Overdues

Revised 23/07/2018
Overdues

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

Overdue Criteria:

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

The test date is usually the current date (today). If today is 17/07/2018, then any item with a due date before that date is classified as overdue. An item with that due date or later is not overdue.
Overdue Lists

The Overdue Lists operation generates column-format lists of overdue items.

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

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

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

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

Ticking *Items due on this date are also overdue*, changes the criteria slightly so that items due on the same date are overdue.
Click on *Print* to see a summary list of the number of overdues per class or year level.

All borrowers having overdue items and matching the selected criteria are listed.
Double click on a borrower to view just their overdues.

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

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

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

Page Layout

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

Include cost in printout adds the cost of items.

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

Printing Font

The font and font-size used by the printout can be changed. Default is Tahoma, 8 point.
Prints out the overdues in list format to all borrowers in the grid or only those highlighted.

**Print to file**

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

**Export**

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

Clicking on this button brings up a window that can be used for sending a list of overdues to classes. Enter the email address for each class on this window. Enter a subject line and select a message then click on Send.

Note: make sure that email settings have been put in place. Go to Controls / General Controls.
Lists all items overdue to all the borrowers displayed or only those highlighted.

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

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

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

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

Change any of the limiting criteria if desired.

Click on Proceed to proceed.
All borrowers from the selected classes, year levels or types are displayed in the grid.

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

Click on the **View all overdue items** button to see all overdues to all the borrowers in the grid or to just those highlighted borrowers.

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

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

Overdue notices are generated in a simple text format. The notices can be printed, saved and edited. The notices can be for all borrowers or highlighted ones only.
It is possible to highlight and copy then paste these overdue notices into email notices.

This prints out overdue notices only to the highlighted borrowers.

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

Overdues
Configuring Overdue Notices

Several parameters are available to customise overdue notices.

Five different formats are available for Overdue Notices:
- Regular overdue notices
- Notices including book covers
- Letter
- Letter with covers
- Email

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

Due to the physical size of book cover images, formats printing covers provide a limited number of overdues per page. Six is the maximum. "Without covers" uses a more compact list format.

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

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

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

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

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

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

**Heading** appears above the borrower’s name (but below the optional banner). It can be the name of the school or any other text. Several colour combinations are available.
Font and font-size

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

Letters

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

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

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

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

Email

Overdue notices can be emailed to borrowers provided Bookmark is able to access a smtp mail server.

After selecting the Email format, click on Email Settings. These must be correctly filled out to email the notices.
Two different "methods" are available to send emails.

The standard set works in most cases, but in cases where emails are not being sent switch to the alternate email system.

**Both systems require a smtp email server.**

*SMTP Server* is the address of the smtp mail server being used.

TLS/SSL should only be ticked if the smtp email service requires it. Most do not.

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

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

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

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

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

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

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

**Borrower Email Addresses**
Borrowers must have correct email addresses saved in their records. This is done in Add/Edit Borrowers. Some administration and school management systems, such as Edwards, may provide email addresses during importing.

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

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

**Email Settings for Google's Gmail**
- **SMTP Server:** smtp.gmail.com
- **Use TLS/SSL:** tick this checkbox (mandatory)
- **Port:** 587 (not 25)
- **Email login:** gmail account address (e.g. username@gmail.com)
- **Email password:** gmail account password
South Australian Department for Education Schools Special Note

SA Department for Education schools must apply to the CSC with a request to "allow devices to send email". A form needs to be filled out and sent to the Department. The request is for a specific computer with its IP address.

Check with your network administrator if you are unsure about the settings.

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

Email Settings for DfE schools (South Australian state schools only)

SMTP Server: smtp.schools.sa.edu.au
Use TLS/SSL: do not tick this
Port: 25
Email login: leave blank
Email password: leave blank

Access to sending emails for DfE schools is normally blocked. To access the smtp mail server, DfE schools need to apply to the CSC with a request to allow devices to send email. See the Email Fact Sheet for more information.

Two different email formats are available: text and html.

Text sends a simple "text only" email. This works for everyone.

Html provides a formatted, more attractive notice. It may even include book cover images. This is automatic.

The book cover images come from Bookmark's CPAC internet search system. A large pool of cover images are available online. Users can contribute to the pool by going to Cataloguing then Export Items then CPAC format. Even if you do not have a CPAC page, your covers can still be uploaded. The more covers uploaded by users, the more are available to everyone.
Overdue Setups

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

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

Click on Save Setup.

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

In future, the configuration can be retrieved and re-used without having to set anything else up. On the previous Overdue Notices window, click on Retrieve Setup. Highlight the setup to use then click OK.
The settings are loaded back. These include the classes, cutoff dates, format and layout information.

Then click on Print.

Setups are a good way of simplifying printing overdue notices.
Overdue notices and lists can contain special messages.

Up to 20 different messages can be pre-written.

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

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

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

Click on the *Automatic Setup* button.

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

The dropdown lists are used to choose the message.

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

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

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

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

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

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

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

If a borrower urgently requires an item on loan, a Recall Notice can be issued.

Enter the item’s barcode or record number.

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