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Circulation

Bookmark's Circulation module can be opened either from the Main Menu or directly from a desktop icon. It can be used on more than one computer at a time.

Circulation is used to do:-

- Issue loans to borrowers
- Return items on loan
- Make reservations and change them to holds when returned
- Display of borrower loans and histories
- Display library news
- Search the catalogue

Circulation can be set up on a network so that it is the only icon available on a particular workstation.

Circulation has been designed so that young students can issue their own loans. A great deal of special security and controls are included. However, Circulation can be adapted to work in situations in which library staff are in charge of issuing loans and returns.

Setup

Circulation can be opened either from Bookmark's Main Menu or using its own desktop icon.

The desktop icon setup is useful when you would like Circulation to be available on one or two workstations but now allow others to access the librarian's main menu. Refer to the separate Networking document for technical information on how to set up a Circulation icon.
The Main Menu

When Circulation is run (or “opened”), the Circulation Menu screen appears.

Circulation offers two different menus! You can choose which one you wish to use. This is set up in Circulation Controls.

Standard Style

Menu First Style

The Menu First Style presents a simple menu. Click on the button to select the task.

The Standard Style combines the Menu First style with the Loans screen into one window. This screen is “ready to borrow”. The menu for the other tasks is along the bottom.

The Circulation window always appears in the middle of the screen display. The amount of space around it depends on the screen resolution to which Windows has been set. Circulation has been designed to just fit on a screen with a resolution of 1024 x 768 resolution. Higher is better. Screen resolution is set up in Windows itself.

Because the size of the window is smaller than the screen-size, desktop icons may be visible around the edges. To work around this, a special control can change Circulation to “full screen mode” so it fills the screen, covering icons. Window mode is the default.

Window Display Mode (resolution 1280x1024) Full Screen Display Mode
Other customizing functions are available, too:

- Standard or Menu First styles
- Window mode or full-screen mode
- Any or all of the buttons at the bottom or on the Menu can be hidden.
- The minimize, maximize and close (red box with white X) buttons on the window’s titlebar (upper right corner) can be visible or hidden.
- The colour of the window can be changed.
- Sound alerts can be altered for many events.
- Library news can be displayed in the middle area. By default it is hidden and can only be viewed by clicking on the News button. This area can display either text only, or an image or text + image. See the Edit News section in Controls.

If the menu buttons are hidden, command words are available which can be scanned as barcodes or can be typed in.
Basic Steps to Borrow an Item

Issuing items to people is called "Borrowing". In some countries, this is known as "Check out".

The steps to borrow items:

1. On the Loans window, scan in the borrower's barcode.

2. The Borrowing window appears.

3. Scan each item's barcode. Items appear in the list as they are issued with the most recent at the top of the list. Repeat for each item.

4. When finished, click on the Finish button, or scan the FINISH barcode label, or scan another borrower's barcode, or press the ESC key.

Note: This window can also be used to view items on loan to a borrower and their previous loan history. Optionally, a reservation can be made from this window, too.
Basic Steps to Return Items

1. Click on the **Returns** button, or type the word (or scan the barcode word) RETURNS in the box where the borrower’s barcode is normally scanned. Or press the F1 key. The Returns window appears.

2. Scan each item’s barcode.

3. Details about each item appear. Special messages appear if necessary. Different sounds may be heard depending on the messages.

4. Click on the **Finish** button or press ESC to close the Returns window and go back to the Menu.
Basic Steps to Reserve an Item

Circulation features two different procedures for making reservations. Below are the steps available from the Menu window’s Reserve button.

1. Click on the Reserve button.

2. Scan an item’s barcode or type in words from a title and click on Find.

3. Click on the title to reserve then click on the Reserve button or press Enter or double-click on the title.

4. Scan the borrower’s barcode to place the reservation.

Additional reservations can be placed against the same title.
5. Close the Reserve Items screen when finished.

6. Close the Reserve Items screen when finished.

Note: Reservations can also be made from the Loans screen.
Borrowing Items -- Specifying the Borrower

The borrower must be identified as the first step.

This is normally done by entering the borrower’s barcode via the barcode reader, the same as in Bookmark.

Barcodes can be typed in, too. Press Enter to accept.

The borrower’s record number can also be typed.

Typing Code Password

If a borrower number was entered (not a complete barcode) and “typing code” password has been set up in the Controls section (discussed later), then Circulation will next ask for this.
The Typing Code is a security measure to discourage students from typing just the numbers. Only users who know the Typing Code can manually enter borrower numbers instead of full barcodes.

Use of the Typing Code is optional but it is a way to stop kids typing in anyone else’s number.

**Quick Borrower Entry**

If the borrower’s barcode is not identified and the number is unused, the borrower may need to be entered onto the system. Circulation offers a “quick borrower entry” system for doing this on-the-fly during the Loans process.

Fill out the form by providing the borrower’s name, their type, class (optional), year level (optional) and the Loan Block password. The borrower is saved and the loan process proceeds. Quick Entry borrowers have “Quick entry” in the address field.

The Quick Entry feature is optional and can be disabled.

**Finding a Borrower by Name**

Borrowers can be located by their names as well as their barcodes. This is done in different ways.

*Method 1 – Type the name*

Instead of a barcode, type part or all of the name and press Enter.

his, simply type in any part or all of the borrower’s name instead of scanning a barcode or typing a number. Press Enter.
Circulation treats the entry as a barcode or record number. If it cannot find it, Circ then searches for the entry as if it is a borrower's name.

An optional *Switch* can be set so Circulation asks for a password before displaying the list of names found. Name searches are then restricted to those who know that password. By default, there is no password request.

A list of borrowers containing the words entered is displayed.

Finding borrowers by entering part of their name instead of the barcode is optional. It can be switched off!
Click on the correct name and then click on OK or press Enter.

Method 2 – Use the Name button

A pushbutton called Name may appear next to the barcode entry line. It can be hidden or visible.

Circulation then searches for the name in the same way as above.
Method 3- Class Lists

A control exists which can switch on the Classes droplist. This allows selecting a class and then a borrower from the class's droplist. Further, all students in a class can be listed in the big box.
Loans Display

Once a borrower is located, the Borrower Window appears.

The top area of the window displays information about the borrower and some additional messages.

The number in brackets after the borrower’s name is their number or barcode.

The photo is optional.

Each button across the bottom can be either visible or hidden.
Holds Notice

If any items are on hold and waiting to be picked up, the borrower is issued a notice before proceeding.

Issuing Loans

Loans are issued (“checked out”) by scanning each item’s barcode in turn. Alternately, the number of the item can be typed and Enter pressed. (There is no facility to enter a title.)

As each loan is issued, Circulation checks to ensure that there are no “blocks” on the loan, and if there are none, it displays the title and other information as the top entry in the list.

Loan data is immediately saved to the database.

By default, all items on loan to the borrower are displayed. The list can be scrolled using the mouse and the vertical slider bar on the right of the list. This appears if the list is longer than the visible area. If the list is hidden, a command and a password can be used to display it.

The order of items in the list can be changed by clicking on a column’s heading.

A number of events can occur during loans, such as reaching a loan limit, or an item being restricted to the borrower. These are discussed later.
Finishing Loans

When the borrower has finished, there are three different ways to exit Loans:

- Click on the **Finish** command button at the bottom of the window
- Scan the **FINISH** barcode label (or type in the word Finish and press enter)
- Press the **Esc** key on the keyboard
- Scan another borrower’s barcode (even though it is asking for an item barcode)

If a borrower’s full barcode is scanned instead of an item barcode, Circulation switches to that borrower. A full barcode must be entered. It is not possible to change to a borrower by using only simple numbers.

Finish or ESC closes the Borrower window, saves any remaining data and returns to the Menu window.

When an item is successfully checked out, many things are saved to the database:

- The item’s status is set to 2
- The Due Date is recorded
- The number-of-times-borrowed counter for the item is incremented
- The number of loans issued today counter is incremented
- The borrower’s barcode, name, class and year level are recorded against the item
- The Last Seen Date used in Stocktaking is set to today
- The Loan Date is set to today
- A record of the item is saved to the borrower’s individual loan history list
- The date is recorded against the borrower’s "last loan date"
- A record of the loan (transaction) is saved to the Circulation Transaction List or Circlog
- If the item was on hold, it is removed from the reservations list
- If a loan receipt is required, it is printed

All of this occurs within a second or two.

View Item Catalogue Details in Loans

To view the cataloguing details of an item, double-click on it.
The History and Reserves buttons can be used to pop up windows showing the item's circulation history and any current reservations. These buttons are normally hidden but can be made visible in Circulation Controls.

**Loan Blocks**

During the Loan process, Circulation checks to see if there are any Loan Blocks that need to be activated.

Each Loan Block Event can be enabled or disabled and may or may not have an overriding password. This allows great flexibility to make circulation behave the way you want. By default, all Loan Blocks are active and require passwords to override.

Loan Block events can be caused by:

- Overdue items
- Borrower requires a privacy code to borrow
- Loan limit reached
- Restricted item
- Item is on Hold or reserved for someone else
- Item has been previously borrowed by this borrower
- Item cannot be borrowed (based on Status)
**Overdue Item(s)**

If the borrower has overdue items (the date comes before today’s date shown at the top of the window), Circulation can display a large coloured window with a message in big letters, and make special sounds.

This Loan Block display is optional: it can be turned off if not required.

The message “Overdues!” can be changed.

The sound is optional as well.

If an overdue block is triggered:

Click on Cancel to cancel the loan process. Circulation then returns to the Menu window.

Note: testing for overdues can occur either before the borrower can do anything or be set to trigger if the borrower tries to borrow an item after they have seen their loan list. Default is after.

Note: each borrower type can be set to “block” or "no block". The latter allows borrowing regardless of the number of overdues.

Note: each borrower type can also have a limit set to a number of overdues allowed before the block is triggered.
**Privacy Code to Borrow Items**

An optional security feature is available that can require a borrower's Privacy Code to be entered before they can borrow. This feature is available for students who may be victimized by others using their barcode. This restricts borrowing to the borrower only if they know the correct passwords to enter. By default, this function is disabled.

In addition to the borrower's personal code, the librarian's Master password or the Loan Block password or the Borrower Privacy password may be entered.

**Loan Limit Reached**

If a borrower reaches their loan limit, a Loan Block event can be triggered. This can be set to occur either immediately when the loan limit is reached, or when the borrower attempts to borrow the next “too many” item. Again, the large coloured window and sounds are optional, and can be switched off if desired. Default is On.

Loans can proceed if the Loan Block password or Main password is entered.
When an item has a Loan Restriction placed on it in Cataloguing or via Borrower Type settings, Circulation checks to see if the borrower is permitted to borrow the item. If not, a Loan Block event can be triggered.

Like the Loan Limit block, a loan block of a restricted item can be overridden by entering either the Loan Block or Master passwords.
Item Cannot be Borrowed

An item can only be borrowed if the "Can be borrowed" setting is ticked in Status Types.

![Status Types Table]

All items with a Status of 1 can always be borrowed. Items with a Status of 2 cannot be borrowed, unless a different control is set to allow this, in which case the item is automatically returned then issued. In the example above, items with a status of 7 can also be borrowed. If this box is not ticked, the item cannot be borrowed and a passworded alert is presented.

![Access Password Required]

This type of loan block cannot be overridden.
Item is on Hold or Reserved

A Loan Block can also be triggered if a loan is attempted against an item that is on hold for someone else. This loan block cannot be overridden.

Item Has Been Previously Borrowed

Circulation can check to see if the item was previously borrowed by the same borrower.

This is not a loan block, but instead simply a notice that appears. Clicking on Yes continues the loan but No cancels issuing the item.

By default, this function is switched off.

Holds

When a borrower enters their barcode, any items that are on Hold to the borrower are displayed first.
Items on Hold are items that have been returned and are awaiting pickup. They can only be borrowed by the borrower the Hold is against.

**Borrowing Boxes**

When a Box is borrowed (See Cataloguing), the contents of the box normally are issued at the same time. Boxes allow a group if items to be issued with one barcode – the box's.

However, there may be instances where this situation is not preferred.

In Circulation Controls (see below), a checkbox can be set so Bookmark asks whether or not to issue the contents. The checkbox is a global setting and affects all boxes.

Alternately, typing the phrase "loan box only" (do not include the quotes) on the OTHER field in AddEdit Items (Cataloguing) and saving it, tells Bookmark to do the same time as above but only for the specific item instead of all boxes.

The phrase "loan box always" tells Bookmark to always issue the contents even if the checkbox is set.

The phrase "return box only" tells Bookmark to return the box and not the contents without displaying a message.
**Bulk Loans**

Temporary boxes can be created while in Loans. These are called "Bulk loan boxes".

After scanning in a borrower, type the command word BOX (not case sensitive) and press Enter (instead of scanning a barcode). This puts loans into "box mode".

The next item scanned becomes the box.

All subsequent items scanned are linked to the box. They become members as they are issued.

To stop adding to the box, type BOX again and enter or finish the borrower.

See returning boxes in Returns for more information.

Bulk Loan Boxes are identified by the phrase "Bulk loan" on the Other field in Cataloguing / AddEdit Items. Removing this phrase and saving the item turns the bulk loan box into a regular, permanent box.

**Due Date Assignment**

Due dates are assigned to loans based on rules.

- Unless otherwise set, the borrower’s normal due date is registered to the loan. If it is a 14 day time, for example, the due date is calculated 14 days forward from the current date as stored by the computer itself.

- If the catalogued item has a different Due Date Category than normal (0), that due date is assigned instead.

- If the borrower’s type category has special item type due dates and the item being issued is one of the types, then that due date is registered instead of the borrower’s normal due date.

- If a temporary due date has been set up, that is registered instead of the above.

- If a "SetDate" command has been given to make a one-off due date, that is used instead of the above. Setdate takes precedence. Temporary due date takes next precedence.
Return

To return an item while the Borrower screen is open, click on the item to highlight first then click on the Return button. This button by default is hidden.

In addition to returning a specific item, the F1, F2, F3 or F4 keys, or type in the word RETURNS (or scan it) or type in or scan the word SWAP switches to the Returns window.

The Return button can be hidden or visible. Click on the appropriate checkbox in Circulation Controls.

Extend

By default this button is hidden. When visible it allows an item to be renewed. Highlight the item first then click on Extend. A password may or may not be requested depending on the setting in Circulation Controls.

Show

By default, Circulation displays all items on loan as soon as a borrower is entered, and this button is not visible.

However, for privacy considerations, this list can be hidden using a Switch in Circulation Controls.

If the Switch is off, the button Show appears at the bottom of the window.

If the borrower has a Privacy Code, it will be requested before displaying the list.
If the borrower does not have a code, the list is displayed as soon as the Show button is clicked.

**Reserve**

The Reserve button allows the borrower to place a reservation against a title on loan to someone else. See Reservations later for more details.

**History**

The History button displays items the user has previously borrowed.
Options

The **Options** button produces a popup menu for selecting other operations. Options are intended for use by library staff and not students. Passwords can be optionally set against each task.

![Loans Options]

Many of these can also be selected by typing in the keyword instead of an item's barcode. These keywords can be typed in either upper or lower case or scanned from the Bookmark command word barcodes. These barcodes can be printed on a sheet by Bookmark itself in Cataloguing, Labels, Print Barcode Labels.

The key words are:

- **SWAP**
- **FINISH**
- **SHOW**
- **HISTORY**
- **LIST**
- **SETDATE**
- **NAME**
- **EXTEND**
- **DUMP**
- **SLIP**
- **COMMENT**
- **RETURNS**
- **PRINT**
- **BOX**
- **OVERDUE**
- **RECALL**
- **SEARCH**
Circulation Commands

- SWAP
- FINISH
- SHOW
- HISTORY
- LIST
- SETDATE
- NAME
- EXTEND
- DUMP
- SLIP
- COMMENT
- RETURNS
- PRINT
- BOX
- OVERDUE
Options - Overdue
This command is used to produce an overdue notice for the borrower.

The Overdue Notice dialog only appears if the borrower has overdue items.

Printout covers: If this is ticked, the "book cover" format for overdue notices is used instead of the non-cover format.

Include this message: If the checkbox is ticked, then the message "The following item(s) are overdue as of <date>" is included in the overdue message. If the checkbox is not ticked, the message is omitted.

Omit overdues prior to: This is used to omit long-standing overdue items from the notice. Circulation tests items' due dates against this date and if any loans have due dates before this date, they are not included in the list. A default date of 01/01/1990 is used. To change the date, click on the editbox, delete what is there and type in your own date.

Overdue Message: Click on the dropdown list to choose a specific overdue message to include. The option "No message" is the default, meaning that no overdue message is included in the printout.

The overdue message can be rewritten or a completely different one written. Click on Save if you wish to save the changes to that overdue message number.

Print: This displays a printout dialog to start printing the overdue notice.
Options - Print

The Print command will print out all items currently on loan to the borrower.

Options - Setdate

Setdate allows a different due date to be used.

Once a different date has been set, it takes precedence over all other due dates for the items borrowed by that borrowers. This can be useful for bulk loans that require a special due date.

As soon as the borrower is finished, due date reverts back to normal.

Options - Extend

The Extend command is used to extend the due dates of existing loans to the borrower. It is one of several ways to renew (extend) loans.
All items on loan to the borrower are listed.

Click on the title(s) to extend. A second click removes the 'Extend' word.

Once all the items that are to be extended have been marked, click on OK.

**Select all** marks all items.

Note: items that are reserved will not extend.

**Options - Dump and Slip**

These commands activate the Dump or Slip printout facility, if it is not already automatically active (see Controls later). Dump or Slip prints out a receipt of the items the borrower has just borrowed. Dump prints out across a whole A4 page, Slip prints half the width and is designed for use with the 40-column receipt printers.

When the borrower is finished, these commands automatically deactivate.

These functions can be set to work automatically.

**Options - Comment**

Displays a loan note written for this borrower in Add/Edit Borrowers.

If a loan note exists, the hyperlink **Comment** appears near the borrower's name.

The Comment command will display a comment if available.
Options – Recall Notice

This function opens a window to issue a recall notice for a highlighted item. The text in the window can be changed before printing.

Options – Search

This provides a simple search facility to locate titles while in Loans.

This is a "word based" search. Optional boolean operators And and Or are allowed between words.
Options – Email

This function opens a window that allows an overdue notice to be emailed to the borrower. For this to work, email settings must be in place and access to a smtp email server available. See Controls / General Controls about this.

Options – List Overdues

Lists overdue items showing the number of days each has been overdue.
Options – Temp

This function allows setting a temporary due date, discussed previously.

![Set Temporary Due Date](image)

Options – Status

The Status function can be used to change the status of selected items on loan to the borrower. Items can be declared lost, for example.

Tick the items to be changed and select the status from the dropdown list. Click OK.
Options – List Loans

Lists all items on loan to the borrower. Displays the item type, date issued and due date.

<table>
<thead>
<tr>
<th>Item</th>
<th>Title</th>
<th>Type</th>
<th>Issued</th>
<th>Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>3403</td>
<td>The Princess and the Pea</td>
<td>Junior Fiction</td>
<td>04/06/2015</td>
<td>26/06/2015</td>
</tr>
<tr>
<td>4515</td>
<td>Clever Tortoise: A Traditional African Tale</td>
<td>Junior Non-Fiction</td>
<td>01/04/2015</td>
<td>26/06/2015</td>
</tr>
<tr>
<td>5630</td>
<td>Toy and Game Science</td>
<td>Non-Fiction</td>
<td>26/06/2015</td>
<td>26/06/2015</td>
</tr>
<tr>
<td>5676</td>
<td>Play With Computers</td>
<td>Junior Non-Fiction</td>
<td>26/06/2015</td>
<td>26/06/2015</td>
</tr>
<tr>
<td>5819</td>
<td>Toys</td>
<td>Junior Non-Fiction</td>
<td>26/06/2015</td>
<td>26/06/2015</td>
</tr>
<tr>
<td>5921</td>
<td>The Toys We Play With</td>
<td>Junior Non-Fiction</td>
<td>26/06/2015</td>
<td>26/06/2015</td>
</tr>
<tr>
<td>9019</td>
<td>Snow White and the Seven Dwarfs</td>
<td>Junior Fiction</td>
<td>26/06/2015</td>
<td>26/06/2015</td>
</tr>
<tr>
<td>6221</td>
<td>Toys</td>
<td>Junior Non-Fiction</td>
<td>26/06/2015</td>
<td>26/06/2015</td>
</tr>
<tr>
<td>6233</td>
<td>Classic Fairy Tales</td>
<td>Junior Fiction</td>
<td>26/06/2015</td>
<td>26/06/2015</td>
</tr>
<tr>
<td>6388</td>
<td>TikTok TikTok Tembo</td>
<td>Junior Fiction</td>
<td>01/06/2015</td>
<td>26/06/2015</td>
</tr>
<tr>
<td>6903</td>
<td>The Velveteen Rabbit</td>
<td>Junior Fiction</td>
<td>01/06/2015</td>
<td>26/06/2015</td>
</tr>
<tr>
<td>7667</td>
<td>Irish Legends for Children</td>
<td>Junior Non-Fiction</td>
<td>01/06/2015</td>
<td>26/06/2015</td>
</tr>
</tbody>
</table>

Checkboxes allow displaying item numbers as full barcodes, and also the cost of items.
Options – Borrower Notes

Allows adding, removing or editing a loan or return note to the borrower.
Issuing an Item Already on Loan

If a borrower tries to borrow an item that is currently on loan to another borrower, Circulation may deny the loan.

However, a checkbox can be set so Circulation will provide an option to proceed.

If Yes is clicked, then the item is returned and immediately issued to the new borrower.

Quick Item Entry

If a loan is attempted using an item that has not yet been catalogued, a Quick Item Entry can be made on the spot.

The Title, Item Type and Due Date Category must be entered, along with either the Loan Block or Master password.

The item is catalogued using this data and the location is set to 100, indicating a Quick Entry.
When the item is returned, a note is displayed indicating the item has been Quick Entered and should be fully catalogued in Add/Edit Items.

**Borrower Photo**

Circulation can be set to display a borrower's photograph immediately, or hide it and show a pushbutton labelled "Photo" or hide it completely. This is set in Circulation Controls.
Clicking on the **Returns** button opens the *Returns Window.*

Scan the barcode or type in the number of each item to be returned.

If the item returned has a reservation, it will be placed on *Hold.*

An item on hold is given a status of 100 and also its status in the reservation list is changed from "n/a" to "on hold". The specific copy is put on hold and this is the only copy that person can borrow. A message appears indicating the item is on hold, and the **Print Notice** button becomes black. Printing hold notices can either be done manually or automatically.

When an item is returned, its status is set to 1, the Return Date is set to the current date, the Last Seen Date used by Stocktaking is also set to the current date, and a record of the Return transaction is placed in the Circulation History List (Circlog).

**View Item Details**

Double click on a title displays cataloguing details about the item.
Returning Boxes

All items that are members of a Box are issued on loan to the borrower when the box is borrowed.  

*Returning of all the items in the box is not automatic!* This is in case some of the items are missing. If a Box is returned, Circulation displays a special dialog that must be acted upon immediately.

Click on **Return all** to return all items in the box. It is assumed the items really are to be returned and nothing is missing.

**Return Some** allows returning selected items in the box.
Click on the boxes of the items to return then click OK.

Items are listed if returned.
Bulk Loan Boxes

Bulk Loan Boxes created during Loans can be dismantled when returned.

If the "Dismantle Bulk Loan Box when returned" checkbox is ticked, the bulk loan box is completely dismantled. This is the default condition. Removing the tick prevents the box from being dismantled.

Bulk Loan Boxes are identified by the phrase "Bulk loan" that appears on the Other line in AddEdit Items in Cataloguing. Removing that phrase turns the box into a regular, permanent box. When a Bulk Loan Box is dismantled, the phrase is automatically removed.
Special Commands

These command words can be typed on the “Scan item barcode” line or scanned from the circulation barcodes sheet.

**FINISH**
The command “Finish” closes the Returns window.

**SWAP**
The “Swap” command jumps from Returns to Loans. Pressing the F1 key or entering the terms BORROW or LOAN does the same.

**BOX**
When a box item is returned, a special window normally appears as described above. However, this can be disabled in Circulation Controls. Instead, the word BOX can be entered immediately after returning the box. This returns everything on loan that is linked to the box.

**STATUS**
The STATUS command can be used to change the status of an item that has just been returned. This can be useful to change an item on loan to lost.

Return the item first, then enter STATUS. Select the status to assign from the popup list.

Alternately, after the word STATUS type a space then the number of the status for lost. The popup box does not appear.

The term STATUS and a number can be printed as a barcode in Controls / Passwords or Print Barcode Labels in Cataloguing.
Reserve

The Reserve button (or keyword) on the Menu window or Loans screen is used to make reservations. The steps to follow are different in each.

Reserve an Item from the Circulation Menu

Click on the Reserve button.

Enter words from a title or an item's barcode or number and click on Find or press enter. (If words are used, a title word type search is performed. See the Search manual for information about this.)
To place a reservation, click on a title to highlight then click on Reserve or highlight and press Enter or double-click.

Scan a borrower's barcode or enter their number or type any part of their name and press Enter. If a name is entered, a list is presented.

If the reservation is successful, a notice appears.

Other borrowers can also reserve the same title until the window is closed.
Reserve an Item from the Loans Screen

If the borrower has already been scanned and their loans details are showing, a reservation can be made by clicking on the Reserve button at the bottom (it can be hidden) or entering the command RESERVE instead of a barcode.

Because the borrower is already known, a different reserve screen appears.

The borrower is identified at the top. Checks are made to determine if the borrower is allowed to borrow the item or there are any other restrictions in place.

To make a reservation, enter one or more words from a title or enter a barcode or item number.
Select the title to reserve. Click on the **Reserve** button.

Click on the **OK** button when finished.

There are conditions on making a reservation, some of which are optional.

- Normally, reservations can only be made if all copies are on loan. If any are available (have a status of 1), then the reservation cannot proceed.

- A control can be set to allow reservations against items with a status of 1.

- The item may be restricted to certain Borrower Types and this borrower is not allowed to borrow it.

- The item has a status of 99 or a loan restriction of 100. Copies of items with these conditions cannot be reserved. If copies with a regular status exist, a reservation can be placed. A status of 99 blocks making a reservation against an item.

If the reservation can be made, a notice appears.
Borrowers can view their reservations by clicking the *List* button. Holds are not listed. This button is on the Reserve an Item screen, near the borrower’s name.

At the bottom of this window, a borrower may be allowed to remove a reservation that they have made. This is an optional function.

Note: removing *holds* is not allowed. These must be borrowed and then returned to be removed.
News

The News button on the Menu opens a special bulletin board that anyone can read. News is a great way to spread special information.

Alternately, News can be made to appear automatically in the middle of the Menu window.
The News can be text or an image or text + image.

Note: the image is intended to be a book cover or similar size. Banners and large images used in the "image only" display will not appear correctly in the "text + image" format.
Search

The **Search** button on the Menu opens Bookmark's Search OPAC module.

![Bookmark OPAC interface](image)
Borrower Photographs

Borrower photos can be displayed on the Borrower screen.

To be used, photos need to be either imported or copied to the Photos folder.

- The files must have a JPG, PNG, GIF or BMP file extension.
- The filename of the photo must match the borrower’s Admin ID. Example: if the borrower’s adminID is 99001 then the filename of the photo must be “99001.jpg” or “99001.gif” or “99001.bmp”. Whatever the text is on the borrower’s AdminID field line must also be the filename of the photo file. Admin IDs are often entered into Bookmark as part of the process of importing student data from school administration database systems.

See the View Photos section in the Borrowers documentation for information on how to import the photos into Bookmark.
Controls

A myriad of controls are available to customize the behaviour of the Circulation Module.

Circulation Controls are available in the Controls module as well as the Circulation module itself. To access Circulation Controls in Circulation, click on the Edit dropdown list at the upper left corner of the Circulation menu.

Each tab deals with a different aspect of Circulation.
Setups

Circulation allows for four different configurations or "Setups". Each one can have a different mixture of settings. This allows one computer to be specifically set for student self-issue with particular security arrangements, and another computer for staff use.

To select a configuration, click on the Setup droplist on the bottom right corner of the Display tab.

Once a Setup is created, it becomes available. It is automatically created with default when selected.

To use a Setup other than the default, the desktop icon used to launch Circulation needs to be modified. This is done via its properties window.

First, on the required workstation, map a drive letter to Bookmark and create the desktop icon as detailed in the Networking Guide. (This is usually done by an IT specialist or your network manager, not library staff.)

To modify the icon, right click on the icon then left click on Properties.

At the top of the Circulation Properties window, left click on the Shortcut tab.

As in the example above, on the Target line, after the filename BMCIRC.EXE add a blank space and then the number of the Setup to use: 1, 2 or 3. This tells the icon which Setup this particular instance of Circulation is to use when it opens.

Click on Apply then OK.
Display Tab

The display tab deals with how things look.

Menu Display Style

This selects either the Standard style or the Menu style of the first screen. A graphic of the screen style appears on the right.

Standard Style

Menu First Style

Window Size

The Window Size control allows setting the Circulation window to be displayed either as a Window or Full-screen.
The window is set to fit within a 1024 x 768 pixel resolution display. This suits most laptops and Windows tablets.

**Display Switches**

**Enable minimize control**: Ticked causes the minimize button to appear on the titlebar. Clicking on that button causes Circulation to be minimized to the Windows Taskbar. Unticked hides this little button so Circulation cannot be minimized. Default setting is ticked or "On".

**Enable close window**: Ticked makes the Close button (red button with white X) appear on the right side of the titlebar. Unticked not only hides this button it also hides the titlebar itself.
**Disable book cover displays:** If ticked, book covers are not displayed in Loans and Returns.

**Display input as dots:** If ticked, barcodes and item numbers typed appear as dots like passwords instead of raw. This can be a method of hiding the input.

**Visible Menu Buttons**

<table>
<thead>
<tr>
<th>Controls enabled on Circulation menu</th>
</tr>
</thead>
<tbody>
<tr>
<td>☑ Returns</td>
</tr>
<tr>
<td>☑ Reserve</td>
</tr>
<tr>
<td>☑ News</td>
</tr>
</tbody>
</table>

These are the buttons which appear on the first Menus, either down the middle or across the bottom.

*Removing a tick hides the button.* Above are examples with all buttons hidden.

**Font Size**

This determines the size of font used in Loans and Returns.

<table>
<thead>
<tr>
<th>Loans/Returns font size</th>
</tr>
</thead>
<tbody>
<tr>
<td>☑ Large font</td>
</tr>
<tr>
<td>☑ Medium font</td>
</tr>
<tr>
<td>☐ Small font</td>
</tr>
</tbody>
</table>
Special Passwords

Six passwords are available to control entering barcodes, entering an area or leaving it.

Note: anywhere Circulation or Bookmark asks for a password, the Master Password – set in the Passwords section in Controls – can always be used. However, there may be times where you may wish specific people to be able to access or override various situations but you do not want them to be able to override everything. All of Bookmark's passwords, except the Master Password, are intended for that purpose.

If passwords are left blank, they are not requested. This may cause certain functions, which may ask for a password, not to operate. This may be advantageous in some situations.

If the Master password in Controls is blank, then all passwords are automatically disabled even if present. A Master Password is required to enable other passwords.

**Enter Circulation:** This is the password which can be used to restrict who can open the Circulation module. If left blank, anyone can open it, otherwise this password is required.

*Note: Passwords are not case sensitive. They can be typed either in upper or lower case. Symbols and blank spaces are important, however.*

**Exit Circulation:** This password is requested when anyone tries to leave Circulation via the Exit button, the Close window control on the Menu or using the keyword command EXIT. Failure to enter this correct password (or the Master password), prevents leaving Circulation.

**Enter Returns:** Only people who know this password (or the Master) can return items. If this password is left blank, then anyone can use Returns.

**Typing Code:** Discussed previously, this password is requested if anyone types in a number instead of entering or scanning a full barcode. The intention is to discourage students from typing numbers instead of scanning barcodes. (This password is not requested if the entire barcode is entered.) This function works only in loans and returns. *Note: if your borrower or item barcodes are simply numbers of 5 digits or less in length instead of full barcodes, then this password must be left blank.*
**Circulation Ctrls:** This password restricts who can open Circulation Controls from the first screen's menubar drop-down menu (below). If students do their own borrowing use of this password is strongly advised.

**Make Reservation:** Placing a password here restricts who is allowed to make reservations. The password must be entered to make a reservation.

**Enter Previous borrowers:** This is an optional password that can be used to restrict access to the Previous Borrower information. If it is entered it replaces the regular Circulation Controls password.

**Enter Reservation ctrls:** This optional password can be used instead of the regular Circulation Controls password to restrict who can access reservation controls.
Changing Colours

Colours allows setting the colour of various windows, both the background and font colours.

To change a colour, click on the button. A special colour setting dialog appears.

Click on the background colour on the left to set it. Click on a text colour on the right to set the colour of the font. Take care to ensure the colours are comfortable and do not clash.
Click on *Advanced* for more colours.

The advanced dialog allows setting a very wide range of colours. Be careful! Bookmark normally uses black for text, therefore background colours should be light in tone.

**Loans Colours**

Loans colours also allow changing the colours used to list items on loan.

The Colours button allows a high degree of customizing colours used for the list of items on loan.
First click on the list in the middle to determine which text element to change.

Select a colour and OK. The selected colour is displayed in the grid above.

**Returns Colours**

Returns also allow specifying the text and background colours to be used for various messages that can be displayed during returns.

To change a colour combination, first click on a line to place the dot.

Click on Set Foreground Text Colour to change the colour of the text.
Click on Set Row BackgroundColour to change the colour of the stripe behind the next.
Click on Set Default Colours for the standard set.

Colour changes are saved with OK is clicked.
Sounds

Circulation offers a series of sounds to alert users to various events. Use the Sounds dialog to assign a sound to an event.

<table>
<thead>
<tr>
<th>Sound event</th>
<th>Sound played</th>
</tr>
</thead>
<tbody>
<tr>
<td>General sound</td>
<td>.beep1</td>
</tr>
<tr>
<td>Loan OK</td>
<td>.blips</td>
</tr>
<tr>
<td>Loan blocked</td>
<td>.siren2</td>
</tr>
<tr>
<td>Quick entry</td>
<td>.siren3</td>
</tr>
<tr>
<td>Return OK</td>
<td>.blips</td>
</tr>
<tr>
<td>Return box</td>
<td>.beep3</td>
</tr>
<tr>
<td>Return overdue item</td>
<td>.beep1</td>
</tr>
<tr>
<td>Return reservation</td>
<td>tada.wav</td>
</tr>
<tr>
<td>Return not on loan</td>
<td>.no sound</td>
</tr>
<tr>
<td>Return irregular</td>
<td>.beep2</td>
</tr>
<tr>
<td>Cannot reserve item</td>
<td>.beep2</td>
</tr>
<tr>
<td>Overdue item</td>
<td>.siren2</td>
</tr>
<tr>
<td>Loan limit reached</td>
<td>.siren2</td>
</tr>
<tr>
<td>Restricted item</td>
<td>.siren2</td>
</tr>
<tr>
<td>Privacy code required</td>
<td>.siren2</td>
</tr>
<tr>
<td>Item on loan to person</td>
<td>.siren2</td>
</tr>
<tr>
<td>List items on hold</td>
<td>.siren2</td>
</tr>
<tr>
<td>Item on hold</td>
<td>exclamation.wav</td>
</tr>
<tr>
<td>Item previously borrowed</td>
<td>.beep1</td>
</tr>
<tr>
<td>Borrower comment</td>
<td>.beep1</td>
</tr>
<tr>
<td>Loan note</td>
<td>.beep2</td>
</tr>
<tr>
<td>Return note</td>
<td>.beep2</td>
</tr>
<tr>
<td>News alert</td>
<td>.no sound</td>
</tr>
<tr>
<td>Birthday alert</td>
<td>HAPBIRTH.WAV</td>
</tr>
<tr>
<td>Extend loan</td>
<td>.no sound</td>
</tr>
</tbody>
</table>

There are 24 sound events.
To link a sound to an event:

1. Click on the event in the list first to highlight it.
2. Use the dropdown list at the bottom to select a sound.
3. You can click on Test to hear the sound before assigning it.
4. Click Set to assign the sound to the highlighted event.

*Default* resets all sound links to the standard ones.

Sounds beginning with a "dot" are simple beeps made using the old PC Speaker system. Some computers are not able to generate sounds in this way.

Sounds beginning with an underbar are built into Windows and should work on all systems.

Sounds ending in .wav are "wav files". These files contain sound data that can be played like music or speech. A selection of wav files is provided with Circulation, and you can add your own. You can even record your own wav sound file – including voice! – using appropriate software and microphones.

Many wav files are available on the Internet. To add one to the list, save it to the Sounds folder located where Bookmark has been installed. Or click on the IMPORT button to save it.

Click on OK to store the sound settings.
Loans Tab

Loans Switches

- Loan limit warning on next loan attempt
- Overdue warning on next loan attempt
- Previous loan alert
- Extend loans by entering existing loan
- Allow borrowing on item that is on loan to someone else
- Make sound and flash window when a loan block occurs
- Show Name button to find borrowers by name
- Use list of names based on a class (in a droplist)
- Allow FS popup class list chooser
- Show + next to borrowers in droplist who have items on loan
- Show list of names below 'enter barcode' instead of a droplist
- Enter name directly on barcode request box to find
- Do not allow quick entry of items and borrowers
- Show location instead of item type
- Do not allow borrower to reborrow same item 2 times in a row
- Show cost in list of items on loan
- Show gridlines on loans display
- Show latest loan at bottom of list instead of top
- Do not count contents of boxes toward loan limit
- Ask whether to issue contents of a box
- History and Reservations can be viewed in item details
- Search button displayed instead of Options button
- Alert if borrower has lost or missing items
- Show message if an item is already on loan to the borrower
- Hide borrower number/barcode
Loans Switches activate various functions involving issuing loans.

A tick means the Switch is ON and that control is active. A blank box means the Switch is OFF and inactive.

**Loan limit warning on next attempt:** If OFF, if the borrower has the maximum number of items on loan, they are notified the moment their barcode is scanned or immediately they reach the limit. If OFF, the alert does not appear until they try to borrow past their limit. This allows borrowers to view their loans without a loan limit warning appearing first.

**Overdue warning on next loan attempt:** On tells Circulation not to display a loan block alert if the borrower has overdue items unless they try to borrow anything. OFF causes this block to appear immediately after scanning the borrower’s barcode. ON is the default. Having this block delayed permits looking up borrower histories and other tasks without requiring a password.

**Previous loan alert:** ON causes Circulation to produce an alert if the item being issued has previously been borrowed by this same borrower. OFF suppresses this check.

**Extend loans by entering existing loan:** Normally, the EXTEND command (in Options) is used to extend loans. However, if this Switch is ON, then a loan can be extended by simply scanning its barcode. A password may or may not be requested, depending on another Switch located in the Loan Block Passwords section (right side).

**Allow borrowing an item that is on loan to someone else:** ON allows Circulation to issue an item that is on loan to someone else to a different borrower in Loans. The item is automatically returned then issued to the new borrower. OFF prevents this.

**List only overdue items in loans:** ON tells Circulation to display only overdue items when in Loans but to hide other non-overdue items on loan.

**Make sound and flash window when a loan block occurs:** This is a method to try to hit someone between the eyes when a lock block event is triggered. A big red window appears and sounds are made, the exact sound depending on the type of block.

**Show Name button to find borrowers by name:** ON tells Circulation to display the pushbutton Name next to the "Scan borrower barcode" line. The button can be used to find a borrower by their name. If this button is hidden, type the word NAME and press enter still works, as do other methods.

**Use list of names based on a class:** ON displays a Classes pushbutton. Click on this for a droplist of classes. This is a very useful feature in cases where only library staff issue loans.

After selecting a class another droplist appears: Choose a name. Click on this for a droplist of all the borrowers in the class.
Allow F5 popup class list chooser
Instead of the above, the dropdown lists of classes can be hidden but the F5 set to pop up a window listing classes and borrowers. This keeps the lists hidden until required.

Show list of names below 'enter barcode' instead of a droplist: Tick this box to list the names of borrowers on the screen instead of using the droplist box above. Click on a name to select.

Show + next to borrowers in droplist who have items on loan: If this is ticked, a + symbol appears next to the names of borrowers with items on loan. This function is not available unless the dropdown list of classes is activated.
Show list of names below 'enter barcode' instead of a droplist: This option causes the names to be listed directly on the loans borrower-barcode entry window, without having to use the dropdown list. It disables "Display news immediately".

Enter name directly on barcode request box to find: If this is ON, then you can type in part of a borrower's name to locate them directly on the line where the barcode is normally scanned. OFF disables this feature.

Do not allow quick entry of items and borrowers: OFF disables the ability to quick entry borrowers and items.

Show location instead of item type: ON displays the location of an item in the list of items on loan instead of the item type.

Do not allow borrower to reborrow same item 2 times in a row: If marked, Bookmark will prevent a borrower lending the same item twice in a row by asking for a password.

Show cost in list of items on loan
Includes the cost of items in the list of items displayed as on loan to a borrower.

Show gridlines on loans display
If ticked (default), lines are shown on the loans screen as a grid. Removing the tick hides the lines.

Show latest loan at bottom of list instead of top
Normally, the latest item borrowed appears at the top of the list of items on loan to the borrower. Placing a tick, tells Bookmark to display the latest loan at the bottom of the list instead.

Do not count contents of boxes toward loan limit
Normally the contents of a Box are added to the loan limit. If the box has 12 members, then 12 is added to the loan limit. If this control is ticked, however, the contents are not added, only the box itself.
Ask whether to issue contents of a box
Normally when a Box is borrowed, it and all the members of the box are issues out at the same time. If this checkbox is ticked, however, a popup window will ask whether the contents should be issued or just the box itself.

![Loan block]

History and Reservations can be viewed in item details
When ticked, the History and Reservations buttons appear on the popup window that displays an item's details in loans. They also appear in the quick search (f8) display. An additional button also allows editing the item's data.

Include items with other status types in loan list
This tells Loans to include items with a status of 3 or larger in the list as well as items on loan (status of 2). The status is noted on the right side.

Search button displayed instead of Options button
This allows hiding the Options button. It is replaced by a Search (catalogue) button.

Alert if borrower has lost or missing items
If ticked, if a borrower has any items with a status containing the words 'lost' or 'missing', a hyperlink is shown beneath their name. Clicking on this lists the items.

Show message if an item is already on loan to the borrower
If an item is already on loan to the borrower a notice is generated.

Hide borrower number / barcode
The borrowers number or barcode is not visible on the borrowing display next to their name.

Visible Loans Buttons

- Return
- Reserve
- History
- Options/Search
- Extend
- Swap (F1 key)

In addition to the buttons on the Circulation Menu and the bottom of the Loans screen, there are also buttons on the bottom of the Borrower screen.
These checkboxes control which buttons are visible at the bottom. All of these functions can also be activated by key words typed or scanned on the "Scan item barcode" line, so even if hidden, the function is still available.

**Display Switches**

These determine whether News is shown on the loans screen or not and if borrower photos are displayed.

<table>
<thead>
<tr>
<th>Display switches</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Display news on loans screen</td>
<td>✓</td>
</tr>
<tr>
<td>Display borrower photo in loans</td>
<td></td>
</tr>
</tbody>
</table>

**Loan Block Password, Commands and Switches**

<table>
<thead>
<tr>
<th>Loan Blocks</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Loan block password: MATTHEWS</td>
<td></td>
</tr>
<tr>
<td>Loan block password requested for each of the following:</td>
<td></td>
</tr>
<tr>
<td>✓ Setdate</td>
<td>✓ Extend</td>
</tr>
<tr>
<td>✓ Name</td>
<td>✗ Return</td>
</tr>
<tr>
<td>✓ Override overdue block</td>
<td>Overdues!</td>
</tr>
<tr>
<td>✓ Override loanlimit block</td>
<td>Loan limit reached!</td>
</tr>
<tr>
<td>✓ Override loan restriction</td>
<td>Restricted item!</td>
</tr>
</tbody>
</table>

These controls deal with events that can cause the loan process to be blocked.
If the event is not ticked, the Switch is OFF and a password is not requested. The event then proceeds unhindered. Tip: only tick events where necessary.

**Loan block password**: This important password is requested when a Loan Block event occurs. If this password is left blank, then loan blocks do not occur *even if ticked*. The Loan block password should be different to the Master password. Tip: always have a loan block password.

*Name* refers to finding borrowers using their name. Tick this box if you want to limit who can do this.

Next to the three bottom events are messages in white edit boxes. This is the wording which appears when this type of loan block event is triggered. The messages can be changed. Tip: even if the event is unticked, the red popup window appears anyway.

**Borrower Privacy Passwords and Switches**

In addition to the Name switch above, Circulation has other switches that turn on or off various borrower information privacy functions.

- **Borrower privacy**
  - **Borrower Privacy:**
    - [ ] Ask for Privacy Password when Show command is issued
    - [ ] Ask for Privacy Password when History command is issued
    - [x] Display list of items on loan when borrowing
    - [ ] Request Privacy Code for loans

**Privacy password**: This password is requested to secure borrower information.

**Ask for Privacy Password when the Show command is issued**: This Switch is used to hide the list of items on loan which appears after the borrower enters their barcode. If this switch is ON (ticked), Circulation will hide the list of items on loan. To see the list, the Show button at the bottom must be clicked. If the borrower has a Privacy Code, the Privacy Password, Loan Block password, Master password or the borrower’s individual Privacy code can be entered. If the borrower does not have a privacy code, then the password is not requested when Show is clicked.

**Ask for Privacy Password when History command is issued**: If ticked, a password is requested when someone clicks on the History button.

**Display list of items on loan when borrowing**: If this switch is ON, then Circulation will automatically display a list of items on loan automatically when the borrower barcode is entered. This is the default condition. If borrower privacy is a concern, this switch should be OFF.

**Request Privacy Code for loans**: If this switch is ON, the borrower’s privacy code is requested before the borrower can borrow anything. This switch is useful to protect students from others using their barcodes. If the borrower does not have a Privacy Code, then the request does not appear and loans proceed unhindered.

**Loan Blocks**
This window can be used to block or unblock trapping overdues for each borrower type.

**Loan Receipt Controls**

Bookmark is able to print "loan receipts". These are slips listing items just borrowed and optionally, everything the user has on loan. They can be deliberately triggered when needed or set to automatically print after every loan.

Three print formats are available: Wide, Standard and Small.
Wide format prints across a normal sheet, 210mm A4 width.

Standard assumes a maximum width of 80mm. This is suitable for the narrow receipt printers such as the Star model.

Small assumes an even narrower width of 50mm.

Use the top of the dialog to select the format if automatically printing.

These printouts always list the items just borrowed.

**Include current loans as well as latest:** ON tells Circulation to include the other items on loan to the borrower as well as those just issued.

**Use print requestor for receipts:** If OFF, printout goes to the default printer, which may be the receipt printer. ON allows selecting the printer.

**Include borrower's name:** OFF does not print the borrower's name.

The Header is what appears at the top of the printout. It can be the name of the school or anything else or left blank. If included, %date% tells Bookmark to place today's date there.

The Footer is a message that appears at the bottom.

Headers and footers are automatically centered.

Note: Even if receipt printing is not automatic, it can still be used on one-off situations. Just type the word DUMP (wide format) or SLIP (standard format) on the barcode entry line. This tells Loans to print the receipt when the borrower is finished. Afterwards, the function is disabled unless it is set to automatic.
These Switches control aspects of returning items.

**Autoprint reservation notices**: If ON (ticked), Circulation will automatically print out a Hold notice when a reserved item is returned.

**Show borrower name when returning**: ON tells Circulation to display the borrower's name with all returned items. OFF suppresses the display.

**Display green dialog to return boxes**: When a Box is returned, a line appears indicating it is a box. If this Switch is ON, a green window pops up, too, offering various options.

**Hold notification popup window**: If ON, a blue popup window appears when an returned item changes from reserved to on hold.

**Display printer dialog for reserve notices**: Causes Circulation to open the printer dialog window when it wants to print a hold notice. If OFF, printout automatically goes to the default printer.

**Do not return items in a box singularly**
When an item belonging to a box is returned, do not return it. Can only be returned when the box itself is returned.
Custom Hold Alert

Custom message that appears when a reserve is returned and becomes a hold.
Special: [name] [class] [year] to display a borrower's name, class and/or year level.

Please place the book just returned
[name]
[class]
[year]
in the red holds tray

When reserved items are returned, Bookmark normally displays a quick small window alerting users the item had gone on hold.

A special alert can be generated by filling out this control. It produces a large red window.

Please place the book just returned
SIMPSON, Thomas
(class 1SB)
(year 1)
in the red holds tray

The control allows entering a message. Terms in square brackets act like commands.
[name] means to show the borrower's name.
[class] shows the class
[year] shows the year level.

These are optional and can be omitted.

They also do not have to be on separate lines. The presentation is up to you.

A maximum of five lines can be accommodated.
Return Status Sounds

This allows setting different alert sounds that are played when an item is returned if its status is 3 or larger.
Reservations Tab

Allow reserves against status 1 items
Normally reservations can only be placed against items if all copies are on loan. If a copy is not, a reservation cannot be made. Setting this to ON allows placing a reservation even if a copy has a status of 1.

Allow reserves against items with a status of 3 or greater
Ticking this box allows items with a status of 3, 4, 5, etc. to be reserved.

Borrower allowed to remove reservations: ON allows borrowers to remove reservations from the Display option in Reserve in Loans.

Show ‘r’ next to item number if item has reservations
With this ticked, a small ‘r’ is displayed next to an item number that has reservations against it. To see the list, double-click on the entry and click on the Reservations button (see above).

Allow an item on hold to be borrowed by someone else
Items on hold normally cannot be borrowed by anyone other than the holdee. This checkbox disables that block.

Filter by site
If the fieldname is set to "Site" instead of "Sublocation" (see General Controls), this checkbox can be used to add a special filter. The filter is only available when finding reservations. It appears at the bottom of the items-found list. The filter allows selecting a particular site or all sites.
Mass Change Loans

This option is used to extend many loans or change their status from on loan to something else. It does not require any knowledge of the borrower.
### Change by Choosing from a List

- Click on a column heading to change the order of the list.
- Click on items to be extended. To select more than one, hold down the CTRL or SHIFT keys and click at the same time. Click on Extend to change the due dates.
- Click on Reset due date to assign a due date different to what would normally be assigned based on the borrower's due date. This is like the Setdate function in Loans.
- Change Status can be used to change marked items on loan (status 2) to a different status (such as lost). This window can be used to mass return highlighted items if the status is set to 1.

![Change Status Window](image)

**Highlight entries to extend or change status.**

<table>
<thead>
<tr>
<th>Item #</th>
<th>Title</th>
<th>Item #</th>
<th>Title</th>
<th>Item #</th>
<th>Title</th>
<th>Item #</th>
<th>Title</th>
<th>Item #</th>
<th>Title</th>
<th>Item #</th>
<th>Title</th>
<th>Item #</th>
<th>Title</th>
<th>Item #</th>
<th>Title</th>
<th>Item #</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>32902</td>
<td>The Encyclopedia of the Unexplained</td>
<td>450</td>
<td>ROBINSON, Ella</td>
<td>597</td>
<td>ALEXANDER, William</td>
<td>598</td>
<td>ALEXANDER, William</td>
<td>599</td>
<td>ALEXANDER, William</td>
<td>600</td>
<td>ALEXANDER, William</td>
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<td>ALEXANDER, William</td>
<td>602</td>
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<td>ALEXANDER, William</td>
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<td>32920</td>
<td>Optical Illusions</td>
<td>238</td>
<td>HOWELL, Lachlan</td>
<td>438</td>
<td>DAVIDSON, Lucie</td>
<td>604</td>
<td>ALBERTSON, Scott</td>
<td>605</td>
<td>ALBERTSON, Scott</td>
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<td>ALBERTSON, Scott</td>
<td>609</td>
<td>ALBERTSON, Scott</td>
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<td>Farming in the future: Food and farming</td>
<td>227</td>
<td>SUPPLE, Jessica</td>
<td>36</td>
<td>TSCHIEF, Larry</td>
<td>610</td>
<td>ALBERTSON, Scott</td>
<td>611</td>
<td>ALBERTSON, Scott</td>
<td>612</td>
<td>ALBERTSON, Scott</td>
<td>613</td>
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<td>ALBERTSON, Scott</td>
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<tr>
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<td>Cars</td>
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<td>HAYWARD, Olivia</td>
<td>19</td>
<td>249</td>
<td>616</td>
<td>ALBERTSON, Scott</td>
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<td>470</td>
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<td>87</td>
<td>249</td>
<td>622</td>
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<td>Flatland 3: Maxim Puzante Fastly</td>
<td>439</td>
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<td>ALBERTSON, Scott</td>
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<td>32974</td>
<td>Everything you need to know about Snakes...</td>
<td>285</td>
<td>CUTLER, Jay</td>
<td>635</td>
<td>ALBERTSON, Scott</td>
<td>636</td>
<td>ALBERTSON, Scott</td>
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<tr>
<td>32986</td>
<td>Andy Road and the Turbine Runaway : Book...</td>
<td>127</td>
<td>LUCAS, Hugh</td>
<td>642</td>
<td>ALBERTSON, Scott</td>
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<td>ALBERTSON, Scott</td>
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<td>647</td>
<td>ALBERTSON, Scott</td>
<td>648</td>
<td>ALBERTSON, Scott</td>
</tr>
</tbody>
</table>

- **Normal due date**

  ![Change Status Window](image)

**Change the status of the marked items from on loan to the status indicated below.**

- Available
- UNLOGGED [Dec 12]
- Repairs
- Lost/Damaged
- ON ORDER
- ACQUIRED
- Processing
The Filter can be used to reduce the size of the displayed list of items on loan.

The list can be limited to certain locations or item types.
Extend by Scanning Barcodes

With this dialog, simply scan in each item's barcode. The due date will be extended to whatever is consistent with the item's due date categories.

This option is useful for extending loans for a pile of textbooks. It is not the normal way to extend loans. See the EXTEND command in Loans and in Controls.

Barcodes can be scanned or imported or downloaded. See Stocktaking for information about importing barcodes from a file and downloading barcodes from portable readers.
Previous Borrowers

This function can be used to list previous borrowers.

Enter one word from the title or the item’s barcode or number.

Select an entry by highlighting then click on either \textit{Latest} (below) or \textit{All}.
Lego Harry Potter: Characters of the Magical World

Author(s): RICHARDS, Jon
Call number: F 805
Subjects: Potter, Harry (Fictional character); Lego
Publisher: London: DK, 2012
ISBN: 9781409383185
Cost: 23.95
Other: PWP5-12-31599

Item number: 31599
Barcode: 11413915997
Status: 2
Item type: 1
Location: 1

Notes:
141 p.: col. ill. ; 24 cm. ; 1 Lego Harry Potter minifigure in plastic bag inset into front cover.

<table>
<thead>
<tr>
<th>Item</th>
<th>Location</th>
<th>Status</th>
<th>Borrower</th>
<th>Due date</th>
<th>Class</th>
<th>Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>31599</td>
<td>Library</td>
<td>3</td>
<td>Smith, Justin (4RF)</td>
<td>31/10/2013</td>
<td>92Y</td>
<td>5</td>
</tr>
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</table>

Previous Borrowers

Lego Harry Potter: Characters of the Magical World

35 Items

<table>
<thead>
<tr>
<th>Borrower</th>
<th>Class</th>
<th>Item</th>
<th>Date borrowed</th>
</tr>
</thead>
<tbody>
<tr>
<td>EDEN, Jude</td>
<td>3EC</td>
<td>31599</td>
<td>17/10/2013</td>
</tr>
<tr>
<td>SCHOOLEY, Lachlan</td>
<td>2HN</td>
<td>31599</td>
<td>16/10/2013</td>
</tr>
<tr>
<td>SCHOOLEY, Lachlan</td>
<td>2HN</td>
<td>31599</td>
<td>09/10/2013</td>
</tr>
<tr>
<td>BENEFIELD, Darcy</td>
<td>4RC</td>
<td>31599</td>
<td>18/09/2013</td>
</tr>
<tr>
<td>GORDON, Oliver</td>
<td>4RC</td>
<td>31599</td>
<td>11/09/2013</td>
</tr>
<tr>
<td>BENEFIELD, Darcy</td>
<td>4RC</td>
<td>31599</td>
<td>11/09/2013</td>
</tr>
<tr>
<td>GORDON, Oliver</td>
<td>4RC</td>
<td>31599</td>
<td>04/09/2013</td>
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<tr>
<td>EDIS, Oliver</td>
<td>2BG</td>
<td>31599</td>
<td>01/08/2013</td>
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<td>24/07/2013</td>
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<td>27/06/2013</td>
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<td>STEPNIAK, Maximilian</td>
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<td>05/06/2013</td>
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<td>29/05/2013</td>
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<td>4RC</td>
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<td>22/05/2013</td>
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<tr>
<td>SCHOOLEY, Lachlan</td>
<td>2HN</td>
<td>31599</td>
<td>15/05/2013</td>
</tr>
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<td>SCHOOLEY, Lachlan</td>
<td>2HN</td>
<td>31599</td>
<td>08/05/2013</td>
</tr>
<tr>
<td>GUBERNA, James</td>
<td>2HN</td>
<td>31599</td>
<td>08/05/2013</td>
</tr>
<tr>
<td>GUBERNA, James</td>
<td>2HN</td>
<td>31599</td>
<td>08/05/2013</td>
</tr>
</tbody>
</table>

Circulation
Reservation Controls

The Reservation and Holds Controls window can be accessed either from Circulation or Controls (Main Menu).

A list of all reservations and holds is displayed in alphabetical order by title. The list cannot be re-sorted.

All reservations and holds to a title are grouped together.
Display entry

Click on an entry to highlight it and then click on the Display entry button.

This displays cataloguing details about the item.

Remove entry

This button removes the highlighted entry.

Clear List

This is used to clear out the reservation and holds list. It removes all reservations and holds.
Age List

“Remove entries prior to date below” is used to age the reservations list. It removes all reserves and holds that were made prior to the date specified. As the current date is displayed by default, it is necessary to change it to an older date, otherwise all reservations may be removed.

Print notice

This option prints out a Hold notice for the highlighted item.

Highlight the entry for which you wish to print a notice and click on the Print notice button.
The dialog that appears next displays the notice in brief and the one-line message that will accompany it. If you wish to change the message, you may change it here before printing. This is a temporary change – the next notice will revert to the default message again.

Click on OK to print the notice or Cancel to abort the procedure and close the dialog.

**Batch print notices**

![Batch print notices dialog](image)

This button is used to print a batch of Hold notices.

The date is used to filter out old Holds. The current date is always displayed as a starter, so it may need to be changed.

Click on OK to process the batch notices.

**Print entire list**

Prints the entire reservations and hold list.

**Print holds only**

Print a list of items on hold, omitting reservations (not yet returned).

**Print for a title**

Prints all reservations and holds for a title. Highlight the topmost copy of the title before selecting this option as it only prints from the highlighted line down.
Edit messages

Reservation and Hold notices have a single line message that appears at the bottom.

Borrower types

Tick the borrower types that are allowed to reserve and leave the ones who cannot unticked.

Set all ticks all types. If they are either all ticked or all empty, Bookmark does not restrict reserving. Borrowing is only restricted if some of the boxes are ticked.
Limits

These values determine the maximum number of reservations against a title (regardless of the number of copies) and the maximum number of reservations one person can make per title.

The maximum number of reservations allowed per person is adjusted in Borrower Types.

Changing the Queue

Use the Up and Down buttons to shift a highlighted entry in the list. The entry can only be shifted among other entries for the same title (link number).

F

The F key can be used to toggle "on hold" and "n/a" for any highlighted item. This is used to correct an anomaly if discovered.

CTRL F6

The CTRL F6 combination is used to change the item number against a highlighted entry. Use with extreme caution to correct only.

Collect Within

The number specifies how many days can elapse before an item on hold should be collected. It is included on the hold notice printouts. The button Uncollected Holds can be used to list all entries with dates past this calculation.

Reservation Notice formats

Hold notices are available in two formats: regular page and "slip".

The tickbox "Print notices in SLIP format" determines which is to be used.

Regular page is a normal A4 page, 210 mm wide.

Slip is narrower, suited to receipt printers. Bookmark automatically calculates the page width. The printed format is somewhat different to the regular page format.
Due Dates

This choice calls up the Due Dates dialog, presented in the Controls module documentation.

Due dates can also be changed in Borrower Types and the Due Date Categories list in Cataloguing Lists in Controls, but this does it all on one screen.

When the change has been entered, click on "Update to List".

Repeat for any other changes then click on "Save".
Overdues

This opens the entire Overdues module.
List Items on Loan to a Class

This option – which can also be brought up by the F9 key – can be used to list everything on loan to a class.
List Items Reserved to a Class

Use the F6 key to bring up a list of items reserved and on hold to a class.
Set Temporary Due Date

The temporary due date function can be used to set a due date different to all other due dates. This is an on-the-fly change.

Either select the "Set temporary due date" option from the edit menu or press the F12 key.

A due date editing window appears.

Select the due date and click OK.

The selected due date is then used for all borrowers until the temporary due date is turned off or Circulation is closed.

To turn off the temporary due date, either select the function again or press F12 again.
This function is also available via F12 after a borrower's loans are shown and they are ready to issue.
Bookings

Bookmark contains an easy to use booking system.

By default the booking system is deactivated. To activate, bring up the Circulation Controls window. In the Enable section, place a tick next to Bookings.

All booking is done through Circulation.

Bookings can be made for an entire day or part of a day.

After opening Circulation, Click on the Edit menu and on the dropdown menu, click on Bookings. Alternately, press the F4 key. The Bookings option only appears if bookings have been activated.
This brings up the Bookings window.

All current bookings are listed, initially in the order in which they are stored. The list can be sorted normally by clicking on the heading of any column.

Add a booking
Click on the Add button or press the A key.

First enter a borrower barcode, number or name.

Next, enter an item’s barcode, number or title.
If a word or title is entered instead of a barcode or item number, a list of titles is shown.

![Image of a list of titles](image)

An *Add a booking* dialog then appears.

![Image of an add booking dialog](image)

By default the start and end dates are the current date. Use the dropdown calendars to set the desired dates.
Use the Recurring dropdown list to set for:
- Daily
- Weekly
- Fortnightly
- Monthly same day
- Monthly same date

Start and End times are in 30 minute intervals, valid from 7:00 am until 4:30 pm.

Daily sets a booking for every day within the start and end range. If the booking is for a single day, make the start and end dates the same and set Recurring to Daily.

Click OK. The bookings are calculated and all are added to the bookings list. Bookings are always added to the end of the list.

Bookings cannot overlap – i.e. the same item's booking cannot be the same as other dates and times already booked for the same item. Note the booking is to the specific copy of an item, its item number, and not to any copy like reservations.

Delete Bookings

Highlight any bookings to be removed and click on the Delete button or press D. Multiple bookings can be removed at the same time.

Print Bookings

Click on Print or press F7 to print the entire booking list.

Clear Bookings

This deletes all bookings.

Borrowing

If an item's due date comes after its booking date to a different borrower, the item cannot be borrowed.

If a loan is attempted to a different borrower on the booking day, the loan cannot proceed.

Start of Day

At the start of the day, Bookmark automatically removes any bookings with dates prior to the current date.

Bookmark also notifies the user of the number of bookings at the start of a day, with an option to view and print a list.