

# Overdues

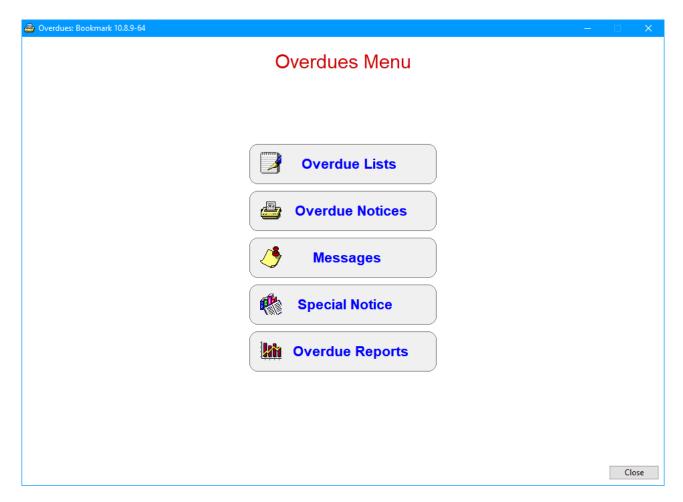
Revised 26/07/2023

#### Contents

Overdue Criteria:	
Overdue Lists	4
Overdue Notices	11
Configuring Overdue Notices	14
Letters	
Email	
A note on emailing images	
Email Settings	
Individual Notices in PDF and HTML formats	19
Export notices as a CSV file	19
Email Message Only	19
Overdue Setups	
Overdues Messages	
Automatic Overdue Message Control	
Holiday Dates	
Special Notice	
Overdues Reports	
List All Overdues	
Count Overdues per Month	
List Overdue Notices	31

# **Overdues**





The Overdues module is used to make lists of overdue items and produce notices for individuals.

## **Overdue Criteria:**

An item is overdue if its due date comes before the overdue "test date".

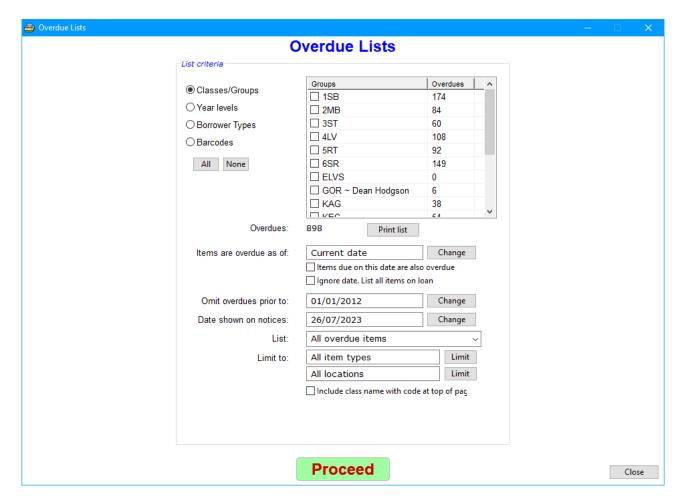
The test date is usually the current date (today). If today is 26/07/2023, then any item with a due date before that date is overdue.

Items with due dates equal to or after the test date are not overdue.

## **Overdue Lists**



The Overdue Lists operation generates column-format lists of overdue items. Overdue lists can be based on classes, year levels, borrower types or individual barcodes. Choose which criteria to use first.



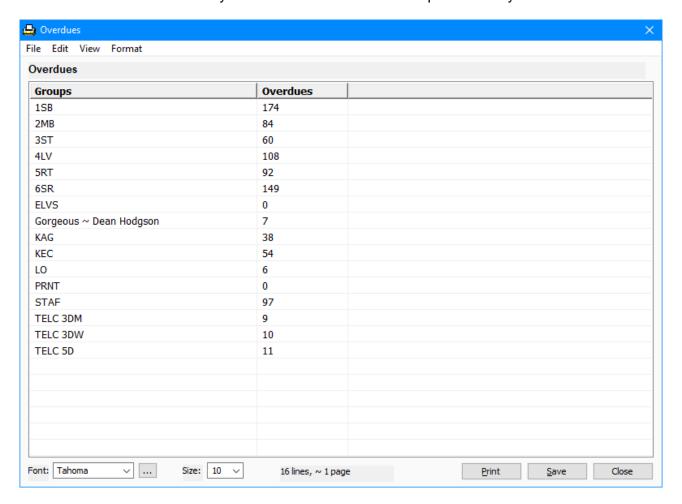
Tick the classes, year levels or borrower types for which you wish to obtain overdue lists, or enter individual borrowers by typing or scanning.

The controls below the list can be used to restrict the overdues list to a specific range of dates, item types or locations. By default there are no restrictions.

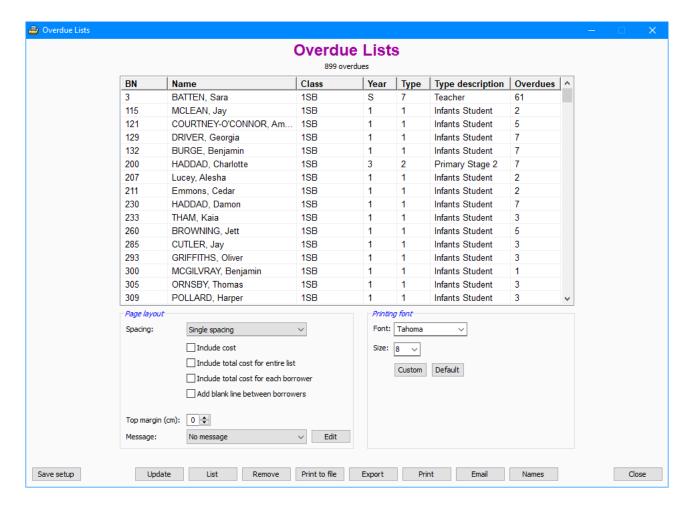
Changing the *Items are overdue as of* date changes the overdue test date and therefore the list. Setting the date to the end of year usually lists all loans as overdue.

Ticking Items due on this date are also overdue, changes the criteria slightly so that items due on the same date are overdue.

Click on *Print* to see a summary list of the number of overdues per class or year level.

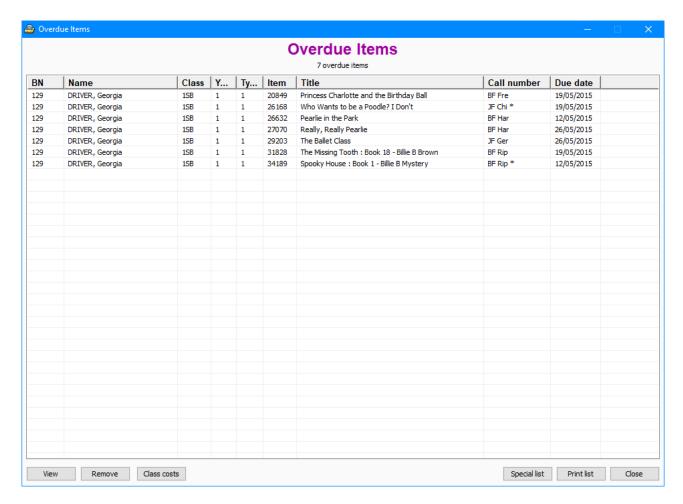


Click on *Proceed* to go to the next step.



All borrowers having overdue items and matching the selected criteria are listed.

Double click on a borrower to view just their overdues.



The Remove button can be used on this window to remove highlighted entries from the Overdues display and printout. If the list is updated, they will reappear.

Double-click on a line to view an item's details.



Back on the main Overdues List display, selected borrowers can be removed from the list by highlighting and pressing the Delete key or by clicking on the *Remove* button. Multiple borrowers can be highlighted at the same time using either the Ctrl or Shift keys while clicking.

#### **Page Layout**

Spacing can be set to either single or double-space.

*Include cost in printout* adds the cost of items.

*Top margin* causes the overdue list to be printed a specified number of centimetres down the page so as to allow for letterheads.

#### **Printing Font**

Default font and size Tahoma, 8 point.



Prints out the overdues in list format to all borrowers in the grid or only those highlighted.



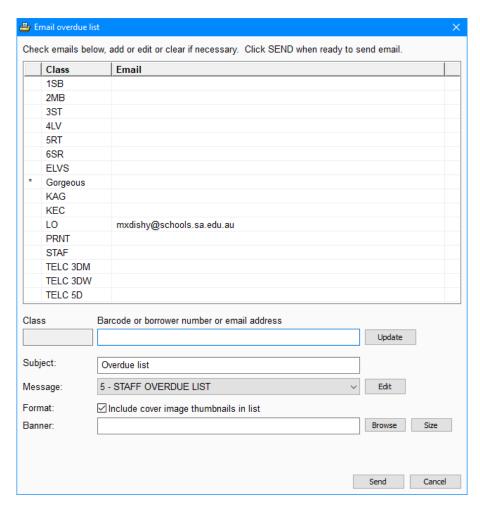
Creates a text file format of the overdues list. This is displayed in a standard report window. The contents can be edited, printed and saved. The display is similar but not exactly like an actual printout.



The overdues to all borrowers in the grid is exported to a tab-delimited text file, which can be opened in Microsoft Excel or Word.



Clicking on this button brings up a window that can be used for sending a list of overdues to class teachers.



A list of all overdue items for the class can be emailed. The list is sent only to those classes which have an email address (usually the teacher's). To enter an address, click on the class then type in

the address below the list. Click on Update to put into the list. To remove, click on a class and make the email address blank then update.

The subject line is the one to be included with the emails.

An overdue message can be selected. It can be a formatted message (see below).

Tick the checkbox "Include cover image thumbnails in list" if you would like book cover images next to the listed overdues.

A banner is optional. This is the filename of the image to be included on the top of the email.

Note: make sure that email settings have been put in place. Go to Controls / General Controls.

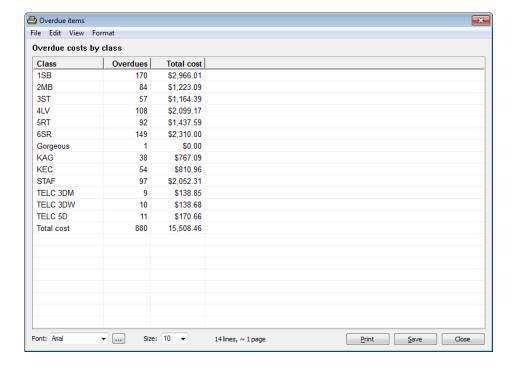
Click on Send to send all the lists.



Lists all items overdue to all the borrowers displayed or only those highlighted.



The *Class costs* button at the bottm pops open a window that shows the total cost of overdue items per class based on the list. The "Include costs" checkbox must be ticked for this to work.

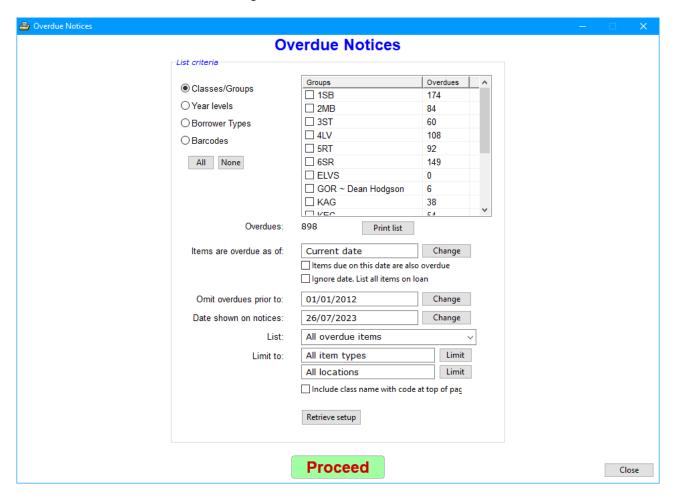


## **Overdue Notices**



This prints out overdue *notices* rather than *lists*. Each borrower's notice is printed on one page.

Overdue notices are intended to be given out to individual borrowers.

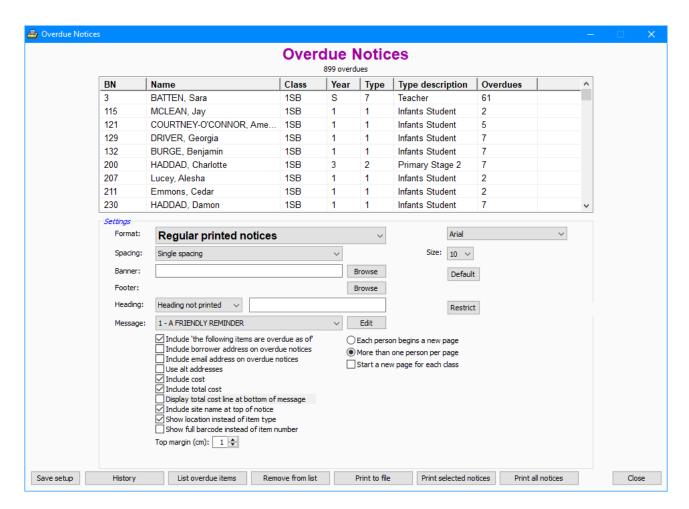


Notices can be produced based on classes, year levels, borrower types or individual barcodes. Choose which criteria to use first.

Tick the classes, year levels or borrower types for which you wish to obtain overdue notices.

Change any of the limiting criteria if desired.

Click on Proceed to proceed.



All borrowers from the selected classes, year levels or types are displayed in the grid.

Double click on a name to view one person's overdues.



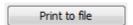
Lists all overdues to all the borrowers in the grid.

Optional: highlight borrower to see only their overdues listed.

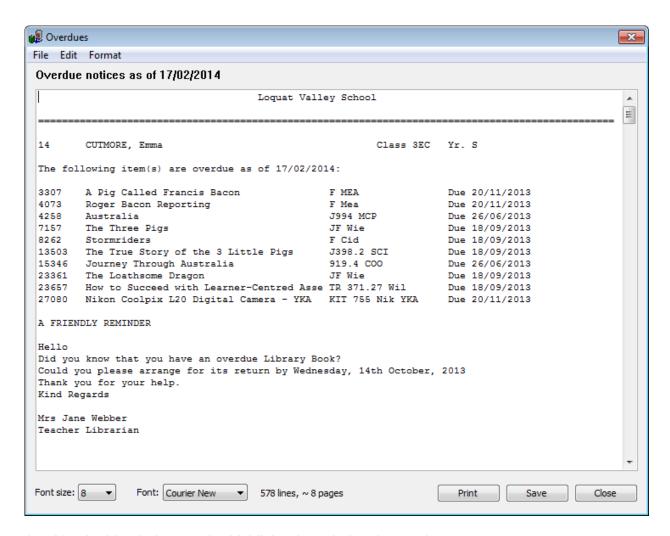
Double-click on one borrower to view only that borrower's overdues.



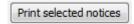
Selected borrowers can be removed from the list by highlighting and pressing the Delete key or by clicking on the *Remove* button. Multiple borrowers can be highlighted at the same time using either the Ctrl or Shift keys while clicking. These borrowers still have overdue items, they just will not appear on the printout.



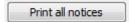
Overdue notices are generated in a simple text format. The notices can be printed, saved and edited. The notices can be for all borrowers or highlighted ones only.



Anything in this window can be highlighted, copied and pasted.



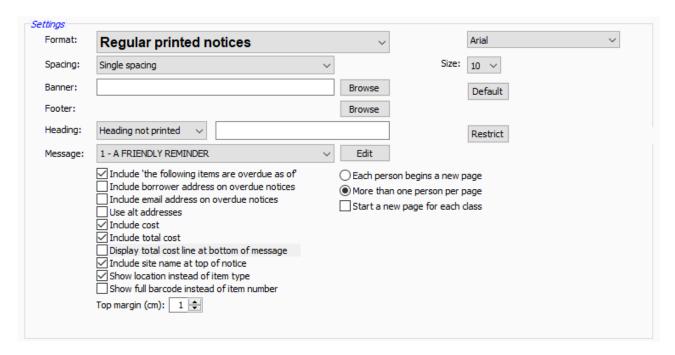
This prints out overdue notices only to the highlighted borrowers.



This prints overdue notices for everyone in the grid, whether they are highlighted or not. A new page is used for each borrower. See below for printout options.

## **Configuring Overdue Notices**

Several parameters are available to customise overdue notices.



Different formats are available for Overdue Notices:

- · Regular overdue notices
- Notices including book covers
- Letter
- · Letter with covers
- Email without covers
- Email with covers
- Notices as individual PDF files
- Notices as individual HTML files
- Export notices as a CSV file
- Email message only

The dropdown list next to **Format** is used to choose.

Spacing can be set to either single or double-space. This only applies to only non-cover overdue notices.

Include cost in printout adds the cost of items. Again, this only applies to the non-cover notice format.

*Top margin* causes the overdue notice to be printed a specified number of centimetres down the page so as to allow for letterheads. This applies only to Regular and Notices with covers formats.

Message is used to select an overdue message to be included. See Messages below.

Banner is a graphics file which can be included at the top of a notice. It should be always accessible and be in a bmp, jpg, gif or png format. Bookmark will resize the image to fit the page.

A *Footer* is another graphics file which can appear at the bottom of a notice. Banners and Footers are most useful with the Letter format.

Heading appears above the borrower's name (but below the optional banner). It can be the name of the school or any other text. Several colour combinations are available. A heading and a banner are generally not used together.

Font and font-size

The font and font-size used by the printout can be changed. Default is Tahoma, 8 point.

#### Letters

Overdue letters are pre-formatted so addresses appear within the window of mailing envelopes.

If *Include site name at top of notice* is ticked, the school's name and address is placed at the top. This information is entered into Bookmark in Controls / General Controls.

If *Include folding line* is included, a line is printed exactly where the letter needs to be folded for the address to appear in the envelope's window.

Letters also include a Mailing Title. The generic title is "To the Parent / Caregiver of". This can be changed on the line provided.

#### **Email**

Overdue notices can be emailed.

Email settings must have first been entered and tested to ensure emailing will work. Emailing notices can be blocked by network policies.

Emailing notices requires access to a smtp email server. See special notes later on setting up the email system.

#### A note on emailing images

In order for images and covers to appear in html emails, the images must have been uploaded to Bookmark's CPAC cloud-based online search system. If you already have a CPAC website set up and have uploaded covers, then they are already available.

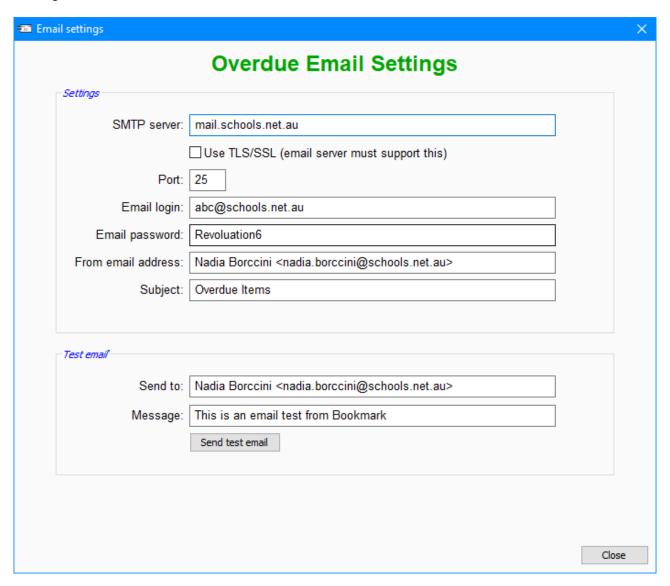
If you do not have a CPAC search website set up, or covers have not yet been uploaded, you can still upload book cover images. Go to Cataloguing > Covers Images > Upload to CPAC. Covers are zipped 100 at a time then uploaded. Only cover images not already in CPAC are uploaded.

If the format is set to Email overdue notices in HTML, a banner and/or footer image is automatically uploaded to CPAC. If it does not appear, contact the Bookmark help desk.

To upload images, go to Cataloguing > Cover images > Upload to CPAC or Cataloguing > CPAC > Upload images.

## **Email Settings**

Email settings can be made either in Controls > General Controls > Email tab or via the Email Settings button when an email format has been selected.



Bookmark uses the smtp method of sending emails. This is a commonly used system provided by most Internet Service Providers. Other systems, such as POP3 and Exchange are not available. Bookmark does not use Outlook or web-based email systems.

*SMTP Server* is the address of the smtp mail server being used. All emails are sent to this server for processing and distribution.

TLS/SSL should only be ticked if the smtp email service requires it.

Port is the port number to be used. It is normally 25 but can be different depending on the service.

Email login is the login used to send the email. Not all email systems require this.

*Email password* is the password used to log in if required.

From email address is the library's or librarian's email address. It appears as the sender.

Subject is the 'subject line' that will appear on all overdue notice emails being sent.

#### **Send Test Email**

It is important to send one or more trial emails to make sure the system works.

Send to should be an email recipient – such as yourself - that can be checked to see if the test email arrived. Message is the test message to be sent.

#### **Borrower Email Addresses**

Borrowers must have correct email addresses saved in their records.

Email addresses are entered via Add/Edit Borrowers. Some administration and school management systems, such as Edsas, may provide email addresses during importing.

The Alt email addresses are usually a parent's address. Multiple addresses can be entered into the one field, if they are separated by semi-colons.

By default the borrower's email address has priority and is used first. If blank, then alt email address is used, unless a control stipulates to use the alt address in preference.

After sending email notices, Bookmark will list borrowers who do not have an email address and to whom notices were not sent.

All emails are sent in HTML format. This provides a better appearance than simple text.

#### **SMTP Email Server Settings**

#### South Australian Department for Education Schools Special Note

Access is limited to a smtp email server for SA Department for Education schools. The specific workstation(s) used to send email notices must have the correct IP address assigned or an application has been accepted to unblock the workstation's current IP address.

- Every school has a range of IP addresses available which are automatically unblocked.
  These are in the range 10.###.###.40 to 55. The ### are unique values for each school.
  Change the IP address of the computer itself to an unused value within the range.
  Submitting a form is not necessary.
- 2. If all the IP addresses in the unblocked range are not available, schools can submit a completed Learn Link Fact Sheet FS70-430A. Access to the Department's smtp email server is granted to a specific workstation. Granting access can take a few weeks. Contact the CSC to obtain the fact sheet.

#### **Email Settings for South Australian state schools only**

SMTP Server: smtp.schools.sa.edu.au

Use TLS/SSL: do not tick this

Port: 25

Email login: leave blank Email password: leave blank

#### Western Australia smtp server

Public schools in Western Australia should use the following:

Email system: standard

SMTP Server: mx-schools.int.det.wa.edu.au

Use TLS/SSL: do not tick this

Port: 25

Email login: leave blank Email password: leave blank

#### Google smtp email

Google has a smtp email service for users with gmail accounts.

SMTP Server: smtp.gmail.com

Use TLS/SSL: tick this checkbox (mandatory)

Port: 587 (not 25)

Email login: gmail account address (e.g. username@gmail.com)

Email password: gmail account password

It is necessary to set the account to allow outside access.

#### Office 365

The smtp email host for Office 365 can be used. See the Microsoft documentation for details on settings.

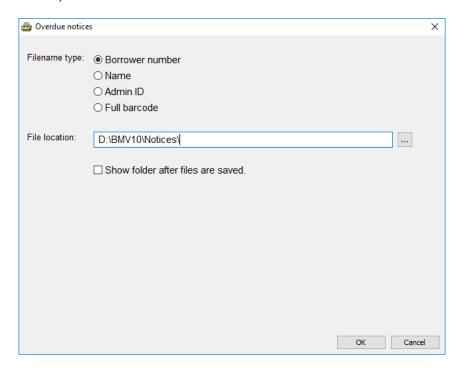
SMTP Server: smtp.office365.com Use TLS/SSL: tick this checkbox

Port: 587

Email login: Office 365 email account login Email password: Office 365 email login password

#### Individual Notices in PDF and HTML formats

For advanced users, the "individual notices" formats generate overdue notices that are saved in files. Each borrower's notice is saved as a *separate file*. These files can then be send via email (separate to Bookmark) or another means.



The filenames used can be the borrower's number, their name, the AdminID value or the full barcode.

Files are saved to the location specified. By default this is a folder called "Notices" which is located in Bookmark's folder. Any other location can be used – e.g. Documents, etc. A special folder to hold the notices is recommended. Files with the same filename are overwritten.

## **Export notices as a CSV file**

This format generates a "comma-separated-value" (CSV) file. This type of file can be opened in Excel and other spreadsheet software.

Each borrower is a separate line.

The fields in each line are: name, email address, class, year, title.

## **Email Message Only**

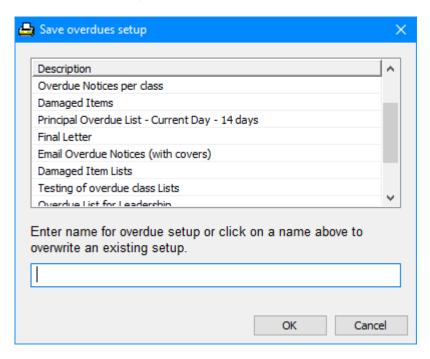
This format sends only the message component. No items are listed.

## **Overdue Setups**

It is possible to save complete overdue notice configurations so they can be easily retrieved for reuse.

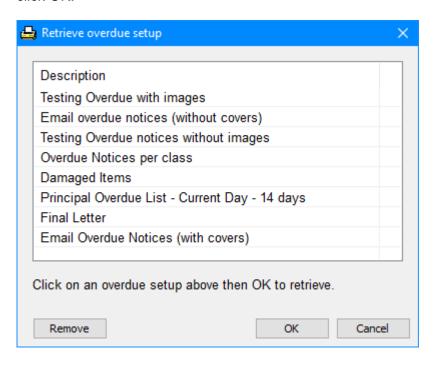
In Overdue Notices, go through the steps as if to print notices. Select classes, parameters, format and output settings like normal.

Click on Save Setup.



Type in a description of the overdue configuration then click OK. It is saved.

In future, the configuration can be retrieved and re-used without having to set anything else up. On the previous Overdue Notices window, click on Retrieve Setup. Highlight the setup to use then click OK.



The settings are loaded back. These include the classes, cutoff dates, format and layout information.

Then click on Print.

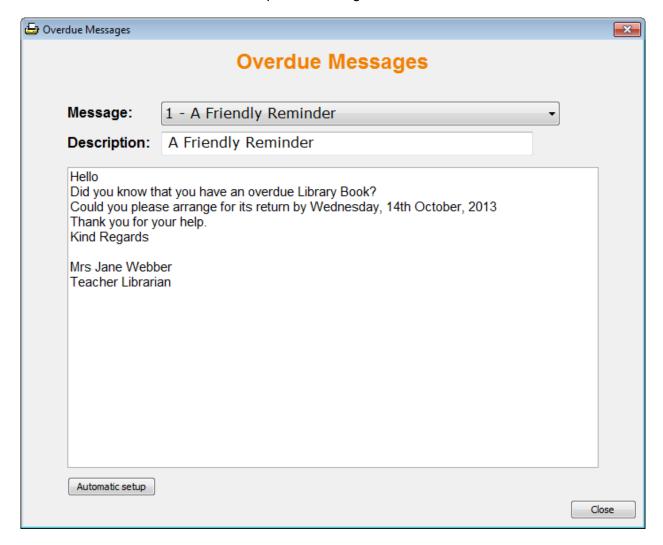
For email notices, the

Setups are a good way of simplifying printing overdue notices. For email notices, the email subject is saved, too. This allows different subjects to be easily retrieved.

# **Overdues Messages**



Overdue notices and lists can contain special messages.



Up to 20 different messages can be pre-written.

Use the dropdown list to select which message to create or edit.

The description appears in the dropdownlists in Overdues and elsewhere. Descriptions are not included as part of the printed message.

Click on the large Text area and write the message. It can be edited at any time.

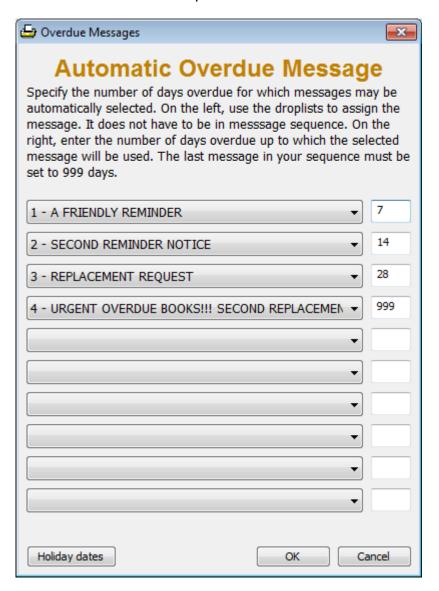
#### **Overdue Message Formatting**

The editor window used to write messages can only display simple text. However, special commands can be embedded within the text that allow changing the font, size, bold, italic or underline, centring lines and even display images.

See the Fact Sheet "Formatting Overdue Messages" for details on how to use these commands.

## **Automatic Overdue Message Control**

Click on the Automatic Setup button.



This feature is used to tell Bookmark which message to use based on how long items have been overdue. It works when *Select message automatically* is chosen for overdue notices.

The dropdown lists are used to choose the message.

On the right side, type in the number of days overdue used to trigger that message.

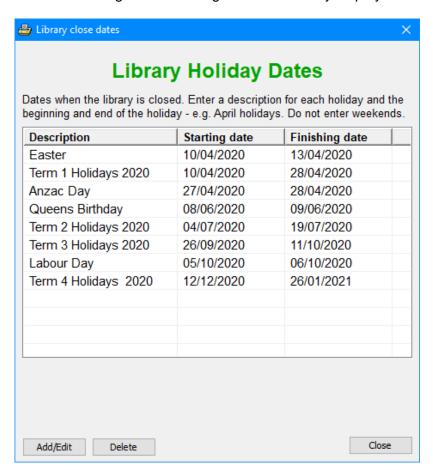
The message is used if the longest overdue item to the borrower falls less than or equal to the value. Bookmark checks all overdues to a borrower and determines the maximum number of days for the longest overdue item. It then compares it to the chart. The message used is the first one in sequence with the number of overdue days greater than the maximum. (Not less.)

In the above example, all items overdue <u>before</u> 14 days have the first message printed, which is assigned Message 1. Items overdue within 15 to 28 days have the second message, which is Message 6. Overdues of 29 or more days have the third message, which effectively acts as a "block", and is the last message in the sequence.

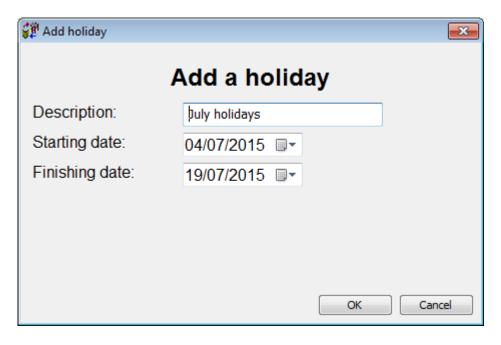
The last message must have 999 as the number of days.

## **Holiday Dates**

This window allows entry of holiday times. These are ranges of dates that will not be included when calculating which message is automatically displays.



Click on Add/Edit to add a new holiday, or highlight an existing one to change and click on Add/Edit.



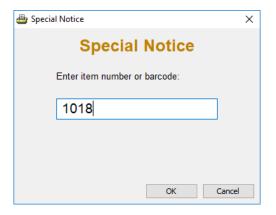
Fill out the form with the correct dates and a description then click OK.

# **Special Notice**

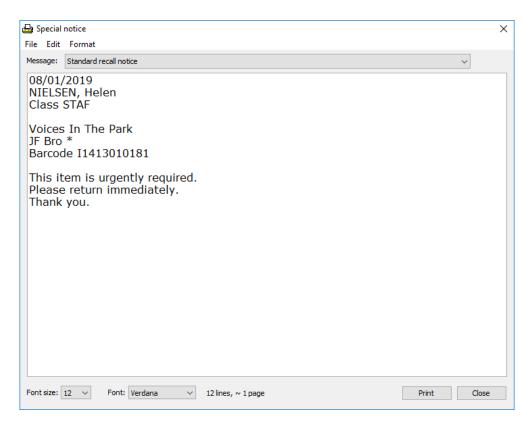


A special notice can be used to recall an item urgently needed, or to send a special note.

Enter the item's barcode or record number.



The notice is displayed in a standard report window. Change the font and other details to suit then print.

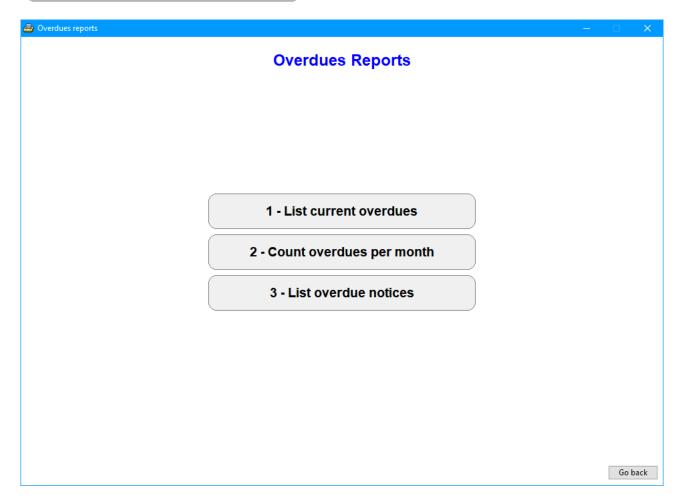


An overdue message can be selected. Use the dropdown list at the top to choose the message.

The "standard recall notice" is a message that normally is displayed instead of an overdue message.

# **Overdues Reports**

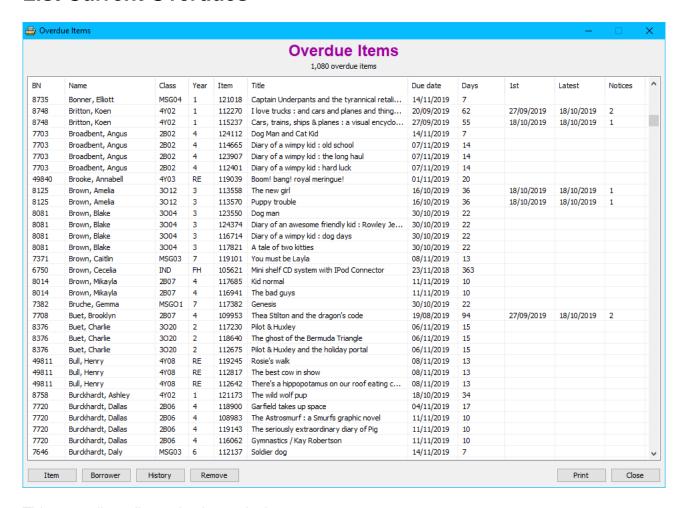




Overdue Reports are available both in Overdues and Reports.

Since October 2019, Bookmark keeps a list of all items that appear in overdue notices. This includes printed and emailed notices. The Overdues Reports can be used to examine the list.

#### **List Current Overdues**



This report lists all overdue items. It shows:

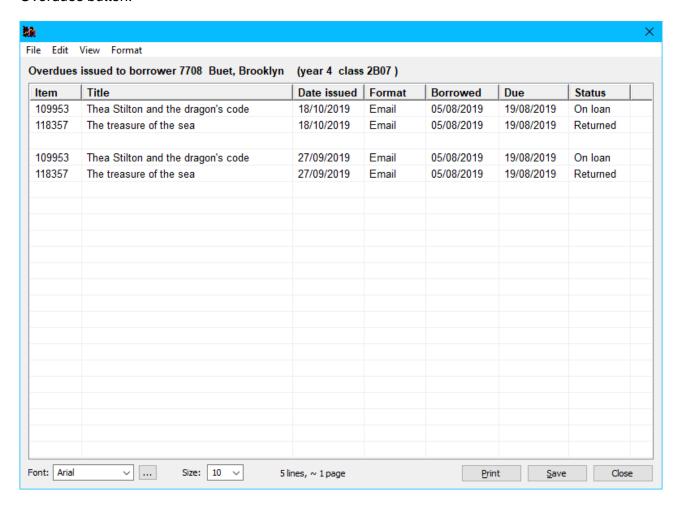
- The borrower
- The item
- The date it was due when borrowed
- · The number of days since it was due
- The date the first time this item to this borrower appeared on an overdue notice
- The date of the latest notice containing this item
- The number of notices issued with this item

The columns can be sorted normally by clicking on a heading.

The Item button shows details about the highlighted item.

The borrower button shows details about the borrower.

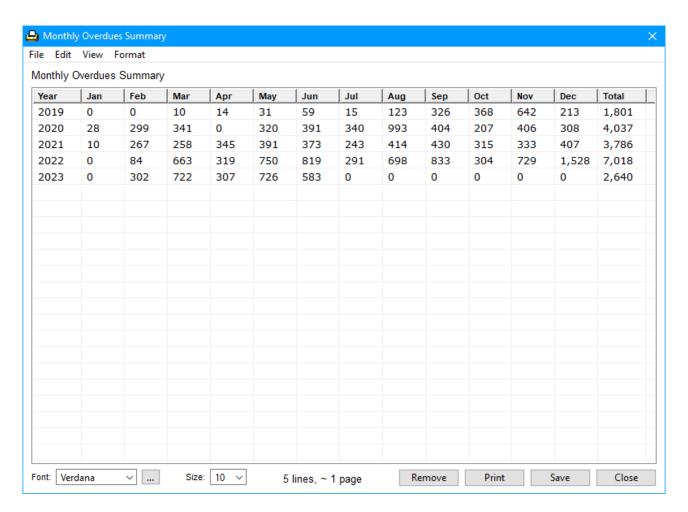
Double-click on a line, or single-click to highlight then click on History to see a list of all the overdues issued to the borrower. This can also be seen in Borrowers > AddEdit Items with the Overdues button.



Remove hides all highlighted overdues from the list. It does not delete the item nor does it remove the overdue.

Print either prints out the entire list or the highlighted entries only.

## **Count Overdues per Month**



This chart shows the number of overdues issued each month. Note that a full account only began in September 2019. Data prior to that is limited.

#### **List Overdue Notices**

This function lists all overdues that occurred during a selected year.

