



## BOOKMARK FACT SHEET

### Due Dates

January 2019

Bookmark uses two types of Due Dates:

- **Duration due date** – A number-of-days loan period. Bookmark automatically calculates the due date based on the number of days specified.
- **Fixed due date** – a set time, such as the end of term or end of the year.

The due date to be assigned when items are issued are based on:

- The Borrower's Type Category
- An Item's due date category
- Holiday dates
- Final due dates

Due dates are normally determined by a borrower's Borrower Type Category (BTC). Each BTC has a due date, which is either a number indicating a loan period or a set date.

But what if a certain type of item needs to be leant for the entire year or for only overnight? Item due date categories are special, exception-to-the-rule dates. These *override* the BTC due dates. Item due dates can be used for items that are always borrowed until the end of the year, regardless of the BTC, or overnight only or other special cases. Up to 20 "Item due date categories" (DDC) are available. These are assigned to items when catalogued.

In addition to these two broad areas – borrower and item due dates - special due dates for specific *item types* can be assigned to each borrower type. This allows musical instruments, for example, to be borrowed until the end of the term for one type of borrower or until the end of the year for another type.

*Holiday dates* – times when the library is closed. Any due date normally "landing" during a holiday time is automatically advanced to the same day of the week following the holiday.

*Final due dates* – dates past which a due date is not permitted. Applies only to loan-periods. Stops borrowing after that date.

### Questions to ask...

- What due dates do I want for each of my borrower type categories?
- Do I need any special due dates for different types of material for each borrower type?
- Do I need any special due dates for items that will over-ride these?
- Do I need a final end-of-year date, past which borrowing is not allowed?
- Do I need end-of-term due dates, past which due dates are not assigned?

### Borrower Due Dates

Due dates assigned to borrower types are the core of the due date system.

Each borrower belongs to a Borrower Type Category (BTC). Each BTC can have its own default due date as well as special due dates for different item types.

Borrower Due Dates can be set up either in the Borrower Type editing window or the special Due Dates window.

#### *Setting Due Dates against Borrower Types*

Go to Borrowers then click on Authority Lists. (Alternately, go to Controls then click on Borrower Lists.) Click on Borrower Types.

No	Description	Loan limit	Resv limit	Ovd block	Year levels	Duration/date	Due date	Restriction	Ovd limit	Count
1	Infants Student	10	10	blocked	P,1,2	7	12/10/2017		2	270
2	Primary Stage 2	10	10	blocked	3,4	14	19/10/2017	Restricted	1	146
3	Primary Stage 3	10	10	blocked	5	7	12/10/2017	Restricted		58
4	Primary Stage 3b	10	10	blocked	6,7	7	12/10/2017	Restricted		10
5	Ex LVS Students	4	2	blocked		30	04/11/2017			14
6	Parents	30	5	no block		30	04/11/2017			6
7	Teacher	200	10	no block		Fixed date	01/12/2017			34
8	Ancillary Staff	300	5	blocked		Fixed date	20/11/2018			24
9	Library Staff	300	5	blocked		30	04/11/2017			12
10	Special	1	5	blocked		14	19/10/2017			2
11		10	5	blocked		14	19/10/2017			
12		10	5	blocked		14	19/10/2017			
13		10	5	blocked		14	19/10/2017			
14		10	5	blocked		14	19/10/2017			
15		10	5	blocked		14	19/10/2017			
16		10	5	blocked		14	19/10/2017			
17		10	5	blocked		14	19/10/2017			
18		10	5	blocked		14	19/10/2017			
19		10	5	blocked		14	19/10/2017			
20		10	5	blocked		14	19/10/2017			
21		10	5	blocked		14	19/10/2017			
22		10	5	blocked		14	19/10/2017			
23		10	5	blocked		14	19/10/2017			
24		10	5	blocked		14	19/10/2017			
25		10	5	blocked		14	19/10/2017			

Note: your borrower type categories can be different to those shown in this example screenshot.

Double-click on a line to open the BTC editing window, or single-click to highlight then click on Edit.

Edit Borrower Type

Primary Stage 3b

Loan limit: 10

Resv limit: 10

Overdue block: blocked

Overdue limit:

Year levels: 6,7

Due date: 7 days (10/07/2018)

Restriction: Restricted

Icon	Description	Due date

Icon	Description	Loan limit

History cut-off date:

Close

To set the default, normal due date, click on the Edit button to the right of the "Due date:" line.

3 - Primary Stage 3b

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

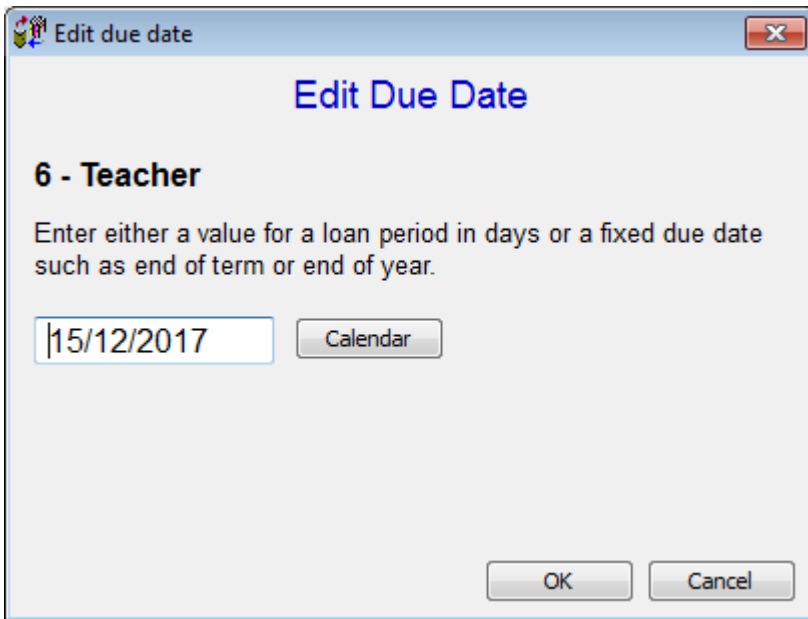
7

Calendar

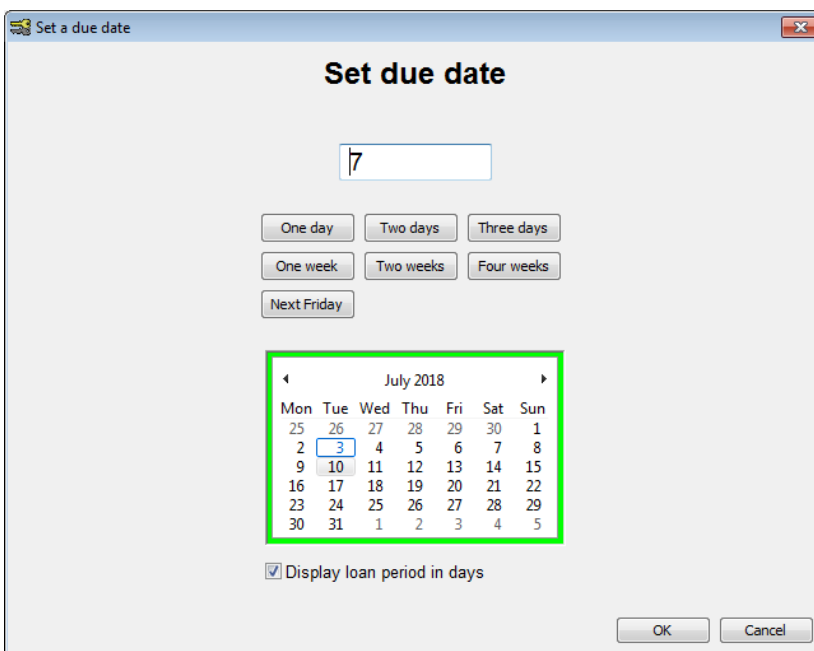
OK Cancel

Enter either the number of days of the loan – e.g. 7, 14, 21, etc or any number (do not type the word "days"). This generates a "loan period" or "number of days loan". Alternately, type in a specific date. Example: 14/01/2018. This makes "fixed date" that does not change

from one day to the next. This is useful for end of year, end of term or other non-changing due dates.



The Calendar button can be used instead.



When OK is clicked on the Edit Due Date window, the value is displayed on the BTC grid.

## Item Type Due Dates

**Edit Borrower Type 4**

Description: Primary Stage 3b

Loan limit: 10

Resv limit: 10

Ovd block: blocked

Year levels: 6,7

Due date: 7 days (17/04/2017)

Final due date:

Restriction: Restricted

Item type due dates:

Icon	Description	Due date
	Bridging Fiction	21
	Periodical	2

Each BTC can have special due dates based on item types. These are used to set a non-standard due date for something like DVDs or magazines.

Click on the Edit button next to the Item type due dates grid to set this up.

**Edit Item Type Due Date**

Icon	Code	Description	Due date
	31	Website	
	AF	Adult Fiction	
	ARCH	Archive Collection	
	BB	Big Book	
	BF	Bridging Fiction	21
	BGKT	Kit in small bag	
	BOXS	Boxed Special Collection	
	CDRM	Audio CD ROM	
	CLF	Classic Fiction Collection	

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

Click on the Item Type line then enter the loan period or fixed due date. Press Enter to set into the grid.

When this category of borrower borrows an item of that type, the date set here overrides the regular due date and is assigned.

To remove a date, just make the line blank and Enter.

## Edit Due Dates

In addition to the due date controls in Borrower Types, a special Due Dates window is also available. This not only allows changing the borrower type due dates but also the item due date categories, the holiday dates and final due dates.

Click on Controls then on Due Dates.

The screenshot shows a window titled "Edit Due Dates" with a subtitle "Today's date: 03/07/2018". Below the title, it says "Click on a row to edit". There are two main sections: "Borrower Due Dates" and "Item Due Dates".

**Borrower Due Dates:**

Borrower Type	Loan period	Due date
1 - Infants Student	7	10/07/2018
2 - Primary Stage 2	7	10/07/2018
3 - Primary Stage 3 *	7	10/07/2018
4 - Primary Stage 3b	7	10/07/2018
5 - Ex LVS Students	30	02/08/2018
6 - Parents	30	02/08/2018
7 - Teacher	Fixed date	01/12/2018
8 - Ancillary Staff	Fixed date	20/11/2017
9 - Library Staff	30	02/08/2018
10 - Ten	14	17/07/2018
11 -	14	17/07/2018
12 -	14	17/07/2018
13 -	14	17/07/2018
14 -	14	17/07/2018
15 -	14	17/07/2018
16 -	14	17/07/2018
17 -	14	17/07/2018
18 -	14	17/07/2018
19 -	14	17/07/2018
20 -	14	17/07/2018

**Item Due Dates:**

Due Date Category	Loan period	Date
1 - Overnight	1	04/07/2018
2 -	Fixed date	
3 -	Fixed date	
4 -	Fixed date	
5 -	Fixed date	
6 -	Fixed date	
7 -	Fixed date	
8 -	Fixed date	
9 -	Fixed date	
10 -	Fixed date	
11 -	Fixed date	
12 -	Fixed date	
13 -	Fixed date	
14 -	Fixed date	
15 -	Fixed date	
16 -	Fixed date	
17 -	Fixed date	
18 -	Fixed date	
19 -	Fixed date	
20 -	Fixed date	

\* Also has item type due dates some of which have expired

Buttons: Holiday dates, Final due dates, Close

To edit a borrower due date, single click on any of the lines in the left list.

**Edit Due Date**

**3 - Primary Stage 3 \***

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

7      Calendar

Item type due dates

Icon	Description	Due date
	Junior Fiction	7
	Video Tape/DVD	2

Edit

OK      Cancel

Enter the loan period in days or the fixed date in the first editbox.

Click on Edit to assign or change item type due dates for this borrower type category.

Click OK to save.

To create or edit an item Due Date Category (DDC), click on any row on the right side.

**Edit Due Date Category**

2      End of year      <- Description

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

15/12/2017      Calendar

OK      Cancel

If blank, enter a description for this category.

Enter a loan period or fixed due date for this category.

Click OK to save.

An item can be assigned a DDC *when cataloguing* the item.

Use the Due Date Category dropdown list to assign.

0 – Normal means to use the borrower's due date. This is the default.

Assigning any other value tells Circulation to use that due date category instead when the item is lent. This due date overrides the borrower dates, including the item types ones.

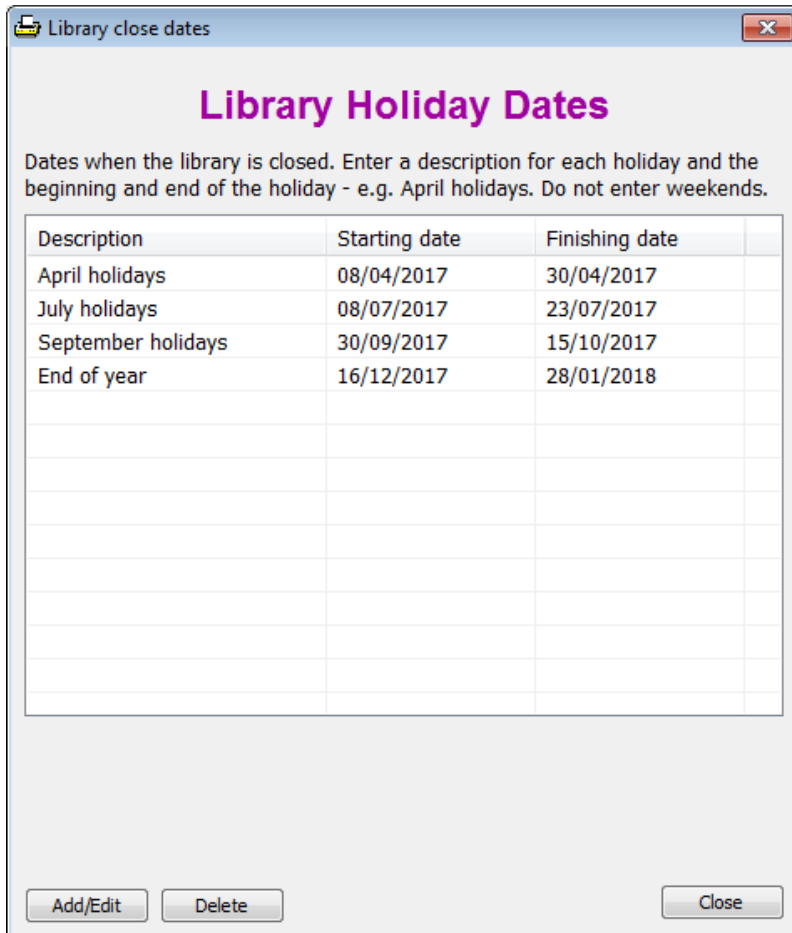
Save the item to store it.

Global Change can be used to mass-assign due date categories.



## Holiday Dates

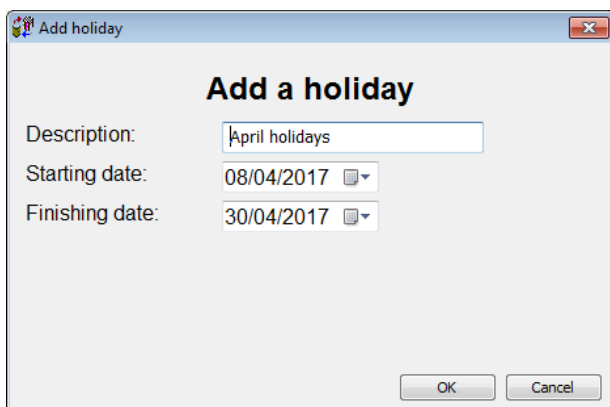
These date ranges specify with the library is closed. They are not the dates when the library is open.



The screenshot shows a window titled "Library close dates" with a close button in the top right corner. The main heading is "Library Holiday Dates" in purple. Below the heading is a text instruction: "Dates when the library is closed. Enter a description for each holiday and the beginning and end of the holiday - e.g. April holidays. Do not enter weekends." Below this is a table with three columns: "Description", "Starting date", and "Finishing date". The table contains five rows of data, followed by several empty rows. At the bottom of the window are three buttons: "Add/Edit", "Delete", and "Close".

Description	Starting date	Finishing date
April holidays	08/04/2017	30/04/2017
July holidays	08/07/2017	23/07/2017
September holidays	30/09/2017	15/10/2017
End of year	16/12/2017	28/01/2018

Click on a line to open the add/edit holiday date window.



The screenshot shows a dialog box titled "Add holiday" with a close button in the top right corner. The main heading is "Add a holiday". Below the heading are three input fields: "Description:" with a text box containing "April holidays", "Starting date:" with a date picker showing "08/04/2017", and "Finishing date:" with a date picker showing "30/04/2017". At the bottom of the dialog box are two buttons: "OK" and "Cancel".

Enter a description and the start and end of the library-closed period. Click OK to save.

Note: holiday dates must be manually updated every year!

## Final Due Date

A final due date the last date that will be assigned. It is only relevant if a "number of days" loan period is used. If the calculated due date falls past this date, then the final due date is assigned.

If the final due date field is left blank, it is not used and completely ignored.

Enter the final due date for each term.  
The last date acts as the final due date for the year.  
These dates only apply to number-of-days loan periods.

1	06/04/2018	Calendar
2	29/06/2018	Calendar
3	28/09/2018	Calendar
4	30/11/2018	Calendar

Close

The last due date to be used for each term can be entered, with the very last date acting as an end-of-year date.

All of these can be blank. In which case there is no final due date. Holiday dates then determine the due dates assigned.

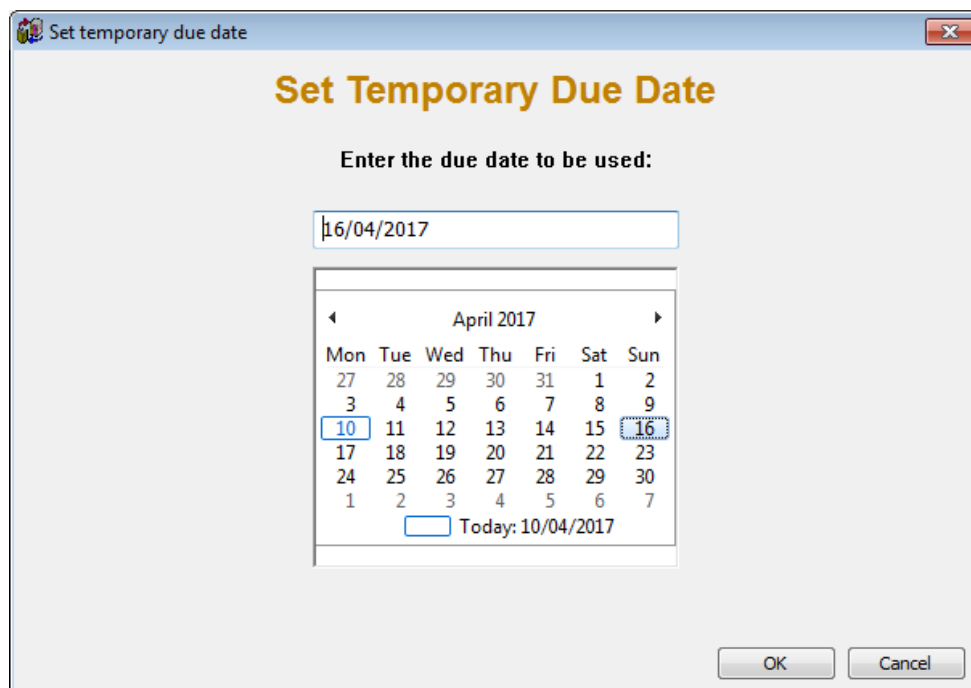
If only one date is listed, it acts as an end-of-year due date.

## Changing Due Dates during Loans – Temporary Due Date

But, wait! There's more...

When issuing loans, the due date can be changed on-the-fly.

On the loans window in Circulation, press the F12 key.



This allows setting a "temporary due date". Once set, it will be applied to all loans to all borrowers until it is either cancelled or Circulation is closed.

To cancel, press F12 again.

This also works after a borrower's barcode has been entered.

## Changing Due Dates during Loans – One-off Due Date

After a borrower has been entered in loans, it is also possible to set a specific due date. It overrides all other due dates and is assigned to anything that borrower is issued.

Click on Options then on SETDATE.

As soon as the borrower is finished, the special date is cancelled. This is different to the temporary due date, which is only cancelled by another F12 keypress.