



# Bookmark Tips

January 2026

## Start of Year

Beginning of a new year is always a busy time for schools.

The Bookmark "Start of year" fact sheet contains useful ideas on things to do.

The most important are:

- Reset due dates
- Update borrowers
- Deal with items still on loan from last year
- Update history settings



# Due Dates

Open Controls and click on Due Dates.

**Due Dates**

Borrower Due Dates				Item Due Dates			
Borrower type	Days	Due date	Count	Item due date category	Days	Date	Count
1 - Years P, 1, 2	7	26/01/2026	135	1 - Overnight	1	20/01/2026	1,443
2 - Year 3,4	7	26/01/2026	56	2 -	Fixed date		0
3 - Year 5	7	26/01/2026	21	3 -	Fixed date		0
4 - Year 6	7	26/01/2026	30	4 -	Fixed date		0
5 - Ex LVS Students	30	18/02/2026	7	5 -	Fixed date		0
6 - Parents	30	18/02/2026	3	6 -	Fixed date		0
7 - Teacher	Fixed date	01/12/2025	17	7 -	Fixed date		0
8 - Ancillary Staff	Fixed date	20/11/2025	12	8 -	Fixed date		0
9 - Library Staff	30	18/02/2026	6	9 -	Fixed date		0
10 - Ten	14	02/02/2026	1	10 -	Fixed date		0
11 -	14	02/02/2026	0	11 -	Fixed date		0
12 -	14	02/02/2026	0	12 -	Fixed date		0
13 -	14	02/02/2026	0	13 -	Fixed date		0
14 -	14	02/02/2026	0	14 -	Fixed date		0
15 -	14	02/02/2026	0	15 -	Fixed date		0
16 -	14	02/02/2026	0	16 -	Fixed date		0
17 -	14	02/02/2026	0	17 -	Fixed date		0
18 -	14	02/02/2026	0	18 -	Fixed date		0
19 -	14	02/02/2026	0	19 -	Fixed date		0
20 -	14	02/02/2026	0	20 -	Fixed date		0

**Holiday dates**      **Final due dates \***

\* Expired borrower due dates    \* Expired final due dates

Mass extend loans      Close

Dates highlighted in yellow should be revised. These are usually “fixed dates” that do not change every day – end of term, end of year.

Click on the date. This opens a popup window used to change the date.

Change the date to what it should be this year. The Calendar button makes it easy. Click OK.

Repeat for each date that requires changing.

Holiday Dates and Final Due Dates are optional. Holiday Dates tell Bookmark the times of year not to allow due dates. Holiday Dates can be used if borrowing is allowed right up until the holiday in order to prevent a due date during the holiday. They do not block borrowing. They do not have to be set up unless you would like this function.

Final Due Dates block borrowing after the set date.

Mixing Final Due Dates for every term and holidays for every term creates a conflict. Use one or the other. Exception: holidays between terms and an end of year final date.

## Update Student Data

The first thing to do: deal with borrowers who have left.

- Delete them (Borrowers > Delete Borrowers), or
- Change the borrowers class to LEFT or LEFT26 or similar. This can be done individually or en-mass by creating the LEFT class and then either mass assigning (see below) or borrower global change. Putting borrowers into a LEFT class does not remove their histories.

Add new staff in Add/Edit Borrowers.

Updating student data is the main task at the start of the year. Existing students usually need year levels and classes changed, and possibly borrower type. New students need to be added. Bookmark offers five different ways.

- Transfer student data from the office system
- Manually update each borrower in Add/Edit Borrowers
- Manually update each borrower in Rollover > Update Borrower List (faster than Add/Edit)
- Mass update using Rollover > 3 – Assign Borrowers to Classes in Batches
- 4 – Scan borrowers into classes

Transferring student data from the office is the fastest and easiest method. Most office systems are supported, including EMS, EDSAS, CASES, and OneSchool. Custom setups can be made to work with data from any office system. Fact Sheets are available for each system. Once set up, transfers only take a minute or two at most.

(Note for SA public schools: Schools using EMS need to change the “As of date” when exporting before students return otherwise no student data is generated prior to 27 January 2026. See the Fact Sheet.)

(Note: the first time data is transferred from EMS, duplicate borrower records may be created due to differences between names in EMS and EDSAS. These can be combined into the original record. This is a one-off. After the first time, duplicates are never produced.)

Manually going through every borrower in Add/Edit Borrowers is the slowest method but offers the greatest control. New borrowers can be entered this way.

Using the Update Borrower List in Rollover allows manually changing the classes, year levels, and other important data elements using a “list approach”. It is quicker than Add/Edit Borrowers. It is also useful for checking after transferring. The list also allows deleting borrowers, adding new borrowers, and editing.

Assign borrowers in batches allows highlighting borrowers and then putting them all into a new class and year level. It is quicker than one-by-one.

Scanning borrowers into classes requires collecting all barcodes into piles by class so they can then be scanned.

## Items on Loan from Last Year

Borrowers > Rollover > 9 – Rollover existing loans. This allows extending items still on loan – i.e. to staff, etc. – or mass returning – or mass changing items to missing.

Borrowers > Rollover > 6 – Borrower Histories. This allows setting the date for each borrower type.

Aging the list of overdues can remove the history record of overdues prior to a date.

Bookmark keeps a count overdues for every borrower. The counters can be reset to 0 here.

7 – Update Borrower Info Against Items. This is useful after all students are in their new classes. It should be done if items are still on loan to students as it updates their classes. It makes sure items currently on loan show the new classes, affecting overdues.

## A few other things

There are a few, lesser important things that can be done at the start of the year.

- Controls > Settings > Messages. Might need removal or updating.
- Update Bookmark. As of this writing it is 10.9.9 (564). Easy automatic backups were introduced with this version.

## Backups

Once the rollover is complete, make a backup to the Cloud location.

## Share your tips!

Any special start of year tasks you might do that could help others can be shared with other library staff using our "Bookmark Community" email service. See the Bookmark website on how to join.