

Bookmark Fact Sheet

Due Dates

August 2023

Bookmark uses two types of Due Dates:

- **Duration due date** – A number-of-days loan period. Bookmark automatically calculates the due date based on the number of days specified.
- **Fixed due date** – a set time, such as the end of term or end of the year.

A due date is assigned to an item when it is borrowed.

The due date can be based on:

- The *Borrower Type Category*
- An Item's *Due Date Category*
- Holiday dates
- Final due dates

Every borrower has a Borrower Type Category (BTC), which sets what happens during a loan. Each BTC has a due date, which is either a number indicating a duration due date or a fixed due date. The BTC due date is the normal due date when items are borrowed.

But what if a certain type of item needs to be lent for the entire year or for only overnight, and the BTC is set for two weeks? An item's due date category (DDC) determines if the item will use the BTC due date, or something different. DDC's are numbers from 0 to 20. A DDC of 0 means to use the borrower's BTC due date. Any other DDC takes precedence. It *overrides* the BTC due date. Item due dates can be used for items that are always borrowed until the end of the year, regardless of the BTC, or overnight only or other special cases. Up to 20 "Item due date categories" (DDC) are available. These are assigned to items when catalogued.

In addition, special due dates for specific *item types* can be assigned to each borrower type. This allows musical instruments, for example, to be borrowed until the end of the term for one type of borrower or until the end of the year for another type.

Holiday dates – times when the library is closed. Any due date normally "landing" during a holiday time is automatically advanced to the same day of the week following the holiday.

Final due dates – dates past which a due date is not permitted. Applies only to duration due dates. Stops borrowing after that date.

Questions to ask...

- What due dates do I want for each of my borrower type categories?
- Do I need any special due dates for different types of material for each borrower type?
- Do I need any special due dates for items that will over-ride these?
- Do I need a final end-of-year date, past which borrowing is not allowed?
- Do I need end-of-term due dates, past which due dates are not assigned?

Borrower Due Dates

Due dates assigned to borrower types are the core of the due date system.

Each borrower belongs to a Borrower Type Category (BTC). Each BTC can have its own default due date as well as special due dates for different item types. Teachers can have a different due date than junior primary students, which can be different to middle or upper primary.

Borrower due dates can be set up either in the Borrower Type editing window or the special Due Dates window.

Setting Due Dates against Borrower Types

Go to Borrowers then click on Authority Lists. (Alternately, go to Controls then click on Borrower Lists.) Click on Borrower Types.

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	10	10	blocked	P,1,2	7	29/08/2023			135
2	Year 3,4	10	10	blocked	3,4	7	29/08/2023	Restricted		56
3	Year 5	10	10	blocked	5	7	29/08/2023	Restricted		21
4	Year 6	10	10	blocked	6	7	29/08/2023	Restricted		30
5	Ex LVS Students	4	2	blocked		30	21/09/2023			7
6	Parents	30	5	no block		30	21/09/2023			3
7	Teacher	200	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	21/09/2023			6
10	Ten	4	5	blocked		14	05/09/2023			1
11		10	5	blocked		14	05/09/2023			
12		10	5	blocked		14	05/09/2023			
13		10	5	blocked		14	05/09/2023			
14		10	5	blocked		14	05/09/2023			
15		10	5	blocked		14	05/09/2023			
16		10	5	blocked		14	05/09/2023			
17		10	5	blocked		14	05/09/2023			
18		10	5	blocked		14	05/09/2023			
19		10	5	blocked		14	05/09/2023			
20		10	5	blocked		14	05/09/2023			
21		10	5	blocked		14	05/09/2023			
22		10	5	blocked		14	05/09/2023			
23		10	5	blocked		14	05/09/2023			
24		10	5	blocked		14	05/09/2023			
25		10	5	blocked		14	05/09/2023			

Edit Print Loan limits Names Move Close

Note: your borrower type categories can be different to those shown in this example screenshot.

Double-click on a line to open the BTC editing window or single-click to highlight then click on Edit.

Edit Borrower Type

Edit Borrower Type 3

Description:

Loan limit:

Resv limit:

Overdue block:

Overdue limit:

Year levels:

Due date:

Restriction:

Item type due dates:

Icon	Description	Due date

Item type loan limits:

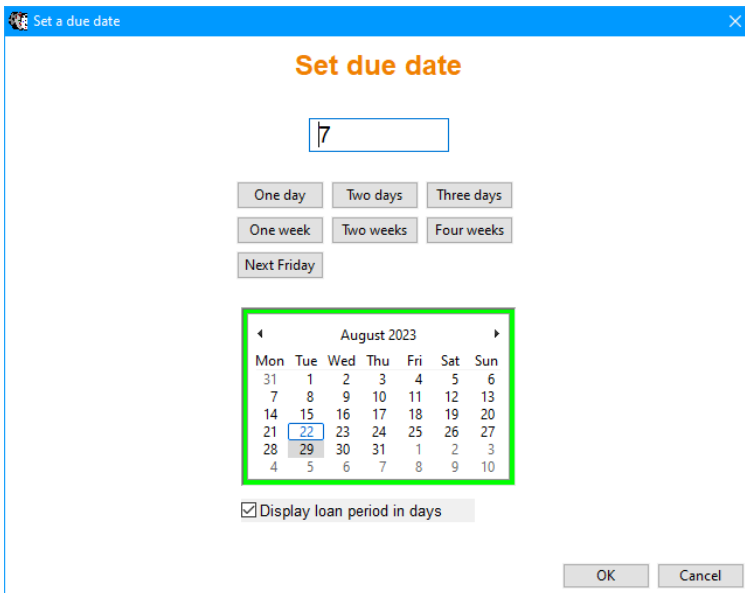
Icon	Description	Loan limit

History cut-off date:

Loan alerts:

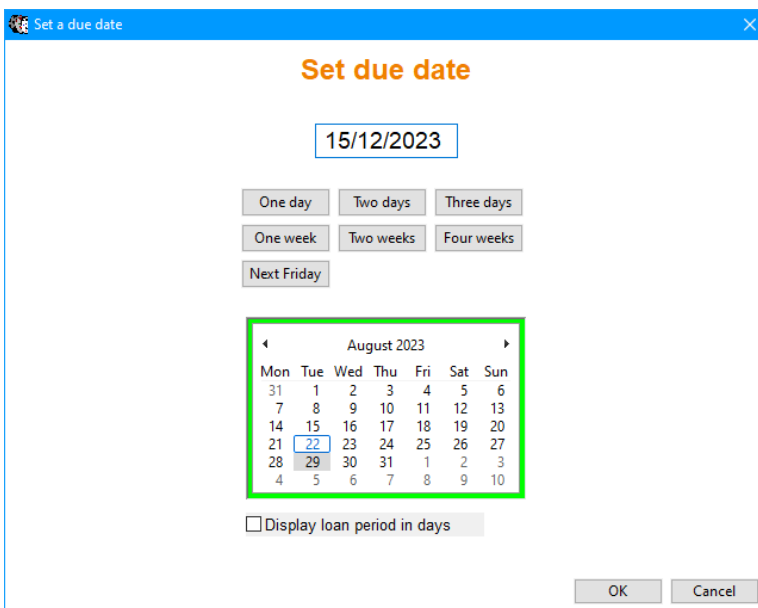
- Pop up alert in loans if borrower has previously loaned the item
- Do not allow borrower to reborrow same item 2 times in a row
- Allow one loan extension even if item is on hold to a diff borrower

To set the default, normal due date, click on the Edit button to the right of the "Due date:" line.



Enter either the number of days of the loan – e.g. 7, 14, 21, etc or any number (do not type the word "days"). This generates a "loan period" or "number of days loan".

Alternately, type in a specific date. Example: 14/01/2018. This makes a "fixed date" that does not change from one day to the next. This is useful for end of year, end of term or other non-changing due dates. (Remove the tick next to "Display loan period in days.")



The Calendar button can be used instead.

When OK is clicked on the Edit Due Date window, the value is displayed on the BTC grid.

Item Type Due Dates

The screenshot shows the 'Edit Borrower Type' window for 'Year 6'. The configuration includes:

- Description: Year 6
- Loan limit: 10
- Resv limit: 10
- Overdue block: blocked
- Overdue limit: (empty)
- Year levels: 6
- Due date: 7 days (29/08/2023)
- Restriction: Restricted
- Item type due dates table:

Icon	Description	Due date
	Bridging Fiction	21
	Periodical	2
- Item type loan limits table: (empty)
- History cut-off date: (empty)
- Loan alerts:
 - 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

An arrow points to the 'Edit' button next to the 'Item type due dates' table.

Each BTC can have special due dates based on item types. These are used to sent a non-standard due date for something like DVDs or magazines.

Click on the Edit button next to the Item type due dates grid to set this up.

The screenshot shows the 'Edit item type due date' window. It features a table of item types with their respective due dates:

Icon	Code	Description	Due date
	CS	Class Sets	
	BF	Bridging Fiction	21
	QF	Quarto Fiction	
	CLF	Classic Fiction Collection	
	SF	Senior Fiction	
	PER	Periodical	2
	BKIT	Kit in small bag	
	GF	Graphic Fiction	
	AF	Adult Fiction	

Below the table, there is a text box with the value '7' and buttons for 'Calendar' and 'Update'. A 'Close' button is located at the bottom right.

Click on the Item Type line then enter the loan period or fixed due date. Click on Update to set into the grid.

The Item Type Due date overrides the borrower's normal due date.

To remove a date, just make the line blank and Update.

Edit Due Dates

The Due Dates window allows changing the borrower type due dates and the item due date categories, holiday dates, and final due dates. This is where due dates can be easily changed from one year to the next.

Click on Controls then on Due Dates.

Edit Due Dates

Borrower Due Dates			
Borrower type	Days	Due date	Count
1 - Years P, 1, 2	7	29/08/2023	135
2 - Year 3,4	7	29/08/2023	56
3 - Year 5	7	29/08/2023	21
4 - Year 6	7	29/08/2023	30
5 - Ex LVS Students	30	21/09/2023	7
6 - Parents	30	21/09/2023	3
7 - Teacher	Fixed date	01/12/2021	17
8 - Ancillary Staff	Fixed date	20/11/2021	12
9 - Library Staff	30	21/09/2023	6
10 - Ten	14	05/09/2023	1
11 -	14	05/09/2023	0
12 -	14	05/09/2023	0
13 -	14	05/09/2023	0
14 -	14	05/09/2023	0
15 -	14	05/09/2023	0
16 -	14	05/09/2023	0
17 -	14	05/09/2023	0
18 -	14	05/09/2023	0
19 -	14	05/09/2023	0
20 -	14	05/09/2023	0

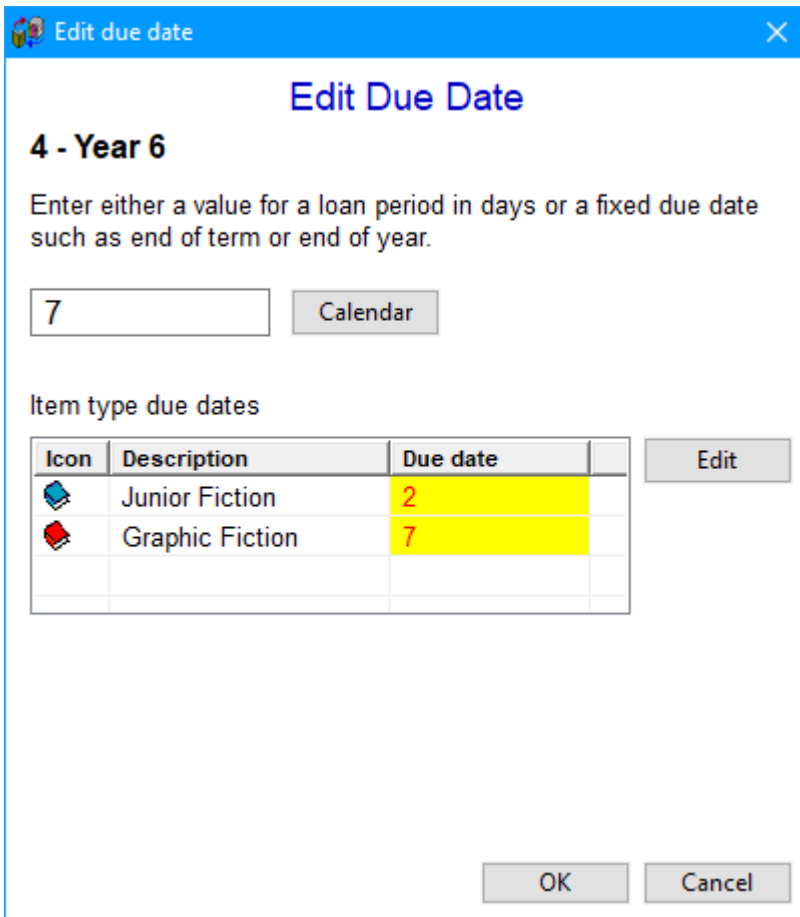
Item Due Dates			
Item due date category	Days	Date	Count
1 - Overnight	1	23/08/2023	1,443
2 -	Fixed date		0
3 -	Fixed date		0
4 -	Fixed date		0
5 -	Fixed date		0
6 -	Fixed date		0
7 -	Fixed date		0
8 -	Fixed date		0
9 -	Fixed date		0
10 -	Fixed date		0
11 -	Fixed date		0
12 -	Fixed date		0
13 -	Fixed date		0
14 -	Fixed date		0
15 -	Fixed date		0
16 -	Fixed date		0
17 -	Fixed date		0
18 -	Fixed date		0
19 -	Fixed date		0
20 -	Fixed date		0

Holiday dates Final due dates

* Expired borrower due dates

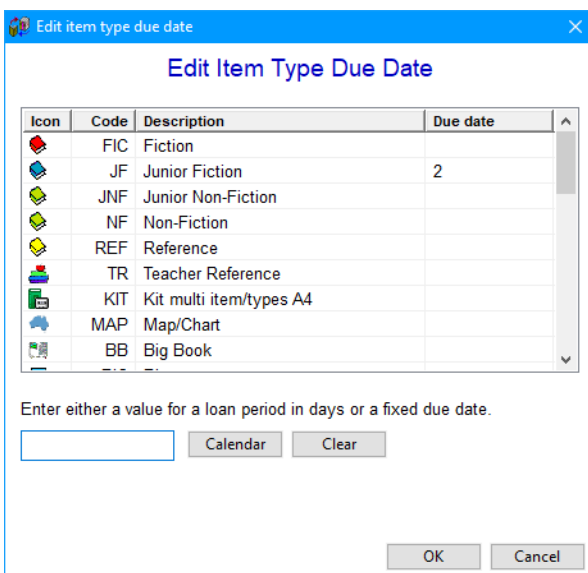
Mass extend loans Close

To edit a borrower due date, single click on any of the lines in the left list.



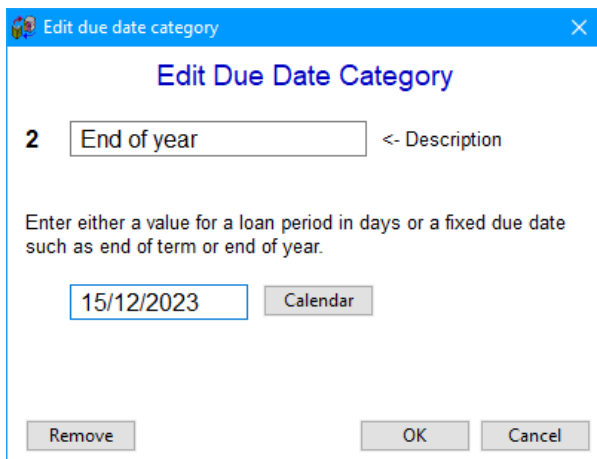
Enter the loan period in days or the fixed date in the first editbox.

Click on Edit to assign or change item type due dates for this borrower type category.



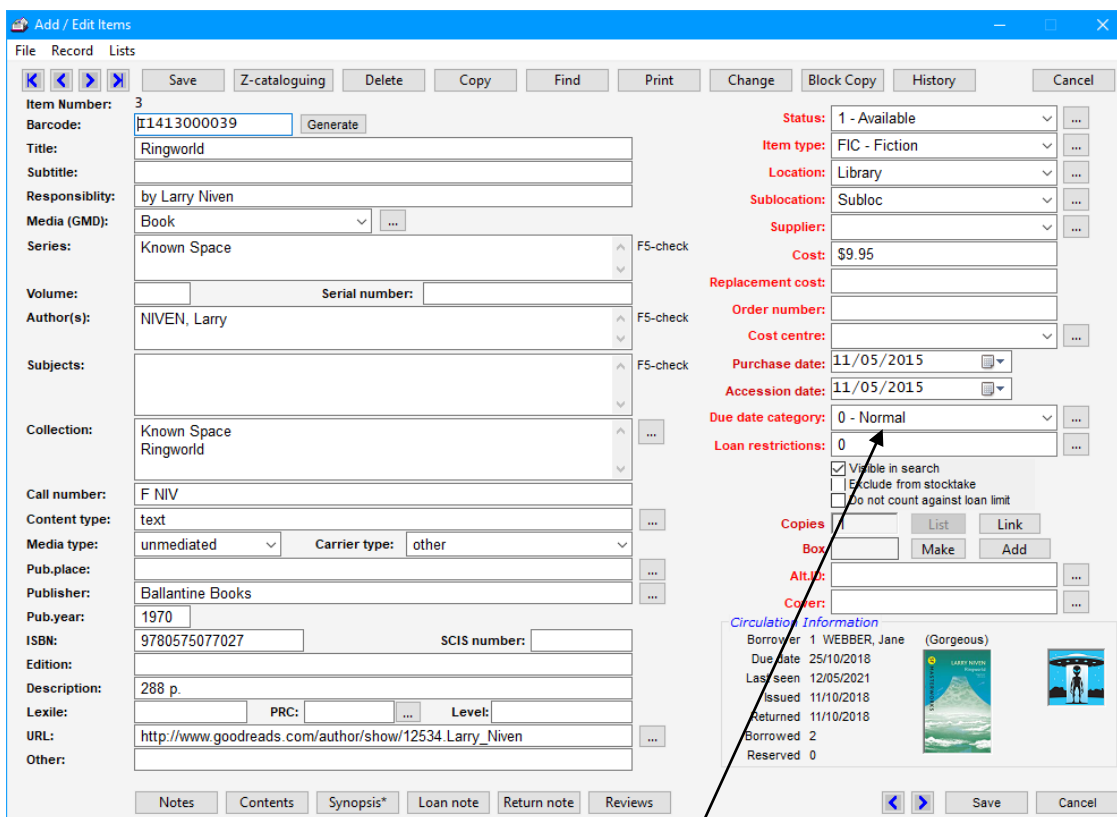
Clicking OK saves the change.

To create or edit an item Due Date Category (DDC), click on any row on the right side.



If blank, enter a description for this category. Enter a loan period or fixed due date for this category. Click OK to save.

An item can be assigned a DDC *when cataloguing* the item.



Use the Due Date Category dropdown list to assign. 0 – Nomal means to use the borrower's due date. This is the default.

Assigning any other value tells Circulation to use that due date category instead when the item is borrowed.

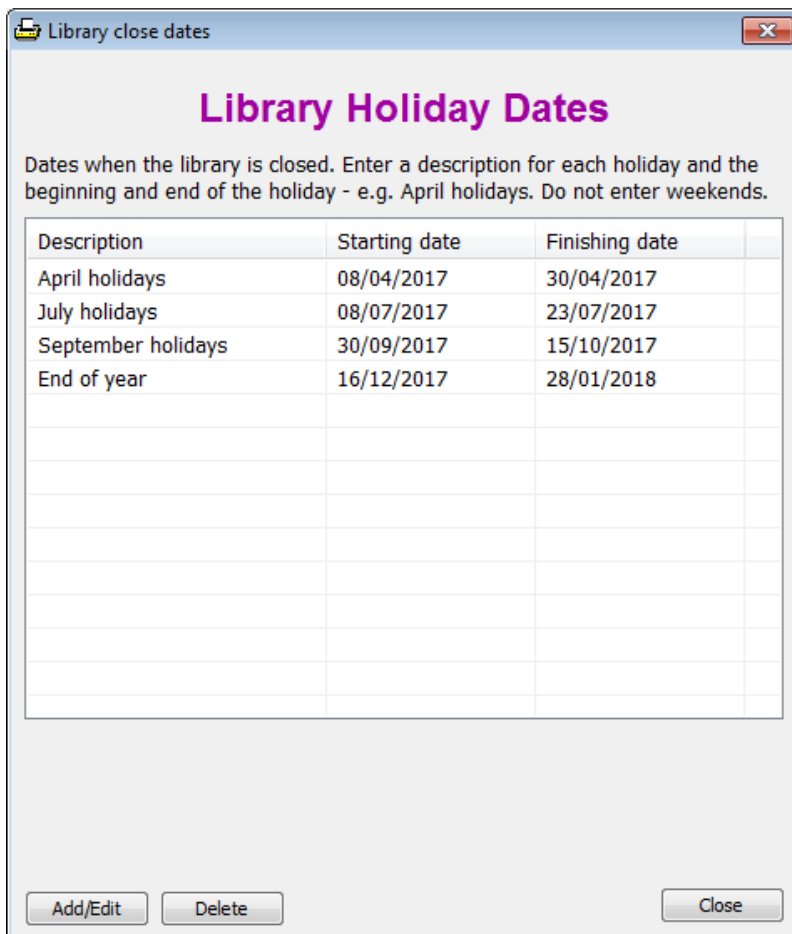
The DDC due date overrides the borrower dates, including the item types ones.

Save the item to store it.

Global Change can be used to mass-assign due date categories.

Holiday Dates

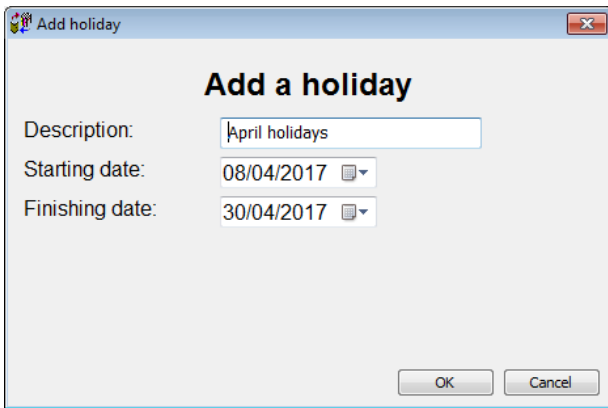
These date ranges specify when the library is closed. They are not the dates when the library is open.



The screenshot shows a window titled "Library close dates" with a close button in the top right corner. The main heading is "Library Holiday Dates" in purple. Below the heading is a text instruction: "Dates when the library is closed. Enter a description for each holiday and the beginning and end of the holiday - e.g. April holidays. Do not enter weekends." Below this is a table with three columns: "Description", "Starting date", and "Finishing date". The table contains four rows of data: "April holidays" (08/04/2017 to 30/04/2017), "July holidays" (08/07/2017 to 23/07/2017), "September holidays" (30/09/2017 to 15/10/2017), and "End of year" (16/12/2017 to 28/01/2018). There are several empty rows below the data. At the bottom of the window are three buttons: "Add/Edit", "Delete", and "Close".

Description	Starting date	Finishing date
April holidays	08/04/2017	30/04/2017
July holidays	08/07/2017	23/07/2017
September holidays	30/09/2017	15/10/2017
End of year	16/12/2017	28/01/2018

Click on a line to open the add/edit holiday date window.



Enter a description and the start and end of the library-closed period. Click OK to save.

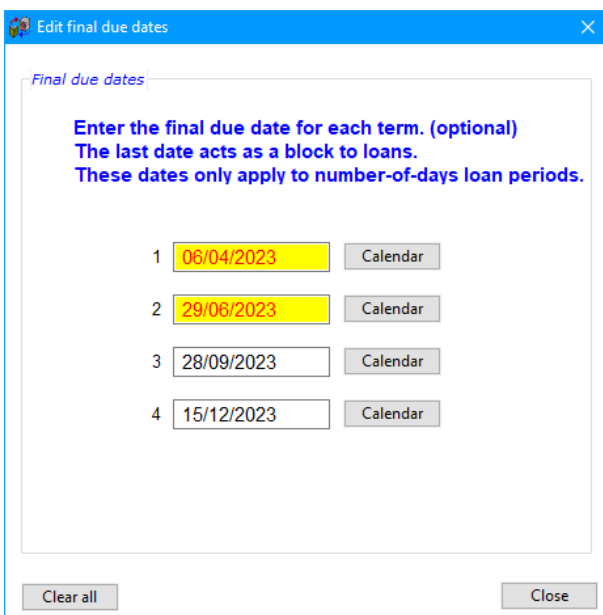
Note: holiday dates must be manually updated every year!

If a due date is calculated to be within the holiday date time, it is automatically shifted forward to the same day of the week after the holiday.

Final Due Date

A final due date the last date that will be assigned. It is only relevant if a "number of days" loan period is used. If the calculated due date falls past this date, then the final due date is assigned.

If the final due date field is left blank, it is not used and completely ignored.



The last due date to be used for each term can be entered, with the very last date acting as an end-of-year date.

All of these can be blank. In which case there is no final due date. Holiday dates then determine the due dates assigned.

If only one date is listed, it acts as an end-of-year due date. No borrowing after the last final due date.

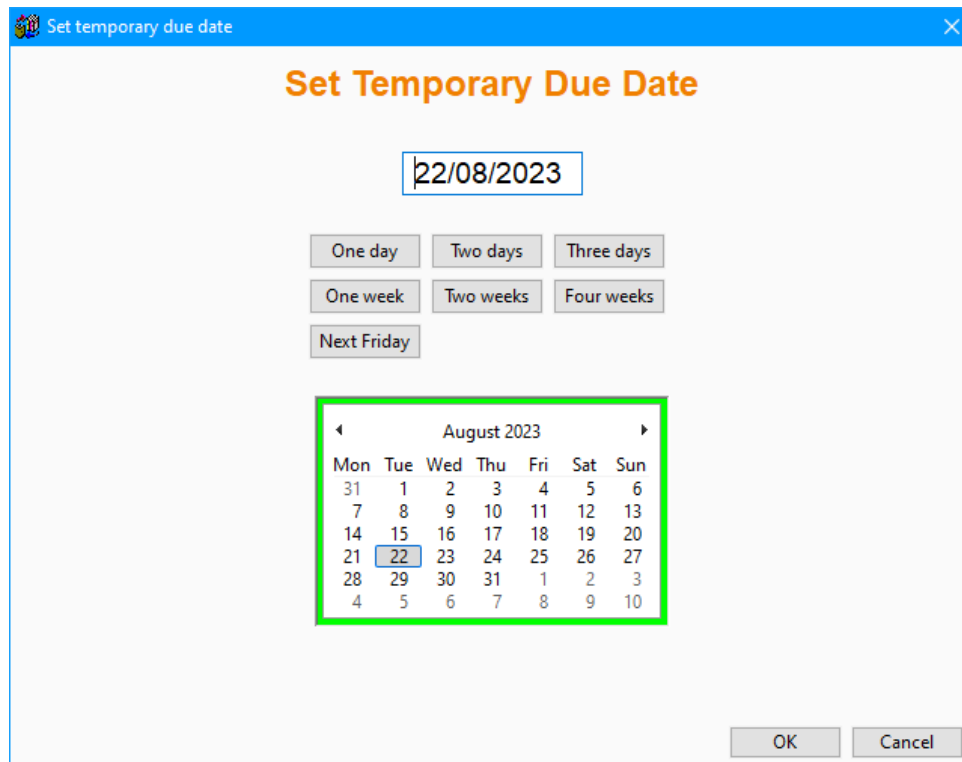
Exception: users with a fixed BTC due date can still borrow. The final due dates only affect borrower types with duration due dates.

Changing Due Dates during Loans – Temporary Due Date

But, wait! There's more...
(Steak knives optional.)

When issuing loans, the due date can be changed on-the-fly right on the borrowing window.

Press the F12 key.



This allows setting a "temporary due date". Once set, it will be applied to *all loans to all borrowers* until it is either cancelled or Circulation is closed.

To cancel, press F12 again.

This also works after a borrower's barcode has been entered.

Changing Due Dates during Loans – One-off Due Date

After a borrower has been entered in loans, it is also possible to set a specific due date. It overrides all other due dates and is assigned to anything that borrower is issued.

Click on Options then on SETDATE.

This can be useful for special bulk loans.

As soon as the borrower is finished, the special date is cancelled. This is different to the temporary due date, which is only cancelled by another F12 keypress.