

Bookmark Fact Sheet

Using Borrower Photos or Names in Loans Instead of Barcodes

September 2024

Bookmark's Circulation module is highly customizable. Colours and font sizes can be set, controls can be visible or hidden, active or inactive. Passwords can be used or not used as needed. Students may or may not be able to borrow books themselves. Librarian's functions can be password protected or hidden. Circulation can be set up to suit how your library works. Using the configurations, different setups are possible.

The steps to borrow books are:

1. Enter the borrower number or scan barcode
2. Enter the book numbers or scan barcodes
3. Finish.

This is the default setup. Many other options are available in Circulation Settings, the Loans tab.

The screenshot shows the 'Circulation settings' window with the 'Loans' tab selected. The window is divided into several sections:

- Loans switches:** A list of checkboxes for various loan options. Key options include 'Loan limit warning on next loan attempt', 'Overdue warning on next loan attempt', 'Extend loans by entering existing loan', 'Allow borrowing an item that is on loan to someone else', 'Make sound and flash window when a loan block occurs', 'Show Name button to find borrowers by name', 'Enter name directly on barcode request box to find', 'Borrow using list of names from a class droplist', 'Borrow using list of names from a popup grid with photos', 'Allow F5 popup class list chooser', 'Show + next to borrowers in list/grid who have items on loan', 'Show list of names below 'enter barcode' instead of a droplist', 'Do not allow quick entry of items and borrowers', 'Show cost in list of items on loan', 'Show gridlines on loans display', 'Show latest loan at bottom of list instead of top', 'Do not count contents of boxes toward loan limit', 'Ask whether to issue contents of a box', 'History and Reservations can be viewed in item details', 'Search button displayed instead of Options button', 'Alert if borrower has lost or missing items', 'Show message if an item is already on loan to the borrower', 'Hide borrower number/barcode', 'Allow showing borrower info in loans', 'Allow temp due date options', 'Show genre icons instead of item type icons', 'Show Sublocation in right column', and 'Show overdue as number of days'. At the bottom, 'Show:' has radio buttons for 'Item type' (selected), 'Location', and 'Sublocation'.
- Loan Blocks:** A text field for 'Loan block password:' containing 'MATTHEWS'. Below are checkboxes for 'Setdate', 'Extend', 'Print', 'Notice', 'Name', 'Return', 'Slip/Dump', and 'Options'. 'Name' and 'Return' are checked. There are also text fields for 'Override overdue block msg:' (Overdues!), 'Override loanlimit block msg:' (Loan limit reached!), and 'Override loan restriction msg:' (Restricted item!).
- Buttons visible on loans screen:** Checkboxes for 'Return', 'Options/Search', 'Reserve', 'Extend', 'History', and 'Swap (F1 key)'. 'Return', 'Options/Search', 'Reserve', and 'History' are checked.
- Display switches:** Checkboxes for 'Display news on loans screen', 'Display borrower photo in loans', and 'Use simple search program instead of full search'. 'Display borrower photo in loans' is checked.
- Borrower privacy:** A text field for 'Borrower Privacy:'. Checkboxes for 'Ask for Privacy Password when Show command is issued', 'Ask for Privacy Password when History command is issued', 'Display list of items on loan when borrowing', and 'Request Privacy Code for loans'. 'Display list of items on loan when borrowing' is checked.

At the bottom of the window, there are buttons for 'Loan blocks', 'Loan receipts', 'Barcodes', 'Classes', 'Loans colours', and 'Limit loans'. A 'Names list font size:' dropdown is set to 'Normal'. A 'Default setup' dropdown is set to 'Default setup'. A 'Close' button is in the bottom right corner.

The borrower can be selected without a barcode.

- Entering a name instead of a barcode or borrower number
- Using a dropdown list of classes and names
- Using a popup grid of classes and names with or without photos

Entering Names

Several options.

Show name button to find borrowers by name

Tick this to use a popup to enter a name instead of a barcode.

It can be optionally password-protected. Tick the “Name” checkbox in the top right Loan Blocks frame. Unticked, and no password is requested.

Enter name directly on barcode request box to find

Tick this to be able to type a name instead of a barcode. The Name button does not have to be used. Can even be a fragment of a name. Again, password-protection is optional.

Using a Droplist of Classes and Names

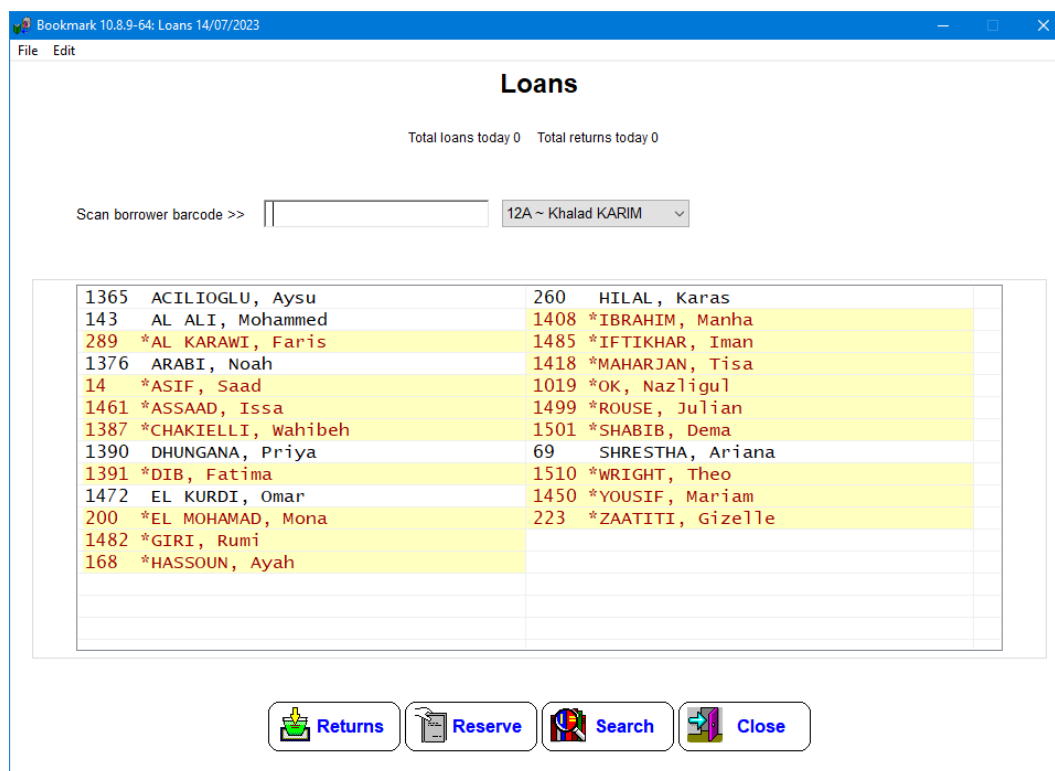
Borrow using list of names from a class droplist

Instead of, or in addition, a droplist is available from which a class can be selected.

Names of members of the class appear in another droplist to the right.

OR

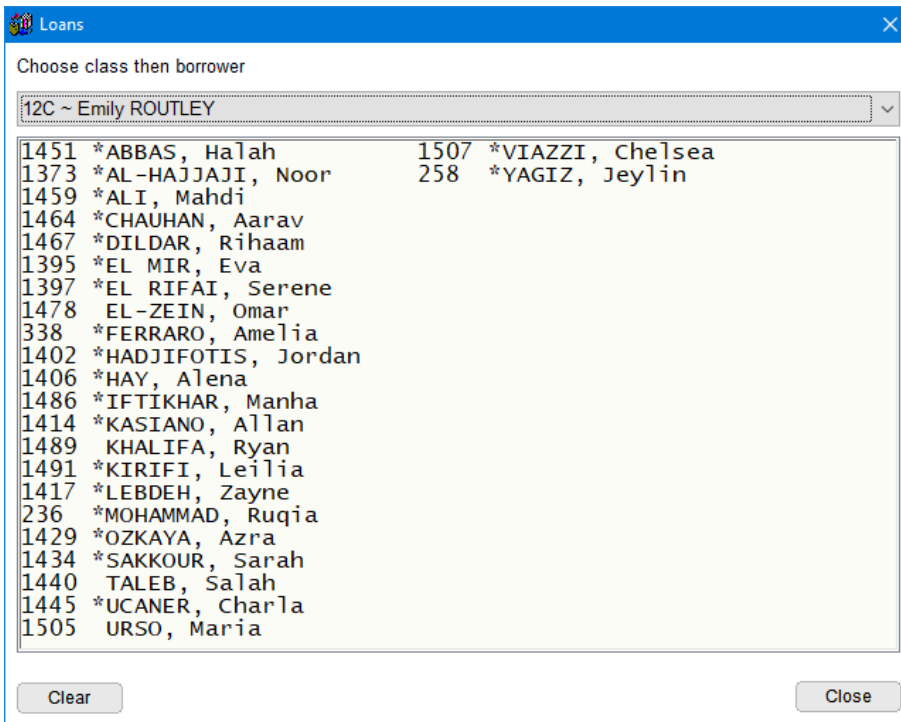
Show list of names below ‘enter barcode’ instead of a droplist (to the right).



Click on a name instead of scanning a barcode, entering a borrower number or typing a name.

The Slider cannot be used if the names are set to appear beneath the barcode entry box.

As an alternative, the F5 key can be set as a hotkey to pop up a class list chooser dialog. The slider can be used with this.

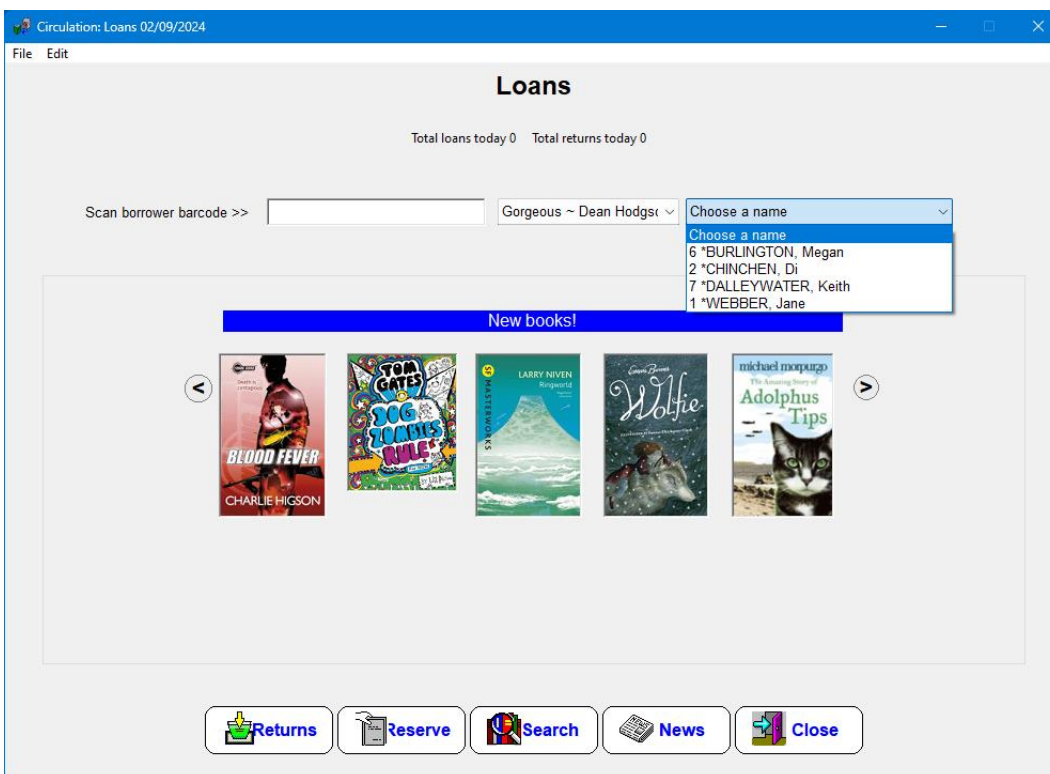


Two font sizes are available for the list of borrowers:

- Normal
- Large

The size is selected by a droplist at the bottom right corner.

The dropdown lists are text-based and work with mouse controls.



Show + next to borrowers in list/grid who have items on loan

Ticking this tells the system to display a + next to any name with items on loan or a * if they have overdues. Colour combinations indicate if the borrower has items on loan or overdue. (Colours can be changed using the “Loans colour” popup and “Grid colours”.)

Using a Popup Grid of Classes and Names (with photos)

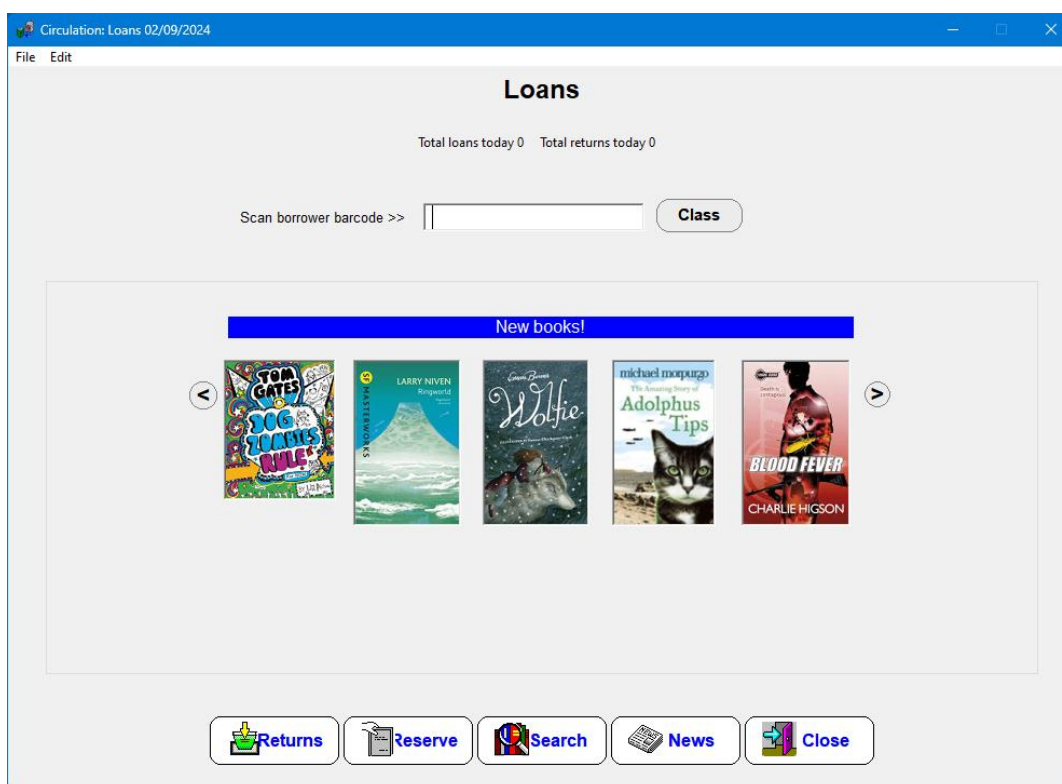
Borrow using list of names from a popup grid with photos

This activates the popup class list and borrower choose.

It can be used instead of the droplist.

It was originally designed for touch-screens but works just as well with a mouse.

Once set up, a *Class* button appears on the Loans window.



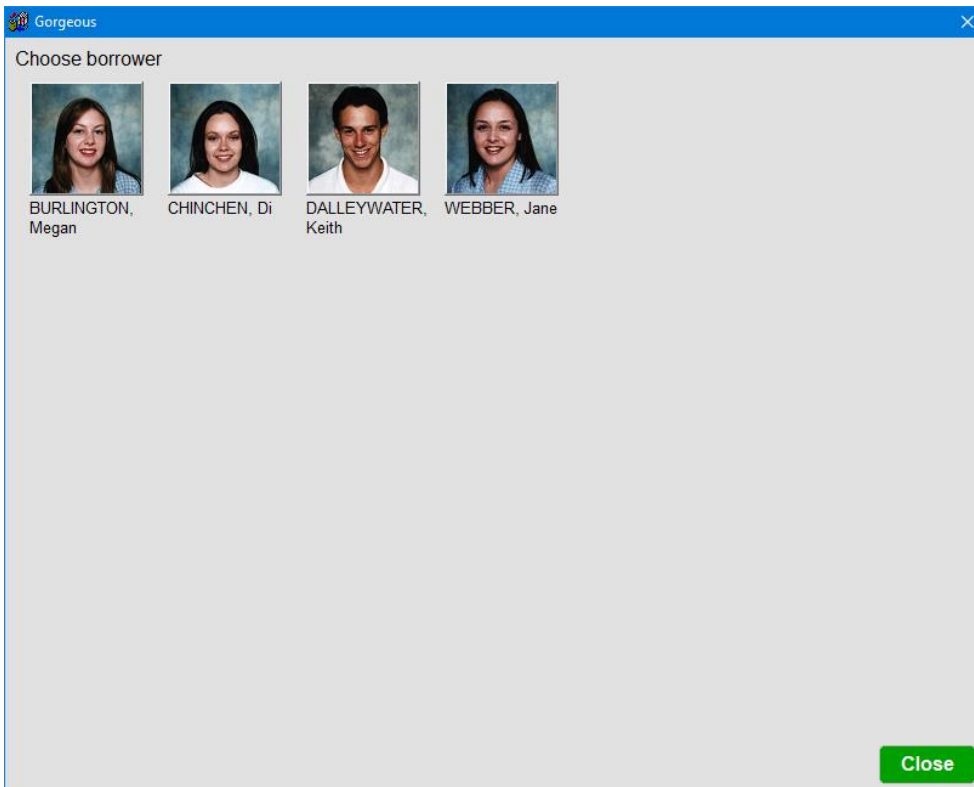
The **Class** button can be tapped (or clicked with a mouse). This opens a popup window.



The size of the popup window varies depending on the number of classes.

If this is the very first click on the Classes button, all borrower photos are loaded into memory. They are not loaded (refreshed) again until Circulation is closed and then re-opened and Class is clicked again.

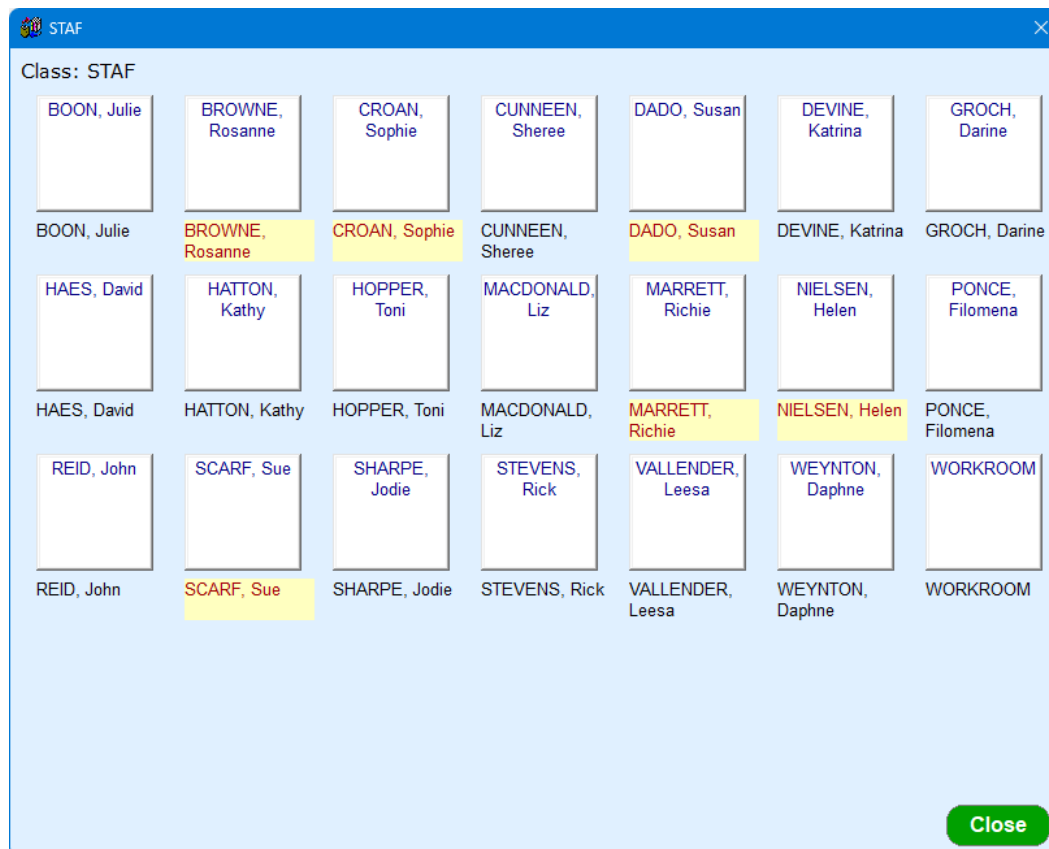
Tap or click on a class square button to select a class group.



Tap or click on a borrower.

The size of the popup window changes depending on the number of borrowers. A maximum of 96 can be displayed with a screen resolution of 1920 x 1080, arranged in 16 columns across by 6 rows down.

If borrowers do not have photos, their name appears in the button.



Borrower names with items on loan or overdue items appear with different colours.

The colours can be controlled by going to Controls > Circulation Controls > Loans tab and clicking on "Loans colours". The Grid Colours button brings up settings that control the colours displayed. These affect both the normal loans display and the class list chooser names.