Getting Started

Revised 11/09/2024

Publication History
Bookmark was first developed at the Angle Park Computing Centre in 1987.
Bookmark was first released by Satchel Software in September, 1989.
Further development, updates and upgrades have occurred frequently since then.

Copyright and Limitations on Warranties and Liabilities
Purchase of Bookmark includes the right to use the software on a local area network and as many stand-alone computers, workstations and tablets within the *one institution* as required. Rights are also granted for librarians to install and use Bookmark their home computers, provided use is directly related to work. All other rights are reserved. Please contact us for further details.

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Department for Education
South Australia

Special Notes
SQLite is used to power the database.

The YAZ toolkit from Index Data is used to access z39.50 records.

The Chilkat software library is used for emailing.

Bookmark is designed and written by Dean Hodgson.

Significant contributors have been Marion Mitchell, Fiona Harper, Anne Ross, Debbie Fuller, and scores of alert and dedicated teacher/librarians, school assistants, school support officers, volunteers, and many others.

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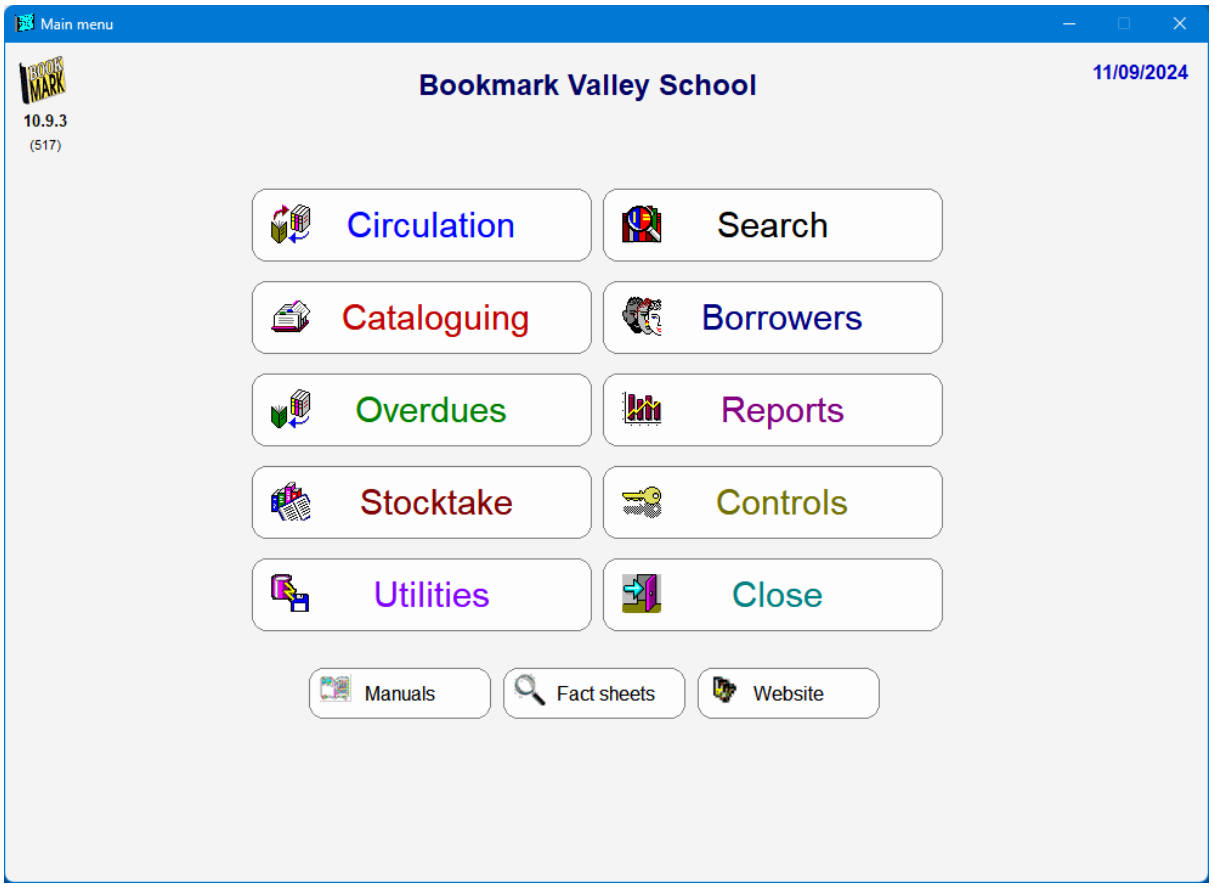
Welcome to Bookmark



The Bookmark library management system is arranged in "modules". These are:

Main Menu	This is image above. It is the librarian's launching point and provides access all modules.
Search	Searching for resources and their availability. Reservations. Resource Lists. Collections. Top 10. Your Details. Websites. Can be used independent of the rest of the system.
Circulation	Issuing loans, returning items. Making reservations. Managing circulation.
Cataloguing	Adding and editing resources. Deleting resources. Importing data. Printing barcodes and spine labels. Maintenance of essential lists and authorities.
Borrowers	Adding and editing users. Deleting borrowers. Importing borrower data. Printing barcodes. Maintenance of borrower categories, classes and year levels.
Overdues	Producing overdue lists and notices, letters, PDFs, and emails.
Reports	Generate a wide range of reports on the catalogue, borrowers, and circulation activity. These include lists, cost summaries, weeding, library usage and collection statistics.
Stocktake	Inventory of the collection. Includes listing of possible missing items and assigning items as lost or missing.

Controls	Settings for various parameters and controls, including policies dealing with circulation and searching. Editing news, resource lists and reservations.
Utilities	Backup data. Restore data. System information and special maintenance tasks.

Manuals	Links to the online documentation.
Fact Sheets	Links to the online fact sheets.
Website	A direct link to the Bookmark website.

Support and Help

Manuals
The Bookmark user manuals are available within the program itself. Click on the Manuals button on the Main Menu to view these.

Fact Sheets
User fact sheets on specific topics are also available within the program. Click on the Fact Sheets buton on the Main Menu.

Help Desk Service
The Bookmark Help Desk provides support to users.

If there is a problem or you are unsure about anything, call the Help Desk first. If ignored, small problems can escalate. The Help Desk can solve most problems and, if not, it can determine if IT support is needed and the language requiredt.

The Help Desk is available to assist with problems as well as day-to-day use, even simple tasks and queries.

The Help Desk is available to help make life easier.

Website
http://bookmark.central.sa.edu.au

Email List
Bookmark users can join the free email list. Announcements of updates, tips and other information is frequently sent via email to users.

User Groups
Locations of Bookmark user groups are available from the Bookmark Help Desk or the Support section of the Bookmark website.

Training
Information about training is available from the Bookmark Help Desk and the Training section of the Bookmark website.

Updates
Bookmark has been continuously developed and improved since its first prototype appeared in 1983.

Updates occur several times a year. Users are encouraged to update regularly.

Bookmark is very highly "user driven" in its design. Users may offer suggestions for new functions and improvements in design to existing functions. These requests are catered for where possible.

Overview

Bookmark is a database system that allows storing information on physical and electronic resources. These resources can be books, CD's, DVD's, kits, pdf's, video and audio files, electronic documents, ebooks, websites and more.

Resource Management

Bookmark provides a suite of modules and functions for creating and managing library resources. This includes adding new resources, editing and deleting existing resources, issuing loans and returns, making reservations, copy cataloguing, generating lists of items using various criteria, a comprehensive and flexible reporting system, cataloguing and accessing websites and electronic resources, stocktaking, generating overdue notices, and much more. Bookmark has been designed to be as easy to use and understand as possible despite the complicated nature of running even a small library.

Borrower Management

Tools are included to manage users. Library users are called ‘Borrowers’. Borrowers can be added and deleted and updated. Data can be and quickly imported into Bookmark thus streamlining the rollover task. A range of reports is available that generate lists of borrowers, borrower loan histories and more.

Finding Resources

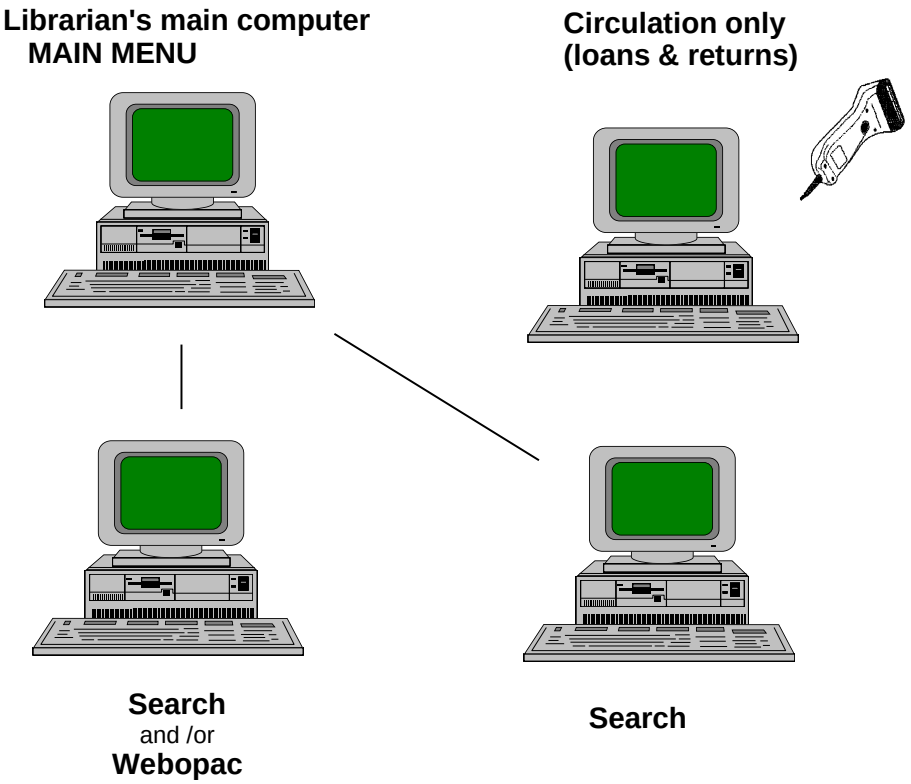
Easy-to-use searching systems are available. They work through Windows, through an Intranet via a browser, and through the Internet via a browser.

Policy Configuration

Bookmark contains a comprehensive customizing system that allows you to control the behaviour of circulation and searching. This means Bookmark can be made to reflect the way your library works, rather than dictating policy. Many functions can be displayed or hidden, turned on or off. You can even set screen colours and sound effects.

Parts of Bookmark

Bookmark consists of three major components: Main Menu, Circulation only, Search only.



All parts can be set up on any number of workstations.

The Main Menu is usually only available to library staff.

Circulation-only can be set up where users need to borrow and return items but do nothing else. This can be done on more than one computer.

Search-only icons can be located on any computer on the network. Ideally, Search should be available on as many computers as possible.

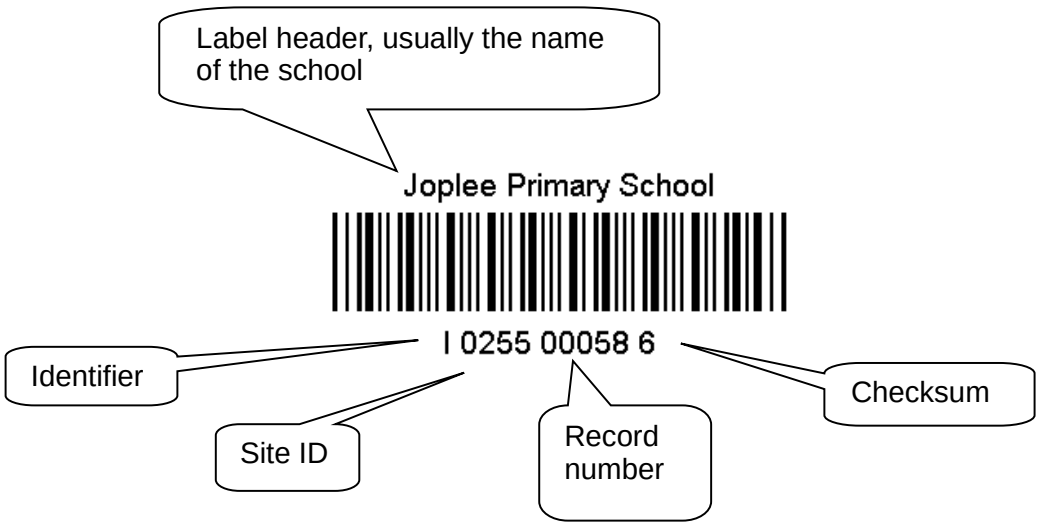
Search is available as a Windows program, a browser-based app within the school's network, and on the Internet to allow searching the catalogue from anywhere on any device.

Barcode Labels and Record Numbers

Barcode labels are used to make the process of issuing and returning loans quick and easy.

Bookmark can work with different types of barcode labels and even mixtures of types of labels. For simplicity it is recommended that all barcode labels are of the same configuration.

The standard "Bookmark" configuration is 11 characters in length and organised in a specific manner. Other label standards used by other library systems have different configurations and sizes. Below is an example of a typical Bookmark-standard label.



Each item and every person has a unique barcode.

Bookmark uses the parts of the barcode to identify the type of label and where data is stored. The barcode itself identifies an item or borrower. The "record number" is used to store the item or borrower in the database.

Important! ***Records can be retrieved by entering either the full barcode or just the record number part.***

Label Header
Above the "stripes" is the label header. This is usually the name of the school or institution. For user labels, it may be the name of a person.

Label Identifier
The first character indicates whether the label contains a borrower's or an item's number. The letter B is normally used for *borrower labels* and I for *item labels*. This character can be either a letter or numeral such as a 3 for items and 2 for borrowers. All borrower labels must begin with the same character, whether it is B or a 2 or anything else. Labels beginning with any other character are considered items. For consistency, it is strongly recommended all item labels begin with the same character and not different letters denoting different types of media.

Site ID
The next four characters – 0255 in the example – identifies where the barcode originates. It can be either 4 digits or 4 letters. The site id is normally the school number.

Record number
Every borrower and every item in the database is stored with a unique *record number*. The next five numerals comprise the *record number*. These values begin at 00001 and can go up to a maximum of 999999. (5 digits on this type of label limits the range to 99999).

Checksum
The final digit of a standard barcode is known as a *checksum digit.* It is used to ensure the label has been read properly by the reader and is not part of the record number.

Special Labels
In addition to Borrower and Item labels, special labels can be printed from Bookmark which show the words FINISH, SWAP, EXTEND, etc. Barcode labels containing your private passwords can even be printed. These special labels are used in Circulation. The words on these labels can be typed in as well as scanned.

Other Types of Barcodes
Bookmark can work with other configurations of barcodes, possibly inherited from a previous library management system. Each has its own configuration.

Mixtures of different barcode types is not recommended although the system will work with them. Some functions may be restricted if mixed types of labels are used.

Bookmark can work with either 1D striped barcodes or 2D QR style barcodes.

Recommendations
If you are just starting out, the 11-character standard barcode is recommended. If you have changed from another library system to Bookmark, continue to use your regular barcodes.

If you expect to have 100,000 items or more or record numbers higher than this, then either 12 or 14 character barcodes can be used. The Bookmark Help Desk can assist in this decision.

If possible, all barcodes should have the same site ID although this is not mandatory.

Placement
Place barcodes on the outside of books in a convenient spot. Avoid covering barcodes with plastic unless it is a special fully-transparent variety (check with the supplier). Some seemingly transparent plastics actually reflect badly in the infra-red spectrum, used by readers, thus resulting in numerous bad reads.

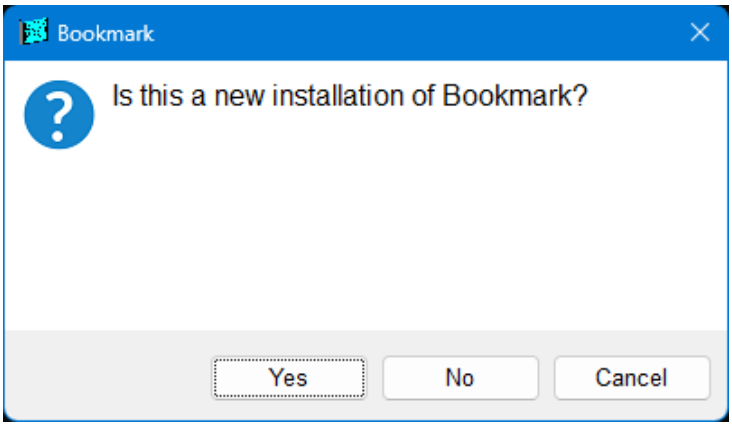
Items which cannot have barcodes – i.e. phys. ed. equipment, etc. – can have them on sheets in a folder.

Consider printing "class sheets" for borrower labels instead of keeping individual barcodes.

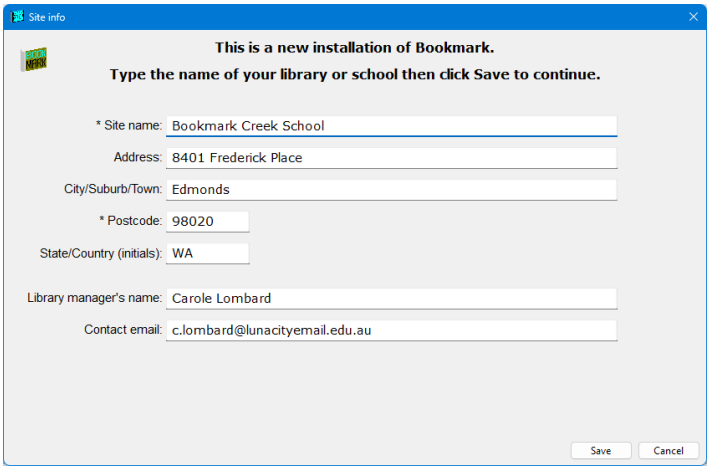
Opening Bookmark

To start Bookmark, double-click on the Bookmark desktop icon or choose Bookmark from the Programs section in the Start menu.

When Bookmark is first opened,



Click on Yes.



Try to fill out every line.

Mandatory are the name of the school or library and the post code.

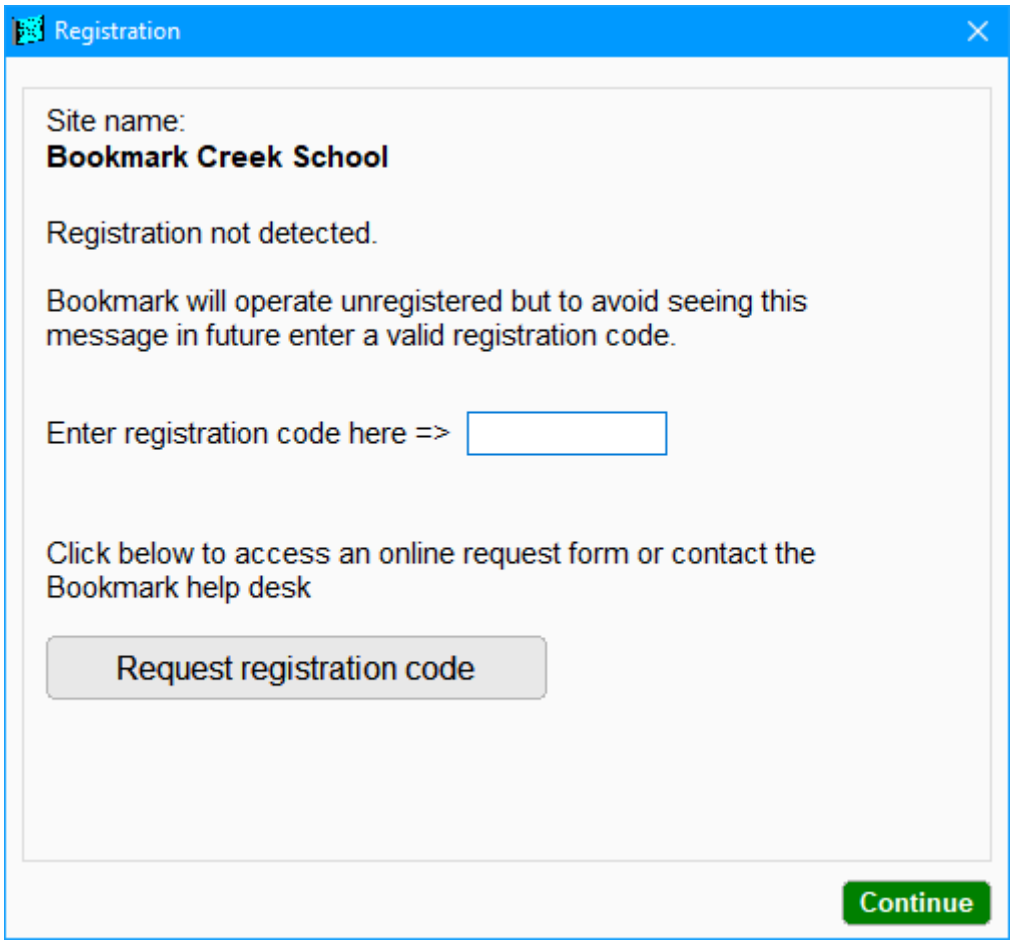
Click on the *Save* button when complete.

Registration

Each Bookmark database requests a *registration code*. A newly installed program will ask for the code when it is opened.

Bookmark will function without this code, but the nagging registration request will appear each day until the code has been entered.

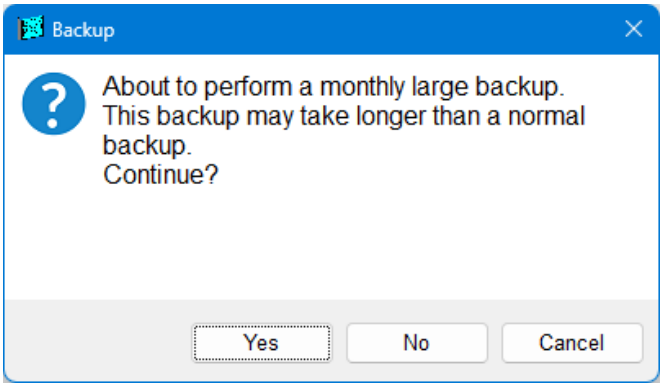
A code can be obtained by clicking on the button *Request Registration Code*. The computer will go onto the Internet and present a form. Fill out the form and submit. An email will be sent back soon with a code.



In the meantime, Bookmark will work without a code. To continue without entering the code, just click on OK.

Once a code has been entered, Bookmark will operate indefinitely without requesting the code again.

Note: the registration code can also be entered in Bookmark's Controls > Settings > System area.



This dialog will appear. Click Yes and wait for the backup to be completed.

Startup Functions

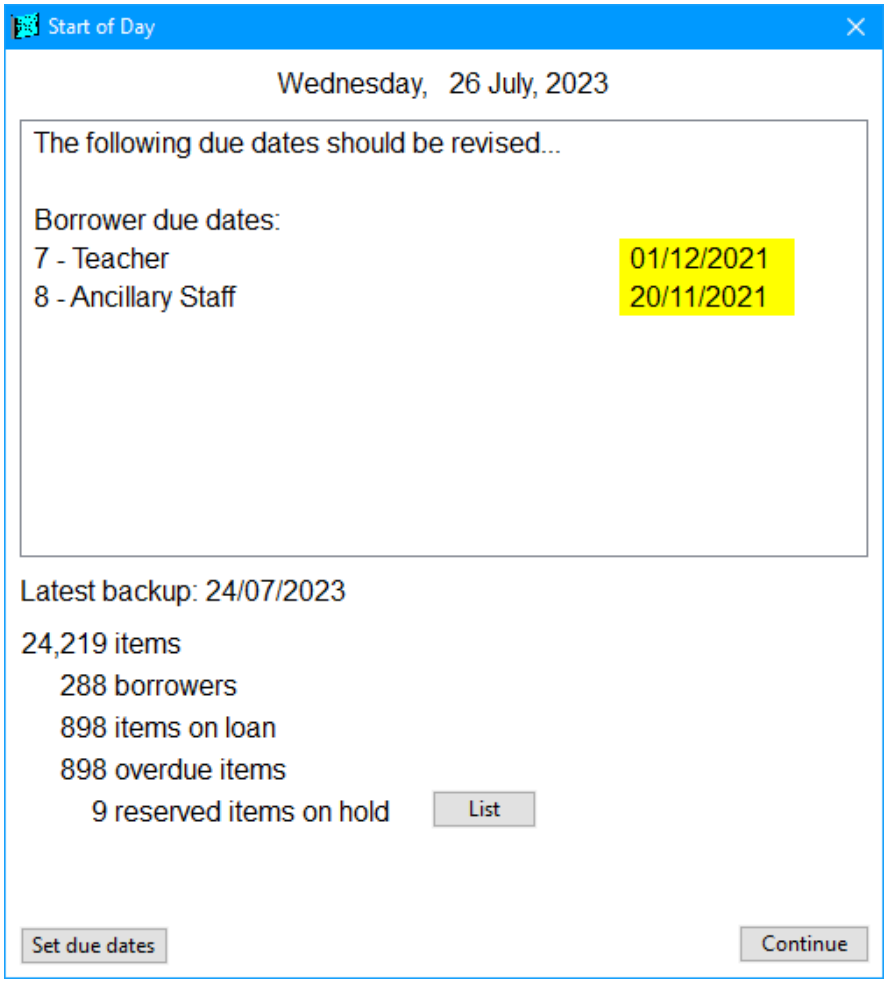
After starting Bookmark, start of day, month and year messages may be displayed. These are optional.

Start of Day Backup

At the beginning of every day, Bookmark automatically performs a data backup to its local drive.

Start of Day and Statistics

A special window can be displayed the first time Bookmark is opened during the day.

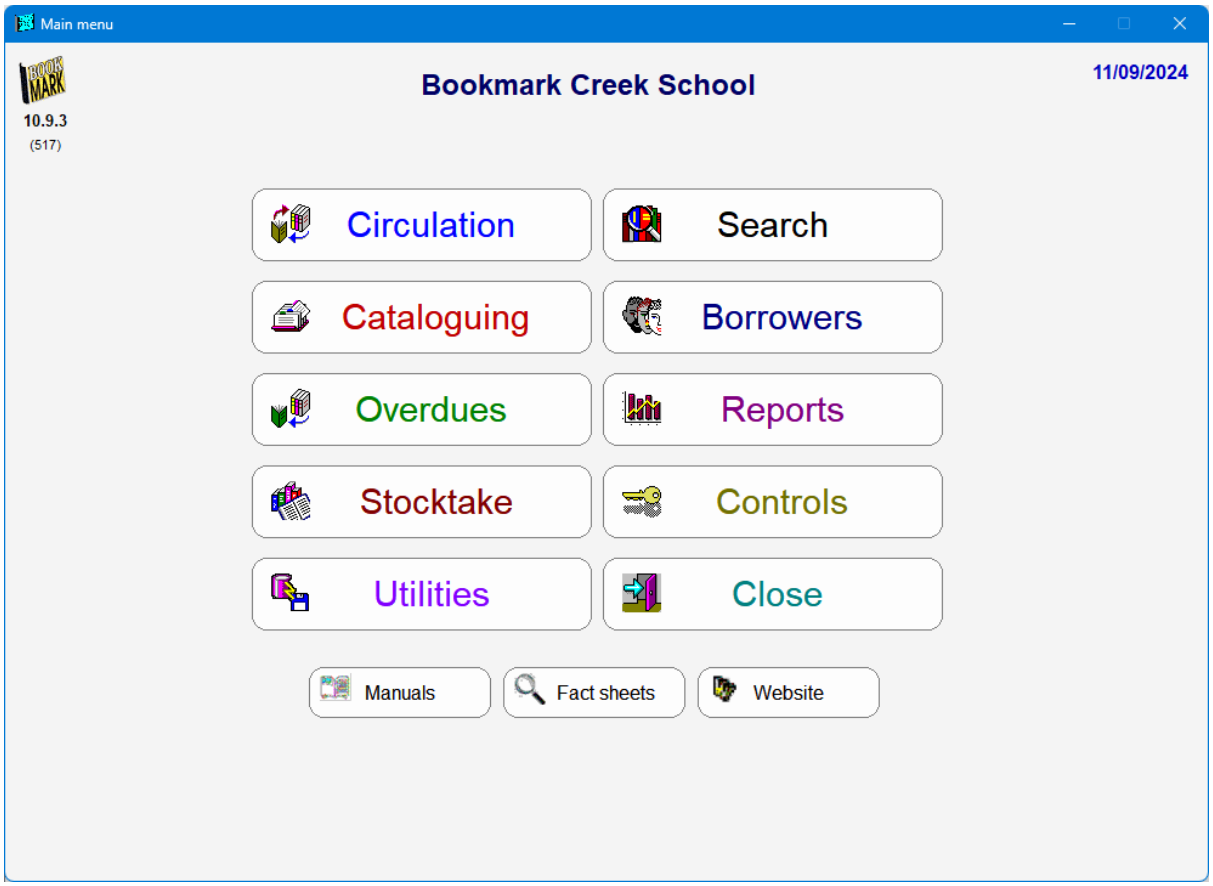


This window can be modified or switched off. It displays an alert if any due dates have expired, and it can also display statistical information about the collection.

Expired due dates are highlighted. The Set Due Date button can be used to pop up the due dates window for re-setting.

Statistics at the bottom are optional and can be switched off if not needed.

The Main Menu



This is the starting point for library staff.

The upper left corner of the Main Menu displays the *current version* of Bookmark. (The version number on your Bookmark will be higher than the one shown in this manual.)

On the standard menu the top line shows the *site name*.

The displayed date comes from the local computer's clock.

The large grey rectangles are *Menu Buttons*.

Single click on these to select.

Do not double click!

Note: throughout Bookmark, single-clicking is the rule. Double-click is rarely used. Double-clicking may cause unpredictable things to happen.

Modules

A 'module' is one major part of Bookmark – e.g. Stocktaking, Utilities, Cataloguing, etc.

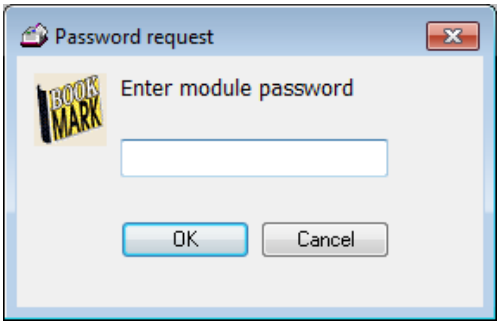
More than one module can be open at the same time. To access another module, return to the Main Menu first or right-click on the menu of any other module.

Clicking on a Menu Button causes a program module's menu to appear. For example, click on Utilities then enter the Utilities Password if requested.

Bring the Main Menu back and click on another button to open another module at the same time.

Passwords

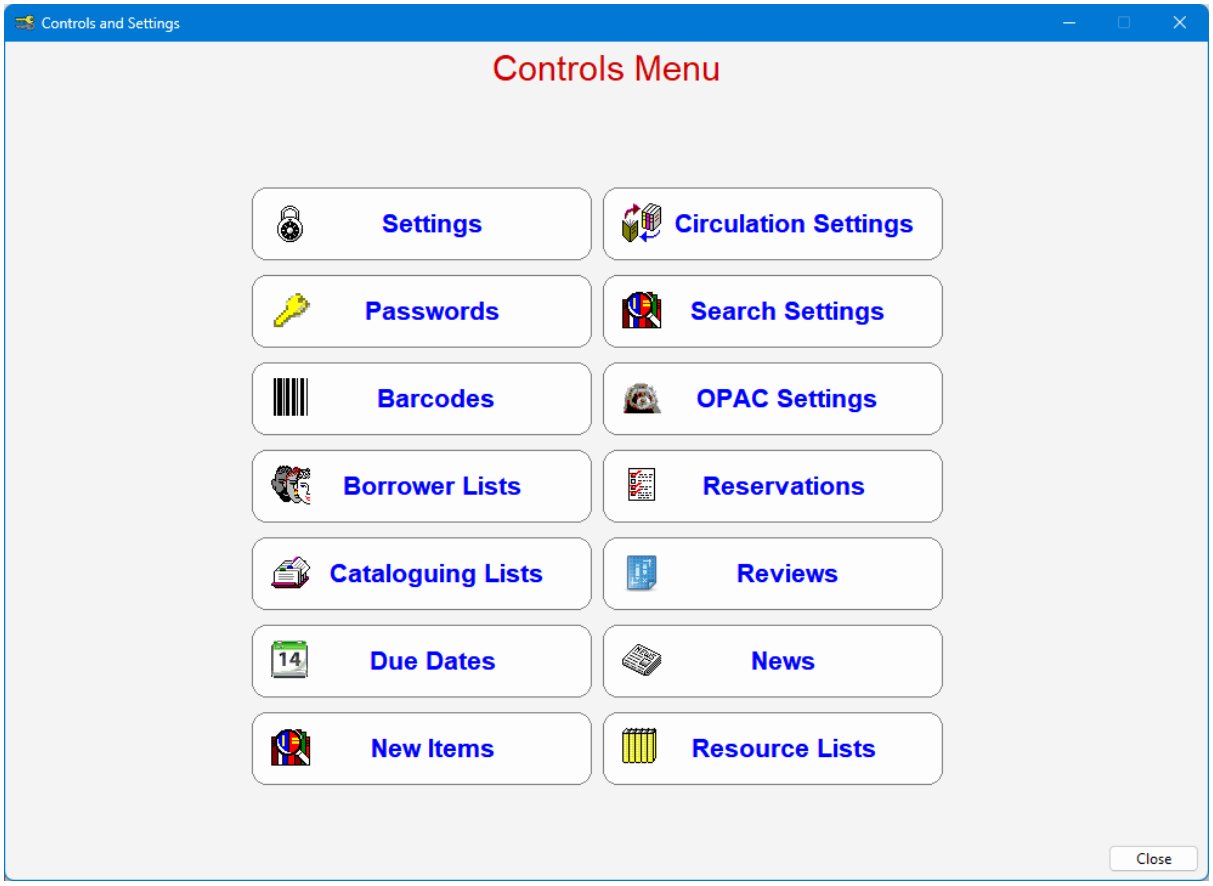
Access to each *module* can be protected by an optional password. This prevents unauthorised users from seeing sensitive data and/or tampering.



When Bookmark is first installed, the word PASSWORD is the default. It is not case sensitive and can be entered in either lower or upper case. Type in PASSWORD then click on *OK* or press the Enter key. Clicking on *Cancel* or pressing the *ESC* key aborts.

When first installed, all passwords are blank therefore none will be requested. Passwords should be entered soon.

See *Passwords* in the **Controls** section for more information and how to reset passwords to your own.



This is a *module menu*. Options appear as large buttons.

Tooltips

Position the mouse over a button without clicking. A small "tool tip" appears.

Tooltips explain what a control does, and often indicate a key which can be used instead of clicking.

Dialogs

Some smaller windows appear within or over top of another window. These are called "Dialogs". They are a type of pop-up window.

Window Sizes

The size of Windows in Bookmark is fixed at 960 pixels wide by 670 pixels high.

Windows can be minimized but not maximized – i.e. set to full screen. Exception: Circulation and Search can be set to full screen mode.

The size of the windows is set by the lowest-grade monitors used by Bookmark users. As of September 2024, many users have monitors capable of 1,920 wide by 1,080 high. A large number of users also have laptops with a maximum of 1,366 wide by 768 high. Bookmark windows are sized to just fit within this smaller dimension.

In addition, users may magnify their display to 125% or 150%. Magnifying is not recommended and may cause the windows to appear “too large” to fit and some controls to not be displayed properly. 125% may work with 1920 x 1080 resolution. Avoid 150% or more.

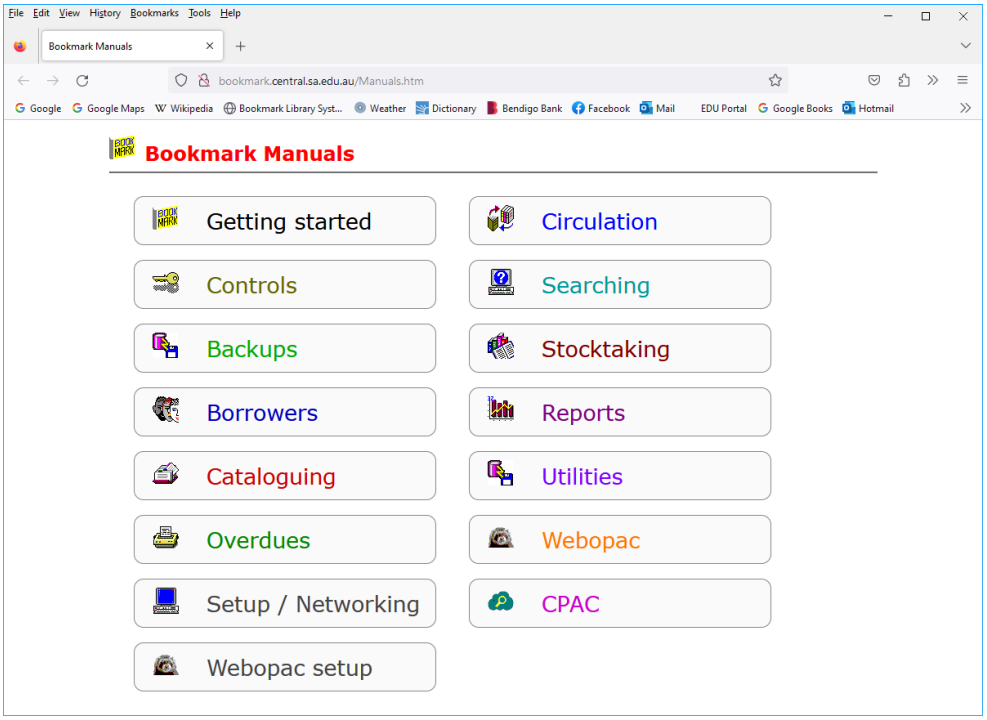
Closing Windows and Dialogs

Windows and dialogs can usually be closed in any of these ways:

- Click on the X in the red box on the upper right corner of the window.
- Click on the Close or Cancel buttons on the bottom right corner.
- Press the ESC (escape) key on the keyboard. (Easiest method. Works everywhere.)
- Hold down the ALT key and press the F4 key at the same time. (Universal method.)

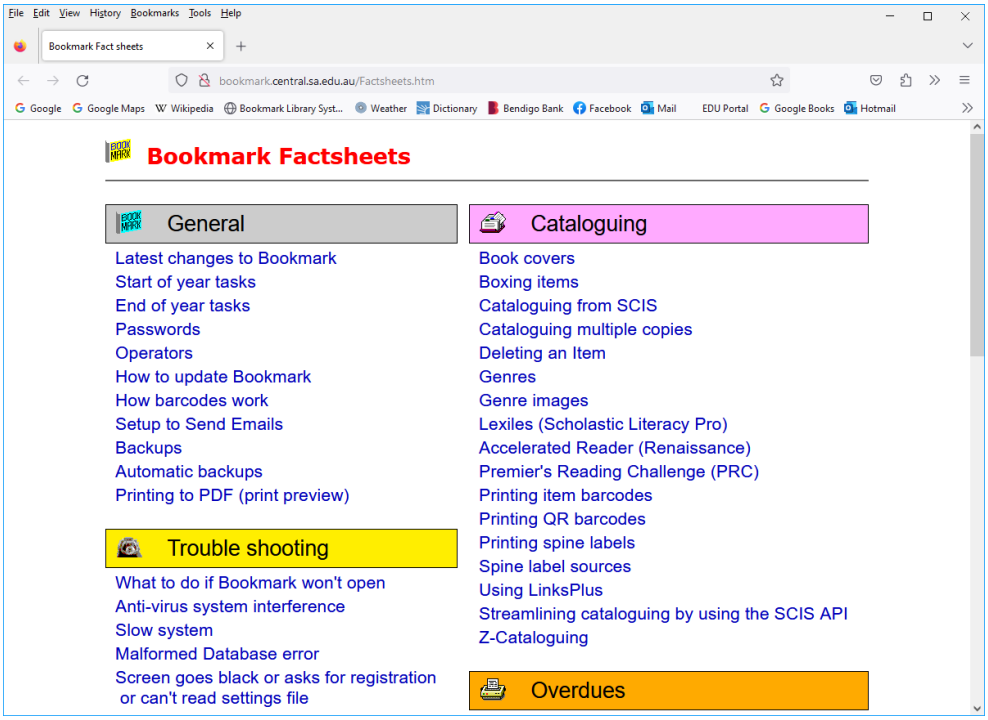
Documentation

Information on how to use Bookmark appears in the "Manuals" section on the Main Menu.



The manuals are held on the Internet.

Bookmark will go onto the Internet to bring up the manuals menu.



Fact Sheets contain step-by-step instructions and specific information.

Dates

Dates are always *displayed* as numerals in the format DD/MM/YYYY – e.g. 24/03/2017.

However, dates can be *entered* in several different formats.

Date entry rules are:

- Always enter Day and Month and Year in that order. No part can be left out.
- Single digit days and months are allowed, Bookmark will automatically add the leading 0. 7/6/2023 is ok.
- Months can be typed either as a number or as the first three letters of the month – jun for June, nov for November. Jan, Feb, Mar, Apr, May, Jun, Jul, Aug, Sep, Oct, Nov, Dec. They are not case sensitive. 25-Jul-2023
- Years can be entered as two or four digits. Two digit years are interpreted as a 21st century date – 13 is 2013, 00 is 2000, 99 is 2099. Bookmark 10 is not 22nd century compliant…yet.
- To enter a date for a different century, use four digits. 1997, 2136.
- A forward slash / or a dash – or a dot or a blank space may be used to separate each part.

Below are valid ways to type dates:

Entered as:	Translated into:	Notes:
1/1/3	01/01/2003	Single digits are padded to two digits
27/11/2013	27/11/2013	Same as display format
27-nov-13	27/11/2013	Lettered months translated into a number. Dash is a /
15.12.16	15/12/2016	Dots is a / and 16 is 2016
4 feb 2043	04/02/2043	Spaces are changed to / and lettered month is 02
16-3/66	15/03/2066	Mixed separators changed to /
9-aug-1967	09/08/1967	4-digit year kept as entered
9-aug-67	09/08/2067	2-digit year assumed to be 2000+ value

Things to Think About Before Starting

If you are starting to use Bookmark and have changed from another library management system, skip ahead to the subheading "Things to Do After Changing from Another LMS".

When first setting up and "starting from scratch", certain things need to be prepared before starting to use Bookmark.

- The name of the library
- Where are barcodes to be placed on books? There is no correct way but a better spot is the back near the top of the spine.
- What types of borrowers will you have? Junior students, Middle students, Upper or senior students, staff, community, etc? Borrower type categories distinguish loan policy rules – e.g. due dates, loan limits, reserve limits, etc. What categories will be needed to cater for different due dates? Borrower types are normally based on groups of year levels.
- Locations where resources are stored when not on loan. These are placed against items as they are catalogued and can be useful to direct users and for stocktaking and making lists.
- Should borrowers have individual barcode cards or would sheets with borrowers arranged in "classes" be easier to use?
- What master password would be best to use?
- Are items to be manually catalogued or is data from a MARC source (such as SCIS) to be used?

Getting Started Order

The following is a suggested order when first starting to use Bookmark:

In the **Controls** module:

1. Settings – make sure the library's name is correctly entered. It is case sensitive and is displayed exactly how it has been entered. Also fill out the other fields, too.

2. Passwords – enter a master password. The others are optional and can be added later.

3. Barcode Settings – barcodes will not work until this area has been correctly configured. Add the "site ID" as a minimum and only change other settings if using a different type of barcode. If you have changed from other library system, these settings may already have been made.

4. Borrower Lists – Borrower Types establish user categories and set due dates and loan limits. They must be set up prior to entering any borrower data. See the Borrowers manual for more detail.

5. Cataloguing Lists - Status Types – these indicate if an item is available for loan, on loan, on hold, lost, etc. Two types are provided at the start, but others – such as missing, in process, on display - can be entered at any time. Every item must have a status type.

6. Cataloguing Lists – Item Types – Every item is required to have an item type. This is usually the type of media – i.e. Book, DVD, website, etc. It is a good idea to have many types of books, like fiction, non-fiction, and many others.

7. Cataloguing Lists - Locations – Items can have a location where they are stored when not on loan. Including a location is not mandatory. At the start, the location list is blank. Add a few initial locations to get started. Locations can be entered as items are catalogued. Entering most locations before cataloguing is a good idea.

8. Cataloguing / Authority Lists / Sublocations - These are optional but may be part of setting up a combination of locations and sublocations list.

Once these things have been set up, you are ready to begin entering data.

Things to Do After Changing from Another Library System

When changing from another library management system to Bookmark, most major data is migrated across. Some values, however, may need to be changed.

Very important! *Some special parts of Bookmark may need to be addressed before starting to issue loans or conduct cataloguing.*

In the **Controls** module:

1. Settings – make sure the library's name is correctly entered. It is case sensitive and is displayed exactly how it has been entered. Fill out the other fields, too.

2. Passwords – Passwords usually do not migrate. Enter the master password you wish to use. The others are optional and can be added later. A password in Circulation Controls for loan blocks should also be entered.

3. Barcode Settings – This area should have been set up during the migration. It identifies the barcode format. This is used to generate new barcodes.

4. Borrower Types – these establish user categories and set due dates and loan limits. *They must be set up prior to entering any borrower data and to circulating*. Borrower types often do not migrate very well. The list and settings provided are a starting point and may need to be altered. Consult with the Bookmark help desk for assistance.

5. Cataloguing Lists - Status Types – these indicate if an item is available for loan, on loan, on hold, lost, etc. Check the list.

6. Cataloguing Lists - Locations – All items have a location where they are stored when not on loan. Including a location is mandatory for every item.

7. Cataloguing / Authority Lists / Sublocations - These are optional but may be included. They are not found in Controls but in Cataloguing / Authority Lists.

8. Item Types – All items have an "item type" which usually denotes the type of material. It is often based on the media type (GMD).

9. The AltID cataloguing field may contain the item's original catalogue number and copy number.

Entering Borrowers

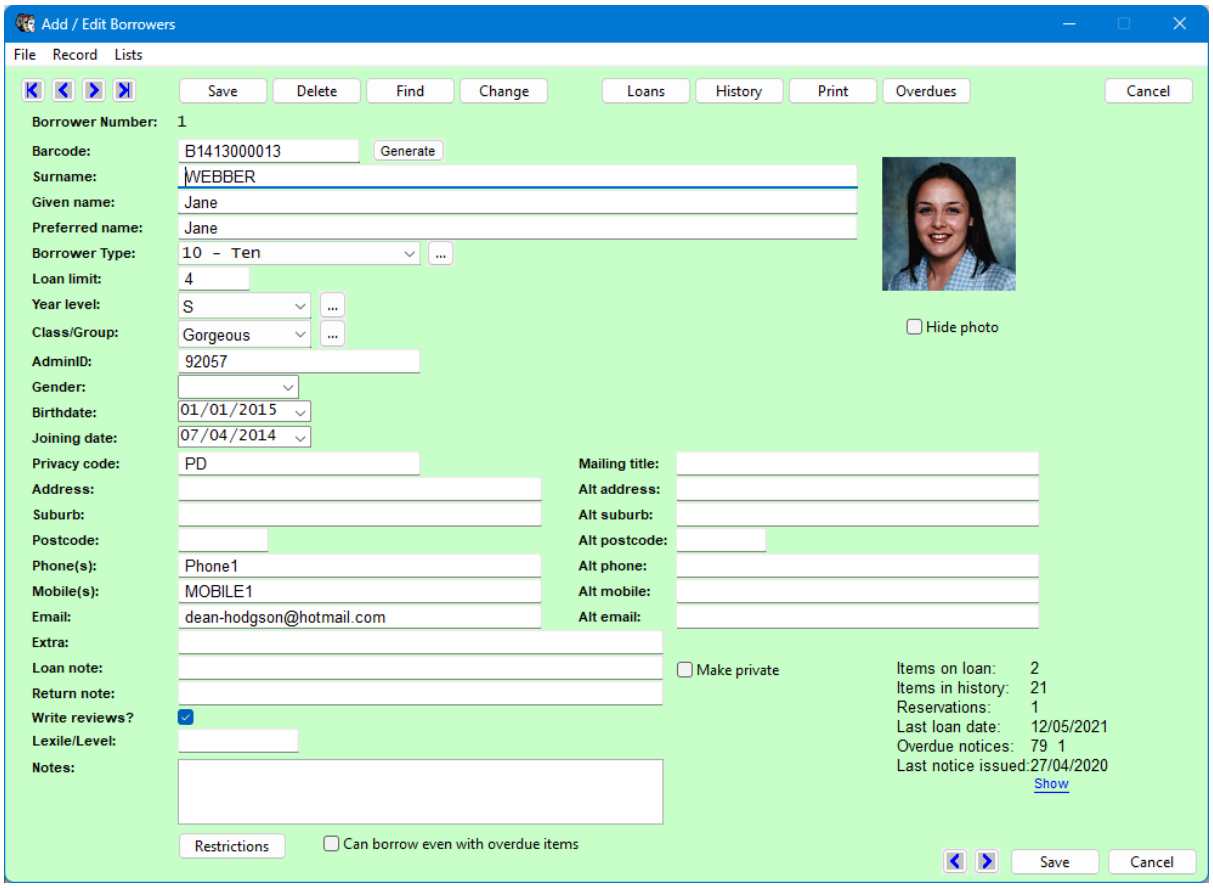
(See the Borrowers manual for more detail.)

People who use the library are called 'Borrowers'.

Start by entering a few borrowers first. This should be done before attempting to catalogue. Use Add/Edit Borrowers to enter the borrowers the first time.

Every borrower requires a "borrower number". This value starts at 1 and goes up. It is also used as part of the barcode. Enter a number.

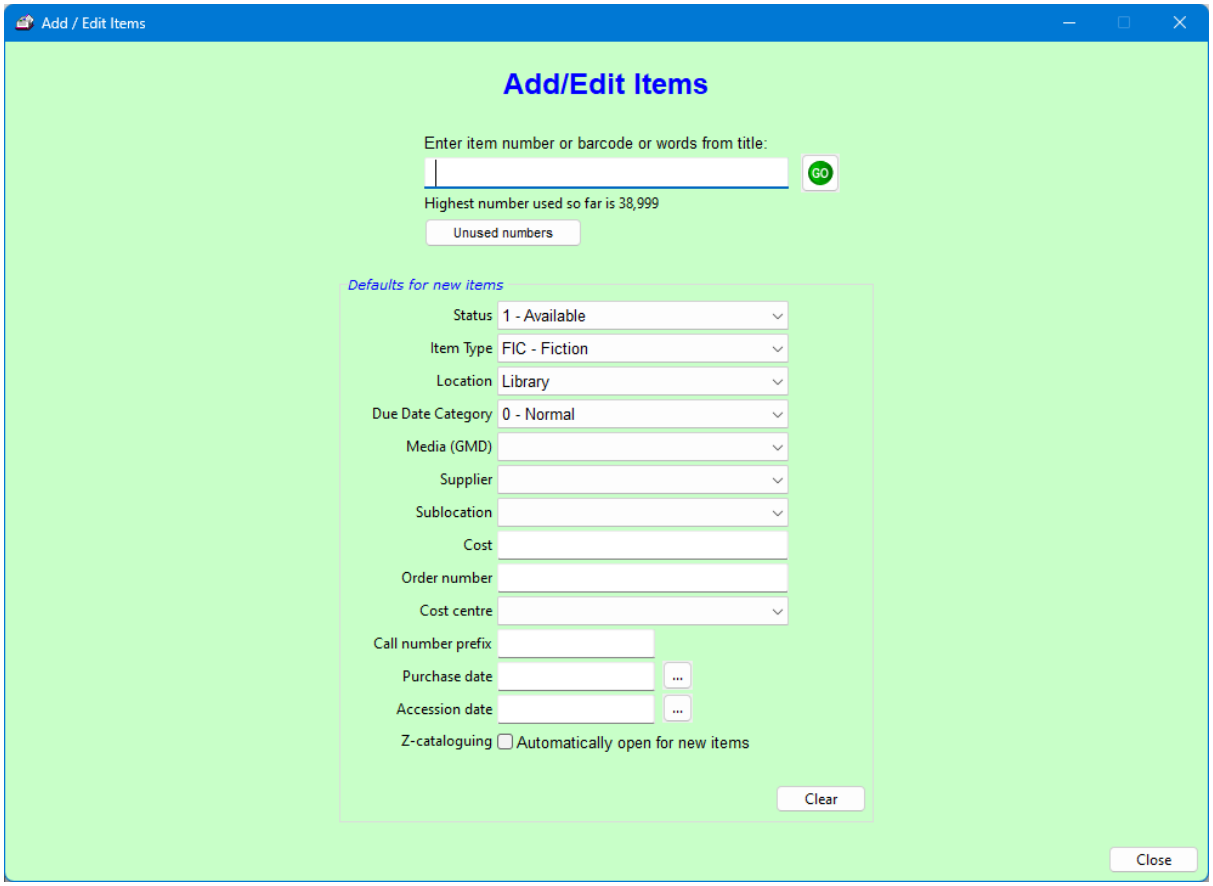
On the borrower data entry screen, type in a surname, given name, assign a borrower type category number. Generate a barcode. This is the minimum data required for borrowers. Click on Save.



Entering Items

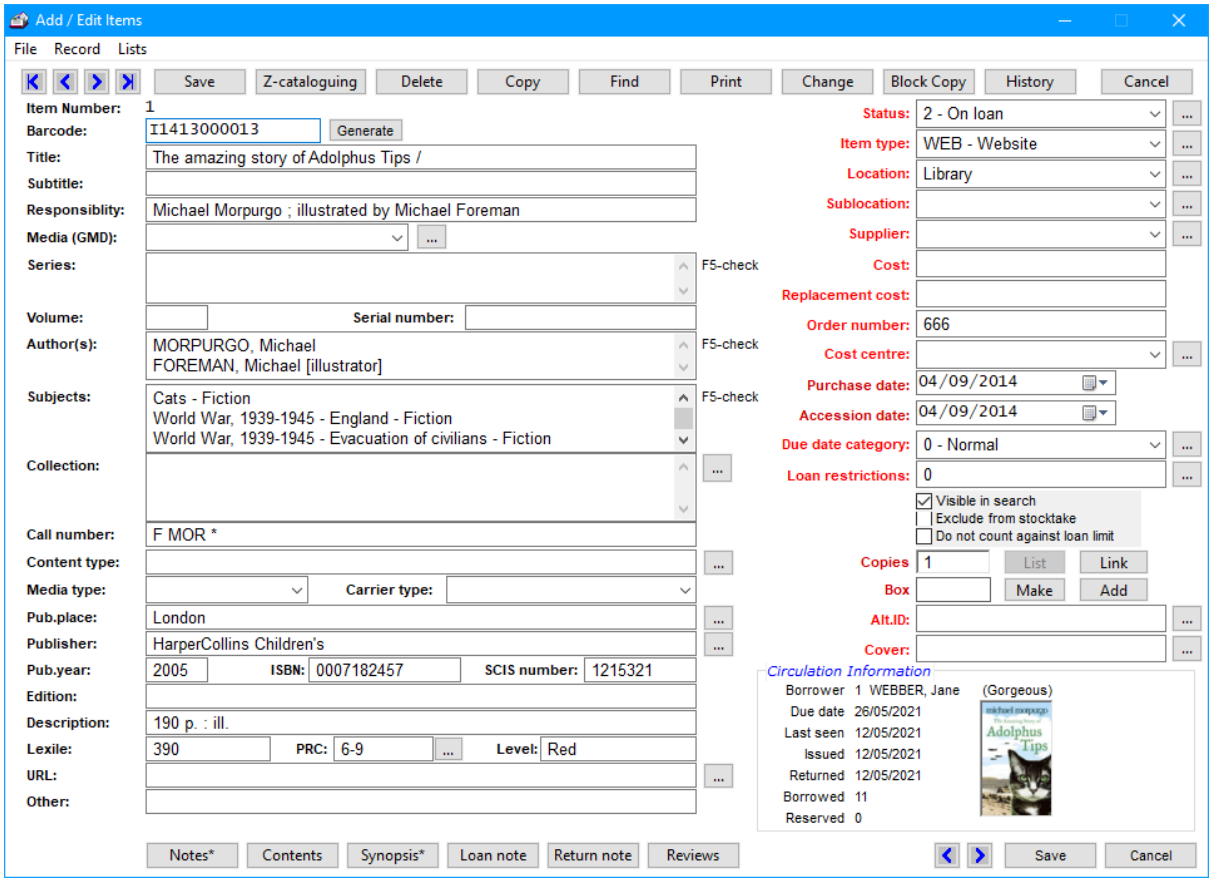
(See the Cataloguing manual for more detail.)

Go to Cataloguing then click on Add/Edit Items.



Every item has its own unique "record number". The record number is part of the full barcode.

Enter the first item's number (possibly just 1) or its full barcode. Either will do.



The minimum data required is the barcode (click on Generate if blank), the Title, a Status number (1 is available and can be borrowed), and an Item Type.

Everything else is optional.

Click on Save to save any data entered or edited.

Import MARC Records (SCIS, etc)

(See the Cataloguing manual for more detail.)

Cataloguing data from MARC record sources can be imported. This can be done via files or the much faster z-cataloguing.

See Cataloguing / Import Items for more information.

Once borrowers and items have been entered, Circulation and Searching can begin.

Daily, Monthly, Annual Tasks

Daily:

Start of Day:
- Turn on server computer (Bookmark host) first (if not already on)
- Start Bookmark on the main computer first.
- Check date screen. Change due dates in Controls if required.

End of Day:
- Close modules on workstations first
- On the librarian's main computer, go to Utilities and make data backup
- Close Bookmark
- Switch off

Monthly:

- Adjust any end-of-month due dates if required
- Do monthly backup

Each Term:

- Adjust any end-of-term fixed due dates

Half Yearly:

- Re-index key words (not absolutely necessary but useful)
- Rebuild series & subject authorities
- Check quality of backups

End of Year:

- Print useful statistics
- List of titles not borrowed may be useful
- Stocktake collection: can be done in sections, over the year, too
- Remove borrowers who have left
- Do end of year backup

Beginning of Year:

- Add new borrowers, either by importing or manually
- Adjust borrower classes and types
- Update borrower data against items
- Age circulation log and borrower types (optional)
- Reset fixed due dates, holiday dates and cut-off dates
- Clear all reservations or remove old reservations and holds