porpoise : an Aborig...	Junior Fiction	01/05/2015	26/06/2015	\$12.95
I1413095107	Toys	Junior Non-Fiction	24/04/2015	26/06/2015	\$34.95
I1413098773	Toys with Springs	Junior Non-Fiction	24/04/2015	26/06/2015	\$29.95
I1413100017	Sometimes	Picture Fiction	01/08/2016	01/07/2016	\$0.00
I1413128293	The Twelve Dancing Princesses	Junior Fiction	04/05/2015	26/06/2015	\$14.95

Font: Arial Size: 10 61 entries ~2 pages

Print Save Close

History

Loan history

431 items in history for borrower 3 BATTEN, Sara

Item	Title	Date issued	Type	Call number
90	Tiddles : the special Tassie devil	13/08/2018	FIC	JF Law
10001	Sometimes	01/08/2016	PF	PF ARN
35248	Toys and games: then and now	08/05/2015	JNF	J688.72 Hop
27397	The Princess and her Panther	04/05/2015	PF	PF Orr *
19934	Rapunzel	04/05/2015	QF	QF Gri
6019	Snow White and the Seven Dwarfs	04/05/2015	JF	JF Gri
8646	The Princess and the Pea	04/05/2015	PF	PF And
12829	The Twelve Dancing Princesses	04/05/2015	JF	JF Gri
8619	The Frog Princess	04/05/2015	PF	PF Orm
16702	Cinderella	04/05/2015	JF	JF GER
19259	The Frog Who Would Be King	04/05/2015	JF	JF WAL
6233	Classic Fairy Tales	04/05/2015	JF	J398.2 Cla
27067	The Princess and the Packet of Frozen Peas	04/05/2015	JF	JF And *
3403	The Princess and the Pea	04/05/2015	JF	JF AND
27681	The Legend of the Golden Snail	04/05/2015	JF	JF Bas *
34593	Herb, the vegetarian dragon	04/05/2015	JF	JF Bas
30721	Lone Pine	04/05/2015	JF	JF Bro *
20431	Uno's Garden	04/05/2015	JF	JF Bas *
6393	The Velveteen Rabbit	04/05/2015	JF	JF Bia *
33230	How the Kangaroos got their Tails : an Aboriginal story	01/05/2015	BB	BB 298 Mun
15891	How The Kangaroos Got Their Tails	01/05/2015	BB	BB 298 Mun
33232	Warnayarra the Rainbow Snake : an Aboriginal story	01/05/2015	BB	BB 298 War
33229	When the Snake Bites the Sun : an Aboriginal story	01/05/2015	BB	BB 298 Mow
27581	How Frogmouth Found her Home	01/05/2015	JF	JF Kwa *

View Print Reset Clear Close

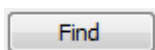
This lists items previously borrowed by this person, including current items on loan.

- Highlight a title and click on View or double-click on the title to see the item's details.
- Print prints out the list to a printer.
- Reset can be used to change the latest loan date.
- Clear erases this borrower's history list.

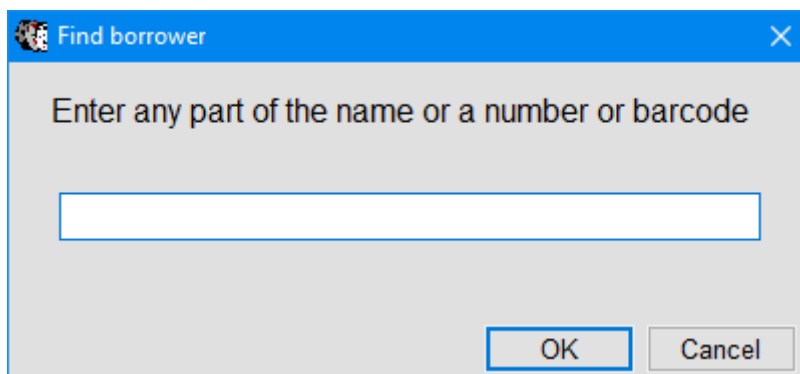
Print

Prints the data for this borrower record.

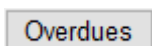
- Hotkey F7



Find can be used to locate a borrower by name instead of number. It works as described previously.



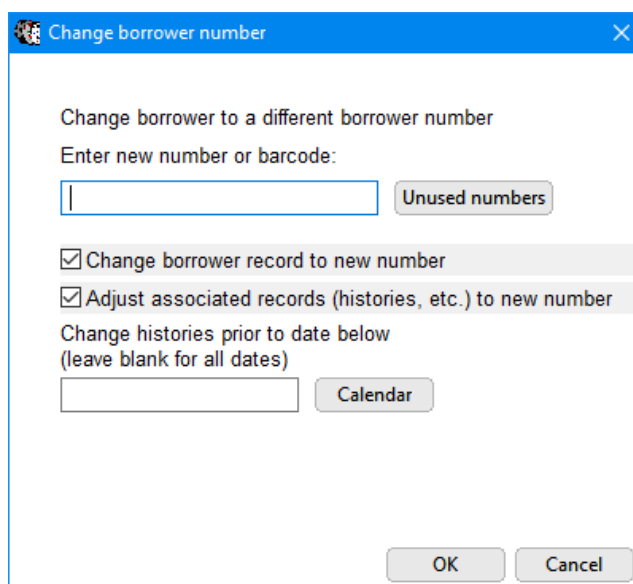
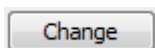
- Hotkey F6



The Overdues button lists all overdue items the borrower has had so far, if any.

A status of Returned indicates the item is no longer on loan and not overdue.

Items with a status of "On loan" are overdue.

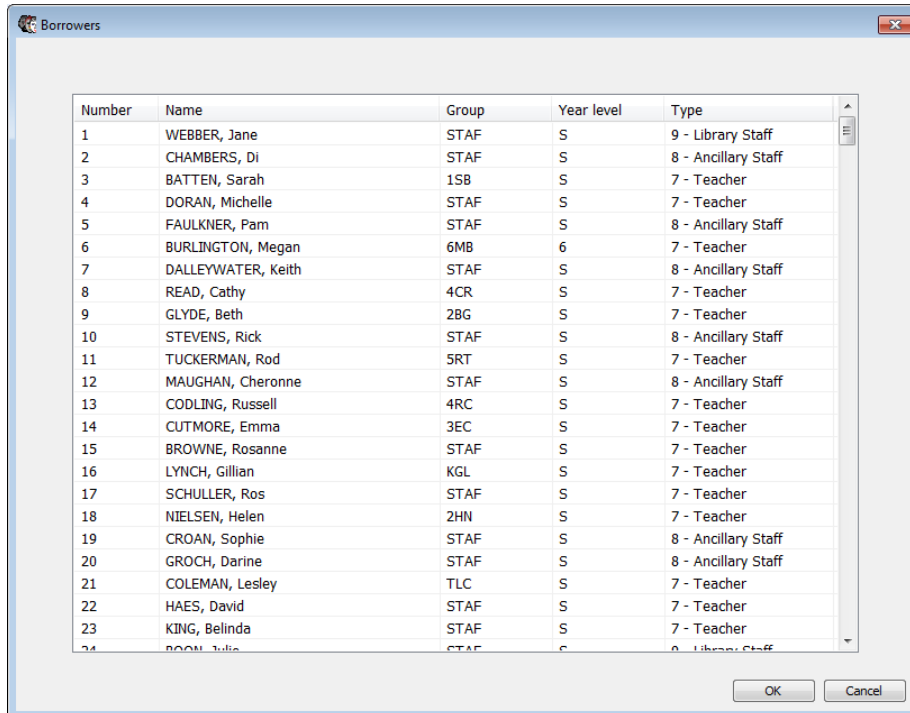


The Change function can be used to change an existing borrower's number/barcode to another number. All references to that borrower are altered throughout the database. *This is the way to change a borrower's number correctly!* History records, items on loan, and reserves are correctly changed.

In addition to the above, other functions are available via the dropdown Menubar.

## All Borrowers

In the Lists dropdown menu is an option that opens a window listing all borrowers.



Number	Name	Group	Year level	Type
1	WEBBER, Jane	STAF	S	9 - Library Staff
2	CHAMBERS, Di	STAF	S	8 - Ancillary Staff
3	BATTEN, Sarah	1SB	S	7 - Teacher
4	DORAN, Michelle	STAF	S	7 - Teacher
5	FAULKNER, Pam	STAF	S	8 - Ancillary Staff
6	BURLINGTON, Megan	6MB	6	7 - Teacher
7	DALLEYWATER, Keith	STAF	S	8 - Ancillary Staff
8	READ, Cathy	4CR	S	7 - Teacher
9	GLYDE, Beth	2BG	S	7 - Teacher
10	STEVENS, Rick	STAF	S	8 - Ancillary Staff
11	TUCKERMAN, Rod	SRT	S	7 - Teacher
12	MAUGHAN, Cheronne	STAF	S	8 - Ancillary Staff
13	CODLING, Russell	4RC	S	7 - Teacher
14	CUTMORE, Emma	3EC	S	7 - Teacher
15	BROWNE, Rosanne	STAF	S	7 - Teacher
16	LYNCH, Gillian	KGL	S	7 - Teacher
17	SCHULLER, Ros	STAF	S	7 - Teacher
18	NIELSEN, Helen	2HN	S	7 - Teacher
19	CROAN, Sophie	STAF	S	8 - Ancillary Staff
20	GROCH, Darine	STAF	S	8 - Ancillary Staff
21	COLEMAN, Lesley	TLC	S	7 - Teacher
22	HAES, David	STAF	S	7 - Teacher
23	KING, Belinda	STAF	S	7 - Teacher
24	DOON, Julie	STAF	S	8 - Library Staff

Click on the name to highlight then click on OK and that borrower's data appears on the Add/Edit window.

## Additional Tasks

The Record dropdown menu contains several additional functions.

### *Copy Record to Clipboard*

Click on Record on the Menubar then on *Copy Record to Clipboard*. This puts the borrower's text data into the Windows clipboard. It can then be pasted into Word, Notepad or another program. Example:

Borrower number: 5  
Name: FAULKNER, Pam  
Barcode: B1413000055  
Gender: F  
Year level: S  
Group: STAF  
Type: 8  
Loan limit: 30  
Birthdate: 30/01/1978  
Address: 8401 Frederick Place  
Town/City: Edmonds, SA  
Postcode: 5323  
Email: pam.faulkner98@sa.edu.au  
Admin ID: 837236  
Can write reviews? No

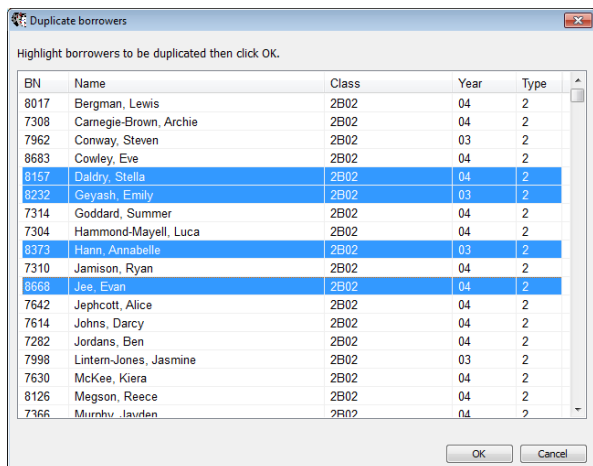


### Combine Two Borrowers into One

This function allows combining data from one borrower to another. The first borrower remains but data from the 2<sup>nd</sup> is added and the 2<sup>nd</sup> is deleted.

### Duplicate Borrower Records

This global function allows highlighted borrower entries to be cloned. The duplicate records have different numbers.



### Change Borrower Numbers to AdminID Values

This function changes *all borrower record numbers to be the same as their AdminID values*. It only works if the AdminID's do not contain letters or other non-numeric symbols. This is a global change affecting all borrowres, not just the one displayed. Borrowers without an AdminID keep their existing numbers. See below for further description.

### Change All Borrower Numbers to Barcode Values

Borrower numbers are changed to match barcodes. Affects all borrowers.

## Borrower Data Fields

Each field has a heading and a white inputbox.

Surname:	<input type="text" value="FAULKNER"/>
----------	---------------------------------------

Information can be typed in the inputboxes. The arrow keys and home and end keys move the cursor within the box. The Insert, PageUp and PageDown keys do not function in Borrower Add/Edit. The Delete and Backspace keys can be used to erase characters.

The TAB key advances the cursor from one field to the next. The Down arrow key does the same.

SHIFT and TAB keys together move the cursor up one field. The Up arrow key does the same.

### Barcode

This is the borrower's *full barcode label*. The *Generate* button on the right will produce a full barcode based on the borrower's record number and barcode settings in Controls. It will only do this if the barcode field is blank.

Note: borrowers can have barcodes that are completely different to their number. These may be student ID cards or anything else. Borrower numbers can also be the "admin ID" values from office

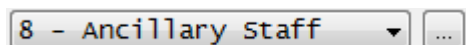
systems, too, and/or barcodes can be based on these values as well. However, this arrangement makes life more difficult, therefore it is recommended to have matching borrower record numbers and barcodes.

### **Surname, Given name, Preferred name**

Borrower names are entered in three parts. Given name and Preferred name may be left blank but a Surname is required. To display a borrower's name, Bookmark follows the rule set up using the *Name Format* control (see Update Borrowers later).

### **Borrower Type**

The Borrower Type code is MANDATORY. Every borrower must have a Type number in the range 1 to 99.



This is a dropdown list showing all 99 types. Select the correct type.

- If you need to change a Type – e.g. add a new one or make an alteration – click on the little 'elipsis' box (it shows ...) to open the Borrower Type dialog. It is not necessary to go back to Controls to do this. You can optionally use the Lists dropdown menu at the top as well.

The Borrower Type determines a borrower's maximum loan limit, the maximum number of items they may reserve, and the due date assigned when they borrow.

### **Loan Limit**

This allows the loan limit to be varied for an individual borrower. The limit can be different from that related by their Borrower Type, and can be any value from 0 to 1000. Entering 0 prevents a borrower making loans.

If you change the Borrower Type, the loan limit will automatically be altered to the default for that type. It can be manually changed after that. This change only affects the displayed borrowers, not all with the type. To change the loan limit of all borrowers of a type, go to Controls / Borrower Types.

### **Year level**

This is a student's actual grade, not necessarily their home class. (It is easy to confuse the two.) A student can only be in one year level at a time. Classes, however, can be composite and have one, two or more levels. From the dropdown list, select the student's grade or year level. Other types of borrowers can have different codes, too.

Click on a level and OK to select it.

*If the year level you wish to use is not in the droplist, click on the 3-dot box to popup a window that allows adding year levels to the list. After adding and clicking OK, select the new level from the list.*

This field can be left blank.

### **Class/Group**

This is the "class" a student uses as their home room. It can be up to 20 characters long. Classes are used for overdue notices and lists and reports. There is no limit to the number of classes on the system. For non-school databases, the Class field can be used as a grouping field.

If a class is not in the list, click on the 3-dot box for a window that allows adding classes.

Alternately, go to the Classes authority to edit the list.

Class can be blank.

### **AdminID**

This field holds the ID from a school administration/front-office database. The unique borrower ID is used as part of the process to transfer data from school offices into Bookmark.

Borrower photos, discussed later, use the AdminID for their filename.

### **Gender**

A droplist can be used. F and M are always available, but you can enter any other term you wish to use, or the field can be left blank. Anything typed is added to the droplist for future use. T, X, A, anything else is acceptable.

### **Birthdate**

This is optional and if not used, the date the borrower record is first entered is saved. A dropdown calendar is available to select the date, or it can be typed in.

### **Joining Date**

The date the borrower is entered onto the system or the school. It can also be used to indicate when a person needs to renew a membership.

### **Privacy Code**

The borrower's personal privacy code acts like a PIN if their data should be secured. If this field is left blank, then this borrower's information is considered public. Anything here deems the information private. Refer to the "Borrower Information Privacy" at the end of this document for more information. This code can consist of any keyboard letters, numbers or symbols.

### **Address**

Holds the borrower's street address -- i.e. 25 Looneytoon Lane. This field can be left blank.

### **Suburb**

This is the postal suburb, town or city. The State can also be included -- i.e. Crazyville, ACT.

### **Postcode**

This field holds the postcode.

### **Phone(s)**

One or more phone numbers can be stored here.

### **Mobile(s)**

Mobile or cell phone numbers can be stored here.

### **Email**

A borrower's email address can be entered here.

### **Mailing title, Alt address, alt suburb, alt postcode, alt phone, alt mobile, alt email**

Alternate contact details can be entered, such as a parent. The alternate details can be selected for overdue notices. The Mailing Title is used for overdue letters.

### **Extra**

This field can hold any additional information or comments concerning this borrower. This data is not displayed anywhere else.

### **Loan note**

This note is displayed during Loans in Circulation. If the Make Private checkbox is ticked, it is not shown immediately. Instead, a comment hotlink is displayed so the comment can be privately viewed.

### Return note

The return note is displayed when any item on loan to that borrower is returned.

### Write reviews?

If the box is ticked, then this borrower is allowed to write reviews against items found in Search.

### Lexile / Level

A borrowers lexile or AR level can be recorded here.

### Notes

Any additional information can be entered here.

Other things to note:

- Changing a borrower's name does change it against items on loan or previously borrowed. Only subsequent loans receive the changed name. (This can be updated in Borrowers > Rollover > 7 - Update borrower info against items.)
- **Do not enter a new borrower by directly changing an existing one.** To reuse a borrower's number for a new person, the previous borrower must first be *deleted*. Deleting clears out important information, such as the loan history, whereas just changing a record's details like name does not.

## Restrictions

The *Restrictions* button allows setting loan restrictions to item types for the individual borrower. These take precedence over the other restrictions. This function can be used where a particular student is not allowed to borrow certain types of items due to a parent or religious request.

	Item Type
<input type="checkbox"/>	FIC Fiction
<input type="checkbox"/>	JF Junior Fiction
<input type="checkbox"/>	JNF Junior Non-Fiction
<input type="checkbox"/>	NF Non-Fiction
<input type="checkbox"/>	REF Reference
<input checked="" type="checkbox"/>	TR Teacher Reference
<input checked="" type="checkbox"/>	KIT Kit multi item/types A4
<input checked="" type="checkbox"/>	MAP Map/Chart
<input type="checkbox"/>	BB Big Book
<input checked="" type="checkbox"/>	PIC Picture
<input checked="" type="checkbox"/>	VID Video Tape/DVD
<input type="checkbox"/>	HWRE Computer Hardware
<input type="checkbox"/>	MAG Magazine
<input checked="" type="checkbox"/>	BOX Boxed Special Collection
<input type="checkbox"/>	TUBE Kit in a Tube
<input type="checkbox"/>	PKIT Picture Kit

Set all Clear all OK Cancel

# Delete Borrowers



## Delete Borrowers

Bookmark contains an easy system for removing borrowers from the database.

All borrowers are loaded from the database into a grid control.

Delete Borrowers

Delete Borrowers

288 borrowers  
Click to highlight those to be deleted, then click on DELETE.  
Many borrowers can be deleted at the same time by using the Shift or Ctrl keys when clicking.  
The order of the list can be changed (re-sorted) by clicking on a column heading.

Number	Name	Class	Year level	Type	Loans	AdminID	Barcode	
1	WEBBER, Jane	Gorgeous	S	10 - Ten	Yes	92057	B1413000013	
2	CHINCHEN, Di	Gorgeous	S	8 - Ancillary Staff	Yes	93023	B0000002	
3	BATTEN, Sara	1SB	S	7 - Teacher	Yes	15539	B0000003	
6	BURLINGTON, Megan	Gorgeous	S	7 - Teacher	Yes	93021	B0000006	
7	DALLEYWATER, Keith	Gorgeous	S	8 - Ancillary Staff	Yes	92140	B0000007	
8	PONCE, Filomena	STAF	S	9 - Library Staff			B0000008	
9	GLYDE, Beth	LO	S	7 - Teacher	Yes		B0000009	
10	STEVENS, Rick	STAF	S	8 - Ancillary Staff			B0000010	
11	TUCKERMAN, Rod	5RT	S	7 - Teacher	Yes		B0000011	
13	CODLING, Russell	LO	S	7 - Teacher	Yes		B0000013	
14	CUTMORE, Emma	KEC	S	7 - Teacher	Yes		B0000014	
15	BROWNE, Rosanne	STAF	S	7 - Teacher	Yes		B0000015	
16	LYNCH, Gillian	LO	S	7 - Teacher	Yes		B0000016	
17	CUNNEEN, Sheree	STAF	S	8 - Ancillary Staff			B0000017	
18	NIELSEN, Helen	STAF	S	7 - Teacher	Yes		B0000018	
19	CROAN, Sophie	STAF	S	8 - Ancillary Staff	Yes		B0000019	
20	GROCH, Darine	STAF	S	8 - Ancillary Staff			B0000020	
22	HAES, David	STAF	S	7 - Teacher			B0000022	
24	BOON, Julie	STAF	S	9 - Library Staff			B0000024	
26	DADO, Susan	STAF	S	8 - Ancillary Staff	Yes		B0000026	
27	MEARES, Shirley	TELC 5D	T	7 - Teacher			B0000027	
28	MACDONALD, Liz	STAF	S	8 - Ancillary Staff			B0000028	
31	TUCKERMAN, Siobhan	3ST	S	7 - Teacher	Yes		B0000031	
32	VALLENDER, Leesa	STAF	S	9 - Library Staff			B0000032	
33	GLYDE, Alice	KAC	S	7 - Teacher	Yes		B0000033	

List loans

Scan

Overdue notice

OK

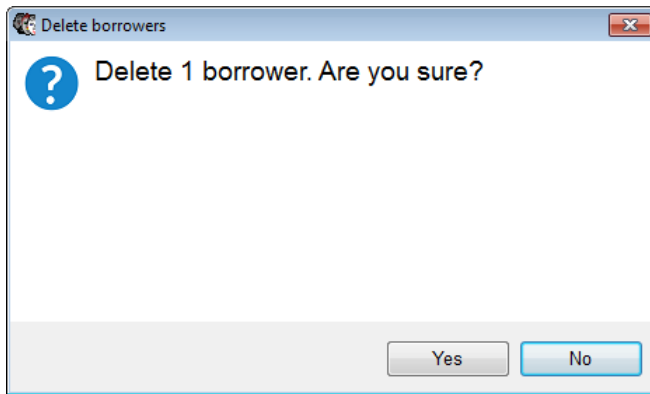
Go back

One or many borrowers can be deleted at one time.

To delete a single borrower, click on their line to highlight.

If the borrower has items on loan (as indicated by "Yes" in the right column), click on *List loans* to see a list of them.

To delete the highlighted borrower, click on the *Delete* button at the bottom.

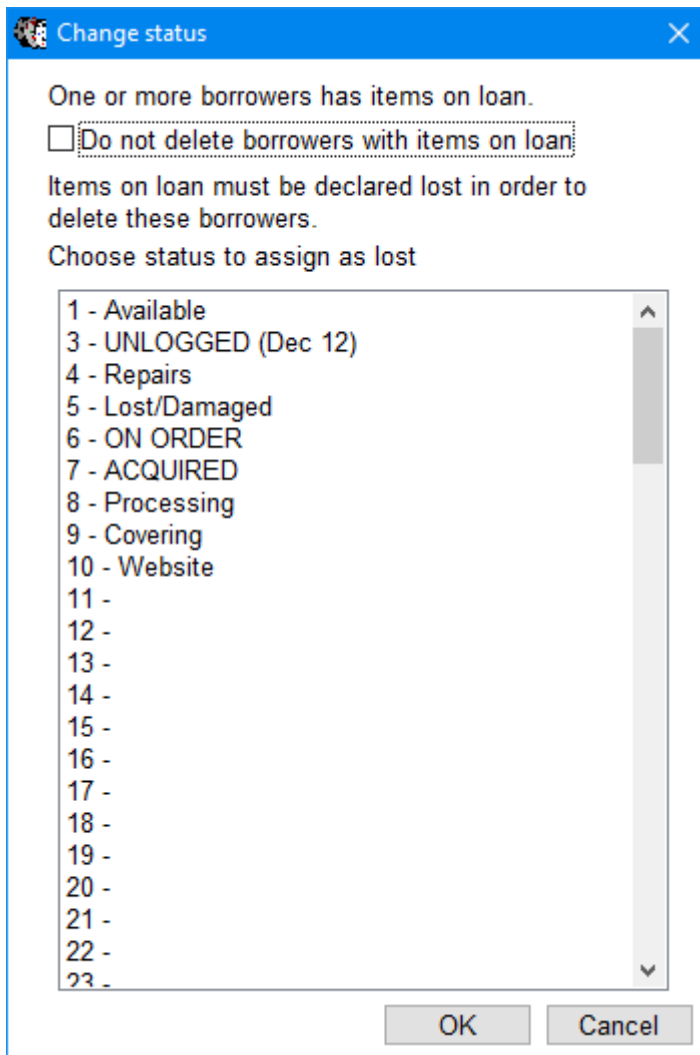


Click on Yes.

The borrower is deleted and the list re-loaded.

### Deleting a borrower with loans

If the borrower has items on loan, this dialog appears:



Click on the status to which the items on loan will be changed – e.g. "Lost" – then click on OK.

Alternately, if the "Do not delete borrowers with items on loan" checkbox is ticked, then any borrower highlighted who has items still on loan will not be deleted and the items will remain on loan. In this case, only borrowers with no loans are deleted.

## Sort the List

Changing the order of the list can be a great help. The list can be sorted (re-arranged) by clicking on the heading at the top of a column. For example, clicking on Year Level sorts the list based on borrowers' year levels. All borrowers in the same grade are grouped together.

## Deleting Multiple Borrowers

Many borrowers can be highlighted at the same time.

- Hold down the CTRL key and click at the same time. This highlights more than one line. Keep the CTRL key down while clicking.
- Hold down the SHIFT key and click on the first borrower then on the last to highlight many.

Number	Name	Class	Year level	Type	Loans	AdminID	Barcode
33	GLYDE, Alice			7 - Teacher	Yes		
34	DRAIN, Amanda	3FD	S	7 - Teacher	Yes		
37	McIVER, Skye	ELVS	E	5 - Ex LVS Students			
39	VENN, Lisa	5LV	S	7 - Teacher	Yes		
40	ABRAHAM, Melissa	STAF	S	8 - Ancillary Staff			
41	WEYNTON, Daphne	STAF	S	8 - Ancillary Staff			
42	WEBBER, Elizabeth	ELVS	E	5 - Ex LVS Students			
43	MCGRATH, Amanda	STAF	S	7 - Teacher			
44	HOPPER, Toni	STAF	S	8 - Ancillary Staff			
59	SCARF, Sue	STAF	S	9 - Library Staff			
97	KWAN, Jin	TLC		1 - Infants Student			
98	HARRIS-WHELAN, Fiona	KFH	S	7 - Teacher	Yes		
100	MARSHALL, Lisa	PRNT	P	6 - Parents			
103	FITZ-ROY, Jamie	4RC	4	2 - Primary Stage 2	Yes	12612	
105	ATHIS, Eliza	2HN	2	1 - Infants Student	Yes	17589	
106	LO CERTO, Julie	PRNT	P	6 - Parents			
107	LAST, Aneta	PRNT	P	6 - Parents			
108	BAILLIE, Jude	3FD	3	2 - Primary Stage 2	Yes	14234	
109	WILLIAMS, Julia	PRNT	P	6 - Parents	Yes		
110	HILL, Jasmin	5RT	5	3 - Primary Stage 3	Yes	14964	
111	MORISON, Sylvia	PRNT	P	6 - Parents			
112	WITTARD, Kristie	PRNT	P	6 - Parents			
114	ROBINSON, Chloe	1SB	1	1 - Infants Student	Yes	19699	
116	FITZ-ROY, Olivia	3FD	3	2 - Primary Stage 2	Yes	12921	

Click on Delete to delete all highlighted borrowers.

## List Loans

Lists all items on loan to one highlighted borrower. The word 'Yes' must appear in the Loans column.

## Overdue notice

Allows printing an "on the spot" overdue notice for the highlighted borrower who is about to be deleted.

**Overdue notice**

**98 HARRIS-WHELAN, Fiona**

**8 items on loan**

**Printout covers** ☐ Include book cover images

**Include this line:** ☒ The following item(s) are overdue as of 13/04/2015

**Omit overdue prior to:** 01/01/1990

**Overdue message:** 5 - STAFF OVERDUE LISTHelloThis is a list of all items you currently have on

Write overdue message below or select from the drop list above.

STAFF OVERDUE LIST

Hello  
This is a list of all items you currently have on loan.  
Please return all outstanding items to the Library by Wednesday 20th November.  
Thanks for your assistance

Item	Title	Call number	Due date
98	HARRIS-WHELAN, Fiona	8418	10 Little Rubber...
98	HARRIS-WHELAN, Fiona	16031	Katy Cat and B...
98	HARRIS-WHELAN, Fiona	27081	Nikon Coolpix L...
98	HARRIS-WHELAN, Fiona	31585	Amazing Aquarium
8418	10 Little Rubber Ducks	PF Car	Due 26/06/2013
16031	Katy Cat and Beaky Boo	PF Cou	Due 26/06/2013
27081	Nikon Coolpix L20 Digital Camera - YKB	KIT 755 Nik YKB	Due 19/09/2012

8 items on loan

Save Print Close

## Scan - Deleting by Scanning Barcodes

In addition to deleting highlighted borrowers, it is possible to delete them individually by scanning their barcodes or entering their numbers.

Click on the *Scan* button.

**Delete a borrower**

**Scan barcode or enter borrower number to delete**

OK Cancel

Either scan a borrower's barcode or enter their record number.

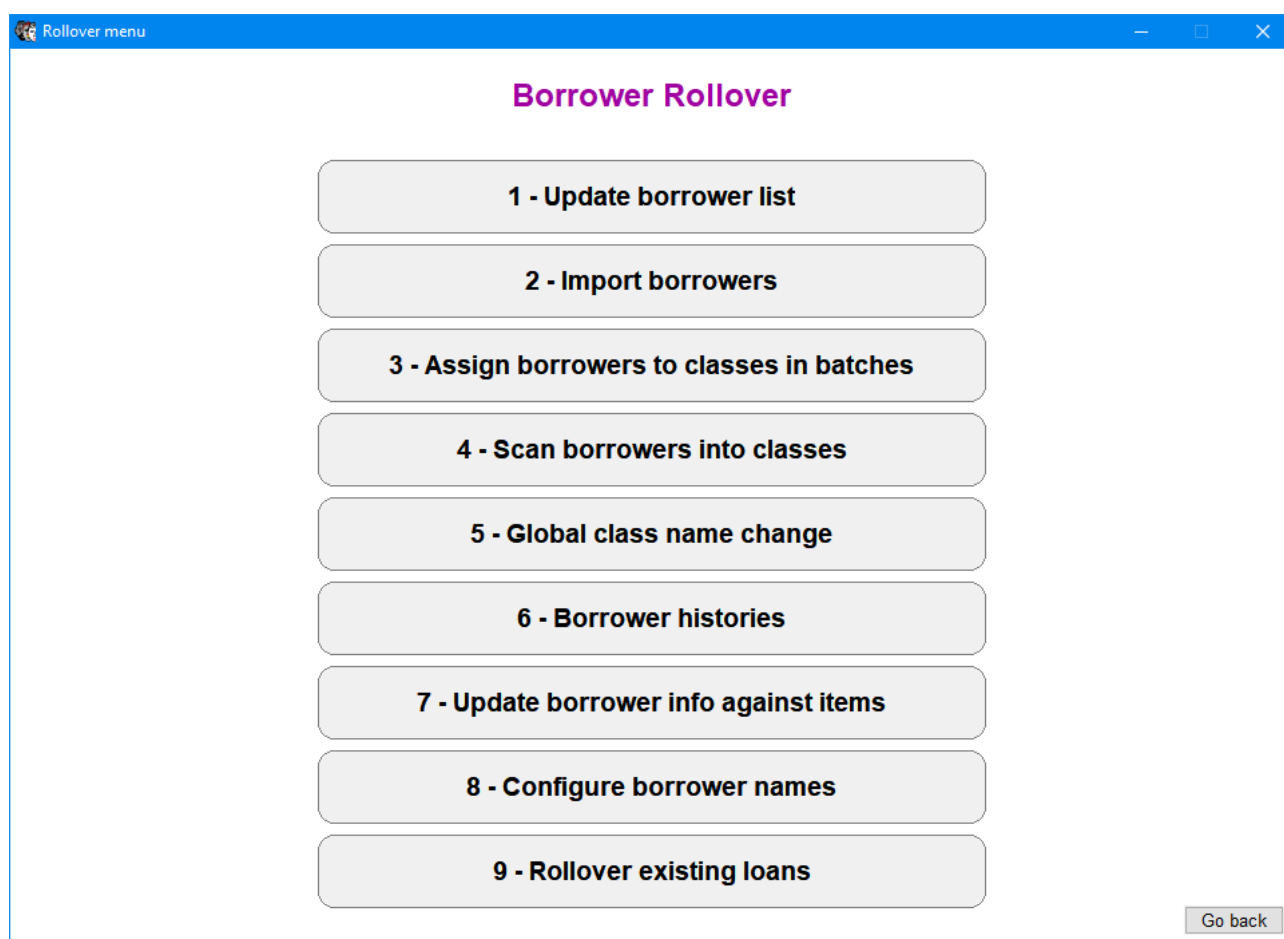


# Borrower Rollover



This section is used to easily update borrower information. It allows updating groups of borrowers at a time and also transferring borrower data from an office system into Bookmark.

The rollover is often done at the start of the school year, but this area can be used at any time. It provides easier-to-use procedures for changing classes and year levels than going through each borrower in Add/Edit.



The rollover can be done in several ways.

- Manually update each borrower displayed in a list ("Update borrowers list")
- Highlight groups of borrowers in a list and assign them to a class, year level and/or borrower type ("Assign borrowers to classes in batches")
- Import borrower data from a file exported from the office system, fastest method ("Import borrowers")
- Scan batches of borrower barcodes to assign to classes ("Scan borrowers into classes")

# Update Borrowers List

Update Borrowers

Backup

Print

Edit

New

Delete

Increment

Lists

Merge

Number	Surname	Given name	Preferred name	Class	Year	Type	Admin ID	Barcode	Loan limit
246	ABBOTT	Kaila		6SR	6	4		B0000246	10
411	ADCOCK	Paris		6SR	6	4	15539	B0000411	10
104	ADDERTON	Chase		TELC ...	T	1		B0000104	10
162	ALLAWAY	Ruth	Ruth	PRNT	P	1		B0000162	30
405	ALLEN	Jade		2MB	2	1		B0000405	10
267	ALLEN	Kai	Kai	6SR	6	4	18566	B0000267	10
425	ALLOWAY	Sophia		2MB	2	1		B0000425	10
377	ANTOUN	Keira	Keira	3ST	3	2		B0000377	10
195	ANTOUN	Leo		KAG	K	1		B0000195	10
478	ARCHER	William	William	3ST	3	2		B0000478	10
105	ATHIS	Eliza	Eliza	4LV	4	2	17589	B0000105	10
458	ATHIS	Jordan	Jordan	6SR	6	4	12943	B0000458	10
209	Austin-Penny	Alexander		TELC ...	K	1		B0000209	10
334	BAILLIE	Beau	Beau	3ST	3	2	14236	B0000334	10
473	BAILLIE	Caz	Caz	1SB	1	1	18578	B0000473	10
180	BARLOW	Bella	Bella	4LV	4	2	18018	B0000180	10
151	BARLOW	Paulina	Paulina	PRNT	P	1		B0000151	30
131	BASSETTO	Jacob		5RT	5	3		B0000131	10
447	BATTEN	Emma	Emma	6SR	6	4	15821	B0000447	10
3	BATTEN	Sara		1SB	S	7	15539	B0000003	200
189	BENEFIELD	Darcy	Darcy	6SR	6	4	12915	B0000189	10
126	BENEFIELD	Debbie	Debbie	PRNT	P	1		B0000126	30

Row 0

Number	Surname	Given name	Preferred name	Class	Year	Type	Admin ID	Barcode	Loan limit
246	ABBOTT	Kaila		6SR	6	4		B0000246	10

Fill blank barcodes

Generate

Update

Close

Update Borrowers List is used to change borrower information from a special list.

All borrowers are loaded from the database into the grid. Initially they are alphabetical by surname but the order can be changed. Changing the order can make updating easier. To change the order, click on the heading at the top of any column.

The borrower being edited is highlighted in the grid and their details appear at the bottom. Each of these details can be changed. Use the TAB key to jump to the right or SHIFT and TAB to jump left.

Type in changes.

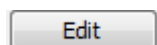
Press Enter or the Down Arrow moves the highlighted to the next row directly beneath.

Any changes made are automatically inserted into the grid whenever another borrower is highlighted or the Update button is clicked.

The Up Arrow key moves the highlighter up. You can also click on a borrower and use the scrollbar. The Page Up and Page Down keys do not function here.

Note: changes made are saved to the database *immediately*.

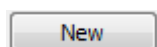
The Assign, Scan and Import buttons do the same tasks as those listed on the Rollover menu, except that they close back to the update borrowers list.



This pops up a window which allows all of a borrower's info to be changed. These changes are saved directly to the database and the grid.

The 'Add / Edit Borrower' window contains the following fields and controls:

- Number: 104
- Barcode: B0000104 (with a 'Generate' button)
- Surname: ADDERTON
- Given name: Chase
- Preferred name: (empty)
- Borrower Type: 1 - Years P, 1, 2 (dropdown)
- Loan limit: 10
- Year level: T (dropdown with a '...' button)
- Class/Group: TELC 5D (dropdown with a '...' button)
- AdminID: (empty)
- Gender: M (dropdown)
- Birthdate: 01/01/2014 (dropdown)
- Joining date: 18/09/2014 (dropdown)
- Privacy code: (empty)
- Address: (empty)
- Suburb: (empty)
- Postcode: (empty)
- Phone: (empty)
- Mobile(s): (empty)
- Email: (empty)
- Alt address: (empty)
- Alt suburb: (empty)
- Alt postcode: (empty)
- Alt phone: (empty)
- Alt mobile: (empty)
- Alt email: (empty)
- Write reviews? ☒
- Other: (empty)
- Loan note: (empty)
- Return note: (empty)
- Lexile/Level: (empty)
- Items on loan: 1 (with a 'Loans' button)
- Items in history: 15 (with a 'History' button)
- Last loan date: 13/05/2015
- Buttons: Save, Cancel



This button can be used to enter a new borrower.

The 'New borrower' window displays a table of unused numbers and a form to enter a new borrower.

Unused numbers					
12	55	70	84	102	177
35	56	71	85	104	179
36	57	72	86	113	183
38	58	73	87	115	188
45	60	74	88	119	190
46	61	75	89	127	192
47	62	76	90	128	203
48	63	77	91	135	215
49	64	78	92	136	221
50	65	79	93	142	224
51	66	80	94	152	231
52	67	81	95	153	233
53	68	82	96	154	244
54	69	83	101	160	249

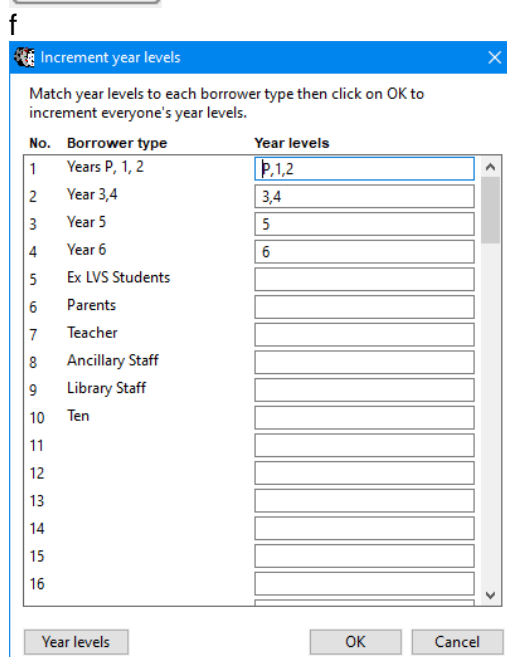
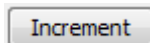
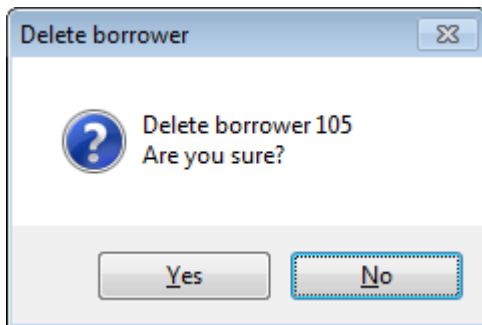
Enter new borrower

Number:

Buttons: OK, Cancel



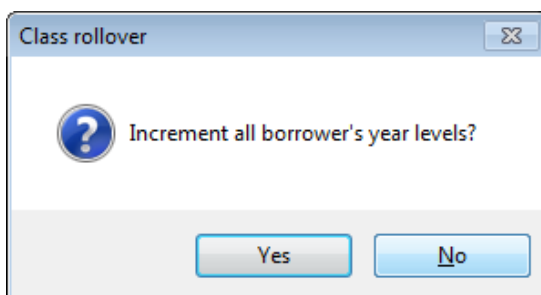
This function allows deleting a highlighted borrower.



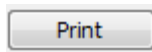
Increment can be used to automatically increment student year levels en-mass. All year 3's become 4's etc in one single time-saving step.

Borrower types are listed Make sure that the correct year levels are indicated next to each Type. If unsure, use the *Year levels* button at the bottom to see the list and select levels for the cell where the cursor is located. This ensures the correct borrower types are automatically changed to correspond to incremented levels.

Click on OK to implement.

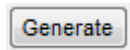


Note: If a student has a year level of K, it is changed to R. R and P are both changed to 1. Numerals are automatically increment. Nothing else is changed.

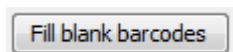


F7

All borrowers are printed out as a large list.



The Generate button produces a full barcode based on the borrower's number and the barcode settings in Controls.



This button generates barcodes for all borrowers and fills blanks in the barcode column. Barcodes already in the column remain unaffected.

## Assign Borrowers to Classes in Batches

An even quicker method of manually assigning borrowers to new classes is to use the "Assign borrowers to classes" function.

It can be used to assign classes, year levels and borrower types to many students at one time.

The concept is to *mass assign* many borrowers to a particular class, year level and/or borrower type all at one time. This can take even less time than using the manual list approach.

Assign classes

Assign Classes

For each class, fill out the three boxes on the left. Highlight the borrowers to be assigned to the class, year level and/or borrower type. Then click on Assign. Repeat for each unique combination. If a new class or year level is not in the dropdown list, click on the ... box. To highlight multiple borrowers, hold down the Ctrl or Shift keys while clicking. Click on a column heading to change the list sort order and group borrowers.

Class to assign:  
4LV

Year level to assign:  
4

Borrower type to assign:  
Do not change

Reset

Number	Name	Class	Y	Type
473	BAILLIE, Caz	1SB	1	1
260	BROWNING, Jett	1SB	1	1
132	BURGE, Benjamin	1SB	1	1
121	COURTNEY-O'CONNOR, Amelia	1SB	1	1
285	CUTLER, Jay	1SB	1	1
424	DOUGLAS, Harper	1SB	1	1
129	DRIVER, Georgia	1SB	1	1
333	EDEN, Otto	1SB	1	1
211	Emmons, Cedar	1SB	1	1
343	FAIRFAX, Oscar	1SB	1	1
293	GRIFFITHS, Oliver	1SB	1	1
230	HADDAD, Damon	1SB	1	1
321	HAYWARD, Olivia	1SB	1	1
318	KORBER, Amelie	1SB	1	1
207	Lucey, Alesha	1SB	1	1
383	MCFADZEAN, Tahlia	1SB	1	1
300	MCGILVRAY, Benjamin	1SB	1	1
115	MCLEAN, Jay	1SB	1	1
305	ORNSBY, Thomas	1SB	1	1
309	POLLARD, Harper	1SB	1	1
311	POLLARD, Liberty	1SB	1	1
326	SAMMUT, Arne	1SB	1	1
310	SIMPSON, Thomas	1SB	1	1

Assign

Borrowers

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The basic idea:

Highlight the borrowers that are going to a particular class, year level, and or type. Set up those three parameters and click Assign.

How to:

First, click on the *Class to assign* dropdown box on the left side. Click on the class the borrowers are to be assigned.

If the class is not in the list, just type it on the line next to the down-arrow. (Do not press enter.) It will automatically be added to the list of classes.

Note: Choosing a class is optional. If you do not wish to assign a class, leave it on "Do not change".

Also set up Year Level and/or Borrower Type. If the year level is not in the list, just type it on the line.

Next, highlight the borrowers to be changed. To highlight multiple borrowers, hold down the CTRL key or SHIFT key at the same time as clicking.

When all borrowers to be assigned to the new class, year level and type have been highlighted, click on the **Assign** button. This change is transferred to the master grid immediately. Changes are not permanent until the master grid is saved.

*The borrowers changed are hidden in the list. Borrowers left to do remain visible. They are not removed from the database or grid.*

Work through all the new classes to assign students.

## Scan Borrowers into Classes

The Scan function opens a window that allows borrower barcodes to be scanned. The borrowers listed are all assigned the class, year level and/or borrower type indicated when the OK button is clicked. This method works if all the barcodes are available "in piles" of classes.

[illegible]

If a class or year level does not appear in the droplist, it will have to be added in the relevation area outside of this function.

As soon as a borrower is scanned, the data is immediately saved.

## Global Class Name Change

This function can be used to globally change classes. It changes the code or name of a class to another name. All borrowers having the previous code are changed to the new one. They are not reassigned to other classes. (See Assign Classes to Groups or Import Borrowers.)

Change class name

### Change class name

Change the name of a class to a different name or code.

Classes/Groups		
1SB	29	
2MB	26	
3ST	28	
4LV	27	
5RT	24	
6SR	30	
ELVS	8	
Gorgeous	2	
KAG	13	
KEC	13	
LO	11	
PRNT	28	
STAF	21	
TELC 3DM	9	
TELC 3DW	9	
TELC 5D	10	
xyz	0	

Change:

To:

Change it

Close

Click on the class to change in the left side column.

Type the class code to change it to on the right side.

Click on the *Change It* button.

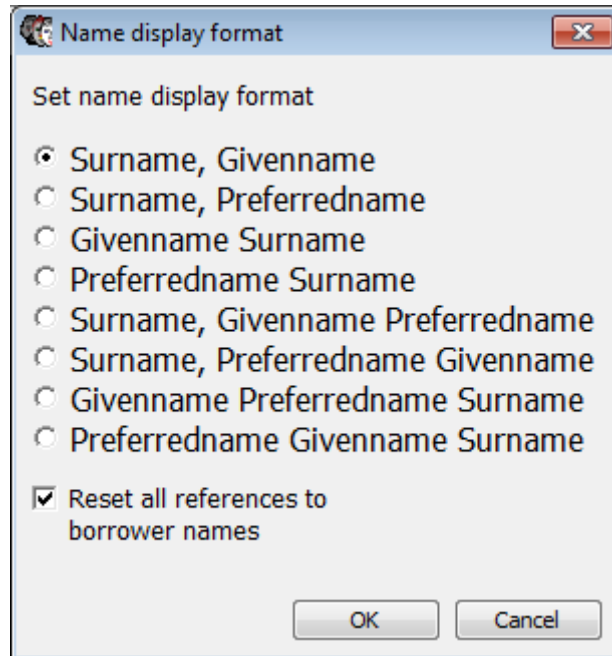
All borrowers with the "Change" class will be reassigned to the new class.



## Configure Borrower Names

This control sets the style to display borrower names everywhere in Bookmark.

It does not affect the data in Add/Edit Borrowers, only what is displayed and printed out.



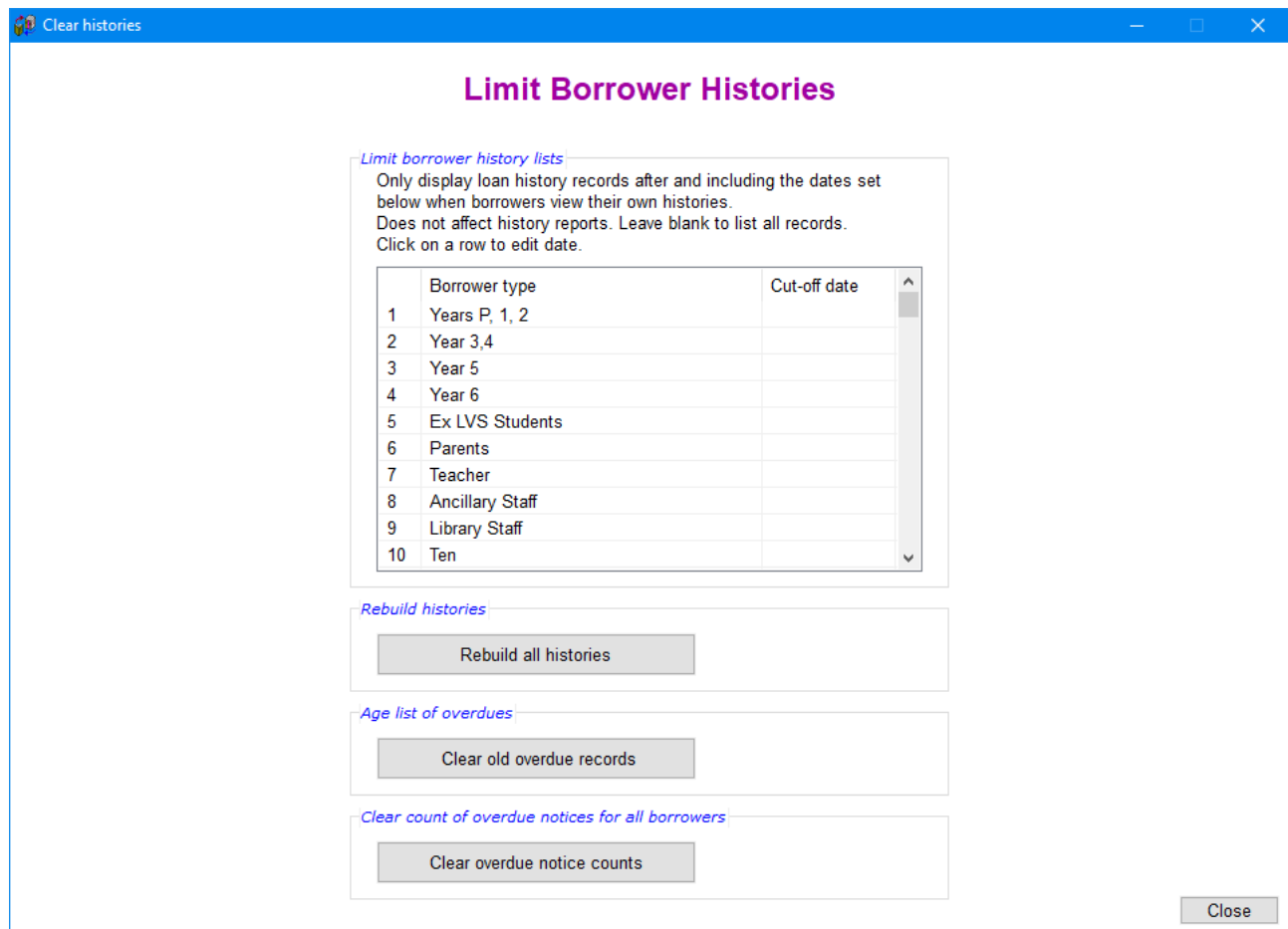
If the checkbox "Reset all references to borrower names" is ticked, then all borrower name displays across the entire system are readjusted to the selected format. If the box is unticked, then this change is not made.

This function can be used to "update" name displays as well.

## Borrower Histories

Bookmark keeps a record of all loans, returns and renewals. Unless regularly "aged", the list of these records can stretch back many years. (Old entries in the master record list can be removed or "aged" by going to Reports / Circulation Reports.)

This function is used to set a "cut-off date" so older history entries are not automatically listed when viewing. It does not remove any data. It only hides older ones. This may be useful if you wish students to only see this year's loans records.

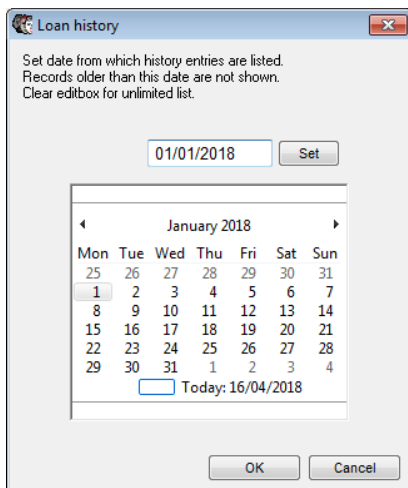


The screenshot shows a window titled "Clear histories" with a blue header bar. The main content area is titled "Limit Borrower Histories" in purple. Below this title, there is a section titled "Limit borrower history lists" in blue, followed by instructions: "Only display loan history records after and including the dates set below when borrowers view their own histories. Does not affect history reports. Leave blank to list all records. Click on a row to edit date." Below the instructions is a table with two columns: "Borrower type" and "Cut-off date". The table has 10 rows, numbered 1 to 10. The borrower types are: 1 Years P, 1, 2; 2 Year 3,4; 3 Year 5; 4 Year 6; 5 Ex LVS Students; 6 Parents; 7 Teacher; 8 Ancillary Staff; 9 Library Staff; 10 Ten. To the right of the table is a vertical scrollbar. Below the table, there are three sections, each with a button: "Rebuild histories" with a "Rebuild all histories" button; "Age list of overdues" with a "Clear old overdue records" button; and "Clear count of overdue notices for all borrowers" with a "Clear overdue notice counts" button. A "Close" button is located at the bottom right of the window.

	Borrower type	Cut-off date
1	Years P, 1, 2	
2	Year 3,4	
3	Year 5	
4	Year 6	
5	Ex LVS Students	
6	Parents	
7	Teacher	
8	Ancillary Staff	
9	Library Staff	
10	Ten	

The cut-off dates are based on borrower types.

To set a date, click on the borrower type row.



Loan history

Set date from which history entries are listed.  
Records older than this date are not shown.  
Clear editbox for unlimited list.

01/01/2018 Set

January 2018						
Mon	Tue	Wed	Thu	Fri	Sat	Sun
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

Today: 16/04/2018

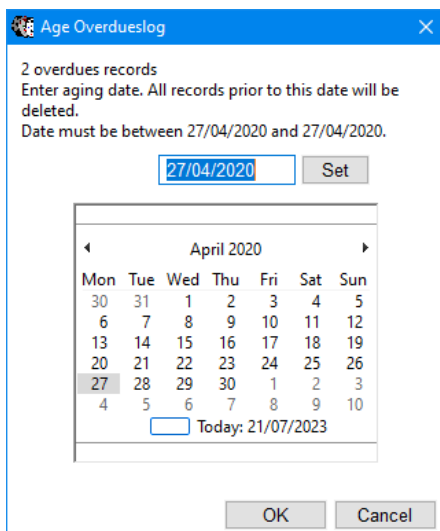
OK Cancel

Choose and click on the date.

## Rebuild All Histories

A rarely used housekeeping task. Borrower loan histories are a subset of and separate list to the main circulation history log. This function erases the borrower list and makes a new one using the log data.

## Clear Old Overdue Records



Age Overdueslog

2 overdues records  
Enter aging date. All records prior to this date will be deleted.  
Date must be between 27/04/2020 and 27/04/2020.

27/04/2020 Set

April 2020						
Mon	Tue	Wed	Thu	Fri	Sat	Sun
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	1	2	3
4	5	6	7	8	9	10

Today: 21/07/2023

OK Cancel

Bookmark keeps a record of overdues. This function erases old records prior to the date entered.

## Clear Overdue Notice Counts

Bookmark keeps a count of every time a borrower is issued an overdue notice. The counters simply increment. They do not keep track of when the overdue notice was issued.

This function resets all counters back to 0 to start over.

## **Update Borrower Info Against Items**

When an item is borrowed, the borrower's number, barcode, name, class and year level are also stored against the item issued.

This data stays against an item until the next loan.

If an item was borrowed a previous year and is still on loan, it is possible the class and year level are the previous year's and not the current year. (The rollover process does not change these stored values.)

This housekeeping function updates item data so it matches the borrower's current class and year level. The matching is based on both the borrower's number and surname.

It is a useful function to use at the start of the school year.

## Import Borrowers

This is the fastest method of updating borrower information at the start of the year. It requires initial "one off" setting up, but once that is done borrower data can be updated in literally seconds.

Import Borrowers takes data exported from a school office administration system and reads it into Bookmark.

Classes, year levels, types, emails and other data are all updated.

New borrowers are automatically added.

Borrowers are not deleted. This should be done manually before importing.

Student data can be imported into Bookmark from the following systems:

- EDSAS (South Australia)
- RMSIS (Western Australia – a.k.a. "Integris")
- Bibliotech export from CASES and CHESS (Victoria)
- One School (Queensland)
- Dux (South Australian Catholic)
- SAMS (Northern Territory)
- SAS (Victoria)
- MAZE
- Generic
- CHESS exported (Victoria)
- CHESS eduHub (Victoria)
- GELI (Griffith University)
- ceSIS (SA Catholic schools)
- Edumate
- TASS
- RMSIS (Integris) Staff
- Icon
- Dynamic List (One School QLD)
- Dynamic 365 (WA Catholic)
- EMS (South Australia)
- Custom

*If your administration system does not appear in this list, contact the Bookmark Help Desk as it might be possible to add it or to use the Custom or Generic format.*

## Exporting Data from the Office System

Data must first be "exported" from the office system. This is usually a special report that generates a type of text file containing student data.

Each administration database has a different set of steps for exporting. Refer to that education system's information on how to export the data for library systems.

For CASES 21 use the "Bibliotech" export. It works for Bookmark, too. The same export can also be made from CHESS.

If your system is not listed, the Generic format is one that some administration systems may be able to generate.

The exported data file should be saved to a USB flash drive so it can then be taken to the library and read by Bookmark.

## ID values and Barcode labels

School administration packages contain a field to store their own student and staff ID values. With the exception of EDSAS, they usually do not store library barcode labels. Bookmark has both barcode labels and a special field for the admin ID value. Borrowers are stored in Bookmark using their borrower number from the library barcode.

Borrower barcodes can be either "Bookmark friendly" (normal) or the student ID or can contain the student ID.

The ID values of the admin system provide the "common ground" between the admin system and Bookmark. In Bookmark, the ID value is entered against the AdminID field. When importing, Bookmark matches the ID value from the admin system to what has been entered. If there is a match, Bookmark then knows which barcode number to use for updating. If there is no match, a new borrower with a new barcode is created.

## Import Borrowers Dialog

Choose Update Borrowers then click on the *Import* button.

**Import Borrowers**

Import format: EMS (SA) ▼ Custom

Assign borrower types: ☒ Based on year levels  
☐ Based on classes  
☐ Do not update types

Assign new barcodes: ☒ Assign new borrowers new high numbers and use normal barcodes  
☐ Assign new borrowers unused numbers and use normal barcodes  
☐ Update only -- do not add new borrowers  
☐ Stop at each new borrower and manually enter numbers and barcodes  
☐ Use AdminID as numbers and barcodes for all borrowers  
☐ Assign new borrowers unused numbers and use AdminID as barcodes for all borrowers  
☐ Use barcodes from EDSAS for new borrowers  
☐ Use AdminID as numbers and create barcodes from it  
☐ Assign new borrowers unused numbers and use EDSAS barcodes for all borrowers  
☐ Use EDSAS number as borrower number and EDSAS barcodes for all borrowers

Match on: ☒ Admin ID and name  
☐ Admin ID only  
☐ Surname and givenname only

Set case: ☒ Keep as imported  
☐ ALL UPPER CASE (SMITH, JANE or JANE SMITH)  
☐ ALL Title Case (Smith, Jane or Jane Smith)  
☐ SURNAME UPPER, Others Title (SMITH, Jane or Jane SMITH)

Remove middle name(s): ☒ Remove middle names(s) from given name

Include 2nd email address: ☐ Include 2nd email address if available in Alt Email

New borrowers: ☒ List new borrowers added during import

Configure borrower types Fields to import Backup **Start** Preview Save settings Cancel

## A special note on formats

Each administration system generates its own data format. Use the dropdown list at the top to select the format for your system.

- EDSAS – this is for South Australian public schools.
- RMSIS – is the system used by public schools in Western Australia. It is also known as "Integris". The format for both students and staff is identical.
- Bibliotech export – this is a special export contained in CASES21 and CHESS, used by public schools in Victoria. Bookmark can import this format.
- One School – a basic export from the Queensland state school administration systems.
- DUX – a variation of Edsas, Dux has been used by Catholic schools in South Australia.
- SAMS – this is the administration system used by schools in the Northern Territory. It is similar to RMSIS but the export format is different.
- SAS – is an old administration system also found in Victorian schools.
- MAZE – is a special export that can be generated by the MAZE system.
- Generic – is a "universal" format for Bookmark that can be produced by some administration systems.
- Custom – is a special import format. See below.
- CHESS exported – is an exported format from the CHESS system (not the Bibliotech format above). It includes extra fields, such as email.
- CHESS eduHub – is the format available in the file associated with eduHub. This file is automatically kept up to date and Bookmark can import it.
- GELI – a special format used by Griffith University.
- ceSIS – a format used by Catholic schools in South Australia.
- Edumate – a special format that can be exported by Edumate.
- TASS – a special format for the TASS administration system.
- Kennedy – a special format for a particular Bookmark user.
- EMS – for South Australian public schools.

Other formats can be added to the list. Contact the Help Desk.

## Assign Borrower Types

When importing, Bookmark tries to match either the year level or class from the office data against a borrower type. See "Configure Borrower Types" below.

"Based on year levels" is the norm as most borrower types reflect year levels. Only use "Based on classes" if borrower types reflect actual classes rather than grades.

## Configure Borrower Types

Click on the *Configure borrower types* button. Use this window to make sure that year levels as included in the data from the admin system are entered against borrower types.

If, for example, reception is REC in the office data, make sure that is entered against the correct borrower type.

Bookmark uses this information to assign borrower types when importing.

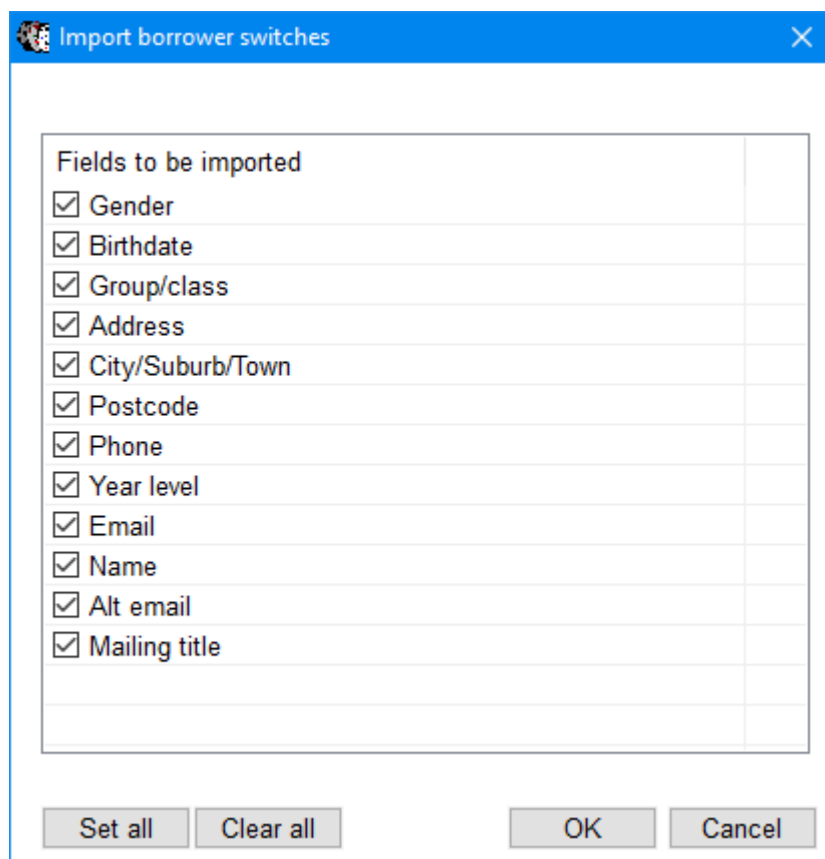
No.	Borrower type	Year levels
1	Years P, 1, 2	P,1,2
2	Year 3,4	3,4
3	Year 5	5
4	Year 6	6
5	Ex LVS Students	
6	Parents	
7	Teacher	
8	Ancillary Staff	
9	Library Staff	
10	Ten	
11		
12		
13		
14		
15		
16		

It is necessary to have the year levels (grades) entered against the student borrower types. The form of these must match what is in the data from the office. Do not include any blank spaces after commas. Do not put 0's in front of grades - e.g. not 06, just 6. Even if the office data has 06, Bookmark will compensate.

If assigning borrower types based on classes, then the class codes should appear instead of year levels.



## Field switches



Fields to be imported	
<input checked="" type="checkbox"/> Gender	
<input checked="" type="checkbox"/> Birthdate	
<input checked="" type="checkbox"/> Group/class	
<input checked="" type="checkbox"/> Address	
<input checked="" type="checkbox"/> City/Suburb/Town	
<input checked="" type="checkbox"/> Postcode	
<input checked="" type="checkbox"/> Phone	
<input checked="" type="checkbox"/> Year level	
<input checked="" type="checkbox"/> Email	
<input checked="" type="checkbox"/> Name	
<input checked="" type="checkbox"/> Alt email	
<input checked="" type="checkbox"/> Mailing title	

Set all Clear all OK Cancel

This sets the fields which will be filled when importing and which are not. Tick the ones to be filled and click on OK.

## Setting up ID Numbers the First Time

If borrowers are already on the system but you have never imported before, it is strongly advised to first enter all the Admin ID values manually. This is a one-off job best done in Update Borrowers. After this, Bookmark will automatically do this for new borrowers.

When Bookmark imports borrowers it first attempts to match the AdminID. If a match cannot be found, it then tries to match the name. If that cannot be found, it is assumed to be a new borrower and is added. If a match is found, the borrower's information is updated.

Adding the AdminID values first improves successful matching.

To quickly add the AdminID values, go back to the Update Borrowers grid and simply fill out the values in the correct column. Adjusting the order of borrowers can help. Be sure to Save.

## Importing Student Data – the procedure

First, select the type of Admin system being used – e.g. EDSAS, EMS, RMSIS, etc. Use the dropdownlist at the top.

Next indicate whether borrower types are assigned based on year levels or not to change the types. Normally it is based on year levels.

Third, select how barcodes will be given to new borrowers.

- Assign new students new high numbers tells Bookmark to automatically give to new students (ones not matched) barcodes starting from the highest used value and going up. Unused borrower numbers are not reused. This is the recommended method.
- Assign new students unused numbers tells Bookmark to reuse the unused borrower numbers. It searches for them and assigns them to the borrowers.
- Update only tells Bookmark not to import borrowers that are not already on the system. These borrowers could later be imported one-at-a-time.
- Stop at each new borrower... causes the program to present every borrower and allow manual entry of the barcode.
- Use AdminID as numbers and barcodes instructs Bookmark to use the AdminID as the borrower's number as well as the barcodes. For most Admin systems, this is not possible. However, a few use simple numbers for borrowers and these can be assigned as barcodes.
- Assign new students unused numbers and use the AdminID as barcodes tells Bookmark to give new students unused numbers but to assign the AdminIDs as barcodes against all borrowers, even if updating existing borrowers. This is useful for schools that use the AdminID as their library barcodes.
- Use barcodes from EDSAS only applies to the EDSAS system. It has its own barcodes, and this option tells Bookmark to use those instead of the AdminID. These are 12-character length barcodes beginning with B.
- Use AdminID as numbers and create barcodes from it. This causes Bookmark to use the AdminID value as the borrower's number and to create a full-size barcode which includes the AdminID, site ID, checksum, etc. Can only be used if the AdminID is a number.
- Assign new borrowers unused numbers and use EDSAS barcodes for all borrowers. The EDSAS barcode itself is used to provide the borrower number and barcode. Note the number on the barcode is not the full EDSAS number.
- Use EDSAS number as borrower number and EDSAS barcodes for all borrowers. Subtly different from the above, the EDSAS number itself is used as the borrower number and the EDSAS barcode for the full barcode.

Fourth, indicate whether matching is done on ID and Name or ID only. Normally the first is used.

Note: Bookmark will save these settings and present them next time.

Click on *Start* to begin the import.

Use the File Requester to locate the file containing the data. Open it.

Import Borrowers

Save Mass import Next

Import record 1 of 490

Borrower Number: 498

Barcode: B1413004986 Generate

Surname: RYAN

Given name: DEXTER

Preferred name: DEXTER

Gender: M

Borrower Type: 3 - Year 5

Loan limit: 10

Year level: 5

Group/Class: 5B

Birthdate: 28/09/2010

Address: 38 XXING ROAD

Suburb: LUNA PARK SA Postcode: 51593

Phone: Mobile:

Email:

Privacy code:

AdminID: 160079

Alt.Email: ney1234@email.com

Mailing title: MR & MRS RYAN

Extra:

Loan note:

Return note:

Alt.address:

Alt.suburb: Alt.postcode:

Alt.phone:

Alt.mobile:

Cancel

The first borrower is presented. Alter anything that needs changing and click on Save.

You can go through each borrower one at a time or do the lot.

Click on *Mass Import* to import everyone quickly.

## Custom Import Format

The Custom option can be used to configure Bookmark to read a format not found in the droplist.

Borrower fields	Import fields	Equivalent Bm field
Surname	EDSAS barcode label	Barcode
Given name	Family Name	Surname
Preferred name	Given Names	Given name
Address	Second Name	Ignore
City/Suburb	Preferred Name	Preferred name
Postcode	BorrowerType (s or t)	Ignore
Phone	School Year Level	Year level
Email	Roll Class	Class
Class	Date of Birth	Birthdate
Gender	Gender	Gender
Year level	Campus	Ignore
Admin ID	Mailing Title	Ignore
Birthdate	Address Line 1	Address
Joining date	Address Line 2	Ignore
Mobile phone	Suburb	City/Suburb
Alt name	Postcode	Postcode
Alt address	Phone	Phone
Alt city/suburb	Email Address	Email
Alt postcode	Student ID	Admin ID
Alt phone		
Alt mobile		
Alt email		
Barcode		
Ignore		

Number of header lines to ignore:  Format:

The format refers to the list of fields to be imported and their order. The selected list must match the order found in the file to be imported.

Use the *Format* option at the bottom. Setting it to Custom clears the list of fields.

Use the *Load sample* button next to fill the "Import fields" column. This shows the contents of the first row of the file. If it has a header line, that is displayed, otherwise the first record is shown.

Click on one of these fields to highlight then click on the matching Bookmark borrower field on the left side. That is assigned. Use "Ignore" for any field for which Bookmark does not have a corresponding field.

All fields must be matched or ignored.

If the file contains lines at the beginning which do not contain student data, enter the number of lines next to "Number of headers lines to ignore".

Click OK.

This completes the Borrower Import section.

.

# Borrower Information Privacy

Bookmark allows easy recall of information about borrowers in the Circulation and Search modules.

Under normal operation, viewing information about borrowers is unrestricted. However, all borrower data can be restricted.

Bookmark takes a flexible approach which allows each library to custom-design the type and nature of this security.

The main parts of borrower privacy are:

- Access to information in Your Details in Search
- Loans listed on screen when borrowing

## Your Details

In the Search module, discussed in another document, Your Details can be used to see a borrower.

**Your details**

HATTON, Kathy (434) 78 items borrowed  
Group: STAF Gender: F  
Type: Library Staff (9) Loan limit: 30

Loans 1 History 78 Reservations 0 Booklists 0

Number	Title	Type	Date
33249	Murder at Mykenai	FIC Fiction	19/10/2013

Details Print Menu

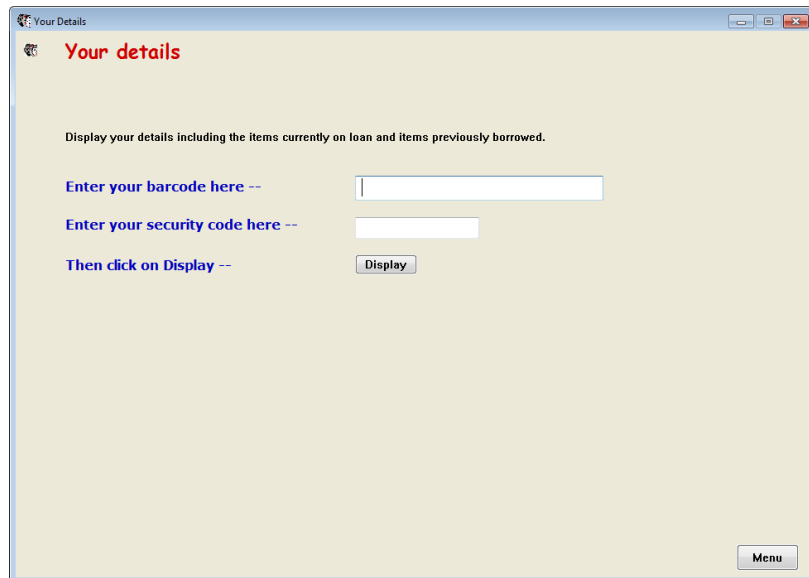
The information includes the borrower's name, number, class, borrower type, a list of items currently on loan, items previously borrowed, current reservations and any booklists the borrower for which the borrower is responsible. This information is always available for any borrower who can be viewed.

Restrictions apply to searching for the actual person.

These restrictions must be turned on. By default, Bookmark does not place any restrictions on searching for and viewing borrowers.

The My Details option in Search may be hidden so no one can access any borrower's information.

A borrower can have a "privacy code" which acts like their PIN. It is a field in Add/Edit Borrowers. This must be entered along with their barcode.



Borrowers without a privacy code may leave the "security code" line blank.

Searching by name can be turned on or off as well. If off, then the borrower's barcode must be used.

Note: library staff can enter the Main Password or the *Borrower Info Password*.

These controls are discussed in the Search Controls section of the Search module documentation.

## Item Loans

When a borrower enters their barcode to borrow items, a list is normally displayed showing what they currently have on loan. To conform to privacy regulations, this list should not be displayed. The number 3 Switch in System Control's Circulation Switches determines if this list is displayed or not.

If the Switch is set to OFF, then when borrowing, the list of items is not displayed. Instead, the number of items on loan is shown and the number of overdues given, if any. The borrower can call up their list by entering the words **LIST** or **SHOW** (instead of an item's barcode), then entering the borrower's privacy code or the Main password or Privacy Access password.

# Borrower Data Global Change



Borrower Global Change can be used to "find" and "replace" data or to add to data already in a borrower field.

Global Change

Global Change

Special backup

Backup

Step 1 - List borrowers to be changed

Details

Remove

Query

Import

Export

Print

Add borrower to list --> 

Add

Number	Name	Group/Class	Year level	Type

Step 2 - Specify the change

Change field:

Choose field

Change to:

Change data in field to the above

☒ Stop at each entry to examine and decide

Step 3 - Make changes

Change

Fill barcodes with admin IDs

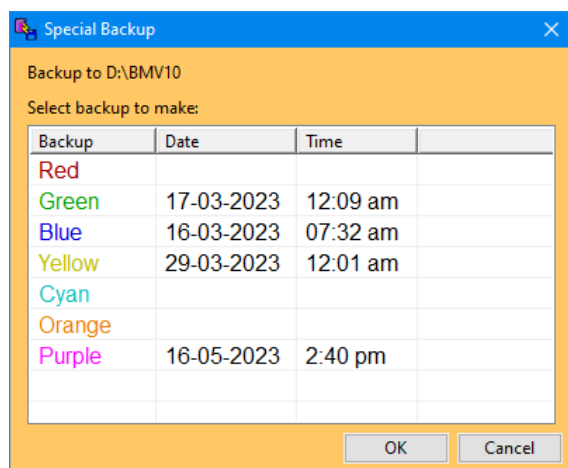
Clear all barcodes

Cancel



## Special Backup

**CAUTION!** The consequences of an incorrect Global Change can be far-reaching. A backup is strongly recommended immediately *before* a Global Change. If the change is not correct, restoring the backup is the only undo operation available. This option backs up to Bookmark's location (flash drive, etc. not needed). Seven backups are available, denoted by colour.



## Step 1 – List Borrowers to be Changed

The first step is to list the borrowers that are to be changed. This can be done in several ways.



- Borrowers can be individually scanned or item numbers entered
- A Query (search) can be conducted to obtain a list of borrowers based on a common criterion (See Reports for a description of Queries)
- A list of borrower numbers or barcodes can be imported (and exported)
- Details of a borrower can be viewed by highlighting and clicking on Details
- A borrower can be removed from the list by highlighting and clicking Remove

## Step 2 – Specify the Change

*Change field:* This is the field in which data will be changed (it can be the one being searched or a different field).

*Change to:* This is the value which will be assigned to the field being changed.

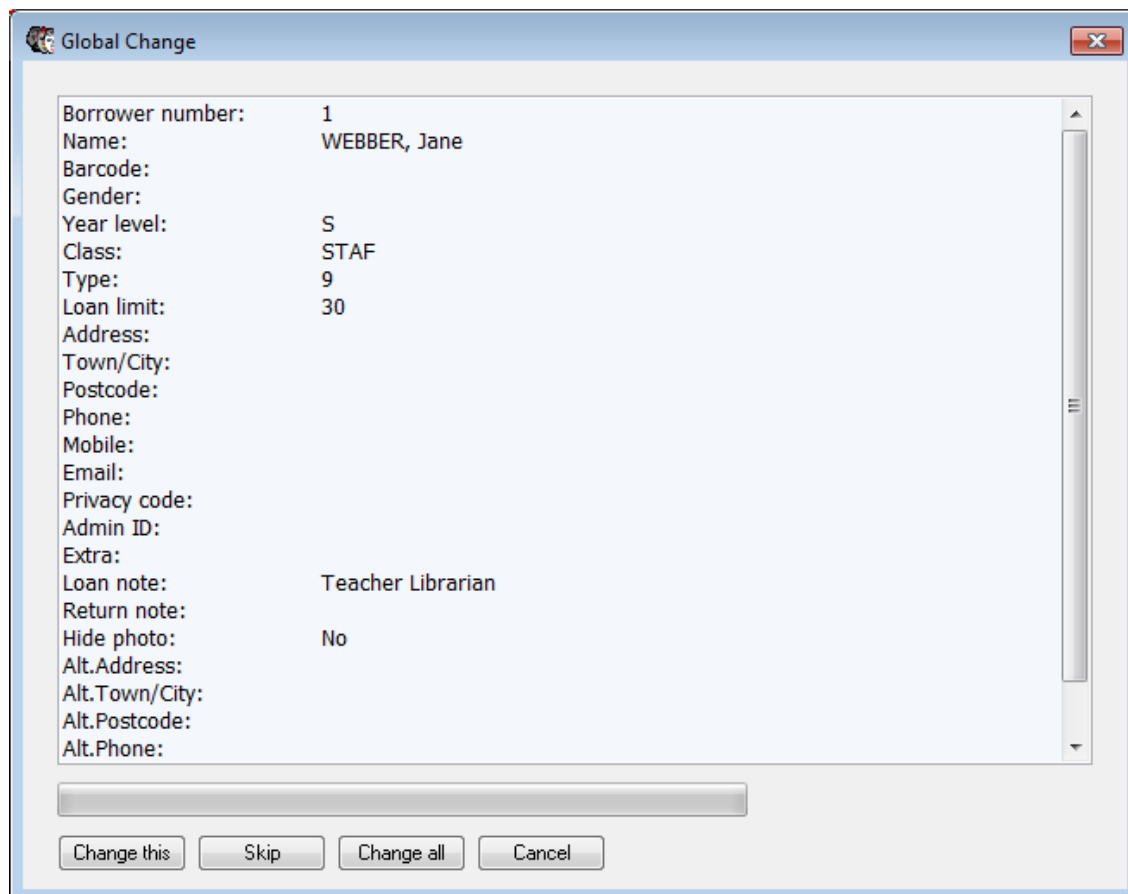
Three ways are available in the droplist below to make a change.

1. Replace entire contents of Change field with 'Change to' text
2. Add data to the beginning of the field (prefix)
3. Append data to the end of the field (suffix)

4. Remove the “change to” data from the field. All instances in the field are removed.

*Stop at each entry and decide:* Normally keep this ticked. However, if you are certain of the global change, the tick can be removed. All borrowers in the list are changed without notice.

### Step 3 – Start search and change



The image shows a 'Global Change' dialog box with a list of borrower details. The details are as follows:

Borrower number:	1
Name:	WEBBER, Jane
Barcode:	
Gender:	
Year level:	S
Class:	STAF
Type:	9
Loan limit:	30
Address:	
Town/City:	
Postcode:	
Phone:	
Mobile:	
Email:	
Privacy code:	
Admin ID:	
Extra:	
Loan note:	Teacher Librarian
Return note:	
Hide photo:	No
Alt.Address:	
Alt.Town/City:	
Alt.Postcode:	
Alt.Phone:	

At the bottom of the dialog box, there are four buttons: 'Change this', 'Skip', 'Change all', and 'Cancel'.

The first borrower in the list is displayed.

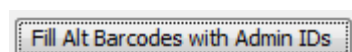
Click on *Change this* to make the change.

Click *Skip* to ignore this borrower and move on to the next.

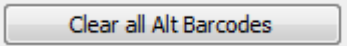
Click *Change all* to change all borrowers without stopping.

Click *Cancel* to abort the global change.

When the global change is completed, a window shows the first record which was changed for checking purposes.



As explained previously, the barcode of every borrower can be stored. This button can be used to make all of the stored barcodes the same as the data in the AdminID field. This should only be used if borrower barcodes are to be the Admin numbers and not the usual sort of barcode.

A rectangular button with a light gray gradient and a thin black border. The text "Clear all Alt Barcodes" is centered in a dark gray, sans-serif font.


This deletes all the stored barcodes, setting the borrower barcode system back to start. Use only for emergencies.

## Borrower Lists



## Borrower Lists

This menu can be used to generate some specific lists based on borrowers. A more comprehensive borrower reporting system can be found in the Reports section.

 Borrower lists

1 - List Borrowers

2 - List Histories

3 - List Loans

4 - List Classes

5 - List Year Levels

6 - Lexiles

7 - Barcodes

8 - Overdue Notice Counts

9 - List Overdues

Go back

## List Borrowers

This produces a simple list of all borrowers for viewing. Click on the heading of a column to change the sorted order of the list.

List borrowers

### List Borrowers

Number	Name	Class	Year level	Type	Barcode
1	WEBBER, Jane	5RT	5	3 - Year 5	B1413000013
2	CHINCHEN, Di	5RT	5	3 - Year 5	B1413000021
3	BATTEN, Sara	5RT	5	3 - Year 5	B1413000039
6	BURLINGTON, Megan	Gorgeous	S	7 - Teacher	B1413000063
7	DALLEYWATER, Keith	Gorgeous	S	8 - Ancillary Staff	B1413000071
8	PONCE, Filomena	STAF	S	9 - Library Staff	B1413000089
9	GLYDE, Beth	LO	S	7 - Teacher	B1413000097
10	STEVENS, Rick	STAF	S	8 - Ancillary Staff	B1413000102
11	TUCKERMAN, Rod	5RT	S	7 - Teacher	B1413000110
13	CODLING, Russell	LO	S	7 - Teacher	B1413000136
14	CUTMORE, Emma	KEC	S	7 - Teacher	B1413000144
15	BROWNE, Rosanne	STAF	S	7 - Teacher	B1413000152
16	LYNCH, Gillian	LO	S	7 - Teacher	B1413000160
17	CUNNEEN, Sheree	STAF	S	8 - Ancillary Staff	B1413000178
18	NIELSEN, Helen	STAF	S	7 - Teacher	B1413000186
19	CROAN, Sophie	STAF	S	8 - Ancillary Staff	B1413000194
20	GROCH, Darine	STAF	S	8 - Ancillary Staff	B1413000209
22	HAES, David	STAF	S	7 - Teacher	B1413000225
24	BOON, Julie	STAF	S	9 - Library Staff	B1413000241
26	DADO, Susan	STAF	S	8 - Ancillary Staff	B1413000267
27	MEARES, Shirley	TELC 5D	T	7 - Teacher	B1413000275
28	MACDONALD, Liz	STAF	S	8 - Ancillary Staff	B1413000283
31	TUCKERMAN, Siobhan	3ST	S	7 - Teacher	B1413000314
32	VALLENDER, Leesa	STAF	S	9 - Library Staff	B1413000322
33	GLYDE, Alice	KAG	S	7 - Teacher	B1413000330
35	RUIZ, Sophie	6SR	S	7 - Teacher	B1413000356
36	VENN, Lisa	4LV	S	7 - Teacher	B1413000368

Double-click on a borrower to view their details


OK Go back

Double click on a name to see details. This display is almost identical to the one in Your Details in the Search module.

Borrower details

WEBBER, Jane (1)  
Class: 5RT  
Type: Year 5 (3)

21 items borrowed  
Gender:  
Loan limit: 10



Loans 1History 21Reservations 1Booklists 3PRC 16

Number	Title	Type	Date
1	The amazing story of Adolphus Tips /	<a href="#">Website</a>	26/05/2021

DetailsPrintClose

Double click on any entry in the list to show the item's cataloguing details.

# List Histories

**List Borrower Histories**

Based on:

- ☒ Group/Class
- ☐ Year level
- ☐ Borrower type

Classes	
<input type="checkbox"/>	2
<input type="checkbox"/> 1SB	20
<input type="checkbox"/> 1ST	20
<input type="checkbox"/> 2BG	21
<input type="checkbox"/> 2HN	20
<input type="checkbox"/> 3EC	21
<input type="checkbox"/> 3FD	19
<input type="checkbox"/> 4CR	19
<input type="checkbox"/> 4RC	20

Date range:  
Specify a range of dates for checking histories...

Earliest date to check: 01/01/2014

Latest date to check: 06/03/2014

List titles or number:

- ☒ List titles in history for each borrower
- ☐ Show only number of entries for each borrower

Format:

- ☒ Multiple borrowers per page
- ☐ One borrower per page
- ☒ Include borrowers with no history results

This function can be used to list borrower loan histories for classes or to list just the number of items borrowed.

**Borrower Histories**

File Edit View Format

3,742 items in histories for 24 borrowers

Number	Title	Call number	Loan date
1	The amazing story of Adolphus Tips /	F MOR *	17/08/2015
33479	The Freedom Merchants	F JOR	21/05/2015
29610	The Shallows : How the Internet is Changing the way we Think, Re...	303.4833 Car	21/05/2015
500	Wolfie	F BAR	21/05/2015
-----	-----	-----	-----
<b>2</b>	<b>CHINCHEN, Di</b>	<b>Class: 5RT</b>	<b>9</b>
2	Home to mother	994.104 PIL *	23/03/2020
34590	Tiddles : the special Tassie devil	JF Law	13/08/2018
1	The amazing story of Adolphus Tips /	F MOR *	15/06/2015
500	Wolfie	F BAR	15/06/2015
26080	Guess How Much I Love You	PF McB	19/08/2014
9380	Do Mice Eat Rice?: Did You Ever Wonder Why we Eat What we D...	J811 Wig	12/08/2010
18262	Honey Sandwich	J A821.3 Hon	12/08/2010
26699	A Song of Colours	J821.914 Hin	12/08/2010
8170	Hailstones and Halibut Bones : Adventures in Colour	J 811.5 One	12/08/2010
-----	-----	-----	-----
<b>3</b>	<b>BATTEN, Sara</b>	<b>Class: 5RT</b>	<b>431</b>
90	Tiddles : the special Tassie devil	JF Law	13/08/2018
10001	Sometimes	PF ARN	01/08/2016
35248	Toys and games: then and now	J688.72 Hop	08/05/2015
27397	The Princess and her Panther	PF Orr *	04/05/2015
19934	Rapunzel	QF Gri	04/05/2015

Font: Arial Size: 10 3790 lines, ~ 64 pages

Below is the display showing the number of history entries (summary) found for a class.

*Borrowers*

Borrower Histories				
File Edit View Format				
3,742 items in histories for 0 borrowers				
Number	Name	Class	History entries	
1	WEBBER, Jane	5RT	21	
2	CHINCHEN, Di	5RT	9	
3	BATTEN, Sara	5RT	431	
11	TUCKERMAN, Rod	5RT	139	
119	CATE, Chloe	5RT	28	
131	BASSETTO, Jacob	5RT	39	
133	KIYORK, James	5RT	181	
145	EDEN, Jude	5RT	173	
152	OSOMANSKI, Luca	5RT	184	
169	EDIS, Charlie	5RT	145	
170	SELTSIKAS, Joseph	5RT	103	
176	ZIVANOVIC, Zev	5RT	155	
182	SUPPLE, Lara	5RT	231	
197	GUBERINA, Tom	5RT	152	
213	CORMACK, Oscar	5RT	128	
216	MAHER, Angus	5RT	181	
219	MCNULTY, Maeve	5RT	183	
228	Turpin, Austin	5RT	3	
232	STEPNIAK, Isabelle	5RT	205	
323	ELKAN, Isobel	5RT	231	
329	MORISON, Angelina	5RT	188	
330	MORISON, Sienna	5RT	251	

Font: Arial    Size: 10    24 lines, ~ 1 page    Remove    Print    Save    Close

Note: the list shown is independent of the cut-off date set in Rollover to restrict the loans shown. This report relies only on the date-range specified.

# List Loans

**Borrower loans**

## List Items on Loan

This report uses the criteria below instead of the query

**Based on**

☒ Group/Class  
☐ Year level  
☐ Borrower type

All None

Classes	
	0
1SB	30
2MB	26
3ST	28
4LV	27
5RT	21
6SR	30
ELVS	8
Gorgeous	4

**Date range**

☒ List all loans  
 Omit loans prior to: 01/01/2014

**List titles or number**

☒ List titles on loan for each borrower  
☐ Show only number of entries for each borrower

**Format**

☒ Multiple classes per page  
☐ One class per page  
☐ One borrower per page  
☒ Include borrowers with no loans

OK Go back

This area can be used to generate a list of all items on loan to various classes or groups.

**Borrower Loans**

File Edit View Format

156 items on loan

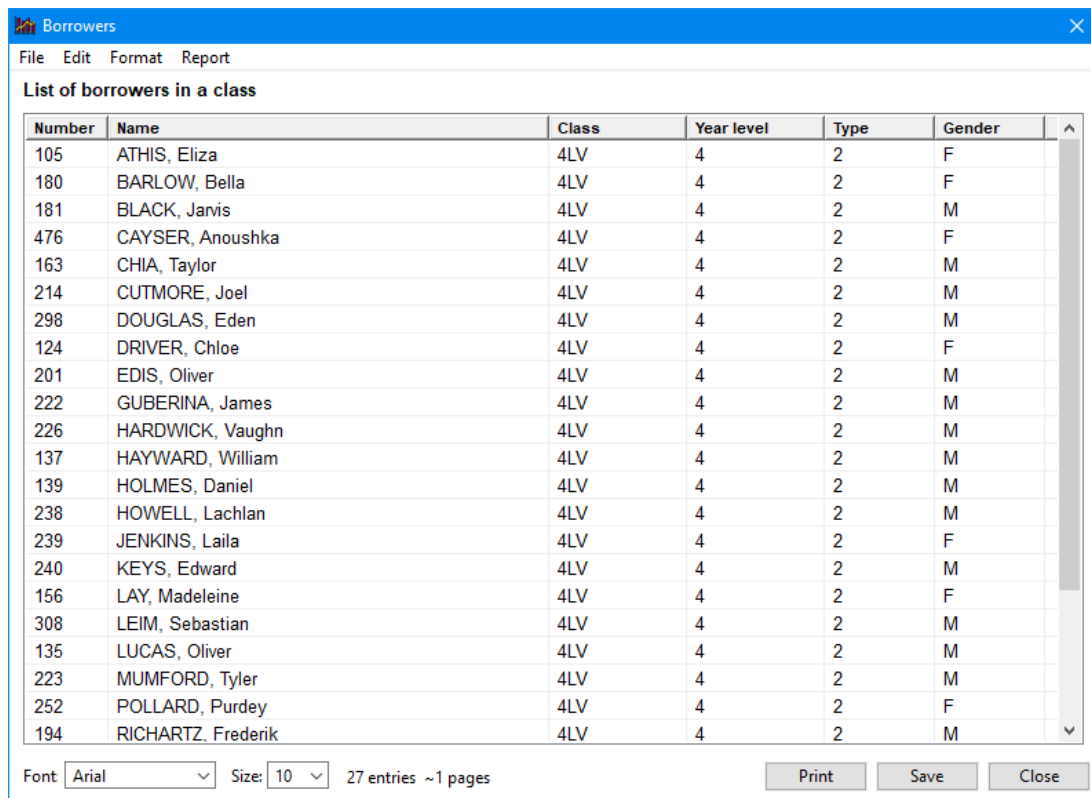
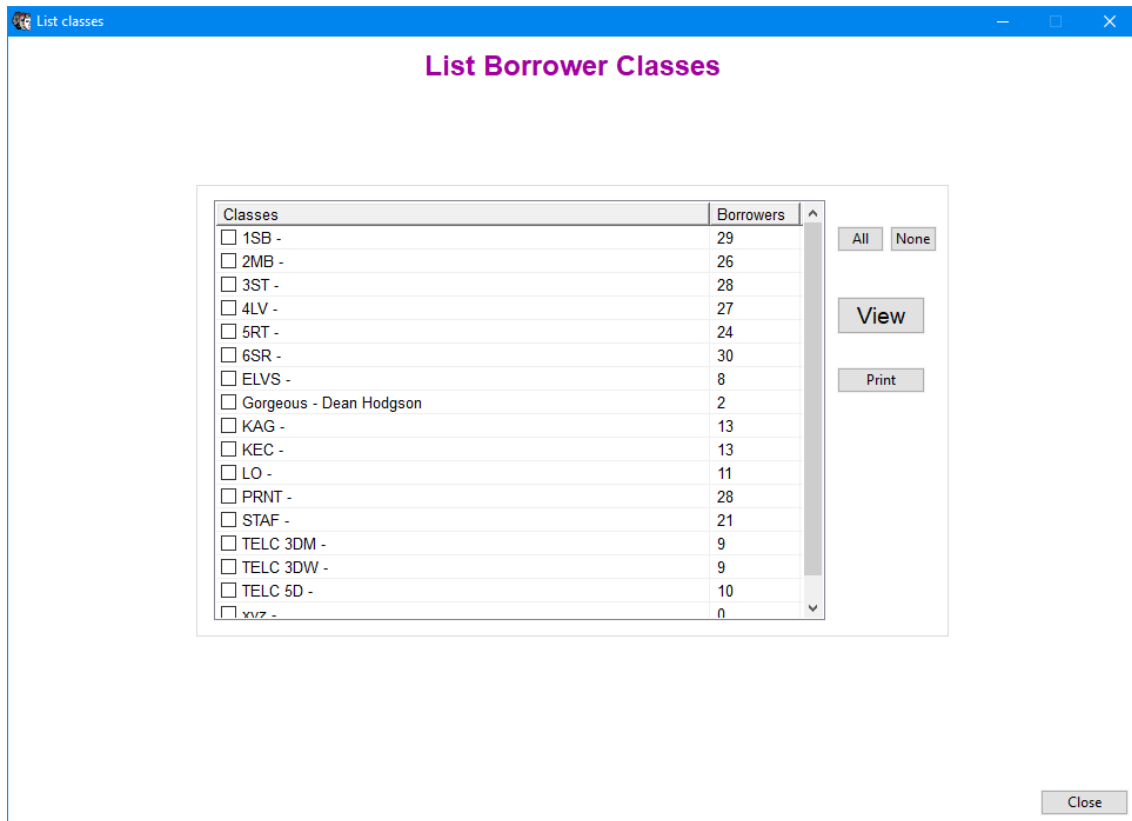
Number	Title	Call number	Loan date
22142	Children's First Cookbook : Have Fun in the Kitchen	J641.5 Kar	18/05/2015 *
7171	The Seeing Stone : Book 2 - The Spiderwick Chronicles	F Dit *	16/03/2015 *
23646	Arthur Spiderwick's field guide to the fantastical world around you	F Dit	16/03/2015 *
-----	-----	-----	-----
145	EDEN, Jude	Class: 5RT	2
33545	Holes : CLASS SET	CS F Sac	26/06/2015 *
34694	Laff-o-tronic school jokes!	J808.882 Dah	18/05/2015 *
-----	-----	-----	-----
169	EDIS, Charlie	Class: 5RT	4
33542	Holes : CLASS SET	CS F Sac	26/06/2015 *
34283	Ships	387.209 Shi	18/05/2015 *
8625	The Best-Ever Book of Flight	629.13 Gra *	06/04/2015 *
33069	P. G. Taylor : The Last of the Great Air Pioneers	629.13 Swi	06/04/2015 *
-----	-----	-----	-----
323	ELKAN, Isobel	Class: 5RT	5
33549	Holes : CLASS SET	CS F Sac	26/06/2015 *
28709	Fantastic Feats and Ridiculous Records	030.2 Phi	18/05/2015 *
25870	502 More Great Aussie Jokes	808.882 Fiv	18/05/2015 *
24066	Scholastic Book of World Records Ultimate Quiz Challenge	030.2 Mor	18/05/2015 *

Font: Arial Size: 10 228 lines, ~ 4 pages Remove Print Save Close



# List Classes

List Classes can be used to list all the borrowers in one or more classes.



# List Year Levels

This lists all borrowers in the indicated year levels.

List year levels

List Borrower Year Levels

Year levels	Borrowers
<input type="checkbox"/>	1
<input type="checkbox"/> 1	28
<input type="checkbox"/> 2	29
<input type="checkbox"/> 3	30
<input type="checkbox"/> 4	26
<input type="checkbox"/> 5	23
<input type="checkbox"/> 6	30
<input type="checkbox"/> E	8
<input type="checkbox"/> K	27
<input type="checkbox"/> P	27
<input type="checkbox"/> S	32
<input type="checkbox"/> T	27

AllNone

View

Print

Close

Borrowers

File Edit Format Report

List of borrower

Number	Name	Class	Year level	Type	Gender
246	ABBOTT, Kaila	6SR	6	4	F
411	ADCOCK, Paris	6SR	6	4	F
267	ALLEN, Kai	6SR	6	4	M
458	ATHIS, Jordan	6SR	6	4	M
447	BATTEN, Emma	6SR	6	4	F
189	BENEFIELD, Darcy	6SR	6	4	M
107	BLACK, Elke	6SR	6	4	F
364	BRUCK, Ellen	6SR	6	4	F
159	COLLITON, Thomas	6SR	6	4	M
445	COOK, Madeleine	6SR	6	4	F
241	CUTMORE, Caleb	6SR	6	4	M
438	DAVISON, Luca	6SR	6	4	M
412	DI BELLO, Serenna	6SR	6	4	F
413	ELMSLIE, Sadie	6SR	6	4	F
294	FRYER, Ruby	6SR	6	4	F
423	GORDON, Oliver	6SR	6	4	M
441	HARDWICK, Paris	6SR	6	4	M
140	HARRISON, Tia	6SR	6	4	F
443	HAYSON, Sam	6SR	6	4	M
202	HORSFALL, Gisele	6SR	6	4	F
407	JENKINS, Mali	6SR	6	4	F
477	LAMBLE THOMAS, Harry	6SR	6	4	M

Font: Arial Size: 10 30 entries ~1 pages

Print

Save

Close

# Lexiles

List borrower lexiles

## List Borrower Lexiles/Levels

Classes	Borrowers
<input type="checkbox"/> 1SB	29
<input type="checkbox"/> 2MB	26
<input type="checkbox"/> 3ST	28
<input type="checkbox"/> 4LV	27
<input type="checkbox"/> 5RT	24
<input type="checkbox"/> 6SR	30
<input type="checkbox"/> ELVS	8
<input type="checkbox"/> Gorgeous	2
<input type="checkbox"/> KAG	13
<input type="checkbox"/> KEC	13
<input type="checkbox"/> LO	11
<input type="checkbox"/> PRNT	28
<input type="checkbox"/> STAF	21
<input type="checkbox"/> TELC 3DM	9
<input type="checkbox"/> TELC 3DW	9
<input type="checkbox"/> TELC 5D	10
<input type="checkbox"/> xvz	0

All None

View

Print

Import

Close

The Lexiles function can be used to list the lexiles recorded against students and to import these from a CSV file downloaded from the Scholastic website.

The file from scholastic is a report showing each student's lexile level and other information. Two formats are available, and Bookmark can import either.

# Barcodes

Barcodes

Scan borrower

No.	Barcode	Name	Class	Year	Type	AdminID
1	B1413000013	WEBBER, Jane	5RT	5	3 Year 5	92057
2	B1413000021	CHINCHEN, Di	5RT	5	3 Year 5	93023
3	B1413000039	BATTEN, Sara	5RT	5	3 Year 5	15539
6	B1413000063	BURLINGTON, Megan	Gorgeous	S	7 Teacher	93021
7	B1413000071	DALLEYWATER, Keith	Gorgeous	S	8 Ancillar...	92140
8	B1413000089	PONCE, Filomena	STAF	S	9 Library ...	
9	B1413000097	GLYDE, Beth	LO	S	7 Teacher	
10	B1413000102	STEVENS, Rick	STAF	S	8 Ancillar...	
11	B1413000110	TUCKERMAN, Rod	5RT	S	7 Teacher	
13	B1413000136	CODLING, Russell	LO	S	7 Teacher	
14	B1413000144	CUTMORE, Emma	KEC	S	7 Teacher	
15	B1413000152	BROWNE, Rosanne	STAF	S	7 Teacher	
16	B1413000160	LYNCH, Gillian	LO	S	7 Teacher	
17	B1413000178	CUNNEEN, Sheree	STAF	S	8 Ancillar...	
18	B1413000186	NIELSEN, Helen	STAF	S	7 Teacher	
19	B1413000194	CROAN, Sophie	STAF	S	8 Ancillar...	
20	B1413000209	GROCH, Darine	STAF	S	8 Ancillar...	
22	B1413000225	HAES, David	STAF	S	7 Teacher	
24	B1413000241	BOON, Julie	STAF	S	9 Library ...	
26	B1413000267	DADO, Susan	STAF	S	8 Ancillar...	
27	B1413000275	MEARES, Shirley	TELC 5D	T	7 Teacher	
28	B1413000283	MACDONALD, Liz	STAF	S	8 Ancillar...	

Erase

Fill blanks

Erase all

AdminID

Close

This window can be used to manage borrower barcodes.

The first column shows the borrower numbers and the second column their barcode.

*If the barcode is blank it still works!* If Bookmark encounters a blank barcode, it calculates what it should be from the borrower number, the site ID and other settings in Controls.

The *Erase* button removes barcodes against all highlighted borrowers.

*Fill blanks* stores barcodes against blanks by generating calculated ones. It is a very good idea to do this as Bookmark will fetch borrowers based on their barcodes faster.

*Erase all* removes all stored barcodes. It is useful if you need to “start over” – e.g. erase all first then fill blanks.

*AdminID* changes all barcodes to be identical to the AdminID values, regardless of the borrower numbers. (Not recommended as this breaks the relationship between the borrower number and barcode.)

## Overdue Notice Counts

This window shows the number of overdue notices issued to each borrower and when the last was generated. The counter for this can be put back to zero in Borrowers > Rollover > Clear overdue notice counts.

Overdue notice counts						
Number	Name	Class	Year level	Overdue notices	Last overdue notice	
1	WEBBER, Jane	5RT	5	79	27/04/2020	
2	CHINCHEN, Di	5RT	5	31	28/08/2017	
3	BATTEN, Sara	5RT	5	2006	16/10/2015	
6	BURLINGTON, Megan	Gorgeous	S	1	28/08/2017	
7	DALLEYWATER, Keith	Gorgeous	S	1	28/08/2017	
8	PONCE, Filomena	STAF	S	0	24/01/2019	
9	GLYDE, Beth	LO	S	33	16/10/2015	
10	STEVENS, Rick	STAF	S	0	24/01/2019	
11	TUCKERMAN, Rod	5RT	S	62	16/10/2015	
13	CODLING, Russell	LO	S	66	16/10/2015	
14	CUTMORE, Emma	KEC	S	720	16/10/2015	
15	BROWNE, Rosanne	STAF	S	450	16/10/2015	
16	LYNCH, Gillian	LO	S	33	16/10/2015	
17	CUNNEEN, Sheree	STAF	S	0	24/01/2019	
18	NIELSEN, Helen	STAF	S	1770	16/10/2015	
19	CROAN, Sophie	STAF	S	270	16/10/2015	
20	GROCH, Darine	STAF	S	0	24/01/2019	
22	HAES, David	STAF	S	0	24/01/2019	
24	BOON, Julie	STAF	S	0	24/01/2019	
26	DADO, Susan	STAF	S	60	16/10/2015	
27	MEARES, Shirley	TELC 5D	T	0	24/01/2019	
28	MACDONALD, Liz	STAF	S	0	24/01/2019	

Font: Arial Size: 10 288 entries ~5 pages

Print Save Close

## List Overdues

This window shows all overdue items in list format. Details about individual entries can be viewed and entries can be removed from the list. Print lists all overdue unless some are highlighted, in which case only the highlighted entries are printed.

Overdue Items									
895 overdue items									
BN	Name	Class	Year	Type	Item	Title	Call number	Due date	Days overdue
497	"CHINCHEN", "Di"	3ST	3	2	500	Wollie	F BAR	26/06/2015	95
497	ABBOTT, Kaila	3ST	3	2	25381	Ingo : Book 1 - Ingo Teratology	F Dun	04/05/2015	148
497	ABBOTT, Kaila	3ST	3	2	35024	No gun for Asmir	CS F Mat *	26/06/2015	95
497	ADCOCK, Paris	3ST	3	2	34339	Catching Fire : The Hunger Games - Book 2	SF Col *	04/05/2015	148
497	ADCOCK, Paris	3ST	3	2	35049	No gun for Asmir	CS F Mat *	26/06/2015	95
497	ADDERTON, Chase	3ST	3	2	8599	Handa's Hen	PF Bro *	20/05/2015	132
497	ALLEN, Jade	3ST	3	2	20949	The 2nd Big Big Book of Tashi	BF Fie *	26/05/2015	126
497	ALLEN, Jade	3ST	3	2	29974	Christmas Countdown : Book 11 - EJ12 Girl Hero	BF McF	26/05/2015	126
497	ALLEN, Jade	3ST	3	2	37949	Ripley's Believe it or not!	030.2 Rip	26/05/2015	126
497	ALLEN, Kai	3ST	3	2	14033	Cheated!	BF Wag *	04/05/2015	148
497	ALLEN, Kai	3ST	3	2	14046	Hammered!	BF Wag *	04/05/2015	148
497	ALLEN, Kai	3ST	3	2	25775	Twin Trouble - No. 1	F Dav	14/05/2015	138
497	ALLEN, Kai	3ST	3	2	28458	Zombiesons' Time Machine : Freak Street	F Kni	13/05/2015	139
497	ALLEN, Kai	3ST	3	2	35028	No gun for Asmir	CS F Mat *	26/06/2015	95
497	ALLOWAY, Sophia	3ST	3	2	21286	Stories of Monsters	BF Pun	26/05/2015	126
497	ALLOWAY, Sophia	3ST	3	2	34882	Gracie and Josh	JF Ger	26/05/2015	126
497	ANTOUN, Keira	3ST	3	2	32163	RSPCA Bumper Book of Pets and other Animals	636.0887 Hir	21/05/2015	131
497	ANTOUN, Leo	3ST	3	2	25079	Little Beauty	PF Bro *	21/05/2015	131
497	ANTOUN, Leo	3ST	3	2	25160	The Very Cranky Bear	PF Bla *	21/05/2015	131
497	ANTOUN, Leo	3ST	3	2	3000	Saltwater Crocodiles	J597.98 THO	21/05/2015	131
497	ARCHER, William	3ST	3	2	25449	Australia at War	355.00994 Bar	21/05/2015	131
497	ARCHER, William	3ST	3	2	31413	Military Helicopters : Flying into Battle	J358.4183 Pep	21/05/2015	131
497	ARCHER, William	3ST	3	2	32755	Star Wars Origami : 36 amazing paper-folding projects	736.982 Ale	21/05/2015	131
497	ARCHER, William	3ST	3	2	33275	Weapons of war	355.8 TUR	21/05/2015	131
497	ARCHER, William	3ST	3	2	34206	Origami Aussie animals	736.982 Ish	21/05/2015	131
497	ATHIS, Eliza	3ST	3	2	17074	Pirateology : The Sea Journal of Captain William Lubbe...	910.45 Pir	21/05/2015	131
497	ATHIS, Eliza	3ST	3	2	23144	Tutankhamen's Tomb	932 GRE	21/05/2015	131
497	ATHIS, Eliza	3ST	3	2	27234	Pearlie in Central Park	BF Har	21/05/2015	131
497	ATHIS, Eliza	3ST	3	2	27677	Pearlie and the Cherry Blossom Fairy	BF Har	21/05/2015	131
497	ATHIS, Eliza	3ST	3	2	32563	The Princess and the Peas	JF Har	21/05/2015	131
497	ATHIS, Eliza	3ST	3	2	35112	Hatchet : CLASS SET	CS F Pau *	26/06/2015	95
497	ATHIS, Eliza	3ST	3	2	38350	Cand rule of wishing : Princess Betony - Book 3	BF Fre	21/05/2015	131
497	ATHIS, Eliza	3ST	3	2	38354	Hatchet	F Pau *	21/05/2015	140

View

Remove

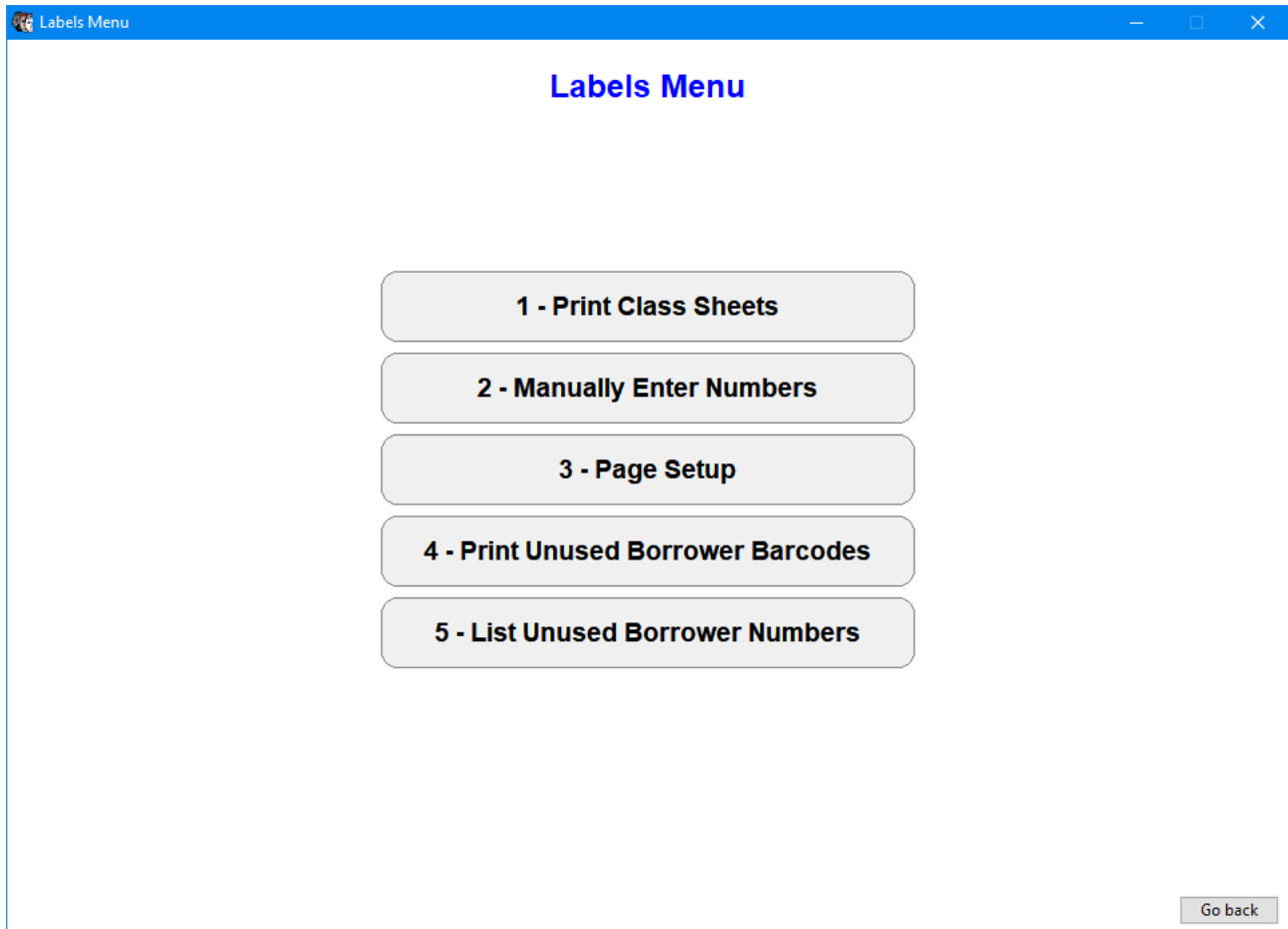
Print list

Close

# Borrower Barcode Labels



Borrower barcode labels can be printed or ordered in this section.



## Print Class Sheets

This very useful feature prints barcodes for all borrowers belonging to a class on one or two pages. These barcodes can include borrower photos.

The barcodes can be regular 1D “striped” barcodes or 2D “square” QR type barcodes.

Tick the classes, year levels or borrower types to be printed.

**Print Class Sheets**

**Based on**

☒ Group/Class  
☐ Year level  
☐ Borrower type

All None

Classes	
<input type="checkbox"/> 1SB	29
<input type="checkbox"/> 2MB	26
<input type="checkbox"/> 3ST	28
<input type="checkbox"/> 4LV	27
<input type="checkbox"/> 5RT	24
<input type="checkbox"/> 6SR	30
<input type="checkbox"/> ELVS	8
<input type="checkbox"/> Gorgeous ~ Dean Hodgson	2
<input type="checkbox"/> KAG	13
<input type="checkbox"/> KEC	13
<input type="checkbox"/> LO	11
<input type="checkbox"/> PRNT	28
<input type="checkbox"/> STAF	24

**Layout**

Layout: 2 x 8 format with photos

Name format: Givenname Surname

Top of label: Borrower's name

Gender:

Sort: ☒ Sort alphabetically by name of borrower

Top of page: ☒ Include class and page number at top

List names: ☐ List borrower names before printing

Show class name: ☐ Include class name with code at top of page

Label: ☐ Print borrower number instead of full barcode

Include: ☐ Include Swap and Finish labels on sheets

Preview: ☒ Show preview of first page

Proceed Cancel

### Layout

Several page layouts are available:

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



2 x 8 means two columns of 8 rows down one page. 16 labels total.

The "page setup format" is the same as defined in Page Setup. This can vary.

The 2 x 5 format suits a readily available variety of sticky labels.

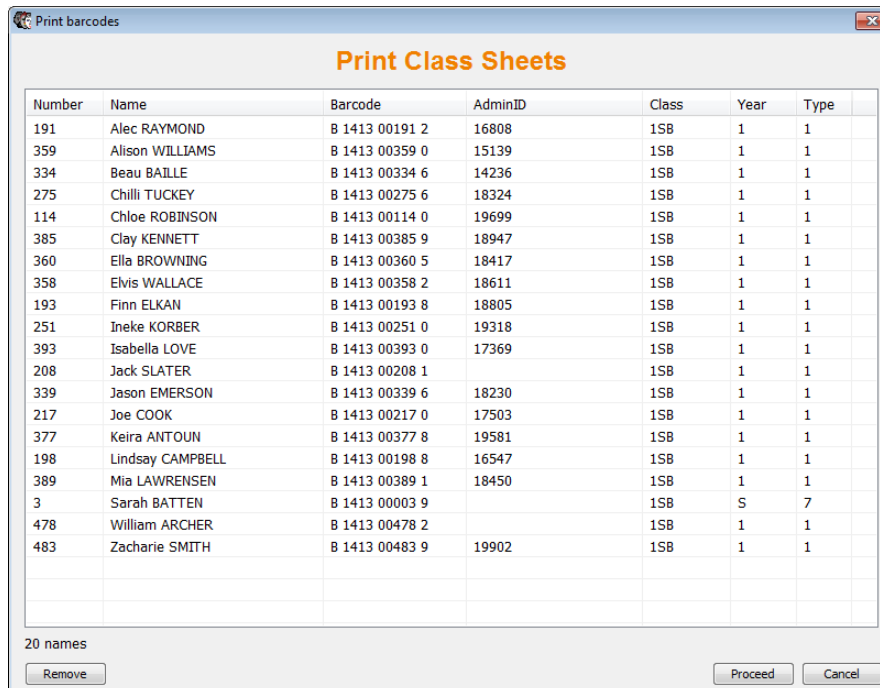
The 1 x 10 prints one barcode on the left side and the borrower's name in large font to the right. Photos are optional. This style can be used to stick to student rulers.

Formats are always being added to the list if users request a new format.

The last two formats print QR type barcodes. Due to their shape, larger size, and the need for readers to have adequate space around the label, only 10 can be included on a page.

## List names

If this box is ticked, a list of borrowers that will be printed is shown. Borrowers can be removed from this list.

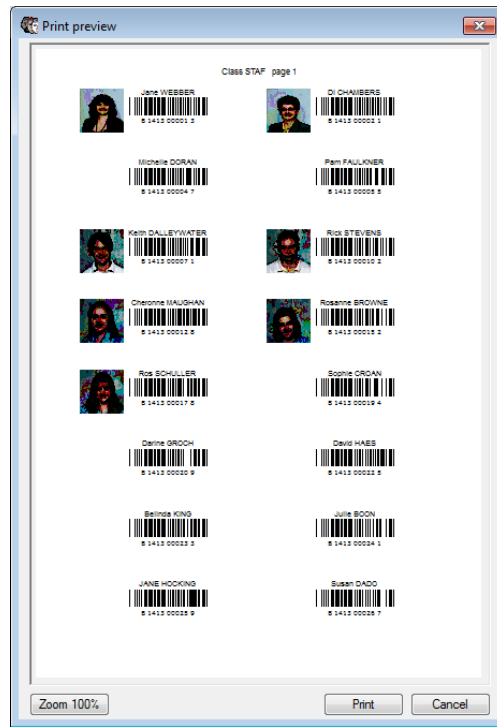


The screenshot shows a window titled "Print barcodes" with a sub-header "Print Class Sheets". It contains a table with the following data:

Number	Name	Barcode	AdminID	Class	Year	Type
191	Alec RAYMOND	B 1413 00191 2	16808	1SB	1	1
359	Alison WILLIAMS	B 1413 00359 0	15139	1SB	1	1
334	Beau BAILLE	B 1413 00334 6	14236	1SB	1	1
275	Chilli TUCKEY	B 1413 00275 6	18324	1SB	1	1
114	Chloe ROBINSON	B 1413 00114 0	19699	1SB	1	1
385	Clay KENNETT	B 1413 00385 9	18947	1SB	1	1
360	Ella BROWNING	B 1413 00360 5	18417	1SB	1	1
358	Elvis WALLACE	B 1413 00358 2	18611	1SB	1	1
193	Finn ELKAN	B 1413 00193 8	18805	1SB	1	1
251	Ineke KORBER	B 1413 00251 0	19318	1SB	1	1
393	Isabella LOVE	B 1413 00393 0	17369	1SB	1	1
208	Jack SLATER	B 1413 00208 1		1SB	1	1
339	Jason EMERSON	B 1413 00339 6	18230	1SB	1	1
217	Joe COOK	B 1413 00217 0	17503	1SB	1	1
377	Keira ANTOUN	B 1413 00377 8	19581	1SB	1	1
198	Lindsay CAMPBELL	B 1413 00198 8	16547	1SB	1	1
389	Mia LAWRENSEN	B 1413 00389 1	18450	1SB	1	1
3	Sarah BATTEN	B 1413 00003 9		1SB	S	7
478	William ARCHER	B 1413 00478 2		1SB	1	1
483	Zacharie SMITH	B 1413 00483 9	19902	1SB	1	1

Below the table, it says "20 names". At the bottom, there are three buttons: "Remove", "Proceed", and "Cancel".

Click on *Print* to see a preview of the first page.



Click on Print on the preview window to begin printing the labels.

Note: barcodes are best printed using a laser printer. The lines are more sharply defined than those generated by inkjet printers. Some readers may have difficulty with inkjet printed labels, although this is not universal.



Keith DALLEYWATER



B1413000071



Megan BURLINGTON



B1413000063

(The grey dots in the example are not included in the actual printout.)

## Manually Enter Numbers

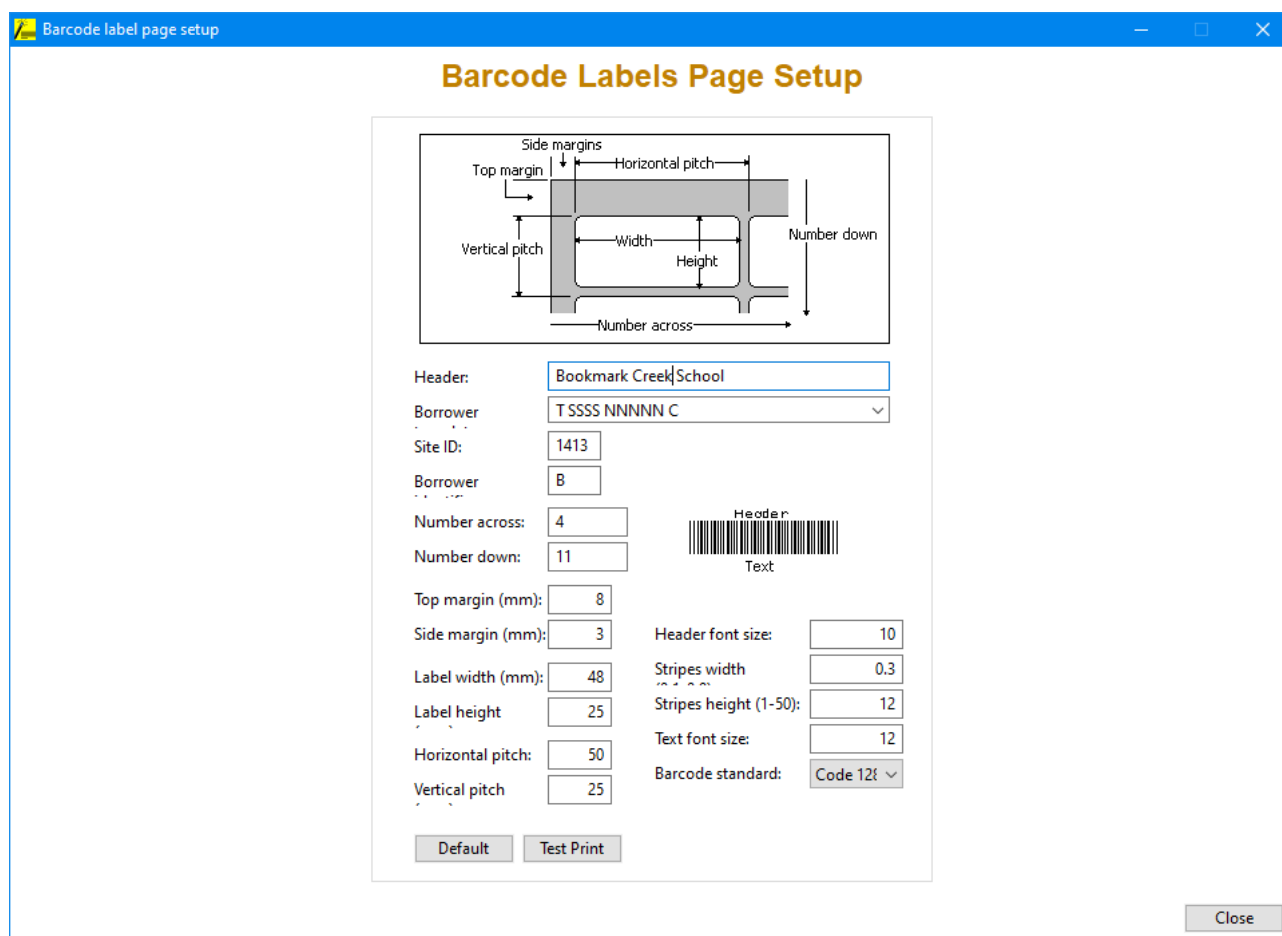
This allows printing of borrower barcodes based on selected numbers or even barcodes.

[illegible]

## Page Setup

Page Setup determines the default layout used for printing borrower barcodes.

It must be filled out correctly as it influences the other barcode printouts.



The dialog box is titled "Barcode Labels Page Setup". It features a diagram at the top showing a barcode label with various dimensions labeled: Side margins, Top margin, Horizontal pitch, Vertical pitch, Width, Height, Number down, and Number across. Below the diagram are input fields for the following settings:

- Header: Bookmark Creek School
- Borrower: T SSSS NNNNN C (dropdown menu)
- Site ID: 1413
- Borrower: B
- Number across: 4
- Number down: 11
- Top margin (mm): 8
- Side margin (mm): 3
- Label width (mm): 48
- Label height: 25
- Horizontal pitch: 50
- Vertical pitch: 25
- Header font size: 10
- Stripes width: 0.3
- Stripes height (1-50): 12
- Text font size: 12
- Barcode standard: Code 128 (dropdown menu)

At the bottom left are buttons for "Default" and "Test Print". At the bottom right is a "Close" button. A small barcode preview is shown next to the "Header" and "Text" labels.

The **Header** is the text printed on top of each label. It is normally the name of your school or site. Optionally, borrower labels can have each person's name used instead.

The **Borrower template** defines the structure of the barcode. It must match the structure of the borrower barcodes you are using. This is normally the same as that in Barcode Settings in Controls, but it can be different if your barcodes are not a standard type. The droplist provides several stands. If the structure you wish to use is not in the list, you can type it in using rules. The symbols used and their position denotes the structure.

- **T** This is the character identifying the type of labels, in this case borrower labels. If present, it usually comes at the start of the label. Item labels begin with a different letter or number.
- **SSSS** This represents the Site ID. It is always 4 characters long and if present comes after the identifier. Note that other library system labels can be configured differently.
- **NNNN** The number of N's is the number of digits in the label of the record value. It is usually 5 or 6 or 8 characters long, depending on the label structure. See examples below.
- **C** This represents a checksum character. Not all label types have this.
- Blank spaces between each part are optional. They are never included in the actual stripes even if they are shown in the template.

Examples of different structures of labels are:

<u>Label type</u>	<u>Template</u>	<u>Example</u>
Standard 11	T SSSS NNNNN C	B 1413 00135 2
Standard 12	T SSSS NNNNNN C	2 1413 0000135 3
Standard 14	T SSSS NNNNNNNN C	2 1413 00000135 4
Oasis type 11	T NNNNN C SSSS	B 00135 Y 1413
Alice, Oliver type 10	T NNNNN SSSS	B 00135 1413
6 digits with type	T NNNNN	B00135
6 digit numbers	NNNNNN	100135
7 digits with type	T NNNNNN	A 000135
5 digit numbers	NNNNN	00135

#### Notes:

- Standard 11 are labels used by most Bookmark users. They also correspond to the structure used by South Australian public libraries.
- Standard 12 are labels used by the Microfusion, Informatif and Metamarc systems.
- Standard 14 are international standard library labels.
- Oasis type are 11 character labels used by the Oasis library system and some Alice and Oliver systems. The Site ID comes at the end and the checksum character is a letter.
- Alice, Oliver type are 10 character labels used by the Alice and Oliver systems. They are the same as the Oasis ones but without the checksum character.
- 6 character types are common to many library systems such as Amlib and Destiny. Sometimes they begin with a letter and other times a numeral.
- 5 digit types are just a number.

Important rule: stick to one structure for all borrower barcode labels!

**Site ID** is the value you wish to include on the borrower labels to identify the site. This is usually a school number but it can also be 4 letters as well. It is only used on the longer labels.

**Number across** is the number of columns of sticky labels on a page.

**Number down** is the number of rows of labels on a page.

**Top margin** is the gap between the top of the page and where the top of the first row of labels actually is. Very few types of sheets do not have a top margin. Also, every printer puts in its own margin. This varies with each model of printer, even the same brand. Bookmark tries to compensate for this but sometimes it is necessary to fiddle the value of the top margin anyway. This value is measured in millimetres and can be a decimal.

**Side margin** is the gap between the left edge of the page and the left side of the first column of labels. Again, printers put their own margins in and it may be necessary to adjust this slightly different to what is measured with a ruler.

**Label width** is the width of each label in millimetres. Decimals can be used.

**Label height** is the height of each label.

**Horizontal pitch** is the distance between the left edge of one label and the left edge of the next label, including a gap between labels.

**Vertical pitch** is the distance from the top of one label to the top of the next label, including a gap if it exists.

**Header font size** is the size of the font used to print text above the stripes. Values of 6, 8 or 10 are normal. The larger the number, the larger the text both horizontally and vertically.

**Stripes width** (0.1-0.9) determines with width of the barcode itself. This is a decimal value between 0.1 and 0.9. It is normally 0.2 to 0.4 with 0.3 fairly normal. Care must be used with this value.

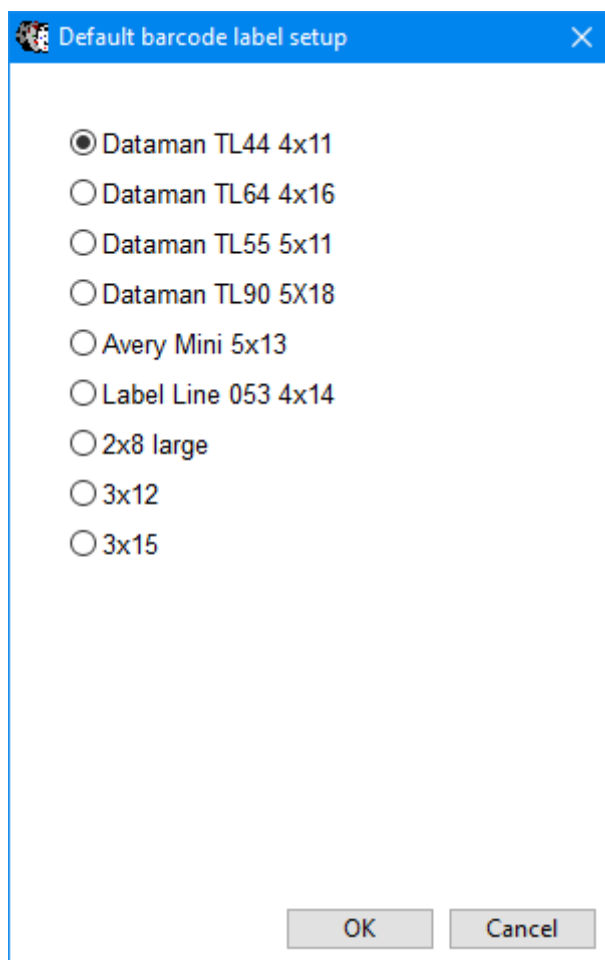
**Stripes height** (1-50) is the height of the label. Normal size is 8.

**Text font size** is the size of the text which appears beneath the stripes. This text shows what the strips represent and conforms to the template. If the template includes spaces, they are included here although they are removed from the strips. In some printouts the check character can be hidden and not shown here even though it is included in the strips.

**Barcode standard** is the starndard used to generate the stripes. There are many standars but only the ones common to libraries are offered here. Code 128 produces darker, thicker lines and is easier for readers to scan. Some very old readers cannot scan this type, however. Code 39 is an older standard and was used by previous versions of Bookmark to print barcodes. It produces finger lines and wider labels (the Stripes Width value usually has to be slightly smaller). Codeabar is another standard used by some other library systems. In general, code 128 should be used unless your reader is unable to work with it.



This button offers serveral standard arrangements for commercial sticky labels plus one (the 3 x 12) that has proven useful. Selecting one of the defaults resets all the values. The TL44 is recommended as a good setup if printing to normal sheets of paper.



Test Print

The Test Print option can be used to see what the printed labels might look like. A "preview" screen is displayed first.



The Zoom button can be used to enlarge. Clicking several times cycles through different sizes.

Print prints one page. Note that the display may be slightly different to the printed page.

## **How to Test**

Test page printouts should be used to make sure the actual printing will be aligned properly within the cells.

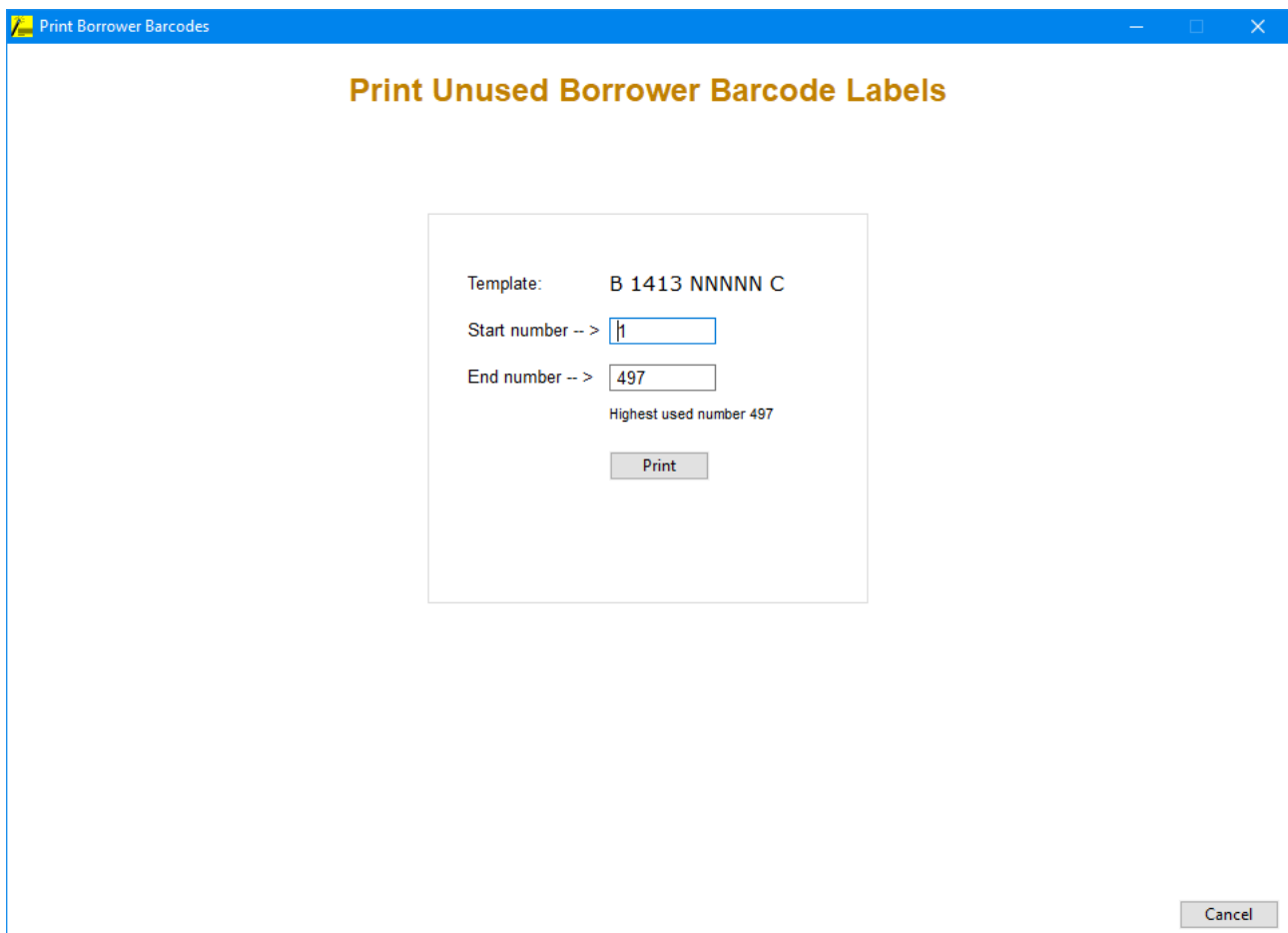
Print a test page on normal paper. Place it behind a blank sticky-labels sheet. Hold up so light shines behind and the silhouette of the labels can be seen within the labels.

If the alignment is incorrect, change a value and repeat the test print. Usually only the top or left margins need to be changed for any of the default label types. Occasionally, several repeats are required.

Once the Page Setup has been defined properly, closing the window saves the values. Page Setup values are kept until altered.



## Unused Borrower Barcodes



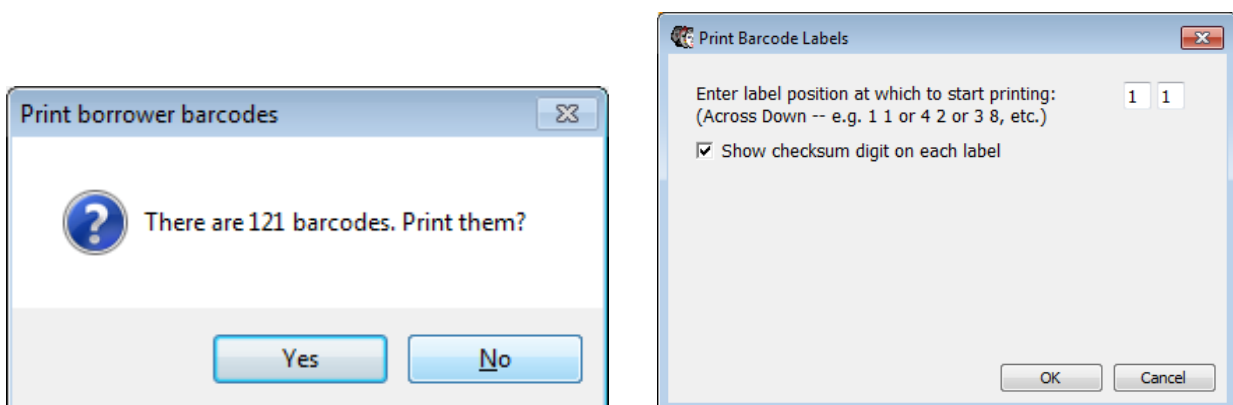
The dialog box is titled "Print Borrower Barcodes" and contains the following elements:

- Template:** B 1413 NNNNN C
- Start number -->** 1
- End number -->** 497
- Highest used number** 497
- Print** button
- Cancel** button

Unused borrower barcodes are based on the borrower record numbers currently vacant. Enter the first and last borrower number of the range between which you wish to print.

Labels are based on only the unused numbers within the range.

The Page Setup format is always used for these labels.



The image shows two dialog boxes side-by-side:

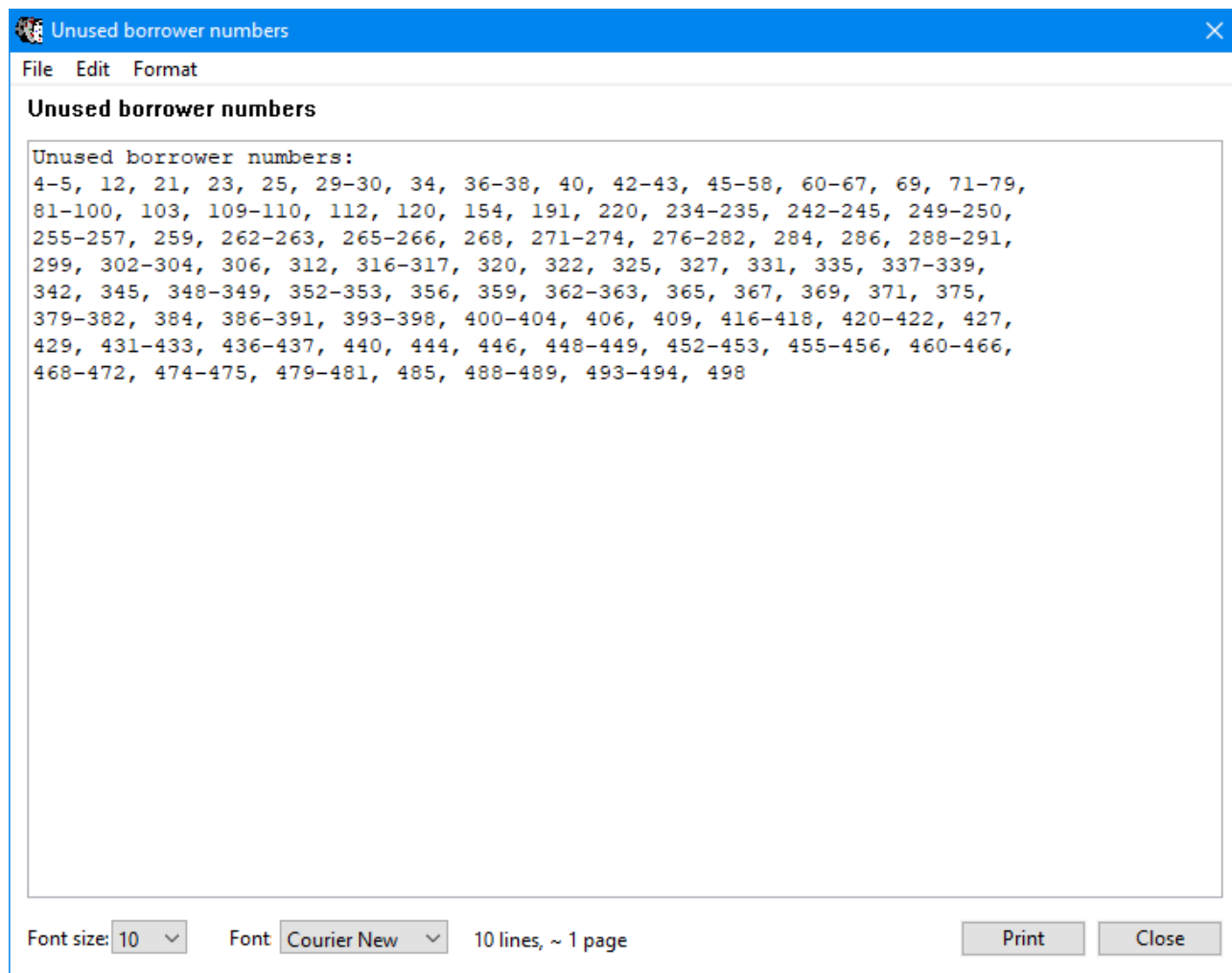
- Print borrower barcodes:** Contains a question mark icon and the text "There are 121 barcodes. Print them?". It has "Yes" and "No" buttons.
- Print Barcode Labels:** Contains the text "Enter label position at which to start printing: (Across Down -- e.g. 1 1 or 4 2 or 3 8, etc.)" with input fields for "1" and "1". It also has a checked checkbox "Show checksum digit on each label" and "OK" and "Cancel" buttons.

The "label position" is where printing begins. This is useful for partially used blank sticky labels.

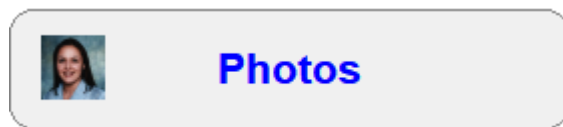
It is strongly recommended to include the final checksum character on labels. Hiding it (remove the tick) does not show it in the text beneath the label but it is still part of the stripes.

## List Unused Borrower Numbers

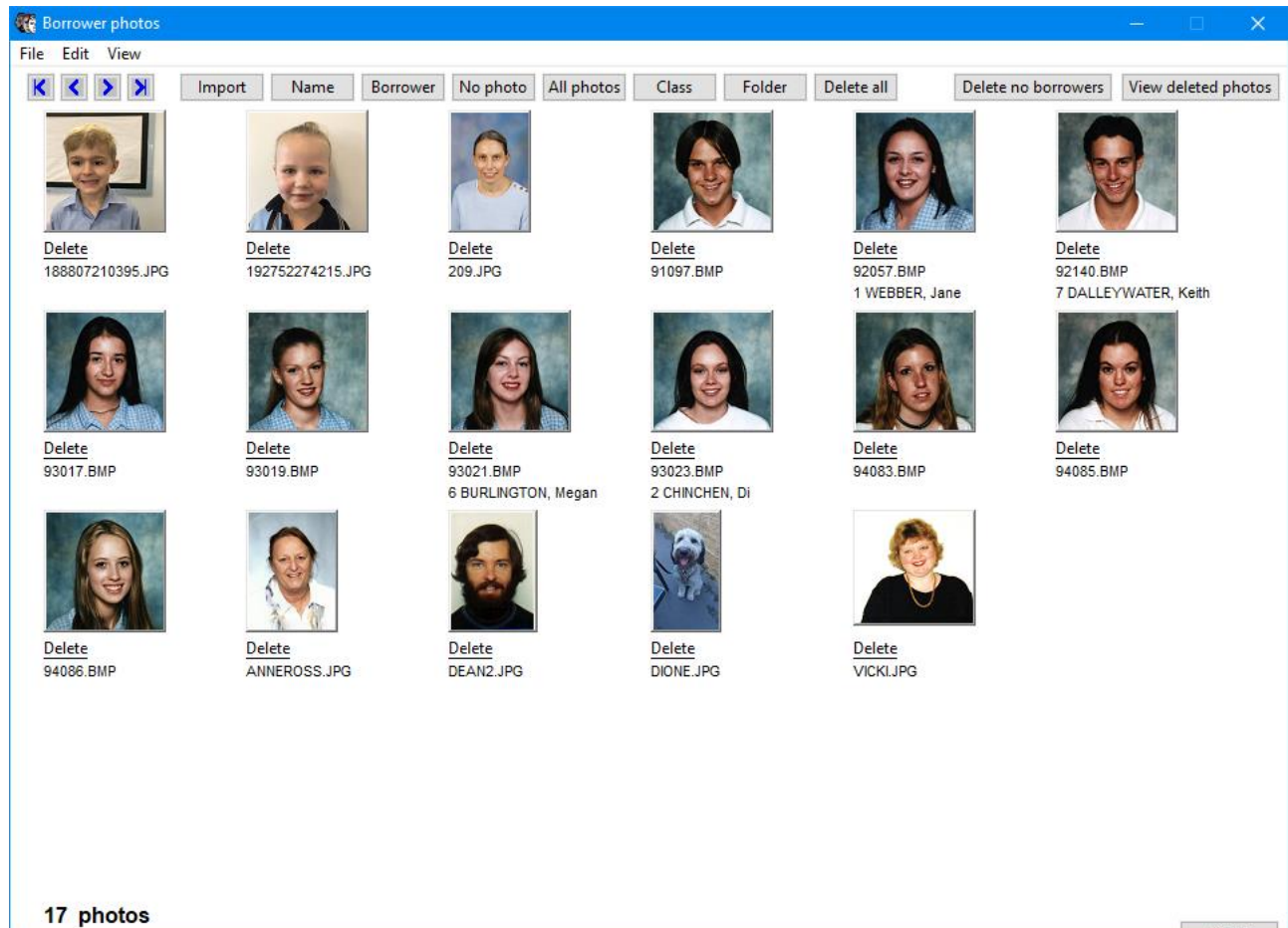
This function lists all unused borrower numbers between 1 and the highest number found in the database. This list is not intended for barcode printing companies but for your reference.



# Photos



Photos can be used to examine all borrower photos, import (put in place) other photo images and delete photos for borrowers who have been removed from the system.





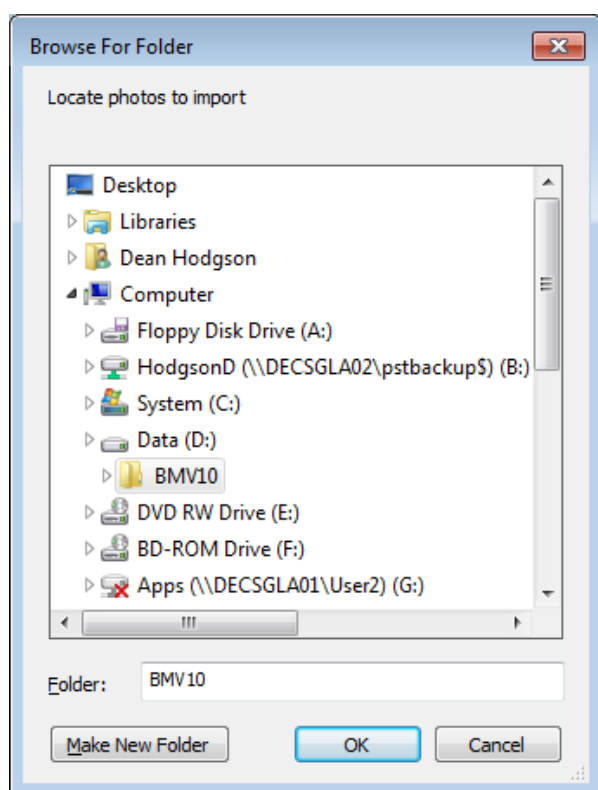
Import is used to bring borrower photos into Bookmark.

The photos can come from either a CD or DVD disc or from within a compressed ZIP file.



Put the dot next to the format then click OK.

If copying from a disc, flashdrive or other source, a "Browse for folder" dialog is shown.



Locate the folder containing the photos then click OK. All the photo files are copied to Bookmark's Photos folder.

If the photos come from a zip file, locate and open it. The photos are automatically extracted from the zip file and copied to Bookmark's Photos folder.

*Ideally, each file should have the AdminID as its filename. Names can be used but may be less able to link to borrower records.*

*Images should be of the bmp, jpg, gif or png type.*

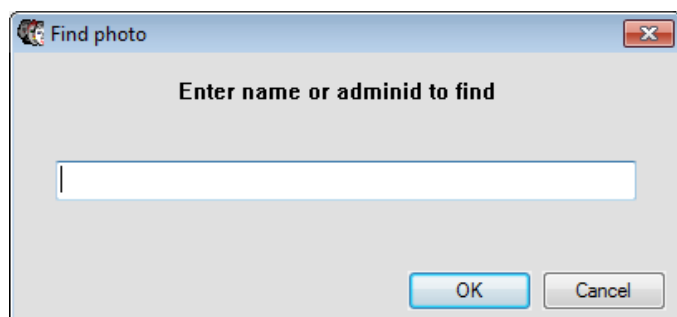
Borrower photos are all stored in a folder called PHOTOS within Bookmark's location.

It is also possible to copy photos directory into the PHOTOS folder.

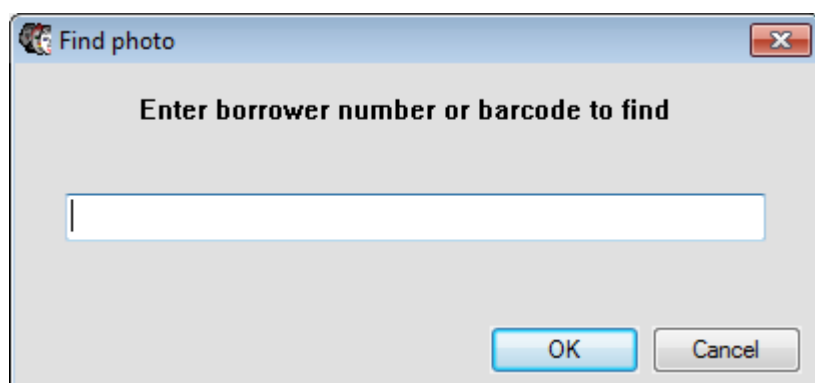
Photos must not be within a folder inside of PHOTOS as Bookmark will not see them.

Name

Use this to locate a borrower by their name or AdminID.

A small dialog box titled "Find photo" with a close button (X) in the top right corner. The main text inside says "Enter name or adminid to find". Below this text is a single-line text input field. At the bottom right of the dialog are two buttons: "OK" and "Cancel".

Borrower

A small dialog box titled "Find photo" with a close button (X) in the top right corner. The main text inside says "Enter borrower number or barcode to find". Below this text is a single-line text input field. At the bottom right of the dialog are two buttons: "OK" and "Cancel".

All photos

Click here to view all photos.

No photo

A list of all borrowers without a photo is shown.

**Borrowers**

File Edit Format Report

**List of borrowers with no photo**

Number	Name	Class	Year level	Type	Adminid
560	Chamberlain, Jason	F2	4	1	
67	Darroch, Anna	F2	4	1	
310	Daw, Kiana	F2	4	1	
195	Dean, Sophie	F2	4	1	
1581	Dickson, Jack	F2	4	1	
506	Francis, Brock	F2	4	1	
681	Graham, Cruz	F2	4	1	
1544	Heaton, Ciara	F2	4	1	
435	Horton, Tiarna	F2	4	1	
1522	Kelly, Haiden	F2	4	1	
1495	Lettherd, Hannah	F2	4	1	
615	MacSween, Breanna	F2	4	1	
1800	Mansell, Kyesha	F2	4	1	
1912	Peters, Chanelle	F2	4	1	
1999	Philp, Poppy	F2	4	1	
1829	Pynaker, Zoe	F2	4	1	
1006	Ratu, Renee	F2	4	1	
1534	Robert, Jaime	F2	4	1	
775	Schafer-Turpin, Jack	F2	4	1	
792	Smith, Cody	F2	4	1	
1560	Street, Joshua	F2	4	1	
830	Taylor, Jackson	F2	4	1	

Font: Arial Size: 10 1332 lines ~23 pages

Print Save Close

All photos

Clicking on this button display all borrower photos.

Class

The Class button allows filtering photos to a particular class. Click on All Photos to see everyone again.

Delete no borrowers

Delete No Borrowers removes all photos that do not have an associated borrower record – e.g. there is no match based on AdminID or name.

View deleted photos

When any borrower photos are deleted, they are shifted into a temporary folder. This button allows viewing that folder.

Photos deleted here are purged from the system.

Recover transfers the photo back to the main Photos folder. It will overwrite an existing image of the same filename.