



FACT SHEET

Start of Year Tasks

January 2021

Backup First!

- Don't forget to do a back Backup **before** starting the rollover.
- If USB flash drives are used for backups, be aware these can "age". They can last two or three years but if older the chances of burnout are greater. Consider replacing older flashdrives used for backups. This is not necessary if using formatted CDs or DVDs or external hard drive or cloud-based backups (Dropbox, OneDrive, GoogleDrive, etc).
- More information is available in **Backups Manual**.
- Reminder: donot rely solely on server backups or bookmark-location-only backups. Regular backups to external locations is essential as a safeguard against big disasters.

Due Dates

Open Controls then click on the Due Dates button.

Update the Due dates as required from *both* columns. Those with "number of days" loan periods do not have to be adjusted, but fixed date entries should be updated.

Click on a row to pop open a dialog window to edit the due date.

Holiday Dates

This is optional. Set up the start and end of each holiday (not the term). Holiday Dates are the times when the library is closed (excluding weekends). Any due date falling within a holiday date period is automatically advanced to a non-holiday date.

Final Due Dates

This is also optional. Instead of holiday dates, end-of-term and/or end-of-year dates can be set. Do not use both holiday dates and final due dates together as they can conflict each other. Only an end-of-year final due date can be used along with holiday dates.

Messages and notifications

Controls > General Controls > Messages tab.

Check Borrower History Display Limits

Borrowers > Rollover > 6 – Borrower Histories

Revise any cut-off dates if they have been set. If there are none, then there is nothing to do.

Age Overdues Log

The Overdues Log is a list of all items that have appeared on overdue lists and notices. This log builds with time. The "Age" function on the same window as the above can remove old entries.

Items Still on Loan

Borrowers > Rollover > 9 – Rollover Existing Loans

Here you can highlight any items on loan that you wish to "extend" their due date. Highlight then click on extend. The By Type button can be used to extend all staff loans.

If you wish to declare loans as missing, click on the Change button to assign a missing status to highlighted entries.

Check Borrower Types

Make sure borrower types are correct and the year levels for them are correct.

Borrowers > Authority Lists > Borrower Types

Borrowers who have Left

Either delete borrowers who have left (Borrowers > Delete Borrowers) or change their class to LEFT or similar, remove their year level and assign them to a special Left borrower type number.

Rollover: change student classes, year levels and borrower types

The *Borrower Rollover* factsheet covers:

- Borrower Type Numbers and lending privilege changes
- Class Year Levels
- Class Names
- Delete Borrowers who have left the school
- Change borrower details for one, several, whole classes and more
- Print sheets of class barcodes to SCAN in changes
- Use the school administration/office data to update borrower data directly to Bookmark (this is a super-fast way to get started for the year)
- Update Borrower Photos

Age Circulation Log

The circulation log is a list of all loans and returns. It grows with time and can contain a huge number of entries. If you do not wish to keep all the entries, the log can be "aged" removing old entries. Reports > Circulation Reports > Age circ log.

Clear Reservations

Controls > Reservations.

You can either age the list (remove old entries) or clear the entire list.

Update Borrower Photos

Import updated photos.