



## FACT SHEET

### End of year tasks

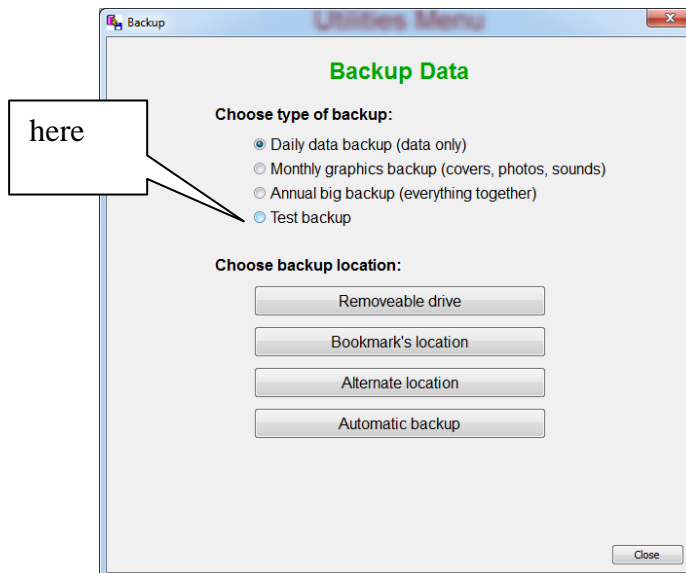
April 2016

#### Countdown...

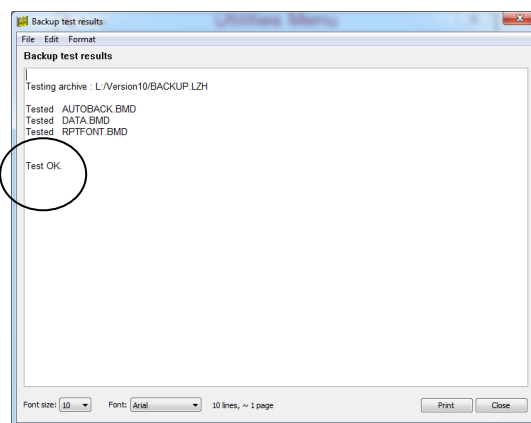
*Four to five weeks before the end of term:*

#### Backups

Check backups each night for the fortnight so as to make sure that they are still travelling well. Go into Utilities / Backup.

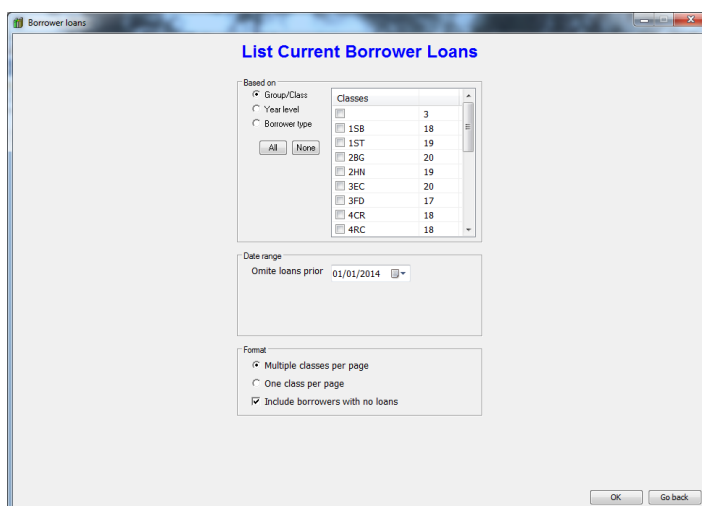


Choose the backup to test.



## Class lists of loans

Start thinking about overdues, by sending out lists to remind people about what they actually have, and give them time to check before you hit them at their busiest time. There are about 4 different ways of generating these lists, so ring the Help desk for ideas. The easiest way is to go into Borrowers / Lists / List loans.



Tick the classes to be printed out, and choose the formats etc. and then print.

## Stocktaking

Start thinking about stocktake and what actually needs to be done.

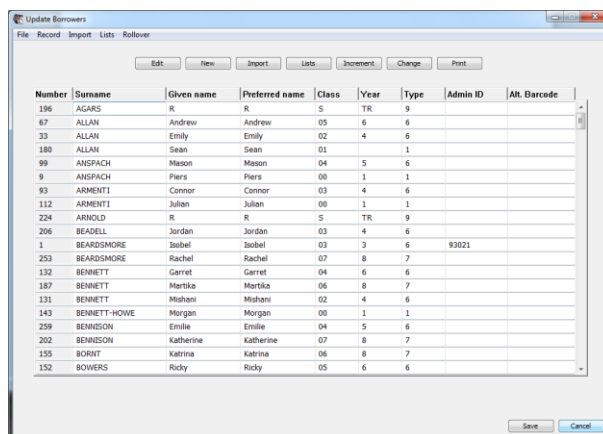
Make sure the barcode reader is ok. For a portable reader, make sure to have fully charged or fresh batteries. Understand how to use the portable functions.

Read up on stocktaking in the manual and the fact sheet. Seek clarification if required. If you don't have a portable reader, consider using a laptop like a portable reader and saving the file in Notepad. (Ring the Help Desk) Check the OH&S guidelines.

## Pre start of year tidying of the Borrower data

If using a compatible student administration system, it is time to check to make sure that all borrowers have their student ID entered, so that next year when the changes are imported, there are no doubly entered students. The easiest way to check is in Borrowers / Update borrowers.

Click on the heading Surname to get them into alphabetical order.



The screenshot shows a window titled 'Update Borrowers' with a menu bar (File, Record, Import, Lists, Rollover) and a toolbar (Edit, New, Import, Lists, Increment, Change, Print). Below is a table with the following columns: Number, Surname, Given name, Preferred name, Class, Year, Type, Admin ID, and Alt. Barcode. The table contains 20 rows of data.

Number	Surname	Given name	Preferred name	Class	Year	Type	Admin ID	Alt. Barcode
196	AGARS	R	R	S	TR	9		
67	ALLAN	Andrew	Andrew	05	6	6		
23	ALLAN	Emily	Emily	02	4	6		
180	ALLAN	Sean	Sean	01		1		
99	ANSPACH	Mason	Mason	04	5	6		
9	ANSPACH	Piers	Piers	00	1	1		
93	ARMENTI	Connor	Connor	03	4	6		
112	ARMENTI	Julian	Julian	00	1	1		
224	ARNOLD	R	R	S	TR	9		
206	BEADELL	Jordan	Jordan	03	4	6		
1	BEARDSMORE	Isobel	Isobel	03	3	6	93021	
253	BEARDSMORE	Rachel	Rachel	07	8	7		
132	BENNETT	Garret	Garret	04	6	6		
187	BENNETT	Martika	Martika	06	8	7		
131	BENNETT	Mishani	Mishani	02	4	6		
143	BENNETT-HOWE	Morgan	Morgan	00	1	1		
259	BENNINGSON	Emilie	Emilie	04	5	6		
202	BENNINGSON	Katherine	Katherine	07	8	7		
155	BORNT	Katrina	Katrina	06	8	7		
152	BOWERS	Ricky	Ricky	05	6	6		

The student ids can be entered at this point or other entries can be amended . Don't forget to save at the end of changes.

*Close to holiday time ....*

Buy Panadol (or wine)(or vodka).

## Due dates

Think about setting some fixed dates so the books come back before holiday time in Control, Due Dates.

## Overdues

Overdues go out specially for those leaving the school.

## Stocktaking

Stocktake gets done. (See the stocktaking fact sheet.)

## Backups

Before deleting departing students, do an annual backup on a separate USB flashdrive or CD. Lock it into the school safe or take it home for storage. This becomes a legal/audit record as well

email

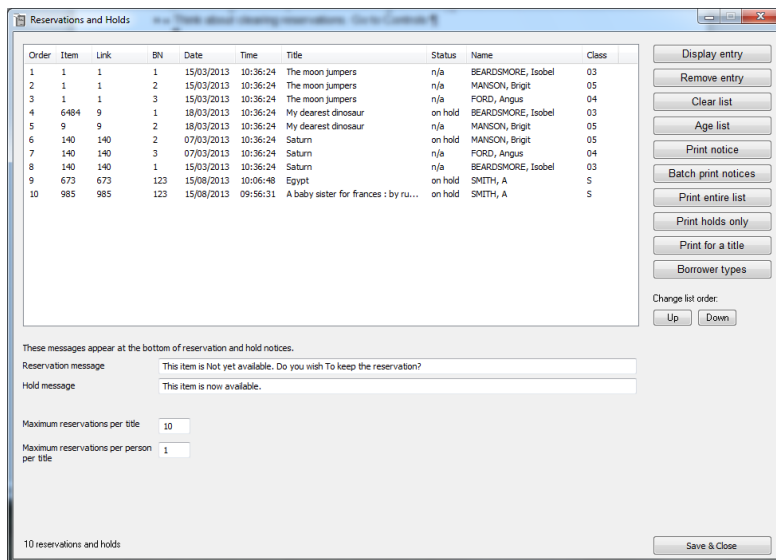
[dec.d.bookmark@sa.gov.au](mailto:dec.d.bookmark@sa.gov.au)

website

<http://bookmark.central.sa.edu.au/>

## Reservations

Think about clearing reservations. Go to Controls, Reservations

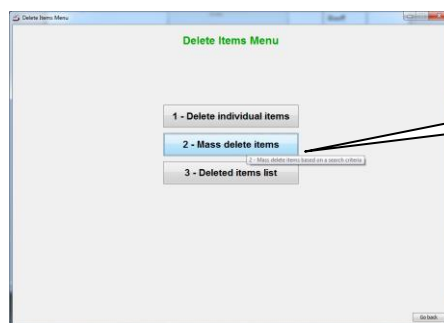


Enjoy the parties. (That is why you may need the Panadol.)

## In the New Year...

1. Clear **reservations** if not done last year. Go to Controls, Reservations.
2. Print out any **statistics** to be kept.
3. **Deletions**

Go to Cataloguing, Delete missing items, Mass delete items if they have been missing for more than 12 months delete them. (They are automatically put into the deleted items list)



Click on status

Backup first

Click on the heading call number to put the list in shelf order then Print for shelf checking

0 items in list

**Delete listed items**

Go back

Double check the shelves before deleting.

Here

- 1 - In stock
- 2 - On loan
- 3 - UNLOGGED (Dec 13)
- 4 - Repairs
- 5 - Lost/Damaged
- 6 - ON ORDER
- 7 - ACQUIRED
- 8 - Processing
- 9 - Covering
- 10 - Weeding
- 11 -
- 12 -
- 13 -
- 14 -
- 15 -
- 16 -
- 17 -
- 18 -
- 19 -
- 20 -
- 21 -
- 22 -
- 23 -

OK Cancel

Press delete all items. They will automatically be stored in the deletions file., which can be cleaned out periodically

Delete all 17 items having a status of 8 - Missing

Show details of highlighted entry Delete all items listed Remove highlighted entry from list (Del) Print list (F7)

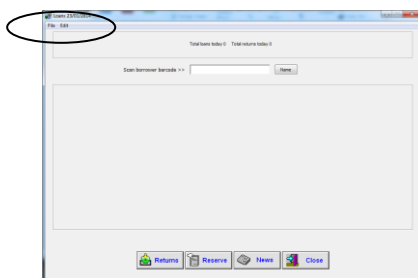
Number	Title	Call number	Item type	Location
51	Library bag 53 - side offer 4/03	418	Library Bag	33 Library Bag
55	Library bag 55 - 3/2003		4 LB Library Bag	33 Library Bag
68	Library bag 68 - lost 2/03 daniel walker		4 LB Library Bag	33 Library Bag
92	Library bag 92 - missing 2/03 jayden sweet		4 LB Library Bag	33 Library Bag
995	Charlie and the great glass elevator 2002	DAH *	1 F Fiction	3 Fiction
1876	What's up there? 2002	523.1 MOR	2 NF Non-Fiction	4 Non Fiction
2227	All about pigs - year 1 2003	599.73 FAR	2 NF Non-Fiction	4 Non Fiction
3141	Malawa the seal pup 2003 a watterson	HOL	1 F Fiction	3 Fiction
4338	The curse of the mummy's tomb	STI	1 F Fiction	30 Classroom reader
4376	Undone! : more mad endings - Lost 3/04 D Walker	JEN *	1 F Fiction	3 Fiction
7627	Jump rope for heart : jump rope for the health of e : activity ...	613.7 JUM	2 NF Non-Fiction	6 Teacher Reference
8652	Just annoying!	GRI *	1 F Fiction	3 Fiction
8963	Over 100 salt dough projects I Thompson 2004	745.592 IMO	2 NF Non-Fiction	4 Non Fiction
9674	Harry potter and the goblet of fire	ROW *	1 F Fiction	3 Fiction
9826	Emily loves to bounce - jode after 4/03	AB21 KB *	2 NF Non-Fiction	4 Non Fiction
10099	A seed in need : a first look at the plant cycle missing 1/03 w...	571.8 GOD	2 NF Non-Fiction	4 Non Fiction
11904	Return of the mummy	STI	1 F Fiction	30 Classroom reader

Go back

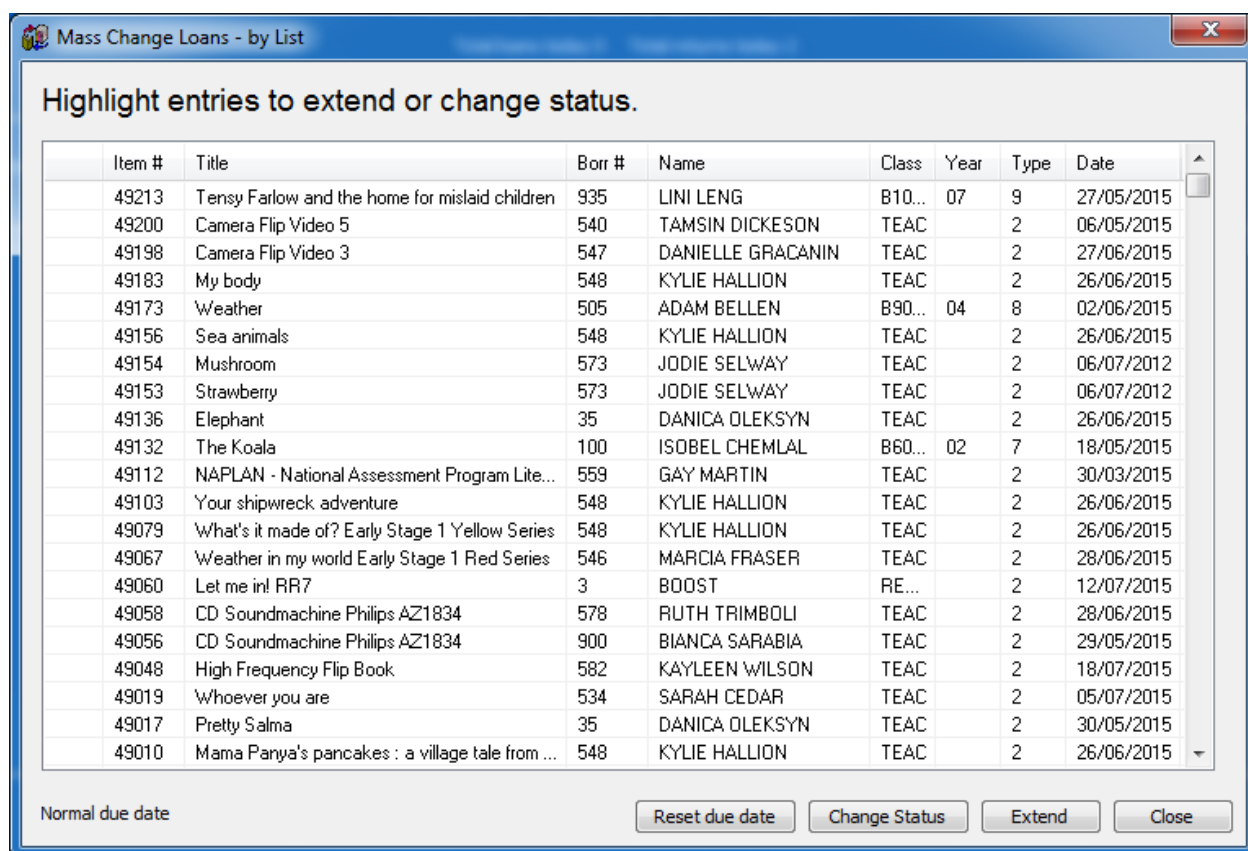
3b. *Clean out old deletions.* Go to cataloguing Delete items / Deleted items list. Tick those to be deleted, and press the Remove button to do so. Check the regulations about how long this information must be retained. In SA state schools some must be kept of 3 months, some for 2 years and some for 7 years.

GDS 22 – <http://www.decs.sa.gov.au/docs/documents/1/GeneralDisposalSchedule22.doc>  
 GDS 15 – [http://www.archives.sa.gov.au/files/management\\_GDS15\\_schedule.pdf](http://www.archives.sa.gov.au/files/management_GDS15_schedule.pdf)

### Outstanding overdue books .



In Circulation in the top left corner is File Edit. Choose Edit, Mass change loans – e.g. loans, by a list. This will show all loans. Click on the due date to resort them into due date order. Click on the ones to be changed in the left column marked EXT. Click change status. Highlight the required status and press OK. It asks are you sure? Saying yes will complete the process. It will then recollect the loan list to show the updated list of loans.



email  
[decd.bookmark@sa.gov.au](mailto:decd.bookmark@sa.gov.au)

website  
<http://bookmark.central.sa.edu.au/>

## Due dates

Bookmark uses fixed dates or duration (*rolling dates*). For a rolling date, enter the number of days by which it should change - 7days for a week loan, 14 days for a fortnight loan. An example of a fixed date would be end of term 11/12/2016. Change the due dates before extending any books.

**Edit Due Dates**  
Today's date: 21/04/2016

Click on a borrower type or due date category to edit

**Borrower Due Dates:**

Borrower Type	Loan period	Due Date
1 - Infants Student	7	28/04/2016
2 - Primary Stage 2	14	05/05/2016
3 - Primary Stage 3	7	28/04/2016
4 - Primary Stage 3b	7	28/04/2016
5 - Ex LVS Students	30	21/05/2016
6 - Parents	30	21/05/2016
7 - Teacher	Fixed date	01/07/2016
8 - Ancillary Staff	Fixed date	20/11/2016
9 - Library Staff	30	21/05/2016
10 - Ten	14	05/05/2016
11 -	14	05/05/2016
12 -	14	05/05/2016
13 -	14	05/05/2016
14 -	14	05/05/2016
15 -	14	05/05/2016
16 -	14	05/05/2016
17 -	14	05/05/2016
18 -	14	05/05/2016
19 -	14	05/05/2016
20 -	14	05/05/2016

**Item Due Dates:**

Item Due Date Category	Loan period	Date
1 - Overnight	Fixed date	1 day
2 -	0	21/04/2016
3 -	0	21/04/2016
4 -	0	21/04/2016
5 -	0	21/04/2016
6 -	0	21/04/2016
7 -	0	21/04/2016
8 -	0	21/04/2016
9 -	0	21/04/2016
10 -	0	21/04/2016
11 -	0	21/04/2016
12 -	0	21/04/2016
13 -	0	21/04/2016
14 -	0	21/04/2016
15 -	0	21/04/2016
16 -	0	21/04/2016
17 -	0	21/04/2016
18 -	0	21/04/2016
19 -	0	21/04/2016
20 -	0	21/04/2016

Close

Don't forget the due date categories as well as the borrower due dates. Click on the date to be changed.

**Edit Due Date**

**5 - Ex LVS Students**

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

30      Calendar

OK      Cancel

## Deleting students

6. Remove departed students and staff and mark any outstanding books for them as missing. They can either be removed individually for years other than the leaving year.

For the departing year, go to Borrowers, Delete borrowers. Sort by clicking on the heading year level. Highlight the student to be deleted using the shift key or the control key. Click delete. An “are you sure” message pops up. Say Yes and it brings up a change status of missing book to and the status for missing is chosen, so the book on loan are marked as missing., and it is done.

324 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	
1	Mitchell, Marion			5 - Teacher	
4	HICKMAN, Alex		1	2 - Junior Primary	Yes
5	UKEN, Mia	PP B	PP	1 - Pre-prim & Kindy	
6	WARR, Catherine			5 - Teacher	
7	SHACKEL, Kaileb	6	7	4 - Upper Primary	
8	PRATT, Jordan	2/3	3	2 - Junior Primary	Yes
9	A'COURT, Marley	1/2	2	2 - Junior Primary	Yes
10	MORTIMER, Kayla	1/2	2	2 - Junior Primary	Yes
12	LE, Anita	4/5	5	3 - Middle Primary	
13	FAHERTY, Stella	TAO1	1	2 - Junior Primary	Yes
15	BAIRD, Lachlan	2/3	2	2 - Junior Primary	Yes
17	HILL, Thomas	TAO1	1	2 - Junior Primary	Yes
18	COLEMAN, Savannah	4/5	5	3 - Middle Primary	Yes
19	TRINGAS, Deanna	3/4	4	3 - Middle Primary	Yes
20	WILMOT, Austen		kr	1 - Pre-prim & Kindy	Yes
21	WARRENER, Meryll	STAF		9 - Staff/Non-teaching	
22	LE, Natalie	TAO1	1	2 - Junior Primary	Yes
23	CARMAN, Luke	6	7	4 - Upper Primary	
24	GASKE, Caron	STAF		9 - Staff/Non-teaching	Yes
25	SELL, Margaret	TEA		5 - Teacher	Yes
26	HEALEY, Amelie	TAO1	1	2 - Junior Primary	Yes
27	UREN, Lachlan	6	7	4 - Upper Primary	
28	BALLIN, Imogen	1/2	1	2 - Junior Primary	Yes
29	KIM, Ben	5	6	4 - Upper Primary	Yes

List loans Delete Go back

Highlight the person to be deleted.  
Press the delete button  
If the person has loans  
a box will come up to  
mark the item/s as  
missing

Or go to Borrower Add/edit. Find the individual student. Click on delete.

File Record Lists

Save New **Delete** Loans History Print Find Name format Change

Borrower Number: 36

Barcode: \_\_\_\_\_

Surname: Mitchell

Given name: Marion

Preferred name: \_\_\_\_\_

Borrower Type: 9 - Library Staff

Loan limit: 30

Year level: \_\_\_\_\_

Class/Group: \_\_\_\_\_

AdminID: \_\_\_\_\_

Gender: f

Birthdate: 25/02/2014

Joining date: 11/03/2014

Privacy code: \_\_\_\_\_

Address: \_\_\_\_\_ All address: \_\_\_\_\_

Suburb: \_\_\_\_\_ All suburb: \_\_\_\_\_

Postcode: \_\_\_\_\_ All postcode: \_\_\_\_\_

Phone(s): \_\_\_\_\_ All phone: \_\_\_\_\_

Mobile(s): \_\_\_\_\_ All mobile: \_\_\_\_\_

Email: Marion.Mitchell@sa.gov.au All email: \_\_\_\_\_

Extras: \_\_\_\_\_

Loan note: Very important person  Make private

Return note: Well done blossom!

Write reviews?

Items on loan: 1

Items in history: 116

Last loan date: 03/03/2014

Go back



To remove individually go to Borrowers, Delete borrowers, Highlight the person to be deleted, and press delete. If there are loans it will ask was status to give the outstanding loans.

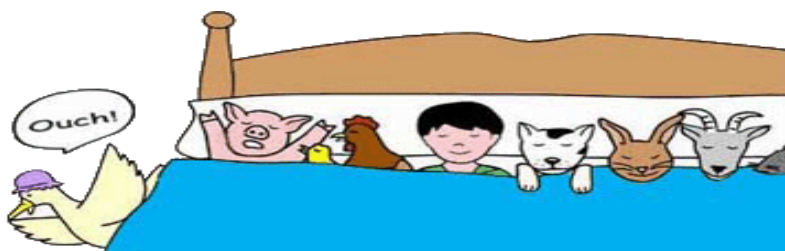
Number	Name	Class	Year level	Type	Loans	AdmsID	Barcode
36	Michael, Mason			9 - Library Staff	Yes		
38	Elkott, John			9 - Library Staff			
97	NISAN, Joe	TLC		1 - Stage 1 - TELC to...			
138	LAST, Harrison	ELVS		5 - Ex LVIS Students	17145		
141	LAST, Olivia	ELVS		5 - Ex LVIS Students	17148		
114	ROBINSON, Chloe	ISB	1	1 - Stage 1 - TELC to...	19699		
188	EEDEN, Miles	1ST	1	1 - Stage 1 - TELC to...	18687		
191	RAYMOND, Alec	ISB	1	1 - Stage 1 - TELC to...	16868		
193	ELKAN, Finn	ISB	1	1 - Stage 1 - TELC to...	18895		
198	CAMPBELL, Lindsay	ISB	1	1 - Stage 1 - TELC to...	16647		
200	HADDAD, Charlotte	1ST	1	1 - Stage 1 - TELC to...			
204	TURNER, Harry	1ST	1	1 - Stage 1 - TELC to...	19085		
208	SLATER, Jack	ISB	1	1 - Stage 1 - TELC to...			
209	BROWN, Jack	1ST	1	1 - Stage 1 - TELC to...	17332		
217	COOK, Joe	ISB	1	1 - Stage 1 - TELC to...	17563		
227	SUPPLE, Jessica	1ST	1	1 - Stage 1 - TELC to...	17252		
234	THOMAS, Sisi	1ST	1	1 - Stage 1 - TELC to...	19478		
251	KORBER, Isaka	ISB	1	1 - Stage 1 - TELC to...	19318		
275	TUCKEY, Chalk	ISB	1	1 - Stage 1 - TELC to...	18324		
334	BALLE, Bezu	ISB	1	1 - Stage 1 - TELC to...	14226		
336	SMITHSON, Samuel	1ST	1	1 - Stage 1 - TELC to...	17307		
339	EMERSON, Jason	ISB	1	1 - Stage 1 - TELC to...	18230		
341	LAST, Matthew	ELVS	1	5 - Ex LVIS Students	18499		
342	MCLEAN, Austin	1ST	1	1 - Stage 1 - TELC to...	18293		

### Quick entries

Check the quick entries. Go to Cataloguing / Lists / List Quick Entries. Chase the items up in Cataloguing "properly" so that they are fully catalogued.

### Updating Borrowers

8 Updating borrowers or rolling them over. The three borrower fields that require change are:



- a> The borrower type determines the number of loans and the length of time borrowed. So you only need one type for each set of loan period and number of loans.
- b> The group name is the class into which they are going, and is used for overdues. When there are no longer any borrowers in a group it will disappear. If you have "leftover" students, make up a group called odds or left, and put them there.
- c> The year level is their standard of academic achievement and is used for statistical reasons. Check to see that you have standardised the term of entry eg 1, or 01 etc

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

See the separate factsheet on rolling over Borrowers,(that gives a weird mind picture) or read the manual

**New Borrowers**

Enter them 1 by one if there aren't too many, in Borrowers, Add/edit, or import them from the administration system.

**Stocktaking leftovers**

Cleanup cataloguing backlog fixups left over from stocktake, or hide them where they won't be on your conscience or in sight, until time permits if it ever does.

**Backups**

Check that the backup procedure is/are still working correctly.

Finally, make a final Annual Backup onto a flashdrive or CD and store away.

Take a deep breath and start the year.