



# FACT SHEET

Start of Year Tasks

April 2018

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### How to use this table of Contents:

When viewing this document on a computer: hover over the relevant area and **click** to jump ahead to that section.  
Viewing a printed version of this document: please refer to the page numbers on the right.

### Backup First!

- Don't forget to do a back Backup **before** starting the rollover.
- If necessary, replace older USB flash drives and/or new formatted CD(s) to be used for this year's backup.
- The previous flashdrives and/or CDs can be used for monthly backups or other things.
- More information is available in **Backups** Manual. Click on the **Manual** Link, below the buttons on the Bookmark main page.

## Update Due Dates

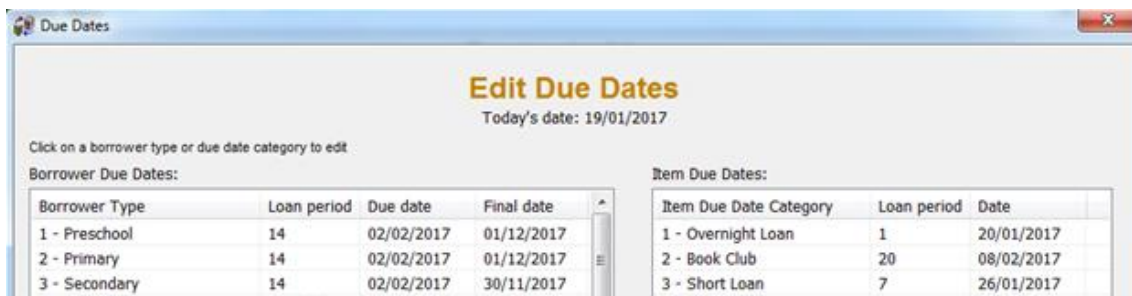
This can be done in the **Controls** section: From the **Main Menu**, Click on the **Controls** Button.



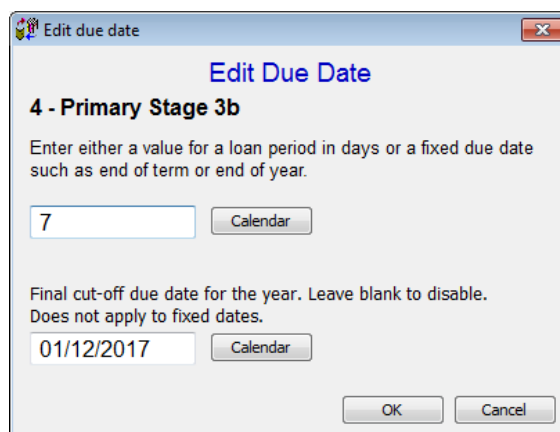
→ A new screen opens, click on the **Due Dates** button



The below window opens:



Update the Due dates as required from both columns. Click on a row to pop open a dialog window to edit the due date.

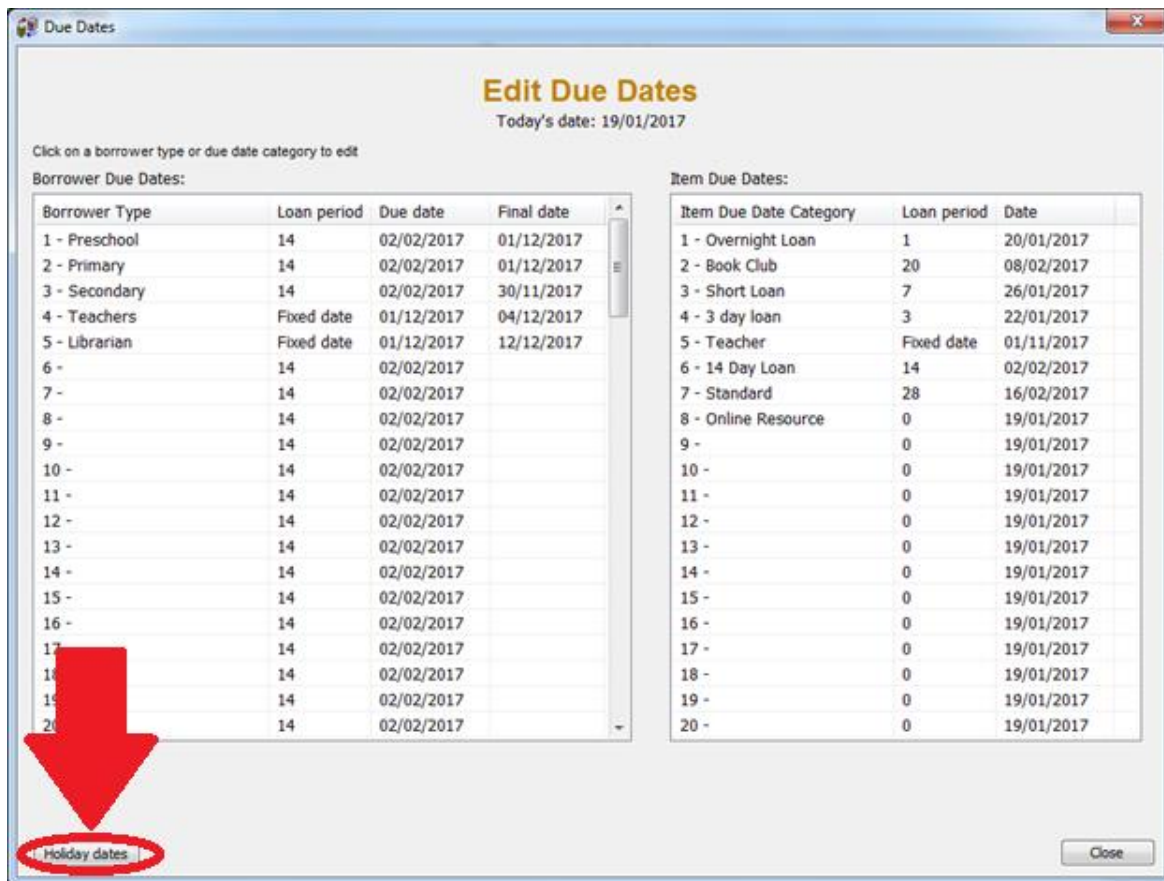


The Final due date acts as a cut-off date. It can be left blank if not needed.

## Assign Holiday Dates

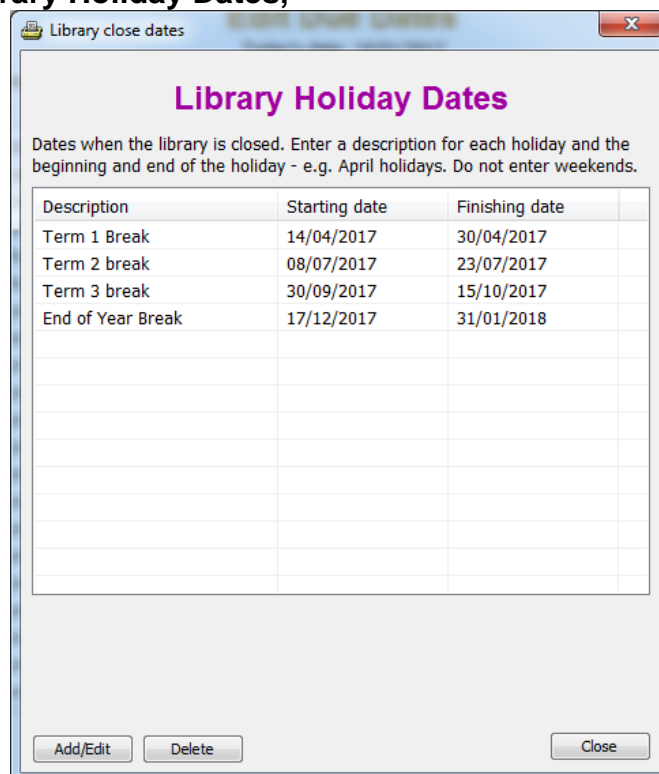
Holiday Dates are the times when the library is closed (excluding weekends). Any due date falling within a holiday date period is automatically advanced to a non-holiday date.

To set up the school term holiday dates, open Controls from the Main Menu. Click on the **Due Dates** button.



→ Click on the **Holiday Dates** button on the lower left-hand corner of the screen.

A new screen opens: **Library Holiday Dates**,



Highlight a date and click on the **Add/Edit** button (lower left-hand corner of screen) to make changes. Clicking on the same **Add/Edit** Button will makes it possible to add or edit new entries. To delete a single entry, highlight the entry to be removed and click the **Delete** button. The dates are the start and end of the holiday time, not the actual term time.

## Messages and notifications

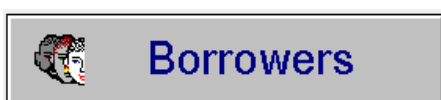
Pop-up messages can be set for:

- At the start of the year
- At the start of the month
- At the start of the day
- When the program is exited
- When an item is loaned out
- When an item is returned

Messages are set in Controls. Click on the Messages button.



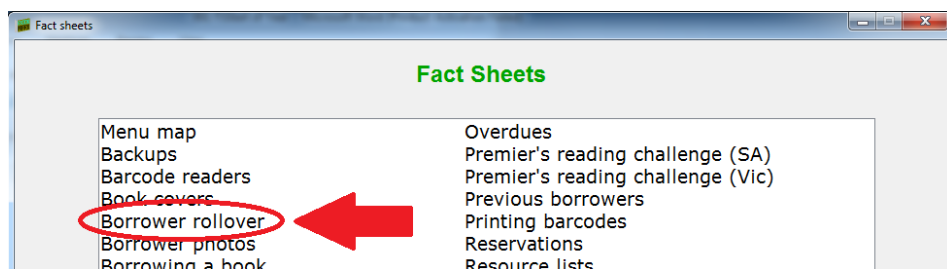
A new window will open, make the desired changes and close the window.



The Borrowers button on the **Bookmark Main Menu** leads to the **Borrowers** menu, where borrower data can be updated. Several different methods are available for doing a rollover.

### Rollover: Updating Borrowers and Class Rollover

Go to the **Bookmark Main Menu**. At the bottom of the screen are three links with picture symbols. Click on **Fact Sheets**.



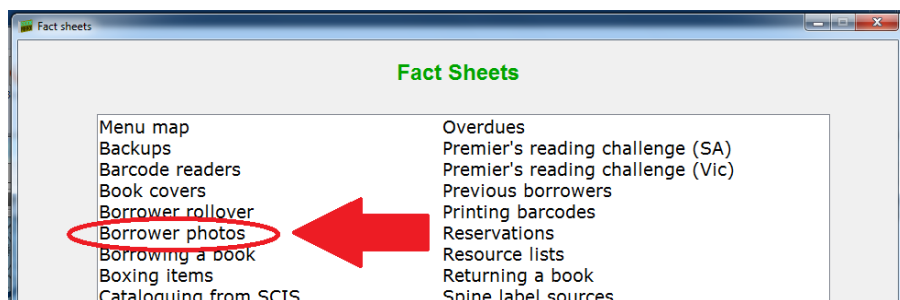
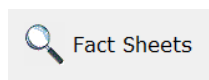
Click on "**Borrower Rollover**"

The **Borrower Rollover** factsheet covers:

- Borrower Type Numbers and lending privilege changes
- Class Year Levels
- Class Names
- Delete Borrowers who have left the school
- Change borrower details for one, several, whole classes and more
- Print sheets of class barcodes to SCAN in changes
- Use the school administration/office data to update borrower data directly to Bookmark (this is a super-fast way to get started for the year)
- Update Borrower Photos

## Update Borrower Photos

Go to the Bookmark Main Menu. At the bottom of the screen you will see three links with picture symbols. Click on **Fact Sheets**.



Click on **Borrower photos** Fact Sheet and follow the instructions.

## Clear Borrower Histories or Age Borrower Histories

Borrower histories can be left "as is" or they can be aged (old entries removed) or cleared entirely.

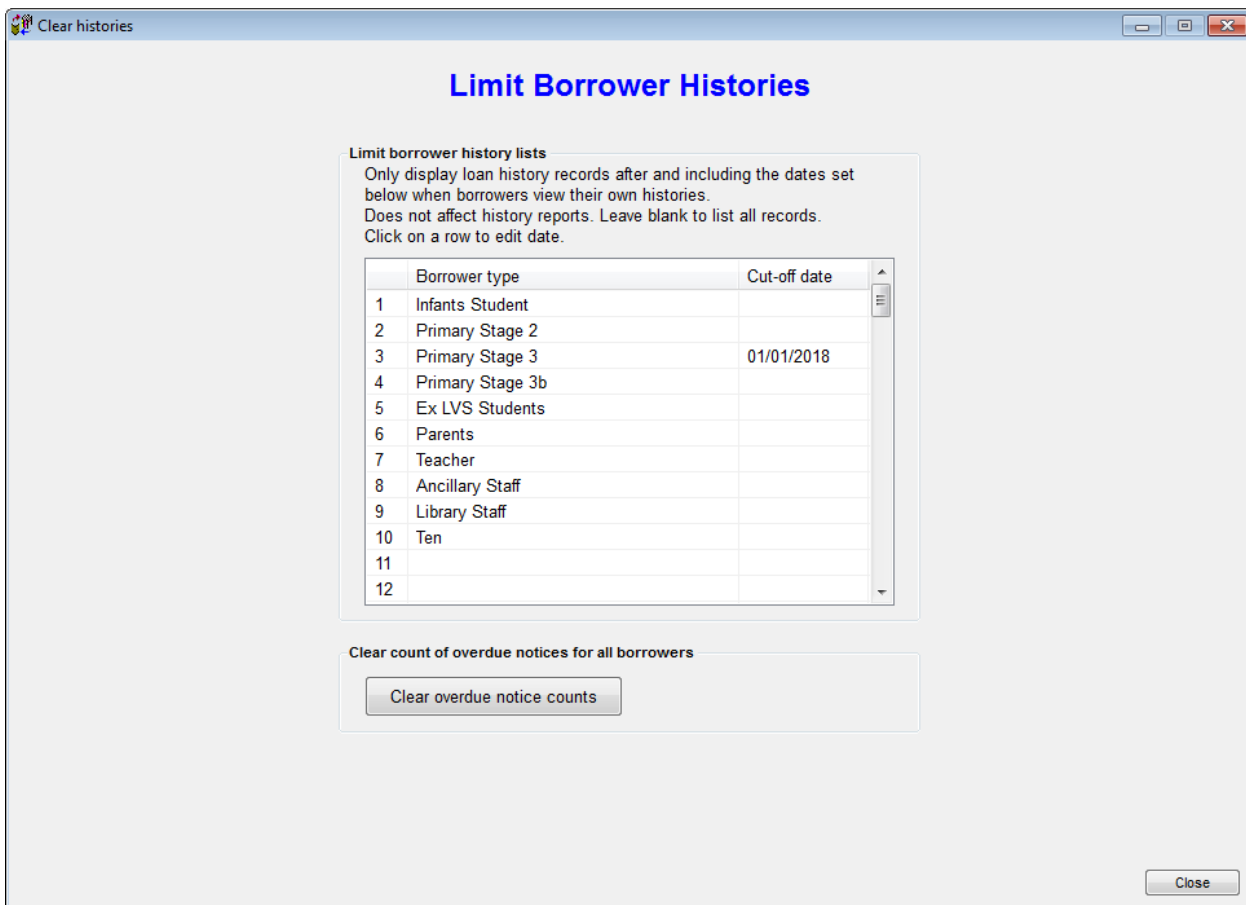
From the **Bookmark Main Menu** go to: **Borrowers** and click on the **Rollover** button.



A new window will open. From the submenu, click on the button titled 6 - **Borrower histories**.



A new window will open.



At this point two actions from which to choose:

1. **Set a cut off date for each borrower type** to display borrower histories. If blank, all loan records are displayed. The date hides older entries when borrowers view their own histories. The records are not actually removed from the database.
2. **Clear overdue notice counts** for all borrowers regardless of the classes ticked.

Congratulations, you're ready to start the new school year.

If you need any further help or assistance, please contact the help desk.