Borrowers

Revised 21/07/2023
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BORROWERS

The Borrower module is used to enter, remove, and update data about people who use the system.

From the Main Menu, the Borrowers Menu appears.
Borrower Authority Lists

Bookmark maintains three special lists related to borrower data. These are technically called Authority Lists. Borrower Types, Classes, Year Levels.

The Borrower Types and Class lists should be set up before entering any borrower data. Year levels are automatically generated from the borrower data as it is entered. The lists can be changed after initial set up.

Borrower Types

Each borrower has a "Borrower Type", which is a number from 1 to 99.

Borrower Type categories determine loan restrictions and conditions allocated to the borrower and may also be used in other functions. Every borrower has a type. Types are mandatory.

Bookmark allows up to 99 Borrower Types. Each is numbered.

*Borrower Types must be set up before entering any borrowers.*
Each Borrower Type requires six settings:

1. A *description* of the borrower type category.

2. The *loan limit* for all borrowers in that category.

3. The *reservation limit* for all borrowers in the category.

4. The *overdue block* condition.

5. The *year levels* associated with each type. (Not classes.)

6. The normal due date for each borrower category.

7. An optional *restriction* to the types of items this category of borrower may borrow.

8. The overdue limit determines the number of overdue items a borrower in this category may have before an alert is given during the loans process.

It can be easier to group all the levels which have the same loan limit and due date into one Borrower Type. In the example above Types 2 and 3 could be combined as they both have a loan limit of 3 and due date of 7 days.

**Adding and Editing Borrower Types**

To add a new borrower type or edit an existing type, double click on the row, or click once to highlight then click on the *Edit* button.

The data from the row is copied into a popup editing window.
- Press the Up/Down arrow keys or Tab key to jump down to the next row. Do not press Enter to go to the next line.

- Press Esc or Enter or click on Close to close the window. Data is automatically saved.

**Description**
This describes the borrower type category. Required.

The following are examples of borrower types created by Bookmark users:

```
1  STUDENTS JP R-2  JUNIOR PRIMARY  STUDENTS
2  STUDENTS MP 3-5  UPPER PRIMARY  STAFF
3  STUDENTS UP 6-7  STAFF A (YR LOAN)  PARENTS
4  STAFF          STAFF B (10 WEEKS)  REFERENCE
5  PARENT         PARENTS/COMMUNITY  RESTRICTED
6  VISITING TEACHERS  FACULTY
7  HIGH SCHOOL STUDENTS
8  HIGH SCHOOL STAFF
9  EX-TEACHERS
```

Upper case letters are optional. Mixed case is allowed and easier to read.

**Loan Limit**
This is the maximum number of items any borrower of this type is permitted to have on loan. The value here can be from 0 to 10000. If a value already exists and you wish to change it, click on the editbox, use the **Delete or Backspace** key to rub it out and type in the new value. All borrowers of that type having the previous value will have their loan limit revised to the new value.

- Each borrower also has their own individual loan limit, which over-rides the global limit set here. This individual loan limit is set in Borrowers Add/Edit (see below).

- When changing the loan limit, borrowers with individual different limits are not changed.

**Reservation Limit**
This is the maximum number of reservations a borrower of this type may make. This value can be between 0 and 255.

**Overdue Block**
This dropbox tells Bookmark to stop loans if a borrower of this type has overdue items. Set to **No Blocked** to allow borrowers to borrow even if they have overdue items.

**Overdue Limit**
This is the number of overdue items a borrower of this type can have before they are blocked from borrowing. If this field is blank or 0, then an overdue block is triggered even if they have one overdue item. This is the default condition. However, a number entered here determines when the overdue block occurs. A value of 2 means this type of borrower can have 2 overdue items without a block being issued.

**Year levels**
List the year (grade) levels associated with the borrower type. Separate multiple entries with a comma. Numbers can go from 0 to 12. Do not put a 0 (zero) at the front – e.g. do not use 03, just 3. Staff and others can be left blank or an identifying term entered like S.

The Year Levels button can be used to pop up a dialog for entering levels.
Tick the levels which need to be entered then click OK.

You can also manually add year levels on the line itself, separated by commas. Different school administration systems use different designators for some levels – e.g. R, P, PP, 00, K, Prep. The values here should reflect the values used by the front-office system.

**Duration/date and Due Date**

*The borrower type due date is the primary due date used for loans.*

The value for Duration/Date specifies the due date used for this category of borrower when items are issued. *This is the default due date assigned when borrowing.*

Bookmark has two types of due dates: *Fixed* and *Duration*.

A *fixed* date is one that never changes from day to day. This can be a staff due date, which might be set to the end of the year.

A *duration* date changes every day. It is a "loan period" – a number of days value. This value is added to the current date to determine the due date. It changes daily.

To set a due date, click on the Edit button.
To specify a due date, enter either the number-of-days loan period or the desired fixed date, or use the Calendar button to pop up a calendar window.

The “Display loan period in days” checkbox is the difference between the type of due dates. Tick the box for number-of-days loans. No tick = fixed date type.

With the calendar, click on the desired due date relative to today. This is marked in grey. (The current date remains outlined in blue.) Tick the “Fixed date” checkbox if the date is to be fixed instead of floating. Click on OK to set.

**Loan Restriction**
This feature controls the types of items that a certain Type of borrower can borrow. It is rarely used. Click on the button which says *Unrestricted.*
Tick the Item Types which a borrower is *not allowed to borrow*. Leave blank the ones which can be issued.

To unrestrict all, click on *Clear all*.

- Items can be individually restricted to different types of borrowers, too. That is the regular way to set up a loan restriction. This method is global.

**Item Type Due Dates**

In addition to the normal due date, different types of items may have special due dates for each borrower type. DVD’s could be one day to a borrower category, and one week or normal to another.

Click on Edit to bring up the Item Type Due Date dialog.

Click on the item type to highlight.

In the editbox next to the "Calendar" button, either enter the loan period or the fixed due date. Or use the Calender button to set.
**Item Type Loan Limits**  
This controls allows setting a special loan limit to selected item types for this borrower type. Example: 1 DVD is allowed to be issued per person.

![Edit Item Type Loan Limits](image)

Click Close to save.

**Loan Limits**  
The *Loan Limits* button at the bottom of the Borrower Types list will force all borrowers to have the loan limit specified by the borrower type. Borrowers who have individually set loan limits different to the type will have them reset.

**Names**  
The Names button lists borrowers with the highlighted type.

**Move**  
The Move button can be used to shift all borrowers from one BT number to another. It can combine two types. After combining, be sure to Edit.

**Arrows**  
The up/down arrow shifts the borrower type up or down the list. All borrowers in the database are updated when this happens.
Every borrower can belong to a class or group. This is optional as the class field can be empty. Some schools only put classes against students. Others have a ‘Staff’ class. Classes are used for overdue notices and reports. They are not normally related to Borrower Types.

Use the Class List button to open a window that is used to manage the list of classes.

To add a new class to the list, type its code in the editbox at the bottom. Entering a class (teacher) name and email is optional. Click on Update or press the enter key.

Use the Rebuild button to make sure the class list reflects the classes against borrowers.

Tip: at the start of the year, go here to change the class list.
Note: this area does not "assign" students to new classes. That is done in the Rollover area.

- Remove. This deletes a class from the list and against all borrowers.
- Change. The name of a class can be changed. Click on it in the list first to highlight. Type the change in the editbox then click on the Change button last.
- List. Shows all borrowers with that class code.
- Print. Outputs the class list to a printer.

- Rebuild. Clears the class list and makes a new one using the classes against all borrowers. It will automatically remove all classes in the list with no borrowers. This is a housekeeping task that only takes a few seconds.

**Year Levels**

The Year Levels list is similar to classes, but these are the grades for students and not necessarily the classes (rooms).

![Year Levels List](image)

This window works the same way as the Classes one described above.
Add / Edit Borrowers

**Important note:** *Borrower Types must be established before entering any borrowers. See the Borrower Type section earlier in this document.*

The Add/Edit Borrowers function is used to add new borrowers, edit and modify data against existing borrowers, view information about a specific borrower such as their loans or history, and it can also be used to delete an individual borrower.

Add/Edit Borrowers works with one borrower at a time. It is ideal for adding borrowers but can be time-consuming when changing classes for students. The "Rollover" section can help speed up that process.
Enter Borrower Number or Barcode

Every borrower stored in the database has a unique "borrower record number" or borrower number. This is a value from 1 upwards. Numbers up to and even beyond 1 million can be used.

*Bookmark does not automatically assign this code.*

Further, these numbers should not be assigned randomly. Reusing deleted numbers can be done but is not recommended.

Borrower numbers are strongly related to the borrower barcode.

The borrower number is *part of the barcode* label. A complete borrower barcode can be scanned or just the record number can be typed. For example, a typical borrower barcode label might show:

\[
\text{B 0225 00135 6} \quad \text{or} \quad \text{2 0225 000135 3} \quad \text{or} \quad \text{B 00135 X 0225}
\]

(The format of a barcode can vary depending on the type you are using. The left is the standard Bookmark type, but there are other types and Bookmark can use them, such as the others. The text beneath barcode stripes may not show the gaps between sections of a barcode. See the Getting Started manual for an explanation of different barcode types.)

The borrower's record number on the examples is 135. Bookmark accepts either the full label or just that "short-hand" number. The leading 0's (00135) do not have to be included when typing a borrower number. Bookmark often shows just the number rather than the full barcode.

*Either scan the entire barcode or just type in the borrower's number. Scanning is recommended.*

- Different format barcodes may show the borrower number in a different position or with more leading zeros. Some may start with a 2 or other characters, too. The record number is retrieved from the barcode based on criteria set in Controls / Barcode Settings discussed in the Controls chapter.

- The first character of the barcode indicates if it belongs to a borrower or an item. For borrowers this may be the letter B or the numeral 2 or something else, depending on the type of barcodes, and is specified in Controls / Barcode Settings. Any leading character in a full barcode which is not for the borrower is considered an item.

- The site ID is ignored, even if present on the label.

- The school administration system number can be used as the borrower number and barcode, provided it is all digits (no letters) and below 1,000,000 in value.

- Borrowers can have a barcode that is nothing like their record number. Their record number might be 67 but the barcode is ABCD12. Some schools use the student ID as the barcode, especially if they have ID cards. However, there is normally no advantage in doing this.

- Bookmark does not automatically allocate numbers to new borrowers unless it is importing (see below). You must choose the number to use for each borrower.

For a new borrower, a new, as-yet unused borrower number (or barcode) can be entered. If a number is entered for an existing borrower, their data will appear and can be edited.

Beneath the inputbox the highest number so far entered is displayed for reference.

When entering a new borrowers you can:
1. Use the "next highest" number above the highest used so far. Strongly recommended.

2. Find an "unused number" and re-use it.

3. If you have a borrower barcode, that can be scanned.

*Note: If a barcode or borrower number is not types and Enter is pressed, then the first borrower already in the database is presented.*

Click on GO or press Enter to proceed.

Click on Go back, close the window or press Esc to go back to the Borrowers Menu.

**Find by name**

Borrowers can be located by searching for their name as well. There are three ways to do this:

- Type any part of a name on the line where the barcode is normally scanned, or
- Use the Find by Name button.
- Select from a list of all borrowers.

Find by name allows entering a few letters or a name. This is identical to typing the letters in the barcode entry inputbox.
Select from a list of borrowers

Sometimes it is easier to locate a borrower by their name.

![Image of borrower list]

Locate the borrower in the list, click on their row to highlight then click on OK or press Enter. Their number is entered.
Add/Edit Borrowers Display and Fields

This display is used to enter or edit a single borrower's data.

If the record is empty -- i.e. deleted or not yet used or a new borrower -- no data appears next to the headings.

**Fields and Records**
Data is spread across a number of *fields*.

- A *Record* is the entire set of data about one person (or one item). Everything shown above is one record.

- Records consist of *fields*. A field is one part of a record's data. It is the place where data is put. On the screen, it is one line or a data entry box.

- *Field headings* describe the contents of the field. These are to the left of the space in which data is entered.

The space into which data is typed is called an inputbox, an editbox, a textbox, an input line and probably many other things.

The example above shows one person's set of data, or one borrower record.
How to Use the Controls

The Borrower Add/Edit window contains many special controls.

Across the top of the window is the *Titlebar*. It shows the name of the window.

At the right side of the titlebar are three small buttons.

The left button is the *minimize control*. Click on this *minimizes* (hides) the window and pushes it into the Taskbar. (Usually across the bottom of the screen.) It allows the window to be temporarily put aside and then brought back.

The middle button is a *maximize control*. Click on this to make the window fill the screen. This control has been disabled on most Bookmark windows as changing a window's size can disrupt the carefully designed display.

The right button is a *close control*. It is usually a white X within a red box. This closes the window.

- ALT and F4 keys held down together also closes any window.
- Many Bookmark windows can be closed by pressing the Esc (escape) key as well. In most cases, data is not saved.

Beneath the Titlebar may be a *Menubar*.

Most windows in Bookmark do not have a menubar but the Borrower Add/Edit window does.

Each word presents a drop-down menu with other selections. Many of the selections are available on the window as buttons, too, but not necessarily everything. Some functions are only in the dropdown menus. Each selection represents an action. Special "hot keys" are often assigned to an action so a keypress can act as a shortcut to the same action.
Below the MenuBar are various **buttons** or pushbuttons. Clicking on these causes an action. Many of these buttons can also be found in the Record dropdown list.

These buttons navigate through the records without saving. Click on the first button to jump to the borrower record with the lowest number. Click on the < button to go to the previous record. Click on > to go to the next record. Click on the rightmost button to jump to the record with the highest number.

- Hovering the mouse over a button often displays a "tool tip" briefly describing the action.

Click on this button to save any changes made to the data. After saving,

appears. When this notice dialog is closed, the previous window re-appears ready to receive another barcode or number.

- Hotkey F1 does the same thing as clicking on the Save button.
- Hotkey F2 saves the record but does not pop back to the previous window. Instead, the current record remains onscreen.

This button can be used to create a new borrower record. It first opens the window showing the unused numbers. Select a number or enter the new borrower's number or barcode. A blank form is presented which can be filled out and saved. You can also obtain a blank record by entering an unused number on the previous window.

- Hotkey F3

The Delete button can be used to remove the visible borrower from the database.

- Hotkey F4
Hotkey F8

The Loans button opens a dialog that lists all items currently on loan to this borrower.

<table>
<thead>
<tr>
<th>Number</th>
<th>Title</th>
<th>Item type</th>
<th>Leaendate</th>
<th>DueDate</th>
</tr>
</thead>
<tbody>
<tr>
<td>90</td>
<td>Tiddles: the special Tassie devil</td>
<td>Fiction</td>
<td>13/08/2018</td>
<td>01/12/2018</td>
</tr>
<tr>
<td>3171</td>
<td>Toys at Playtime</td>
<td>Junior Non-Fiction</td>
<td>24/04/2015</td>
<td>25/06/2015</td>
</tr>
<tr>
<td>3403</td>
<td>The Princess and the Pea</td>
<td>Junior Fiction</td>
<td>04/05/2015</td>
<td>26/06/2015</td>
</tr>
<tr>
<td>4516</td>
<td>Clever Tortoise: A Traditional African Tale</td>
<td>Junior Non-Fiction</td>
<td>01/06/2015</td>
<td>26/06/2015</td>
</tr>
<tr>
<td>5930</td>
<td>Toy and Game Science</td>
<td>Non-Fiction</td>
<td>23/04/2015</td>
<td>26/06/2015</td>
</tr>
<tr>
<td>5976</td>
<td>Play With Computers</td>
<td>Junior Non-Fiction</td>
<td>24/04/2015</td>
<td>26/06/2015</td>
</tr>
<tr>
<td>5929</td>
<td>Toys</td>
<td>Junior Non-Fiction</td>
<td>25/04/2015</td>
<td>26/06/2015</td>
</tr>
<tr>
<td>5921</td>
<td>The Toys We Play With</td>
<td>Junior Non-Fiction</td>
<td>24/05/2015</td>
<td>26/06/2015</td>
</tr>
<tr>
<td>6019</td>
<td>Snow White and the Seven Dwarfs</td>
<td>Junior Fiction</td>
<td>04/05/2015</td>
<td>26/06/2015</td>
</tr>
<tr>
<td>6221</td>
<td>Toys</td>
<td>Junior Non-Fiction</td>
<td>24/05/2015</td>
<td>26/06/2015</td>
</tr>
<tr>
<td>6233</td>
<td>Classic Fairy Tales</td>
<td>Junior Fiction</td>
<td>04/05/2015</td>
<td>26/06/2015</td>
</tr>
<tr>
<td>6388</td>
<td>Tikki Tikki Tamba</td>
<td>Junior Fiction</td>
<td>01/05/2015</td>
<td>26/06/2015</td>
</tr>
<tr>
<td>6393</td>
<td>The Velveteen Rabbit</td>
<td>Junior Fiction</td>
<td>04/05/2015</td>
<td>26/06/2015</td>
</tr>
<tr>
<td>7667</td>
<td>Irish Legends for Children</td>
<td>Junior Non-Fiction</td>
<td>01/05/2015</td>
<td>26/06/2015</td>
</tr>
<tr>
<td>7814</td>
<td>Flat Stanley</td>
<td>Bridging Fiction</td>
<td>27/04/2015</td>
<td>26/06/2015</td>
</tr>
<tr>
<td>8519</td>
<td>The Frog Princess</td>
<td>Picture Fiction</td>
<td>04/05/2015</td>
<td>26/06/2015</td>
</tr>
<tr>
<td>8646</td>
<td>The Princess and the Pea</td>
<td>Picture Fiction</td>
<td>04/05/2015</td>
<td>26/06/2015</td>
</tr>
<tr>
<td>9206</td>
<td>The Kangaroo and the Purseise: an Aboriginal Story</td>
<td>Junior Fiction</td>
<td>01/05/2015</td>
<td>26/06/2015</td>
</tr>
<tr>
<td>9510</td>
<td>Toys</td>
<td>Junior Non-Fiction</td>
<td>26/04/2015</td>
<td>26/06/2015</td>
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<tr>
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<td>26/06/2015</td>
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<tr>
<td>10001</td>
<td>Sometimes</td>
<td>Picture Fiction</td>
<td>01/08/2016</td>
<td>01/07/2016</td>
</tr>
<tr>
<td>12829</td>
<td>The Twelve Dancing Princesses</td>
<td>Junior Fiction</td>
<td>04/05/2015</td>
<td>26/06/2015</td>
</tr>
</tbody>
</table>

The cost column can be displayed or hidden.
The borrower numbers can be replaced with full barcodes.
This lists items previously borrowed by this person, including current items on loan.

- Highlight a title and click on View or double-click on the title to see the item’s details.
- Print prints out the list to a printer.
- Reset can be used to change the latest loan date.
- Clear erases this borrower’s history list.

Prints the data for this borrower record.

- Hotkey F7

<table>
<thead>
<tr>
<th>Item</th>
<th>Title</th>
<th>Date issued</th>
<th>Type</th>
<th>Call number</th>
</tr>
</thead>
<tbody>
<tr>
<td>90</td>
<td>Tiddles: the special Tassie deal</td>
<td>13/08/2016</td>
<td>FIC</td>
<td>JF Law</td>
</tr>
<tr>
<td>1001</td>
<td>Sometimes</td>
<td>01/08/2016</td>
<td>PF</td>
<td>PF ARN</td>
</tr>
<tr>
<td>35248</td>
<td>Toys and games: then and now</td>
<td>08/05/2016</td>
<td>JNF</td>
<td>J188 72 Hop</td>
</tr>
<tr>
<td>27367</td>
<td>The Princess and her Panther</td>
<td>04/05/2016</td>
<td>PF</td>
<td>PF On *</td>
</tr>
<tr>
<td>19834</td>
<td>Rapunzel</td>
<td>04/05/2016</td>
<td>QF</td>
<td>QF Gri</td>
</tr>
<tr>
<td>6019</td>
<td>Snow White and the Seven Dwarfs</td>
<td>04/05/2016</td>
<td>JF</td>
<td>JF Gri</td>
</tr>
<tr>
<td>8646</td>
<td>The Princess and the Pea</td>
<td>04/05/2016</td>
<td>PF</td>
<td>PF And</td>
</tr>
<tr>
<td>12629</td>
<td>The Twelve Dancing Princesses</td>
<td>04/05/2015</td>
<td>JF</td>
<td>JF Gri</td>
</tr>
<tr>
<td>8619</td>
<td>The Frog Princess</td>
<td>04/05/2015</td>
<td>PF</td>
<td>PF Om</td>
</tr>
<tr>
<td>16702</td>
<td>Cinderella</td>
<td>04/05/2015</td>
<td>JF</td>
<td>JF GER</td>
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<tr>
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<td>The Frog Who Would Be King</td>
<td>04/05/2015</td>
<td>JF</td>
<td>JF WNL</td>
</tr>
<tr>
<td>6233</td>
<td>Classic Fairy Tales</td>
<td>04/05/2015</td>
<td>JF</td>
<td>J98 2 Cla</td>
</tr>
<tr>
<td>27067</td>
<td>The Princess and the Packet of Frozen Peas</td>
<td>04/05/2015</td>
<td>JF</td>
<td>JF And *</td>
</tr>
<tr>
<td>3403</td>
<td>The Princess and the Pea</td>
<td>04/05/2015</td>
<td>JF</td>
<td>JF AND</td>
</tr>
<tr>
<td>27681</td>
<td>The Legend of the Golden Snail</td>
<td>04/05/2015</td>
<td>JF</td>
<td>JF Bas *</td>
</tr>
<tr>
<td>34593</td>
<td>Herb, the vegetarian dragon</td>
<td>04/05/2015</td>
<td>JF</td>
<td>JF Bas</td>
</tr>
<tr>
<td>30721</td>
<td>Lone Pine</td>
<td>04/05/2015</td>
<td>JF</td>
<td>JF Bre *</td>
</tr>
<tr>
<td>20431</td>
<td>Ufo’s Garden</td>
<td>04/05/2015</td>
<td>JF</td>
<td>JF Bas *</td>
</tr>
<tr>
<td>6393</td>
<td>The Velveteen Rabbit</td>
<td>04/05/2015</td>
<td>JF</td>
<td>JF Bas *</td>
</tr>
<tr>
<td>33220</td>
<td>How the Kangaroos Got their Tails - an Aboriginal story</td>
<td>01/05/2015</td>
<td>BB</td>
<td>BB 288 Mun</td>
</tr>
<tr>
<td>15891</td>
<td>How The Kangaroos Got Their Tails</td>
<td>01/05/2015</td>
<td>BB</td>
<td>BB 288 Mun</td>
</tr>
<tr>
<td>33232</td>
<td>Yawmavarr the Rainbow Snake : an Aboriginal story</td>
<td>01/05/2015</td>
<td>BB</td>
<td>BB 288 War</td>
</tr>
<tr>
<td>33229</td>
<td>When the Snake Blies the Sun : an Aboriginal story</td>
<td>01/05/2015</td>
<td>BB</td>
<td>BB 288 Mov</td>
</tr>
<tr>
<td>27561</td>
<td>How Frogmouth Found her Home</td>
<td>01/05/2015</td>
<td>JF</td>
<td>JF Kwa *</td>
</tr>
</tbody>
</table>
Find can be used to locate a borrower by name instead of number. It works as described previously.

- Hotkey F6

The Overdues button lists all overdue items the borrower has had so far, if any.

A status of Returned indicates the item is no longer on loan and not overdue.

Items with a status of “On loan” are overdue.

The Change function can be used to change an existing borrower's number/barcode to another number. All references to that borrower are altered throughout the database. This is the way to change a borrower's number correctly! History records, items on loan, and reserves are correctly changed.

In addition to the above, other functions are available via the dropdown Menubar.
All Borrowers
In the Lists dropdown menu is an option that opens a window listing all borrowers.

Click on the name to highlight then click on OK and that borrower's data appears on the Add/Edit window.

Additional Tasks
The Record dropdown menu contains several additional functions.

Copy Record to Clipboard
Click on Record on the Menubar then on Copy Record to Clipboard. This puts the borrower's text data into the Windows clipboard. It can then be pasted into Word, Notepad or another program.

Example:

Borrower number: 5
Name: FAULKNER, Pam
Barcode: B1413000055
Gender: F
Year level: S
Group: STAF
Type: 8
Loan limit: 30
Birthdate: 30/01/1978
Address: 8401 Frederick Place
Town/City: Edmonds, SA
Postcode: 5323
Email: pam.faulkner98@sa.edu.au
Admin ID: 837236
Can write reviews? No
Combine Two Borrowers into One
This function allows combining data from one borrower to another. The first borrower remains but data from the 2nd is added and the 2nd is deleted.

Duplicate Borrower Records
This global function allows highlighted borrower entries to be cloned. The duplicate records have different numbers.

Change Borrower Numbers to AdminID Values
This function changes all borrower record numbers to be the same as their AdminID values. It only works if the AdminID’s do not contain letters or other non-numeric symbols. This is a global change affecting all borrowers, not just the one displayed. Borrowers without an AdminID keep their existing numbers. See below for further description.

Change All Borrower Numbers to Barcode Values
Borrower numbers are changed to match barcodes. Affects all borrowers.

Borrower Data Fields
Each field has a heading and a white inputbox.

Surname: FAULKNER

Information can be typed in the inputboxes. The arrow keys and home and end keys move the cursor within the box. The Insert, PageUp and PageDown keys do not function in Borrower Add/Edit. The Delete and Backspace keys can be used to erase characters.

The TAB key advances the cursor from one field to the next. The Down arrow key does the same.

SHIFT and TAB keys together move the cursor up one field. The Up arrow key does the same.

Barcode
This is the borrower's full barcode label. The Generate button on the right will produce a full barcode based on the borrower’s record number and barcode settings in Controls. It will only do this if the barcode field is blank.

Note: borrowers can have barcodes that are completely different to their number. These may be student ID cards or anything else. Borrower numbers can also be the "admin ID" values from office...
systems, too, and/or barcodes can be based on these values as well. However, this arrangement makes life more difficult, therefore it is recommended to have matching borrower record numbers and barcodes.

Surname, Given name, Preferred name
Borrower names are entered in three parts. Given name and Preferred name may be left blank but a Surname is required. To display a borrower's name, Bookmark follows the rule set up using the Name Format control (see Update Borrowers later).

Borrower Type
The Borrower Type code is MANDITORY. Every borrower must have a Type number in the range 1 to 99.

This is a dropdown list showing all 99 types. Select the correct type.

- If you need to change a Type – e.g. add a new one or make an alteration – click on the little 'ellipsis' box (it shows ...) to open the Borrower Type dialog. It is not necessary to go back to Controls to do this. You can optionally use the Lists dropmenu at the top as well.

The Borrower Type determines a borrower's maximum loan limit, the maximum number of items they may reserve, and the due date assigned when they borrow.

Loan Limit
This allows the loan limit to be varied for an individual borrower. The limit can be different from that related by their Borrower Type, and can be any value from 0 to 1000. Entering 0 prevents a borrower making loans.

If you change the Borrower Type, the loan limit will automatically be altered to the default for that type. It can be manually changed after that. This change only affects the displayed borrowers, not all with the type. To change the loan limit of all borrowers of a type, go to Controls / Borrower Types.

Year level
This is a student's actual grade, not necessarily their home class. (It is easy to confuse the two.) A student can only be in one year level at a time. Classes, however, can be composite and have one, two or more levels. From the dropdown list, select the student's grade or year level. Other types of borrowers can have different codes, too.

Click on a level and OK to select it.

If the year level you wish to use is not in the droplist, click on the 3-dot box to popup a window that allows adding year levels to the list. After adding and clicking OK, select the new level from the list.

This field can be left blank.

Class/Group
This is the "class" a student uses as their home room. It can be up to 20 characters long. Classes are used for overdue notices and lists and reports. There is no limit to the number of classes on the system. For non-school databases, the Class field can be used as a grouping field.

If a class is not in the list, click on the 3-dot box for a window that allows adding classes.

Alternately, go to the Classes authority to edit the list.
Class can be blank.

**AdminID**
This field holds the ID from a school administration/front-office database. The unique borrower ID is used as part of the process to transfer data from school offices into Bookmark.

Borrower photos, discussed later, use the AdminID for their filename.

**Gender**
A droplist can be used. F and M are always available, but you can enter any other term you wish to use, or the field can be left blank. Anything typed is added to the droplist for future use. T, X, A, anything else is acceptable.

**Birthdate**
This is optional and if not used, the date the borrower record is first entered is saved. A dropdown calendar is available to select the date, or it can be typed in.

**Joining Date**
The date the borrower is entered onto the system or the school. It can also be used to indicate when a person needs to renew a membership.

**Privacy Code**
The borrower's personal privacy code acts like a PIN if their data should be secured. If this field is left blank, then this borrower’s information is considered public. Anything here deems the information private. Refer to the “Borrower Information Privacy” at the end of this document for more information. This code can consist of any keyboard letters, numbers or symbols.

**Address**
Holds the borrower's street address -- i.e. 25 Looneytoon Lane. This field can be left blank.

**Suburb**
This is the postal suburb, town or city. The State can also be included – i.e. Crazyville, ACT.

**Postcode**
This field holds the postcode.

**Phone(s)**
One or more phone numbers can be stored here.

**Mobile(s)**
Mobile or cell phone numbers can be stored here.

**Email**
A borrower's email address can be entered here.

**Mailing title, Alt address, alt suburb, alt postcode, alt phone, alt mobile, alt email**
Alternate contact details can be entered, such as a parent. The alternate details can be selected for overdue notices. The Mailing Title is used for overdue letters.

**Extra**
This field can hold any additional information or comments concerning this borrower. This data is not displayed anywhere else.

**Loan note**
This note is displayed during Loans in Circulation. If the Make Private checkbox is ticked, it is not shown immediately. Instead, a comment hotlink is displayed so the comment can be privately viewed.

*Borrowers*
Return note
The return note is displayed when any item on loan to that borrower is returned.

Write reviews?
If the box is ticked, then this borrower is allowed to write reviews against items found in Search.

Lexile / Level
A borrower's lexile or AR level can be recorded here.

Notes
Any additional information can be entered here.

Other things to note:

- Changing a borrower's name does change it against items on loan or previously borrowed. Only subsequent loans receive the changed name. (This can be updated in Borrowers > Rollover > 7 - Update borrower info against items.)

- Do not enter a new borrower by directly changing an existing one. To reuse a borrower's number for a new person, the previous borrower must first be deleted. Deleting clears out important information, such as the loan history, whereas just changing a record's details like name does not.

Restrictions

The Restrictions button allows setting loan restrictions to item types for the individual borrower. These take precedence over the other restrictions. This function can be used where a particular student is not allowed to borrow certain types of items due to a parent or religious request.
Delete Borrowers

Bookmark contains an easy system for removing borrowers from the database.

All borrowers are loaded from the database into a grid control.

One or many borrowers can be deleted at one time.

To delete a single borrower, click on their line to highlight.

If the borrower has items on loan (as indicated by "Yes" in the right column), click on List loans to see a list of them.

To delete the highlighted borrower, click on the Delete button at the bottom.
Click on Yes.

The borrower is deleted and the list re-loaded.

**Deleting a borrower with loans**

If the borrower has items on loan, this dialog appears:

Click on the status to which the items on loan will be changed – e.g. "Lost" – then click on OK.
Alternately, if the "Do not delete borrowers with items on loan" checkbox is ticked, then any borrower highlighted who has items still on loan will not be deleted and the items will remain on loan. In this case, only borrowers with no loans are deleted.

**Sort the List**

Changing the order of the list can be a great help. The list can be sorted (re-arranged) by clicking on the heading at the top of a column. For example, clicking on Year Level sorts the list based on borrowers' year levels. All borrowers in the same grade are grouped together.

**Deleting Multiple Borrowers**

Many borrowers can be highlighted at the same time.
- Hold down the CTRL key and click at the same time. This highlights more than one line. Keep the CTRL key down while clicking.
- Hold down the SHIFT key and click on the first borrower then on the last to highlight many.

Click on Delete to delete all highlighted borrowers.

**List Loans**

Lists all items on loan to one highlighted borrower. The word 'Yes' must appear in the Loans column.

**Overdue notice**

Allows printing an "on the spot" overdue notice for the highlighted borrower who is about to be deleted.
Scan - Deleting by Scanning Barcodes

In addition to deleting highlighted borrowers, it is possible to delete them individually by scanning their barcodes or entering their numbers.

Click on the Scan button.

Either scan a borrower's barcode or enter their record number.
Borrower Rollover

This section is used to easily update borrower information. It allows updating groups of borrowers at a time and also transferring borrower data from an office system into Bookmark.

The rollover is often done at the start of the school year, but this area can be used at any time. It provides easier-to-use procedures for changing classes and year levels than going through each borrower in Add/Edit.

The rollover can be done in several ways.

- Manually update each borrower displayed in a list (“Update borrowers list”)
- Highlight groups of borrowers in a list and assign them to a class, year level and/or borrower type (“Assign borrowers to classes in batches”)
- Import borrower data from a file exported from the office system, fastest method (“Import borrowers”)
- Scan batches of borrower barcodes to assign to classes (“Scan borrowers into classes”)

Borrowers
Update Borrowers List is used to change borrower information from a special list.

All borrowers are loaded from the database into the grid. Initially they are alphabetical by surname but the order can be changed. Changing the order can make updating easier. To change the order, click on the heading at the top of any column.

The borrower being edited is highlighted in the grid and their details appear at the bottom. Each of these details can be changed. Use the TAB key to jump to the right or SHIFT and TAB to jump left.

Type in changes.

Press Enter or the Down Arrow moves the highlighted to the next row directly beneath.

Any changes made are automatically inserted into the grid whenever another borrower is highlighted or the Update button is clicked.

The Up Arrow key moves the highlighter up. You can also click on a borrower and use the scrollbar. The Page Up and Page Down keys do not function here.

Note: changes made are saved to the database immediately.

The Assign, Scan and Import buttons do the same tasks as those listed on the Rollover menu, except that they close back to the update borrowers list.

Borrowers
This pops up a window which allows all of a borrower's info to be changed. These changes are saved directly to the database and the grid.

This button can be used to enter a new borrower.
This function allows deleting a highlighted borrower.

Increment can be used to automatically increment student year levels en-mass. All year 3's become 4's etc in one single time-saving step.

Borrower types are listed. Make sure that the correct year levels are indicated next to each Type. If unsure, use the Year levels button at the bottom to see the list and select levels for the cell where the cursor is located. This ensures the correct borrower types are automatically changed to correspond to incremented levels.

Click on OK to implement.
Note: If a student has a year level of K, it is changed to R. R and P are both changed to 1. Numberals are automatically increment. Nothing else is changed.

F7

All borrowers are printed out as a large list.

The Generate button produces a full barcode based on the borrower's number and the barcode settings in Controls.

This button generates barcodes for all borrowers and fills blanks in the barcode column. Barcodes already in the column remain unaffected.

Assign Borrowers to Classes in Batches

An even quicker method of manually assigning borrowers to new classes is to use the "Assign borrowers to classes" function.

It can be used to assign classes, year levels and borrower types to many students at one time.

The concept is to mass assign many borrowers to a particular class, year level and/or borrower type all at one time. This can take even less time than using the manual list approach.
The basic idea:

Highlight the borrowers that are going to a particular class, year level, and or type. Set up those three parameters and click Assign.

How to:

First, click on the Class to assign dropdown box on the left side. Click on the class the borrowers are to be assigned.

If the class is not in the list, just type it on the line next to the down-arrow. (Do not press enter.) It will automatically be added to the list of classes.

Note: Choosing a class is optional. If you do not wish to assign a class, leave it on “Do not change”.

Also set up Year Level and/or Borrower Type. If the year level is not in the list, just type it on the line.

Next, highlight the borrowers to be changed. To highlight multiple borrowers, hold down the CTRL key or SHIFT key at the same time as clicking.

When all borrowers to be assigned to the new class, year level and type have been highlighted, click on the Assign button. This change is transferred to the master grid immediately. Changes are not periminent until the master grid is saved.

The borrowers changed are hidden in the list. Borrowers left to do remain visible. They are not removed from the database or grid.

Work through all the new classes to assign students.
Scan Borrowers into Classes

The Scan function opens a window that allows borrower barcodes to be scanned. The borrowers listed are all assigned the class, year level and/or borrower type indicated when the OK button is clicked. This method works if all the barcodes are available “in piles” of classes.

If a class or year level does not appear in the droplist, it will have to be added in the relevance area outside of this function.

As soon as a borrower is scanned, the data is immediately saved.
Global Class Name Change

This function can be used to globally change classes. It changes the code or name of a class to another name. All borrowers having the previous code are changed to the new one. They are not reassigned to other classes. (See Assign Classes to Groups or Import Borrowers.)

Click on the class to change in the left side column.

Type the class code to change it to on the right side.

Click on the Change It button.

All borrowers with the "Change" class will be reassigned to the new class.
Configure Borrower Names

This control sets the style to display borrower names everywhere in Bookmark.

It does not affect the data in Add/Edit Borrowers, only what is displayed and printed out.

![Name display format](image)

If the checkbox “Reset all references to borrower names” is ticked, then all borrower name displays across the entire system are readjusted to the selected format. If the box is unticked, then this change is not made.

This function can be used to "update" name displays as well.
Borrower Histories

Bookmark keeps a record of all loans, returns and renewals. Unless regularly "aged", the list of these records can stretch back many years. (Old entries in the master record list can be removed or "aged" by going to Reports / Circulation Reports.)

This function is used to set a "cut-off date" so older history entries are not automatically listed when viewing. It does not remove any data. It only hides older ones. This may be useful if you wish students to only see this year's loans records.

The cut-off dates are based on borrower types.

To set a date, click on the borrower type row.
Choose and click on the date.

**Rebuild All Histories**

A rarely used housekeeping task. Borrower loan histories are a subset of and separate list to the main circulation history log. This function erases the borrower list and makes a new one using the log data.

**Clear Old Overdue Records**

Bookmark keeps a record of overdues. This function erases old records prior to the date entered.

**Clear Overdue Notice Counts**

Bookmark keeps a count of every time a borrower is issued an overdue notice. The counters simply increment. They do not keep track of when the overdue notice was issued.

This function resets all counters back to 0 to start over.
Update Borrower Info Against Items

When an item is borrowed, the borrower's number, barcode, name, class and year level are also stored against the item issued.

This data stays against an item until the next loan.

If an item was borrowed a previous year and is still on loan, it is possible the class and year level are the previous year’s and not the current year. (The rollover process does not change these stored values.)

This housekeeping function updates item data so it matches the borrower's current class and year level. The matching is based on both the borrower's number and surname.

It is a useful function to use at the start of the school year.
Import Borrowers

This is the fastest method of updating borrower information at the start of the year. It requires initial “one off” setting up, but once that is done borrower data can be updated in literally seconds.

Import Borrowers takes data exported from a school office administration system and reads it into Bookmark.

Classes, year levels, types, emails and other data are all updated.

New borrowers are automatically added.

Borrowers are not deleted. This should be done manually before importing.

Student data can be imported into Bookmark from the following systems:

- EDSAS (South Australia)
- RMSIS (Western Australia – a.k.a. "Integris")
- Bibliotech export from CASES and CHESS (Victoria)
- One School (Queensland)
- Dux (South Australian Catholic)
- SAMS (Northern Territory)
- SAS (Victoria)
- MAZE
- Generic
- CHESS exported (Victoria)
- CHESS eduHub (Victoria)
- GELI (Griffith University)
- ceSIS (SA Catholic schools)
- Edumate
- TASS
- RMSIS (Integris) Staff
- Icon
- Dynamic List (One School QLD)
- Dynamic 365 (WA Catholic)
- EMS (South Australia)
- Custom

If your administration system does not appear in this list, contact the Bookmark Help Desk as it might be possible to add it or to use the Custom or Generic format.

Exporting Data from the Office System

Data must first be "exported" from the office system. This is usually a special report that generates a type of text file containing student data.

Each administration database has a different set of steps for exporting. Refer to that education system’s information on how to export the data for library systems.

For CASES 21 use the "Bibliotech" export. It works for Bookmark, too. The same export can also be made from CHESS.

If your system is not listed, the Generic format is one that some administration systems may be able to generate.
The exported data file should be saved to a USB flash drive so it can then be taken to the library and read by Bookmark.

**ID values and Barcode labels**

School administration packages contain a field to store their own student and staff ID values. With the exception of EDSAS, they usually do not store library barcode labels. Bookmark has both barcode labels and a special field for the admin ID value. Borrowers are stored in Bookmark using their borrower number from the library barcode.

Borrower barcodes can be either "Bookmark friendly" (normal) or the student ID or can contain the student ID.

The ID values of the admin system provide the “common ground” between the admin system and Bookmark. In Bookmark, the ID value is entered against the AdminID field. When importing, Bookmark matches the ID value from the admin system to what has been entered. If there is a match, Bookmark then knows which barcode number to use for updating. If there is no match, a new borrower with a new barcode is created.

**Import Borrowers Dialog**

Choose Update Borrowers then click on the *Import* button.
A special note on formats

Each administration system generates its own data format. Use the dropdown list at the top to select the format for your system.

- **EDSAS** – this is for South Australian public schools.
- **RMSIS** – is the system used by public schools in Western Australia. It is also known as "Integris". The format for both students and staff is identical.
- **Bibliotech export** – this is a special export contained in CASES21 and CHESS, used by public schools in Victoria. Bookmark can import this format.
- **One School** – a basic export from the Queensland state school administration systems.
- **DUX** – a variation of Edsas, Dux has been used by Catholic schools in South Australia.
- **SAMS** – this is the administration system used by schools in the Northern Territory. It is similar to RMSIS but the export format is different.
- **SAS** – is an old administration system also found in Victorian schools.
- **MAZE** – is a special export that can be generated by the MAZE system.
- **Generic** – is a "universal" format for Bookmark that can be produced by some administration systems.
- **Custom** – is a special import format. See below.
- **CHESS exported** – is an exported format from the CHESS system (not the Bibliotech format above). It includes extra fields, such as email.
- **CHESS eduHub** – is the format available in the file associated with eduHub. This file is automatically kept up to date and Bookmark can import it.
- **GELI** – a special format used by Griffith University.
- **ceSIS** – a format used by Catholic schools in South Australia.
- **Edumate** – a special format that can be exported by Edumate.
- **TASS** – a special format for the TASS administration system.
- **Kennedy** – a special format for a particular Bookmark user.
- **EMS** – for South Australian public schools.

Other formats can be added to the list. Contact the Help Desk.
Assign Borrower Types

When importing, Bookmark tries to match either the year level or class from the office data against a borrower type. See "Configure Borrower Types" below.

"Based on year levels" is the norm as most borrower types reflect year levels. Only use "Based on classes" if borrower types reflect actual classes rather than grades.

Configure Borrower Types

Click on the Configure borrower types button. Use this window to make sure that year levels as included in the data from the admin system are entered against borrower types.

If, for example, reception is REC in the office data, make sure that is entered against the correct borrower type.

Bookmark uses this information to assign borrower types when importing.

It is necessary to have the year levels (grades) entered against the student borrower types. The form of these must match what is in the data from the office. Do not include any blank spaces after commas. Do not put 0's in front of grades - e.g. not 06, just 6. Even if the office data has 06, Bookmark will compensate.

If assigning borrower types based on classes, then the class codes should appear instead of year levels.

Borrowers
Field switches

This sets the fields which will be filled when importing and which are not. Tick the ones to be filled and click on OK.

Setting up ID Numbers the First Time

If borrowers are already on the system but you have never imported before, it is strongly advised to first enter all the Admin ID values manually. This is a one-off job best done in Update Borrowers. After this, Bookmark will automatically do this for new borrowers.

When Bookmark imports borrowers it first attempts to match the AdminID. If a match cannot be found, it then tries to match the name. If that cannot be found, it is assumed to be a new borrower and is added. If a match is found, the borrower's information is updated.

Adding the AdminID values first improves successful matching.

To quickly add the AdminID values, go back to the Update Borrowers grid and simply fill out the values in the correct column. Adjusting the order of borrowers can help. Be sure to Save.
Importing Student Data – the procedure

First, select the type of Admin system being used – e.g. EDSAS, EMS, RMSIS, etc. Use the dropdown list at the top.

Next indicate whether borrower types are assigned based on year levels or not to change the types. Normally it is based on year levels.

Third, select how barcodes will be given to new borrowers.

- Assign new students new high numbers tells Bookmark to automatically give to new students (ones not matched) barcodes starting from the highest used value and going up. Unused borrower numbers are not reused. This is the recommended method.

- Assign new students unused numbers tells Bookmark to reuse the unused borrower numbers. It searches for them and assigns them to the borrowers.

- Update only tells Bookmark not to import borrowers that are not already on the system. These borrowers could later be imported one-at-a-time.

- Stop at each new borrower… causes the program to present every borrower and allow manual entry of the barcode.

- Use AdminID as numbers and barcodes instructs Bookmark to use the AdminID as the borrower's number as well as the barcodes. For most Admin systems, this is not possible. However, a few use simple numbers for borrowers and these can be assigned as barcodes.

- Assign new students unused numbers and use the AdminID as barcodes tells Bookmark to give new students unused numbers but to assign the AdminIDs as barcodes against all borrowers, even if updating existing borrowers. This is useful for schools that use the AdminId as their library barcodes.

- Use barcodes from EDSAS only applies to the EDSAS system. It has its own barcodes, and this option tells Bookmark to use those instead of the AdminID. These are 12-character length barcodes beginning with B.

- Use AdminID as numbers and create barcodes from it. This causes Bookmark to use the AdminID value as the borrower's number and to create a full-size barcode which includes the AdminID, site ID, checksum, etc. Can only be used if the AdminID is a number.

- Assign new borrowers unused numbers and use EDSAS barcodes for all borrowers. The EDSAS barcode itself is used to provide the borrower number and barcode. Note the number on the barcode is not the full EDSAS number.

- Use EDSAS number as borrower number and EDSAS barcodes for all borrowers. Subtly different from the above, the EDSAS number itself is used as the borrower number and the EDSAS barcode for the full barcode.

Fourth, indicate whether matching is done on ID and Name or ID only. Normally the first is used.

Note: Bookmark will save these settings and present them next time.

Click on Start to begin the import.
Use the File Requester to locate the file containing the data. Open it.

The first borrower is presented. Alter anything that needs changing and click on Save.

You can go through each borrower one at a time or do the lot.

Click on Mass Import to import everyone quickly.
Custom Import Format

The Custom option can be used to configure Bookmark to read a format not found in the droplist.

The format refers to the list of fields to be imported and their order. The selected list must match the order found in the file to be imported.

Use the Format option at the bottom. Setting it to Custom clears the list of fields.

Use the Load sample button next to fill the "Import fields" column. This shows the contents of the first row of the file. If it has a header line, that is displayed, otherwise the first record is shown.

Click on one of these fields to highlight then click on the matching Bookmark borrower field on the left side. That is assigned. Use "Ignore" for any field for which Bookmark does not have a corresponding field.

All fields must be matched or ignored.

If the file contains lines at the beginning which do not contain student data, enter the number of lines next to "Number of headers lines to ignore".

Borrowers
Click OK.

This completes the Borrower Import section.
Borrower Information Privacy

Bookmark allows easy recall of information about borrowers in the Circulation and Search modules.

Under normal operation, viewing information about borrowers is unrestricted. However, all borrower data can be restricted.

Bookmark takes a flexible approach which allows each library to custom-design the type and nature of this security.

The main parts of borrower privacy are:

- Access to information in Your Details in Search
- Loans listed on screen when borrowing

Your Details

In the Search module, discussed in another document, Your Details can be used to see a borrower.

The information includes the borrower's name, number, class, borrower type, a list of items currently on loan, items previously borrowed, current reservations and any booklists the borrower for which the borrower is responsible. This information is always available for any borrower who can be viewed.

Restrictions apply to searching for the actual person.
These restrictions must be turned on. By default, Bookmark does not place any restrictions on searching for and viewing borrowers.

The My Details option in Search may be hidden so no one can access any borrower's information.

A borrower can have a "privacy code" which acts like their PIN. It is a field in Add/Edit Borrowers. This must be entered along with their barcode.

Borrowers without a privacy code may leave the "security code" line blank.

Searching by name can be turned on or off as well. If off, then the borrower's barcode must be used.

Note: library staff can enter the Main Password or the Borrower Info Password.

These controls are discussed in the Search Controls section of the Search module documentation.

**Item Loans**

When a borrower enters their barcode to borrow items, a list is normally displayed showing what they currently have on loan. To conform to privacy regulations, this list should not be displayed. The number 3 Switch in System Control’s Circulation Switches determines if this list is displayed or not.

If the Switch is set to OFF, then when borrowing, the list of items is not displayed. Instead, the number of items on loan is shown and the number of overdues given, if any. The borrower can call up their list by entering the words LIST or SHOW (instead of an item’s barcode), then entering the borrower’s privacy code or the Main password or Privacy Access password.
Borrower Data Global Change

Borrower Global Change can be used to “find” and “replace” data or to add to data already in a borrower field.

![Global Change Interface]

**Step 1 - List borrowers to be changed**

- Number
- Name
- Group/Class
- Year level
- Type

**Step 2 - Specify the change**

- Change field
- Change to

**Step 3 - Make changes**

- Change

---

Borrowers 56
Special Backup

CAUTION! The consequences of an incorrect Global Change can be far-reaching. A backup is strongly recommended immediately before a Global Change. If the change is not correct, restoring the backup is the only undo operation available. This option backs up to Bookmark's location (flash drive, etc. not needed). Seven backups are available, denoted by colour.

Step 1 – List Borrowers to be Changed

The first step is to list the borrowers that are to be changed. This can be done in several ways.

- Borrowers can be individually scanned or item numbers entered
- A Query (search) can be conducted to obtain a list of borrowers based on a common criterion (See Reports for a description of Queries)
- A list of borrower numbers or barcodes can be imported (and exported)
- Details of a borrower can be viewed by highlighting and clicking on Details
- A borrower can be removed from the list by highlighting and clicking Remove

Step 2 – Specify the Change

*Change field:* This is the field in which data will be changed (it can be the one being searched or a different field).

*Change to:* This is the value which will be assigned to the field being changed.

Three ways are available in the droplist below to make a change.

1. Replace entire contents of Change field with 'Change to' text
2. Add data to the beginning of the field (prefix)
3. Append data to the end of the field (suffix)
4. Remove the “change to” data from the field. All instances in the field are removed.

*Stop at each entry and decide:* Normally keep this ticked. However, if you are certain of the global change, the tick can be removed. All borrowers in the list are changed without notice.

**Step 3 – Start search and change**

![Global Change](image)

The first borrower in the list is displayed.

Click on *Change this* to make the change.

Click *Skip* to ignore this borrower and move on to the next.

Click *Change all* to change all borrowers without stopping.

Click *Cancel* to abort the global change.

When the global change is completed, a window shows the first record which was changed for checking purposes.

![Fill all Barcodes](image)

As explained previously, the barcode of every borrower can be stored. This button can be used to make all of the stored barcodes the same as the data in the AdminID field. This should only be used if borrower barcodes are to be the Admin numbers and not the usual sort of barcode.
This deletes all the stored barcodes, setting the borrower barcode system back to start. Use only for emergencies.
Borrower Lists

This menu can be used to generate some specific lists based on borrowers. A more comprehensive borrower reporting system can be found in the Reports section.
List Borrowers

This produces a simple list of all borrowers for viewing. Click on the heading of a column to change the sorted order of the list.

Double click on a name to see details. This display is almost identical to the one in Your Details in the Search module.

Double click on any entry in the list to show the item’s cataloguing details.
List Histories

This function can be used to list borrower loan histories for classes or to list just the number of items borrowed.

Below is the display showing the number of history entries (summary) found for a class.

Borrowers
Note: the list shown is independent of the cut-off date set in Rollover to restrict the loans shown. This report relies only on the date-range specified.
List Loans

This area can be used to generate a list of all items on loan to various classes or groups.
List Classes

List Classes can be used to list all the borrowers in one or more classes.

Image 1: List Borrower Classes

Image 2: List of borrowers in a class
List Year Levels

This lists all borrowers in the indicated year levels.
Lexiles

The Lexiles function can be used to list the lexiles recorded against students and to import these from a CSV file downloaded from the Scholastic website.

The file from scholastic is a report showing each student's lexile level and other information. Two formats are available, and Bookmark can import either.
Barcodes

This window can be used to manage borrower barcodes.

The first column shows the borrower numbers and the second column their barcode.

*If the barcode is blank it still works!* If Bookmark encounters a blank barcode, it calculates what it should be from the borrower number, the site ID and other settings in Controls.

The *Erase* button removes barcodes against all highlighted borrowers.

*Fill blanks* stores barcodes against blanks by generating calculated ones. It is a very good idea to do this as Bookmark will fetch borrowers based on their barcodes faster.

*Erase all* removes all stored barcodes. It is useful if you need to “start over” – e.g. erase all first then fill blanks.

*AdminID* changes all barcodes to be identical to the AdminID values, regardless of the borrower numbers. *(Not recommended as this breaks the relationship between the borrower number and barcode.)*
## Overdue Notice Counts

This window shows the number of overdue notices issued to each borrower and when the last was generated. The counter for this can be put back to zero in Borrowers > Rollover > Clear overdue notice counts.

<table>
<thead>
<tr>
<th>Number</th>
<th>Name</th>
<th>Class</th>
<th>Year level</th>
<th>Overdue notices</th>
<th>Last overdue notice</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>WEBBER, Janu</td>
<td>5RT</td>
<td>5</td>
<td>79</td>
<td>27/04/2020</td>
</tr>
<tr>
<td>2</td>
<td>CHINCHEN, Di</td>
<td>5RT</td>
<td>5</td>
<td>31</td>
<td>28/08/2017</td>
</tr>
<tr>
<td>3</td>
<td>BATTEN, Sara</td>
<td>5RT</td>
<td>5</td>
<td>2006</td>
<td>16/10/2015</td>
</tr>
<tr>
<td>6</td>
<td>BURLINGTON, Megan</td>
<td>Gorgeous</td>
<td>S</td>
<td>1</td>
<td>28/08/2017</td>
</tr>
<tr>
<td>7</td>
<td>DALLEY WATER, Keith</td>
<td>Gorgeous</td>
<td>S</td>
<td>1</td>
<td>28/08/2017</td>
</tr>
<tr>
<td>8</td>
<td>PONCE, Filomena</td>
<td>STAF</td>
<td>S</td>
<td>0</td>
<td>24/01/2019</td>
</tr>
<tr>
<td>9</td>
<td>GLYDE, Beth</td>
<td>LO</td>
<td>S</td>
<td>33</td>
<td>16/10/2015</td>
</tr>
<tr>
<td>10</td>
<td>STEVENS, Rick</td>
<td>STAF</td>
<td>S</td>
<td>0</td>
<td>24/01/2019</td>
</tr>
<tr>
<td>11</td>
<td>TUCKERMAN, Rod</td>
<td>5RT</td>
<td>5</td>
<td>62</td>
<td>16/10/2015</td>
</tr>
<tr>
<td>13</td>
<td>CODING, Russell</td>
<td>LO</td>
<td>S</td>
<td>66</td>
<td>16/10/2015</td>
</tr>
<tr>
<td>14</td>
<td>CUTMORE, Emma</td>
<td>KEC</td>
<td>S</td>
<td>720</td>
<td>16/10/2015</td>
</tr>
<tr>
<td>15</td>
<td>BROWNE, Rosanne</td>
<td>STAF</td>
<td>S</td>
<td>450</td>
<td>16/10/2015</td>
</tr>
<tr>
<td>16</td>
<td>LYNCH, Gillian</td>
<td>LO</td>
<td>S</td>
<td>33</td>
<td>16/10/2015</td>
</tr>
<tr>
<td>17</td>
<td>CUNNEEN, Sheree</td>
<td>STAF</td>
<td>S</td>
<td>0</td>
<td>24/01/2019</td>
</tr>
<tr>
<td>18</td>
<td>NIELSEN, Helen</td>
<td>STAF</td>
<td>S</td>
<td>1770</td>
<td>16/10/2015</td>
</tr>
<tr>
<td>19</td>
<td>CROAN, Sophie</td>
<td>STAF</td>
<td>S</td>
<td>270</td>
<td>16/10/2015</td>
</tr>
<tr>
<td>20</td>
<td>GROCH, Darine</td>
<td>STAF</td>
<td>S</td>
<td>0</td>
<td>24/01/2019</td>
</tr>
<tr>
<td>22</td>
<td>HAES, David</td>
<td>STAF</td>
<td>S</td>
<td>0</td>
<td>24/01/2019</td>
</tr>
<tr>
<td>24</td>
<td>BOON, Julio</td>
<td>STAF</td>
<td>S</td>
<td>0</td>
<td>24/01/2019</td>
</tr>
<tr>
<td>25</td>
<td>DADO, Susan</td>
<td>STAF</td>
<td>S</td>
<td>60</td>
<td>16/10/2015</td>
</tr>
<tr>
<td>27</td>
<td>MEARES, Shirley</td>
<td>TELC 5D</td>
<td>T</td>
<td>0</td>
<td>24/01/2019</td>
</tr>
<tr>
<td>28</td>
<td>MACDONALD, Liz</td>
<td>STAF</td>
<td>S</td>
<td>0</td>
<td>24/01/2019</td>
</tr>
</tbody>
</table>
List Overdues

This window shows all overdue items in list format. Details about individual entries can be viewed and entries can be removed from the list. Print lists all overdues unless some are highlighted, in which case only the highlighted entries are printed.
Borrower Barcode Labels

Borrower barcode labels can be printed or ordered in this section.

Labels Menu

1 - Print Class Sheets
2 - Manually Enter Numbers
3 - Page Setup
4 - Print Unused Borrower Barcodes
5 - List Unused Borrower Numbers

Go back
Print Class Sheets

This very useful feature prints barcodes for all borrowers belonging to a class on one or two pages. These barcodes can include borrower photos. The barcodes can be regular 1D “striped” barcodes or 2D “square” QR type barcodes.

Tick the classes, year levels or borrower types to be printed.

Layout

Several page layouts are available:
2 x 8 means two columns of 8 rows down one page. 16 labels total.

The "page setup format" is the same as defined in Page Setup. This can vary.

The 2 x 5 format suits a readily available variety of sticky labels.

The 1 x 10 prints one barcode on the left side and the borrower’s name in large font to the right. Photos are optional. This style can be used to stick to student rulers.

Formats are always being added to the list if users request a new format.

The last two formats print QR type barcodes. Due to their shape, larger size, and the need for readers to have adequate space around the label, only 10 can be included on a page.

**List names**

If this box is ticked, a list of borrowers that will be printed is shown. Borrowers can be removed from this list.

![Print Class Sheets](image)

Click on *Print* to see a preview of the first page.
Click on Print on the preview window to begin printing the labels.

Note: barcodes are best printed using a laser printer. The lines are more sharply defined than those generated by inkjet printers. Some readers may have difficulty with inkjet printed labels, although this is not universal.

(The grey dots in the example are not included in the actual printout.)
Manually Enter Numbers

This allows printing of borrower barcodes based on selected numbers or even barcodes.
Page Setup

Page Setup determines the default layout used for printing borrower barcodes.

It must be filled out correctly as it influences the other barcode printouts.

The **Header** is the text printed on top of each label. It is normally the name of your school or site. Optionally, borrower labels can have each person's name used instead.

The **Borrower template** defines the structure of the barcode. It must match the structure of the borrower barcodes you are using. This is normally the same as that in Barcode Settings in Controls, but it can be different if your barcodes are not a standard type. The drop list provides several stands. If the structure you wish to use is not in the list, you can type it in using rules. The symbols used and their position denotes the structure.

- **T** This is the character identifying the type of labels, in this case borrower labels. If present, it usually comes at the start of the label. Item labels begin with a different letter or number.
- **SSSS** This represents the Site ID. It is always 4 characters long and if present comes after the identifier. Note that other library system labels can be configured differently.
- **NNNNN** The number of N's is the number of digits in the label of the record value. It is usually 5 or 6 or 8 characters long, depending on the label structure. See examples below.
- **C** This represents a checksum character. Not all label types have this.
- Blank spaces between each part are optional. They are never included in the actual stripes even if they are shown in the template.

Examples of different structures of labels are:

---

**Borrowers**
<table>
<thead>
<tr>
<th>Label type</th>
<th>Template</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard 11</td>
<td>T SSSS NN NN NN C</td>
<td>B 1413 00135 2</td>
</tr>
<tr>
<td>Standard 12</td>
<td>T SSSS NN NN NN NN C</td>
<td>2 1413 0000135 3</td>
</tr>
<tr>
<td>Standard 14</td>
<td>T SSSS NN NN NN NN NN C</td>
<td>2 1413 00000135 4</td>
</tr>
<tr>
<td>Oasis type 11</td>
<td>T NN NN NN C SSSS</td>
<td>B 00135 Y 1413</td>
</tr>
<tr>
<td>Alice, Oliver type 10</td>
<td>T NN NN NN SSSS</td>
<td>B 00135 1413</td>
</tr>
<tr>
<td>6 digits with type</td>
<td>T NN NN NN N</td>
<td>B00135</td>
</tr>
<tr>
<td>6 digit numbers</td>
<td>NN NN NN NN N</td>
<td>100135</td>
</tr>
<tr>
<td>7 digits with type</td>
<td>T NN NN NN N</td>
<td>A 000135</td>
</tr>
<tr>
<td>5 digit numbers</td>
<td>NN NN NN NN N</td>
<td>00135</td>
</tr>
</tbody>
</table>

Notes:
- Standard 11 are labels used by most Bookmark users. They also correspond to the structure used by South Australian public libraries.
- Standard 12 are labels used by the Microfusion, Informatif and Metamarc systems.
- Standard 14 are international standard library labels.
- Oasis type are 11 character labels used by the Oasis library system and some Alice and Oliver systems. The Site ID comes at the end and the checksum character is a letter.
- Alice, Oliver type are 10 character labels used by the Alice and Oliver systems. They are the same as the Oasis ones but without the checksum character.
- 6 character types are common to many library systems such as Amlib and Destiny. Sometimes they begin with a letter and other times a numeral.
- 5 digit types are just a number.

Important rule: stick to one structure for all borrower barcode labels!

Site ID is the value you wish to include on the borrower labels to identify the site. This is usually a school number but it can also be 4 letters as well. It is only used on the longer labels.

Number across is the number of columns of sticky labels on a page.

Number down is the number of rows of labels on a page.

Top margin is the gap between the top of the page and where the top of the first row of labels actually is. Very few types of sheets do not have a top margin. Also, every printer puts its own margin. This varies with each model of printer, even the same brand. Bookmark tries to compensate for this but sometimes it is necessary to fiddle the value of the to margin anyway. This value is measured in millimetres and can be a decimal.

Side margin is the gap between the left edge of the page and the left side of the first column of labels. Again, printers put their own margins in and it may be necessary to adjust this slightly different to what is measured with a ruler.

Label width is the width of each label in millimetres. Decimals can be used.

Label height is the height of each label.

Horizontal pitch is the distance between the left edge of one label and the left edge of the next label, including a gap between labels.

Vertical pitch is the distance from the top of one label to the top of the next label, including a gap if it exists.

Header font size is the size of the font used to print text above the stripes. Values of 6, 8 or 10 are normal. The larger the number, the larger the text both horizontally and vertically.
**Stripes width** (0.1-0.9) determines with width of the barcode itself. This is a decimal value between 0.1 and 0.9. It is normally 0.2 to 0.4 with 0.3 fairly normal. Care must be used with this value.

**Stripes height** (1-50) is the height of the label. Normal size is 8.

**Text font size** is the size of the text which appears beneath the stripes. This text shows what the strips represent and conforms to the template. If the template includes spaces, they are included here although they are removed from the strips. In some printouts the check character can be hidden and not shown here even though it is included in the strips.

**Barcode standard** is the standard used to generate the stripes. There are many standards but only the ones common to libraries are offered here. Code 128 produces darker, thicker lines and is easier for readers to scan. Some very old readers cannot scan this type, however. Code 39 is an older standard and was used by previous versions of Bookmark to print barcodes. It produces finger lines and wider labels (the Stripes Width value usually has to be slightly smaller). Codeabar is another standard used by some other library systems. In general, code 128 should be used unless your reader is unable to work with it.

This button offers several standard arrangements for commercial sticky labels plus one (the 3 x 12) that has proven useful. Selecting one of the defaults resets all the values. The TL44 is recommended as a good setup if printing to normal sheets of paper.
The Test Print option can be used to see what the printed labels might look like. A “preview” screen is displayed first.

The Zoom button can be used to enlarge. Clicking several times cycles through different sizes.

Print prints one page. Note that the display may be slightly different to the printed page.
How to Test

Test page printouts should be used to make sure the actual printing will be aligned properly within the cells.

Print a test page on normal paper. Place it behind a blank sticky-labels sheet. Hold up so light shines behind and the silhouette of the labels can be seen within the labels.

If the alignment is incorrect, change a value and repeat the test print. Usually only the top or left margins need to be changed for any of the default label types. Occasionally, several repeats are required.

Once the Page Setup has been defined properly, closing the window saves the values. Page Setup values are kept until altered.
Unused Borrower Barcodes

Unused borrower barcodes are based on the borrower record numbers currently vacant. Enter the first and last borrower number of the range between which you wish to print.

Labels are based on only the unused numbers within the range.

The Page Setup format is always used for these labels.

The "label position" is where printing begins. This is useful for partially used blank sticky labels.

It is strongly recommended to include the final checksum character on labels. Hiding it (remove the tick) does not show it in the text beneath the label but it is still part of the stripes.
List Unused Borrower Numbers

This function lists all unused borrower numbers between 1 and the highest number found in the database. This list is not intended for barcode printing companies but for your reference.
Photos can be used to examine all borrower photos, import (put in place) other photo images and delete photos for borrowers who have been removed from the system.
Import is used to bring borrower photos into Bookmark.

The photos can come from either a CD or DVD disc or from within a compressed ZIP file.

Put the dot next to the format then click OK.

If copying from a disc, flashdrive or other source, a "Browse for folder" dialog is shown.

Locate the folder containing the photos then click OK. All the photo files are copied to Bookmark's Photos folder.

If the photos come from a zip file, locate and open it. The photos are automatically extracted from the zip file and copied to Bookmark's Photos folder.
Ideally, each file should have the AdminID as its filename. Names can be used but may be less able to link to borrower records.

Images should be of the bmp, jpg, gif or png type.

Borrower photos are all stored in a folder called PHOTOS within Bookmark's location. It is also possible to copy photos directory into the PHOTOS folder. Photos must not be within a folder inside of PHOTOS as Bookmark will not see them.

Use this to locate a borrower by their name or AdminID.

Click here to view all photos.

A list of all borrowers without a photo is shown.
Clicking on this button displays all borrower photos.

The Class button allows filtering photos to a particular class. Click on All Photos to see everyone again.

Delete No Borrowers removes all photos that do not have an associated borrower record – e.g. there is no match based on AdminID or name.

When any borrower photos are deleted, they are shifted into a temporary folder. This button allows viewing that folder.

Photos deleted here are purged from the system.
Recover transfers the photo back to the main Photos folder. It will overwrite an existing image of the same filename.