

Bookmark Fact Sheet

Keeping Track of Deleted Borrowers

July 2021

Unlike deleted items, Bookmark does not automatically keep a record of deleted borrowers.

When a borrower is removed from the system, their main record, loan & return history, overdues history, bookings, reservations, and holds are deleted.

The borrower number and barcode become available. However, a few traces of the borrower may remain – e.g. last person to borrow particular items and their previous overdue items. Because of this, it is recommended that borrower numbers and barcodes are never re-used. New borrowers should be allocated a never-before-used number and barcode.

Some education systems also require keeping a record of borrowers for up to 7 years, including their loan histories.

A method can be adopted to deal with this. It is called the "Left borrowers" method.

Borrowers are not deleted until any information about them will no longer be needed.

Instead of deleting a borrower, change their class to something that means left plus the year. Here is the process:

- Invent a class code like LEFT21 or LFT21 or L21. Instead of deleting borrowers, change them to the "left class" code.
- First, add the new "left class code" to the list of classes. Open Borrowers. Click on Authority Lists. Click on Classes. Add the new code there. The description is optional but worthwhile.
- Do not go to AddEdit Borrowers and change the class of each borrower manually.
- To assign borrowers to the "left class" go to Borrowers, then Rollover, then 3 – Assign borrowers to classes in batches. Sort the borrowers list as necessary to make it easier to locate the borrowers. On the left side, use the dropdown list to locate the "left class" code. Highlight the borrowers who have left. Click on Assign. This is a mass-global-change that changes the class for the borrowers in all areas.

Note: Global Change only alters the class against the borrower record. It does not change the classes held in other lists such as histories.

Optional: change the year level and borrower type, too, to "left" or equivalent. Make sure the authority lists have these entries beforehand. Do this in the Assign area. It can be done at the same time as assigning the LEFT class code.

Tip: Change all borrows to "LFT22" at the start of the year. Then do the rollover. Borrowers not fully rolled over can then be easily spotted and dealt with in Rollover > Update Borrowers List.