Booktracks®

V 12.6

Table Of Contents

Overview

Tip!
Feel free to write in this document. You will notice there is plenty of room on every page for notes.

Note:
If you are new to using a web-based software program, refer to the "Computer Skills" section in the "Appendix" to get familiar with the terms used in this manual.

Did you know?
An index is provided at the end of this document so you can easily look up features if you need to refer back to the instructions at any time.

Notes:

Overview

Welcome to Booktracks, Book Systems' web-based integrated asset management solution. We believe that you will benefit by referring to this **Training Manual** as a refresher after your initial learning session.

First, let's look at what these instructions *are* intended to do.

- Reacquaint you with the following features:
    - Log On and Log Off
    - Menu Bar, Desktop, and Left Column
    - Administration
    - Patron Entry
    - Form Letters
    - Circulation (Check Out and Check In)
    - Cataloging (manual and quick)
    - Equipment
    - Reports
- Remind you of some general principles to help you find your way around Booktracks. Specific names and defaults referenced in these instructions may vary because you accessed *your* Booktracks database in your training session; therefore, any changes you made were applied dynamically to your database.
- Refresh your memory of what you learned in training when you begin to use Booktracks in live transactions in your school. This document provides step-by-step instructions for specific functions that you will use regularly.

Second, let's look at what these instructions *are not* intended to do.

- Be equivalent to a full-scale training event.
- Provide a comprehensive look at *all* that Booktracks can do for you.
- Provide answers to *all* questions that you may have.

Following your initial training, you may want to repeat the procedures using these instructions to practice tasks you will perform most often. Additionally, you may want to explore some options that are not addressed in this document or that were only covered briefly in your training session.

Click **Help** from Booktracks' **Menu Bar** at any time to open a topic directly related to your current task. You can also use the **Contents**, **Index**, and **Search** features to find additional information; the first entry in the **Contents** view opens the **FAQs** topic, which has answers to common questions that may arise while tracking your assets. You can also use the **Glossary** to find definitions of terms that may be unfamiliar to you or click **Contact** to open a topic with phone numbers and email addresses to reach Book Systems.

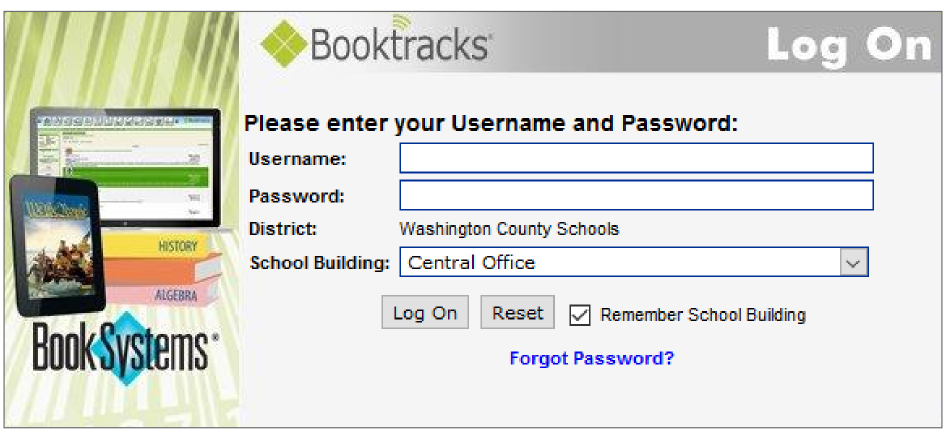
Also, visit the **Downloads** form in the product to find useful resources (covered later in this manual).

Log On

You can access Booktracks via your browser's address bar. Simply enter your URL and then press **Enter** to open the main page.

From here, parents and students can log on to **My Items**, and teachers/staff members can log on to the **Self Check Out** and **Self Check In** interfaces. You should do the following to log on to the administrative side of Booktracks.

- Click **Log On** to open the **Log On** form.



- Enter your username and password in the corresponding fields. You should have been given a username/password and then instructed to edit it during your training session.
- Select your school name from the **School Building** drop-down list (**Centralized** only).
- If needed, click the **Remember School Building** check box. This changes the **Default School Building For Log On** machine setting so that Booktracks will remember this location every time you log on.
- Click **Log On**.

The **Booktracks Desktop** opens, providing varying navigation options and a **Home Page** which includes three widgets: one for messages so you can list important dates and announcements for your school system, one that contains a list of key tasks that most users will perform, and one with a form to quickly begin distributing assets.

Tip!
When you change your username and/or password, you may want to write down that information so you don't forget.

Did you know?
You can enable a general setting to display a **Forgot Password?** link for workers. An administrator must add email addresses to the worker records so reset instructions can be sent.

Note:
If you see a **Software Upgrade Notice** (after first log on or after getting a newer version), this form lists new features in Booktracks and may link to a **What's New** document with more details. Click **Mark As Read** or **Show Me Again Next Time I Log On** to see the **Home Page**.

Notes:

Navigation Tools

Did you know?
Workers with related permissions can configure which **Toolbar** buttons display and assign custom hotkeys to those features.

Tip!
You can add a **Log Off** button to your Booktracks' **Toolbar** to quickly sign out of your worker account. **Toolbar** buttons can be arranged according to your preference, with the ones you use most often being placed first.

Notes:

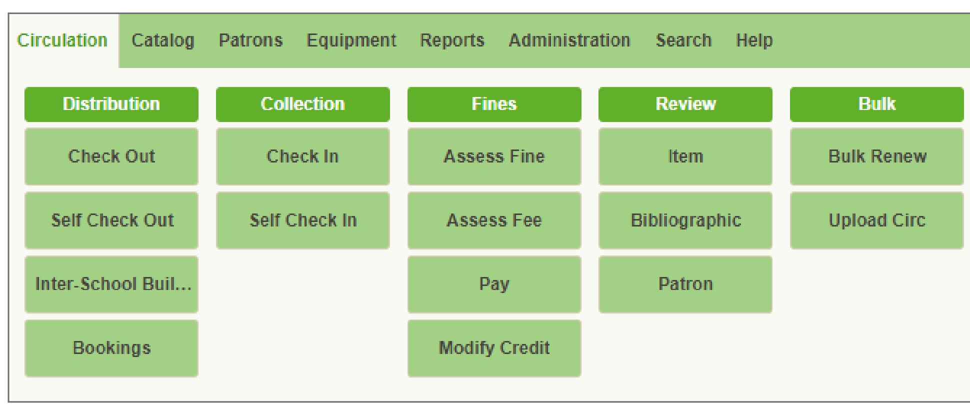
Navigation Tools

The **Booktracks Desktop** provides several ways to navigate to the features you will use to track your assets. The options available from the **Toolbar** and **Menu Bar** depend on your current worker permissions.

Toolbar - This row of buttons across the top of the window allows you to quickly open various forms and features. If you hover over a button, its name displays above it; if applicable, click the arrows on either side to see more buttons. If you have permission, you can customize the contents and order. See the online Help files for more details.

Menu Bar - This bar consists of seven task menus, starting with **Circulation**, plus the **Help** button. You can also add a **My Reports** option for your favorite reports.

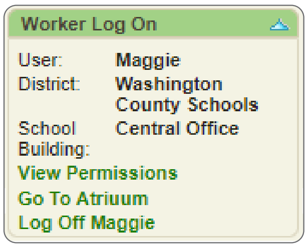
Based on your **Worker Settings** (covered later), you can choose to display menu options and subcategories in one of two visual styles: a button-based interface that's great for touch screens or a minimalist text-based option. The structure, subcategories , and order remain the same in both and depend on worker permissions.



Buttons Menu Style

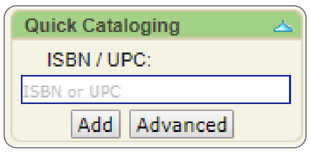
Text Menu Style

Left Column - This column displays the following forms: **Worker Log On**, **Quick Cataloging**, **Item Lookup**, **Equipment Lookup**, **Patron Lookup** and **Cart Lookup**. Each form can be collapsed or expanded by clicking the up or down arrows in the top right corner.

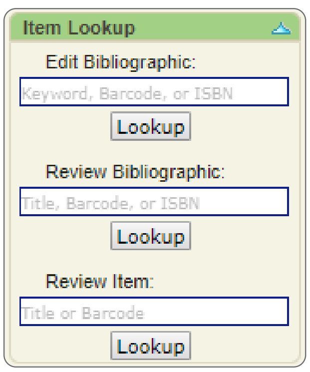


Worker Log On shows the worker and School Building where you are logged on (**Centralized** only).

You can also view permissions, open your Atriuum® site (if applicable), and log off.

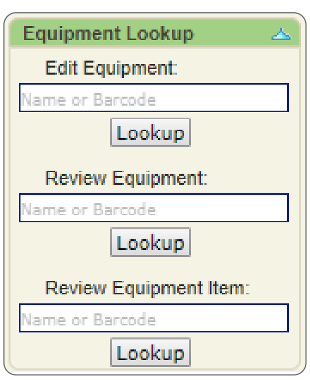


Quick Cataloging is for expedited cataloging of textbooks, DVDs, etc. by ISBN/UPC or other (advanced) criteria. You can scan or enter 10- or 13-digit ISBNs or 12-digit UPCs to find item records from your Z39.50 servers.



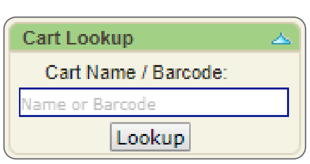
Item Lookup provides several methods for quickly finding *existing* textbook records in your database.

- The **Edit Bibliographic** option allows you to open the **Edit Item: Bibliographic Record** form by keyword, ISBN, or barcode.
- The **Review Bibliographic** option allows you to open the **Review Bibliographic** form by title, ISBN, or barcode.
- The **Review Item** option allows you to open the **Review Item** form (holding) by title or barcode.

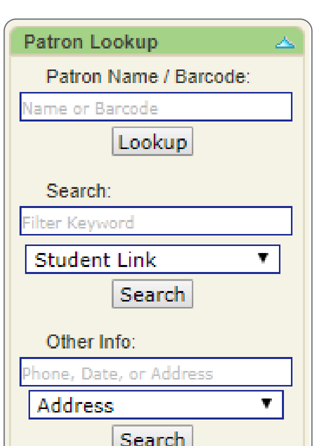


Equipment Lookup provides several options to quickly find equipment records.

- The **Edit Equipment** option allows you to open the **Edit Item: Equipment Record** form by name, barcode, or serial number.
- The **Review Equipment** option allows you to open the **Review Bibliographic** form by name, barcode, or serial number.
- The **Review Equipment Item** option allows you to open the **Review Item** form (holding) by name or barcode.



Cart Lookup provides a quick way to find cart records that contain a group of eReaders, laptops, or other devices. Search by name, keyword, or barcode to open the **Edit Cart** form.



Patron Lookup provides several methods for quickly finding patron records.

Search by name, barcode, demographic data, or other search criteria to open the **Patron Information** form.

Note:
You may see a **Messages** form in the **Left Column** if you are an administrator and receive updates about sales promotions; administrators can also send worker messages to teachers and staff about important, timely information. See the online Help files for more details.

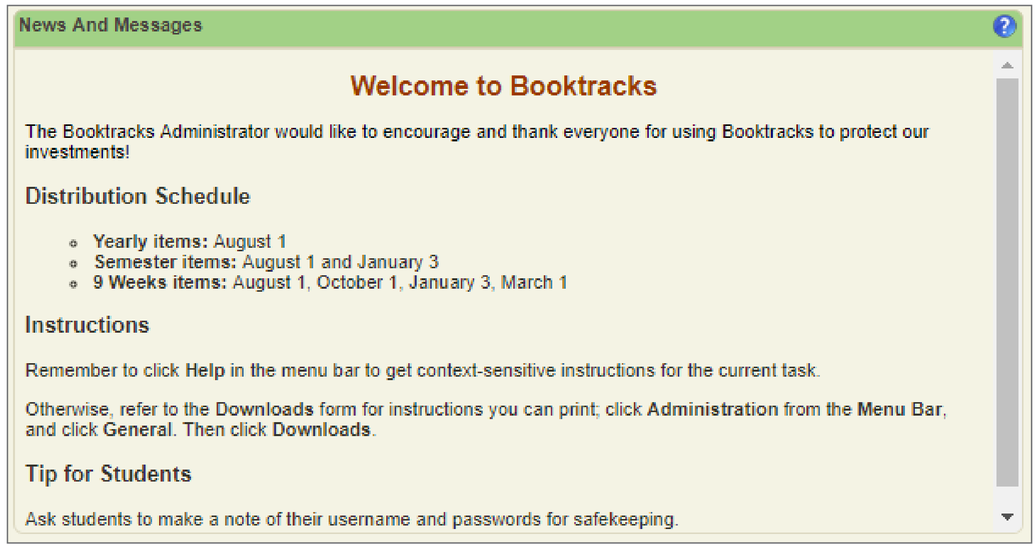
Notes:

Home Page

Home Page

News And Messages - This widget at the top of the **Home Page** allows you to display important information. For instance, you could list dates for distribution, or you could remind workers of tasks related to distributing and collecting items, running reports, and sending notifications to parents.

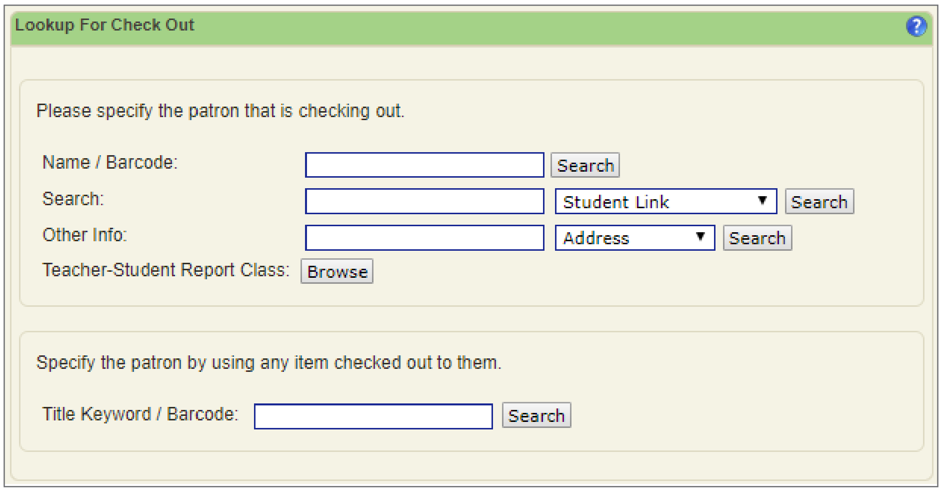
Workers with permission can edit the messages that display in this widget. Click **Administration** from the **Menu Bar**, and then click **General**. Click **Organize News And Messages** to make changes or add new information.



Notes:

Common Tasks - This widget contains **links** to key features you will use throughout the school year to manage your textbooks and equipment. The tasks are divided into three separate times of year; within each list, tasks are grouped into useful sections, such as ***Wrap Up The School Year*** in the image below. Click links to open related forms and begin adding records, distributing items, running reports, and more. By default, you may see descriptions along with the links that open associated forms, or you may see the links only (based on your worker settings).

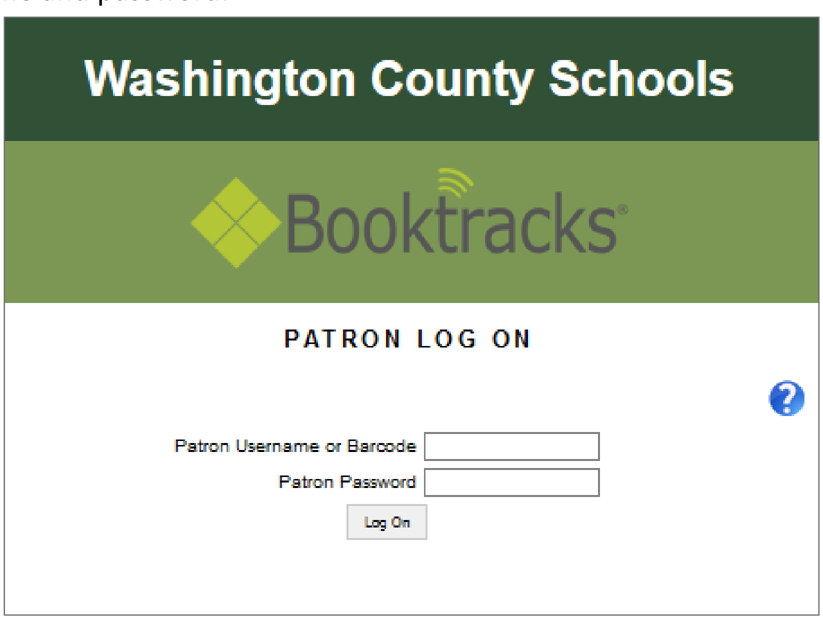
Lookup For Check Out - This widget provides a form where you can search for a student or teacher record by name, barcode, Student Link, report class, etc. or by searching for an item that the student or teacher has already checked out. Once you have found the correct record, you can easily begin checking out assets.



My Items

Booktracks provides a separate interface where students and teachers can check their status (items out and fines/fees owed) from home or any computer with an internet connection. Simply provide them the URL to Booktracks' main page and a username/password.

See the "Add Patron" section of this manual for steps on how to assign a username and password.



When students/teachers navigate to the URL, they can click **My Items**, enter their username/password, and click **Log On**. A page welcomes them by name and displays the following sections as applicable:

- **BOOKS/EQUIPMENT CHECKED OUT** - lists each textbook or piece of equipment currently checked out, including title/name, author, barcode, due date, and estimated fines as applicable. Images of textbook covers or equipment may display if they were added to the records. If the item is out past the due date, an overdue message displays. If a URL was included in the bibliographic record, the link displays to the far right of the entry.
- **CURRENT FINES/FEES** - lists each charge currently owed, including the amount, reason, item, and comment. The total amount owed and the number of overdue items displays at the bottom.

Once they are done, they can click **[Log Off]** to end their session.

Did you know?
You can enable a general setting to display a **Forgot Password?** link when patrons log on to **My Items**. Patron records must include email addresses so reset instructions can be sent.

Did you know?
You can configure **PayPal** using the **Add On Settings** form (**General Administration** submenu) to add a **Pay Now** button to the **My Items** interface so that students who owe fines can process them online with either a **PayPal** account or a credit/debit card.

Tip!
If your district/school has Atriuum, you can set that up so students can view checked out textbooks and equipment in Atriuum's **OPAC** (**O**nline **P**ublic **A**ccess **C**atalog).

Notes:

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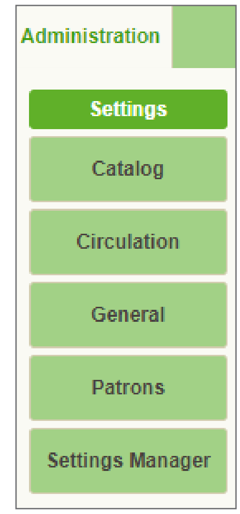
Administration

Important!
You can create as many Worker Groups as you need, but remember that Worker Groups can't be deleted; they can only be edited.

Did you know?
If you choose to select a Worker Group for the new worker, you don't need to specify the permissions because they are automatically assigned; simply click **Add** after making the appropriate selection.

Notes:

Administration



Booktracks is highly customizable! There are a variety of options that are available so you can configure Booktracks to match your asset distribution and collection process. The **Administration** menu consists of four categorical submenus: **Catalog**, **Circulation**, **General**, and **Patrons**.

You will also see a **Settings Manager** option which allows you to open a directory and run a keyword search for administration options; this helps you quickly find infrequently used settings.

General Administration

The **General Administration** submenu contains links to important features and settings. Changes made in this area apply to the entire Booktracks database. This chapter covers several options on this submenu beginning with "Worker Records."

Worker Records

Worker Records are configured and maintained by a Booktracks Administrator, who can identify each worker and assign permissions for what the person is allowed to do when logged on to Booktracks.

Each person who uses Booktracks MUST have a username, password, and definitive permissions. For example, you can limit workers to only check in and check out or give them access to even more functions. Administrative privileges, such as overriding check out limits, configuring worker records, etc., can be restricted to administrators.

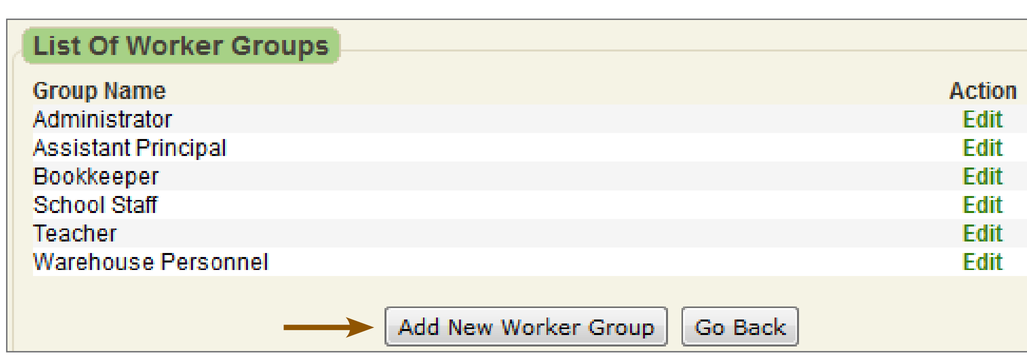
Booktracks groups permissions according to type. You can enable **Circulation Related**, **Material Related**, and/or **Patron Related Permissions**, but restrict **Administrative** or **Supervisor** permissions.

- Click **Administration** from the **Menu Bar**, and then click **General**.
- Click Worker Records to view the **List Of Worker Groups** and **List Of Workers** forms.

To create a worker group

Adding workers and defining their respective permissions individually can be time consuming, so Booktracks offers a way to create **Worker Groups**. If several workers have the same privileges, then creating a Worker Group with preset permissions will save you time as you add new workers.

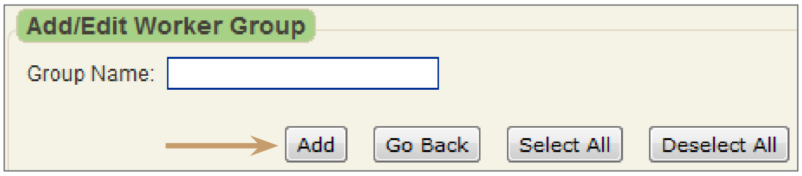
- On the **List Of Worker Groups** form, click **Add New Worker Group**.


List Of Worker Groups

Group Name	Action
Administrator	Edit
Assistant Principal	Edit
Bookkeeper	Edit
School Staff	Edit
Teacher	Edit
Warehouse Personnel	Edit

Add New Worker Group   Go Back

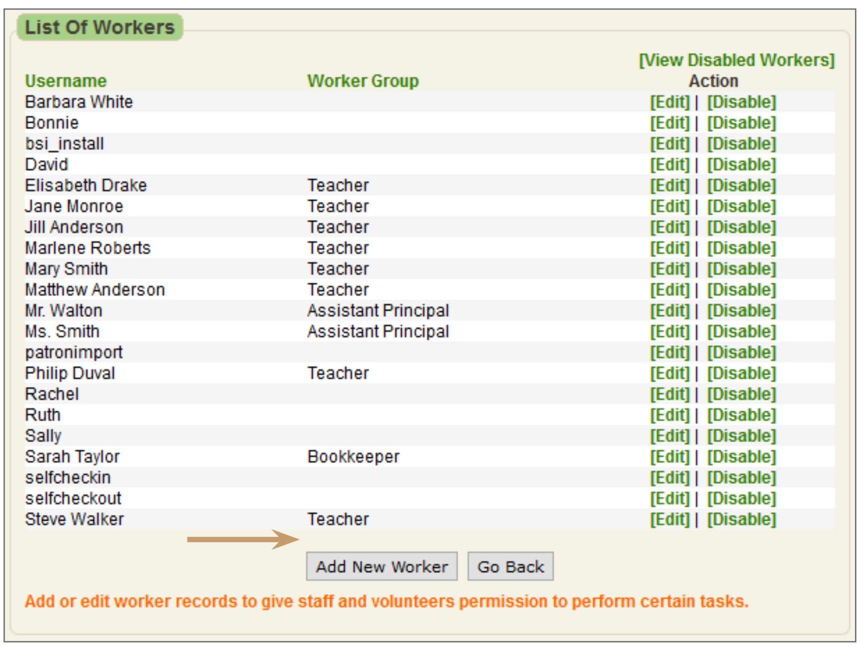
- Enter a name in the **Group Name** field.
- Click **Select All** to give full permissions to an administrative group, such as ***Assistant Principal***; for most groups, click individual check boxes to enable specific permissions.
- Click **Add**.



To create a new worker

All workers will need usernames, passwords, and permissions that define their authority to access information and/or change database records. You can also create temporary worker accounts with a built-in expiration date for volunteers, substitutes, etc.

- On the **List Of Workers** form, click **Add New Worker**.



List Of Workers

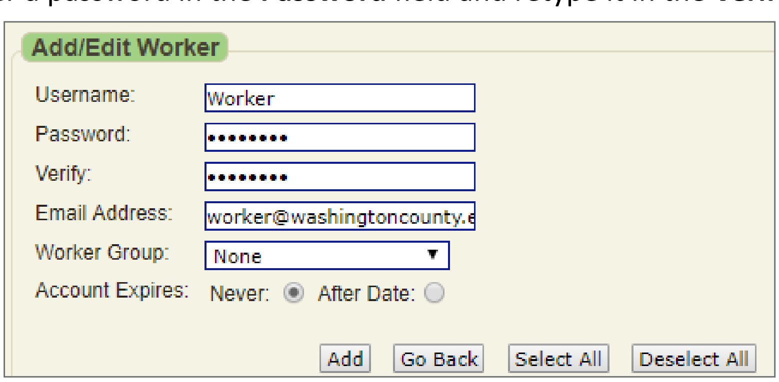
[View Disabled Workers]

Username	Worker Group	Action
Barbara White		[Edit] | [Disable]
Bonnie		[Edit] | [Disable]
bsi_install		[Edit] | [Disable]
David		[Edit] | [Disable]
Elisabeth Drake	Teacher	[Edit] | [Disable]
Jane Monroe	Teacher	[Edit] | [Disable]
Jill Anderson	Teacher	[Edit] | [Disable]
Marlene Roberts	Teacher	[Edit] | [Disable]
Mary Smith	Teacher	[Edit] | [Disable]
Matthew Anderson	Teacher	[Edit] | [Disable]
Mr. Walton	Assistant Principal	[Edit] | [Disable]
Ms. Smith	Assistant Principal	[Edit] | [Disable]
patronimport		[Edit] | [Disable]
Philip Duval	Teacher	[Edit] | [Disable]
Rachel		[Edit] | [Disable]
Ruth		[Edit] | [Disable]
Sally		[Edit] | [Disable]
Sarah Taylor	Bookkeeper	[Edit] | [Disable]
selfcheckin		[Edit] | [Disable]
selfcheckout		[Edit] | [Disable]
Steve Walker	Teacher	[Edit] | [Disable]

Add New Worker Go Back

Add or edit worker records to give staff and volunteers permission to perform certain tasks.

- Enter the username of the new worker in the **Username** field.
- Enter a password in the **Password** field and retype it in the **Verify** field.



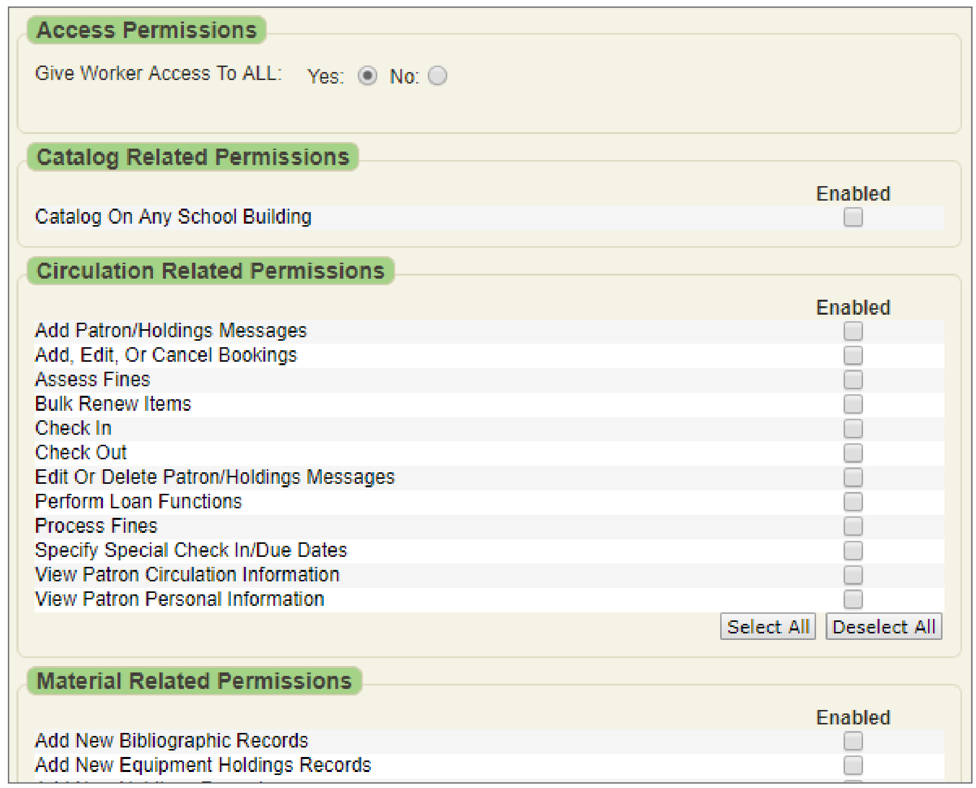
- Enter an email where the worker will receive instructions for resetting the password in the **Email Address** field (based on general settings).
- If applicable, select the appropriate choice from the **Worker Group** drop-down list; otherwise, leave **"None"** selected and continue.
- If applicable, for temporary workers, click the **After Date** radio button adjacent to **Account Expires** and use the calendar icon or manually enter a date after which the worker account will be disabled.

Note:
If someone is no longer employed, workers can be disabled, meaning they cannot log on but history will be retained. Simply click **[Disable]** on the **List Of Workers** form.

Important!
Booktracks is delivered with several pre-configured workers, i.e., **bsi_install**, **patronimport**, **selfcheckin**, and **selfcheckout**. Please don't disable any of these worker records.

Notes:

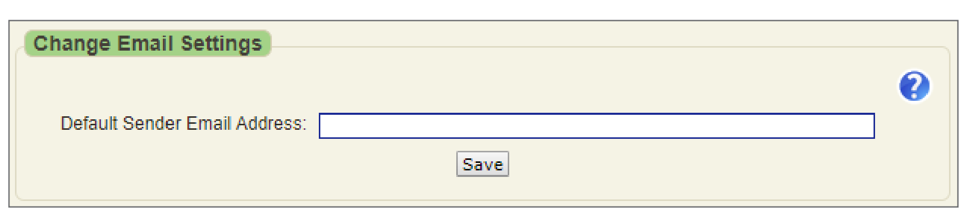
- Assign permissions in one of the following ways:
  - If this is someone who needs full permissions, click **Select All**.
  - If this is someone who only needs limited permissions, click the appropriate check boxes in the **Enabled** column on each form.
- If you need to limit this worker to a particular location (**Centralized** only), select **No** next to **Give Worker Access To ALL** under **Access Permissions**, and select schools from the dialog box that displays.
- Click **Add** when you are satisfied with assigned permissions.



Email Settings

Booktracks can email fine notices, reports, etc. You can specify the return address that should be listed with any electronic messages. You must also configure settings on the *Server* side of Booktracks.

- Click **Administration** from the **Menu Bar**, and then click **General**.
- Click **Email Settings**.
- Enter a return address in the **Default Sender Email Address** field.
- Click **Save**.

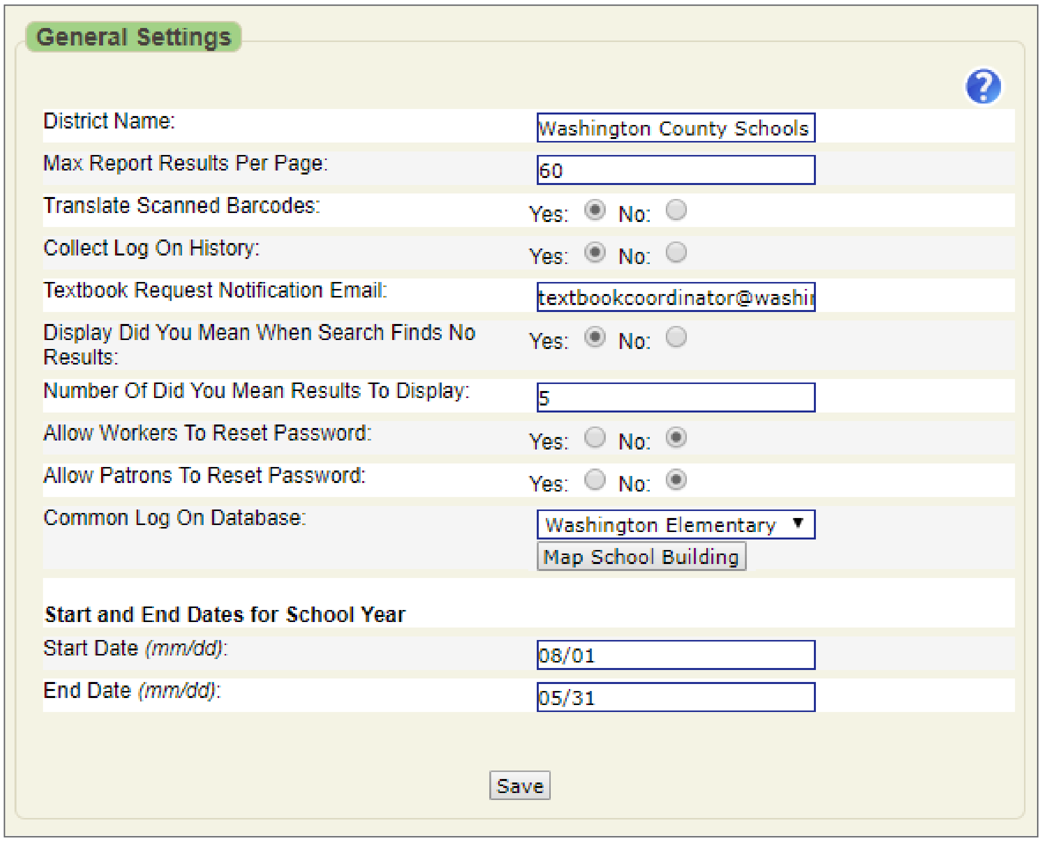


Notes:

General Settings

General Settings apply to various parts of Booktracks, including reports, cataloging, etc.

- Click **Administration** from the **Menu Bar**, and then click **General**.
- Click **General Settings**.


General Settings

District Name:	Washington County Schools
Max Report Results Per Page:	60
Translate Scanned Barcodes:	Yes: ◉ No: ○
Collect Log On History:	Yes: ◉ No: ○
Textbook Request Notification Email:	textbookcoordinator@washi
Display Did You Mean When Search Finds No Results:	Yes: ◉ No: ○
Number Of Did You Mean Results To Display:	5
Allow Workers To Reset Password:	Yes: ○ No: ◉
Allow Patrons To Reset Password:	Yes: ○ No: ◉
Common Log On Database:	Washington Elementary ▼ Map School Building

Start and End Dates for School Year

Start Date *(mm/dd)*:	08/01
End Date *(mm/dd)*:	05/31

Save

- Read through the table starting on the next page, and make changes as necessary.
- Click **Save**.

Did you know?
The **General Settings** form (and others searchable from the **Settings Manager**) include blue help icons that you can click to open a topic specific to that form; click **Help** in the **Menu Bar** to open a topic explaining the **Settings Manager**.

Notes:

General Settings

<table>
<tr><th colspan="2">General Settings</th></tr>
<tr><th>Setting / Definition</th><th>Action</th></tr>
<tr><td>Setting:
District Name (Centralized only)

Definition:
The name entered will display in the Worker Log On form in the Left Column, on the Holdings Summary report, and in other areas.</td><td>Enter the name of your school district.</td></tr>
<tr><td>Setting:
School Name (Distributed only)

Definition:
The name entered will display in the Worker Log On form in the Left Column, on the Holdings Summary report, and in other areas.</td><td>Enter the name of your school.</td></tr>
<tr><td>Setting:
Max Report Results Per Page

Definition:
Every time you create applicable reports, this number of results will display on each page.

Accession List
Report Results For: Holdings Status equals "Active"
93262 Result(s) Found.
Displaying Results 1 - 60</td><td>Highlight the default “60,” and enter a different number as needed.</td></tr>
<tr><td>Setting:
Translate Scanned Barcodes

Definition:
When scanning a barcode that has fewer digits than others that exist in your district database, Booktracks will convert it. For example, Booktracks will translate 1 to an 8-digit barcode, i.e., 00000001.</td><td>Click Yes if you want Booktracks to translate scanned barcodes.

Click No to accept the barcode as it was scanned.</td></tr>
<tr><td>Setting:
Collect Log On History

Definition:
History reports track which workers log on and off over a designated period.

<table>
<tr><th>Date of Action</th><th>History Action</th><th>Worker Name</th><th>History School Building</th></tr>
<tr><td>08/23/2019 09:01:39AM</td><td>Log On</td><td>Bonnie</td><td>Valley High</td></tr>
<tr><td>08/23/2019 09:04:50AM</td><td>Log On</td><td>Rachel</td><td>Redwood Elementary</td></tr>
<tr><td>08/23/2019 09:18:54AM</td><td>Log On</td><td>Ruth</td><td>Inspiration Middle</td></tr>
<tr><td>08/23/2019 09:37:27AM</td><td>Check Out</td><td>Ruth</td><td>Inspiration Middle</td></tr>
</table></td><td>Click Yes if you want to collect log on history.

Click No if log on history is not necessary.</td></tr>
</table>

Notes:

Setting: Textbook Request Notification Email **Definition:** Workers at different locations can request extra textbooks that are currently located at other School Buildings using the **Course Data By Site** report (**Centralized** only) or **Course Data** report (**Distributed** only). These requests will be sent to the email address specified here.	Enter the email address for whomever will receive and process these requests.
Setting: Display Did You Mean When Search Finds No Results **Definition:** Choose this option to see a list of alternatives if your search does not find exact matches using bibliographic/holding/equipment lookup forms.	Click **Yes** if you want Booktracks to list **suggestions**. Click **No** if you prefer not to see **suggestions**.
Setting: Number Of Did You Mean Results To Display **Definition:** If you selected **Yes** for the above setting, you can specify how many alternatives display.	Highlight the default **"5,"** and enter a new number in the field.
Setting: Allow Workers To Reset Password **Definition:** Enable this option to add a **Forgot Password?** link to the **Log On** form so workers can reset their passwords if they cannot remember it.	Click **Yes** if you want to allow workers to change their passwords. Click **No** if you prefer workers to come to you, as the administrator, to change passwords.
Setting: Allow Patrons To Reset Password **Definition:** Enable this option to add a **Forgot Password?** link to the **PATRON LOG ON** form (**My Items**) so patrons can reset their passwords if they cannot remember it.	Click **Yes** if you want to allow patrons to change their passwords. Click **No** if you prefer patrons to use pre-assigned passwords and go to an administrator or teacher if they forget.
Setting: Common Log On Database **Definition:** If Booktracks is set up so you can work in Atriuum without logging on/off, Booktracks will connect to the library you specify. You must configure settings on the *Server* side to see these options, and you need the same username and password saved for your worker record in both products.	Click the drop-down button, and click again to make a selection. If connecting to a **Distributed** Atriuum, click **Map School Building** and match each of your School Buildings to a different library on your Atriuum.

Important!
For workers and patrons to use the **Forgot Password?** links successfully, they must have email addresses saved in their records.

Notes:

Note:
The **Start Date** and **End Date** fields use the month and day only to fit the length of the school year for most users. This means you may not have to edit the start and end dates every school year.

Tip!
Enable ***Unique User Def 1-2*** fields on the **User Defined Fields** form to create distinct identifiers that prevent duplicate records. **"Drivers Lic Number"** and **"SSN"** are the delivered defaults.

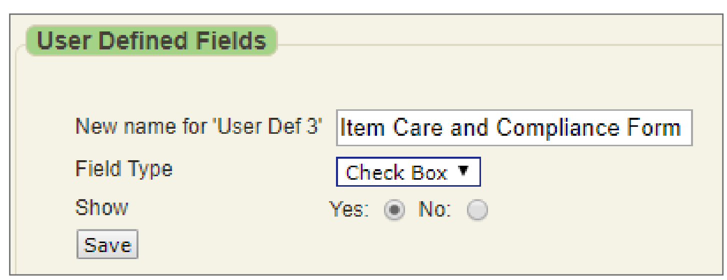
Notes:

Start and End Dates for School Year	
Setting / Definition	**Action**
Setting: Start Date *(mm/dd)* **Definition:** The date you enter here marks the beginning of the school year for the **Expense Report**, **Common Tasks** widget, and more. This date is also used to check in and delete consumable holdings, such as workbooks, between the end of one school year and the start of the next.	Highlight the default **"08/01,"** and enter a new date if needed.
Setting: End Date *(mm/dd)* **Definition:** The date you enter in this field marks the end of the school year for various features that look for a start and end date (see above).	Highlight the default **"05/31,"** and enter a new date if needed.

User Defined Fields

Booktracks provides **User Defined Fields** so you can customize fields for various features and forms to better fit your school environment. Not only can you rename certain fields, but you can also create unique input fields for patron and equipment data. Newly-defined fields are global changes and are inserted automatically into report columns, drop-down lists, **links**, and more.

- Click **Administration** from the **Menu Bar**, and then click **General**.
- Click **User Defined Fields**.
- From the row of the user defined field you wish to change, click **Edit** in the **Action** column.
- For any **Fixed Label** field (always visible in your database), enter the new name in the **New name for *'field name you are changing'*** field.



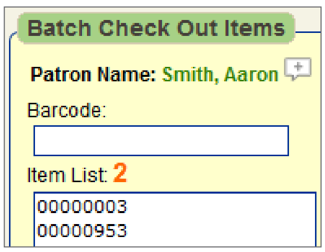
- To create unique fields for equipment and patron related data, use the ***Equipment User Defined 1-4*** and ***User Def 1-5*** fields. These *text* field types can be renamed and/or converted to check boxes to display yes/no options.
- Click **Save**.

Worker Settings

All workers can use this page to set their individual preferences for how they interact with Booktracks in the areas of circulation, cataloging, reports, etc.

- Click **Administration** from the **Menu Bar**, and then click **General**.
- Click **Worker Settings**.
- Read through the table starting on the next page, and make changes as necessary.
- Click **Save**.

Worker Settings

Setting / Definition	Action
Setting: Use Batch Check Out **Definition:** The **Batch Check Out Items** form queues scanned barcodes for items being checked out. You must click **Check Out** or scan the special “Check Out” barcode after you’ve scanned all item barcodes to complete the transaction.  The single **Check Out Items** form completes each check out transaction upon scanning the barcode. This form doesn’t queue items; each is processed individually.	Click **Yes** to use the **Batch Check Out Items** form. Click **No** if you prefer to use the single **Check Out Items** form.
Setting: Set Up The Next Patron After A Successful Check Out **Definition:** After completing a transaction on the single **Check Out Items** form, the cursor automatically displays in the **New Patron Name / Barcode** field, ready for you to scan the next patron’s barcode.	Click **Yes** to instruct Booktracks to set up for the next patron after a successful check out. Click **No** if you prefer to manually move your cursor or scan the special “Next Patron” barcode.
Setting: Display Less Circulation Info **Definition:** Configure Booktracks to display patron information in full or abbreviated form. Circulation forms include **More.../Less...** buttons to switch views.	Click **Yes** to display brief patron information with a **More...** button. Click **No** to display full patron information with a **Less...** button.
Setting: Open Circulation Links In A New Tab **Definition:** Configure Booktracks to open links on circulation-related forms in the *current* tab or in a *new* tab, keeping your original one open.	Click **Yes** to open links in a new tab. Click **No** to open links in the current tab.

Worker Settings - General Settings

Setting / Definition	Action
Setting: Menu Style **Definition:** Booktracks allows you to view menu options in one of two visual styles: buttons or text. The categories, menu options, and order remain the same in each.	Click **Buttons** to use the buttons menu style. Click **Text** if you prefer to use the text menu style. After saving, you may need to refresh your browser to view the new menu style.

Did you know?
On the **Worker Settings** form, you can click **Restore Defaults** at any time to reapply the options selected on the **Worker Settings Defaults** form. You can also click **My Reports Setup** to open a form where you can customize a favorite reports list (see next section).

Notes:

Worker Settings

Did you know?
Whichever view you select for the **Common Tasks** widget, workers always have the option of switching to a different display directly from the **Home Page**.

Note:
If you opt to have Booktracks automatically add your holdings during the import process, you can still generate a report of those imported items.

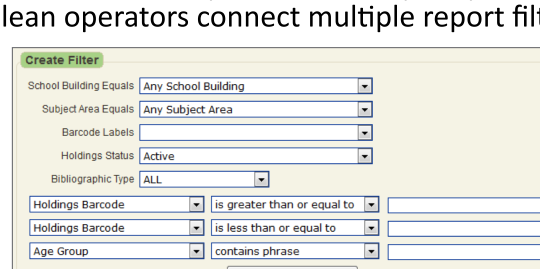
Notes:

Setting: Display Sales Messages **Definition:** Workers with administrator permissions can choose whether to see messages about sales promotions.	Click **Yes** to view sales messages in the **Left Column**. Click **No** if you do not want to see sales messages.
Setting: Display Common Tasks Widget With **Definition:** You can choose whether or not to view descriptions along with the **links** on the **Common Tasks** widget on Booktracks' **Home Page**. New users would benefit from seeing these brief steps; advanced users may prefer to view the **links** only so they can get started quickly.	Click **Descriptions And Links** to see both. Click **Links Only** to hide the descriptions.
Setting: Max Search Results Per Page **Definition:** Every time you perform applicable searches, this number of results will display on each page.	Highlight the default **"25,"** and enter a different number as needed.

Worker Settings - Item Settings

Setting / Definition	Action
Setting: Mark Imported MARC Records For Review **Definition:** Configure Booktracks to allow you to review imported records before adding them to your database. After review, you must click **Add Imported Holdings**. The **Add Imported Records To Database** report opens; then you must click **Accept All Imported Items**.	Click **Yes** to review imported records before adding holdings to the database. Click **No** to automatically add holdings during import.
Setting: Use Title Sort Relevance **Definition:** Booktracks allows workers to sort search results by how close the title matches the criteria.	Click **Yes** to sort results by title ranking. Click **No** to sort alphabetically by title.

Worker Settings - Report Settings

Setting / Definition	Action
Setting: Default Filtering Level **Definition:** **Easy Filtering** (example for **Accession List** pictured) simplifies creating a report filter and is useful for workers inexperienced with Boolean operators. **Advanced Filtering** allows you to set up any available filters you need and specify which Boolean operators connect multiple report filters. 	Click **Easy** to set **Easy Filtering** as your default. Click **Advanced** to set **Advanced Filtering** as your default.

<table>
<tr>
<td>Setting:
Printable Reports Font Size

Definition:
Booktracks allows you to choose the font size for printable reports.</td>
<td>Highlight the default “8,” and enter a different number if you want a larger font size. For best results, keep the report font size to 12 or less.</td>
</tr>
<tr>
<td>Setting:
Display Column Borders For Printable Reports

Definition:
Booktracks allows you to add vertical lines between each column in applicable reports for easier viewing.

<table>
<tr><th>Line #</th><th>Holdings Barcode</th><th>Title</th><th>School Building</th><th>Current Location</th></tr>
<tr><td>1</td><td>00000001</td><td>Treasures, Grade 01, Unit 01</td><td>Inspiration Elementary</td><td>Central Office</td></tr>
<tr><td>2</td><td>00000002</td><td>Treasures, Grade 01, Unit 01</td><td>Main Street Elementary</td><td>Central Office</td></tr>
<tr><td>3</td><td>00000010</td><td>Treasures, Grade 01, Unit 01</td><td>Maple Elementary</td><td>Inspiration Elementary</td></tr>
<tr><td>4</td><td>00000847</td><td>enVisionMATH Common Core, Grade 04, Student Edition with Digital Access</td><td>Valley Elementary</td><td>Central Office</td></tr>
<tr><td>5</td><td>00002507</td><td>Algebra 1</td><td>Central Office</td><td>Inspiration High</td></tr>
<tr><td>6</td><td>00002817</td><td>Physical Science: Concepts in Action</td><td>Inspiration High</td><td>Washington High</td></tr>
<tr><td>7</td><td>00002818</td><td>Physical Science: Concepts in Action</td><td>Inspiration High</td><td>Washington High</td></tr>
<tr><td>8</td><td>00003214</td><td>Glencoe Health</td><td>Central Office</td><td>Inspiration High</td></tr>
<tr><td>9</td><td>00004330</td><td>Spelling Connections, Grade 04, TE</td><td>Redwood Elementary</td><td>Redwood Middle</td></tr>
<tr><td>10</td><td>00004474</td><td>Spelling Connections, Grade 01, TE</td><td>Valley High</td><td>In Transit</td></tr>
</table>
</td>
<td>Click Yes to add vertical borders to printable reports.

Click No to print without vertical lines between each column.</td>
</tr>
<tr>
<td>Setting:
Display Row Borders For Printable Reports

Definition:
Booktracks allows you to add horizontal lines between each row in applicable reports for easier viewing.

<table>
<tr><th>Line #</th><th>Patron Name</th><th>Patron Barcode</th><th>Title</th><th>Holdings Barcode</th><th>Amount</th><th>Reason</th></tr>
<tr><td>1</td><td>Abbot, David</td><td>1616508</td><td>Earth iScience</td><td>00016460</td><td>65.00</td><td>Automatic fine.</td></tr>
<tr><td>2</td><td>Abbot, David</td><td>1616508</td><td>Pre-Algebra</td><td>00002521</td><td>54.58</td><td>Automatic fine.</td></tr>
<tr><td>3</td><td>Abram, Ben</td><td>1665810</td><td>Drive Right</td><td>00028232</td><td>48.91</td><td>Automatic fine.</td></tr>
<tr><td>4</td><td>Acord, Lindsey</td><td>1619032</td><td>United States History Beginnings to 1877, Grade 08</td><td>00008027</td><td>71.95</td><td>Automatic fine.</td></tr>
<tr><td>5</td><td>Acord, Christy</td><td>1619032</td><td>Earth iScience</td><td>00016461</td><td>65.00</td><td>Automatic fine.</td></tr>
</table>
</td>
<td>Click Yes to add horizontal borders to printable reports.

Click No to print without horizontal lines between each column.</td>
</tr>
<tr>
<td>Setting:
Report Wizards Default To Logged On Location (Centralized only)

Definition:
When enabled, the related filter on the holding Report Wizard automatically selects the School Building where you are currently logged on.</td>
<td>Click Yes to use the current location for related filters.

Click No to select Any School Building.</td>
</tr>
</table>

Tip!
If you enable both the **Display Column Borders For Printable Reports** and the **Display Row Borders For Printable Reports** settings, you can create a grid for your report data.

Notes:

Custom Sounds

Notes:

Custom Sounds

Booktracks allows you to enable sounds during circulation so you will know immediately if a transaction is successful or if there is an error to address; see "Circulation Settings" later in this chapter for more information. If you enabled this feature, you can use the **Custom Sounds** form to customize what type of sound plays in various situations.

You can also use this form to disable sounds in certain instances, for instance if you only want to hear sounds for situations that need your attention.

You can select a delivered sound, upload your own, or disable the sound for any of the following situations:

Main Circulation	
Setting	**When Sound Plays**
Successful Check Out	Items are successfully checked out.
Successful Check In	Items are successfully checked in.
Unsuccessful Check Out/In (Including Override Notifications)	Items are not checked out or in due to errors; you may have the opportunity to override the message.
Barcode Scanned/Entered In Check Out	An item is successfully added to a queue, but the transaction is not complete.
Kit Notification	Items checked in/out include kit information or components (if the **Pop-Up Kit Notifications** circulation setting is enabled).
Self Check Stations (license must be activated)	
Setting	**When Sound Plays**
Successful Check Out	Items are successfully checked out.
Successful Check In	Items are successfully checked in.
Unsuccessful Check Out/In (Including Override Notifications)	Items are not checked out or in due to errors; you may have the opportunity to override the message.

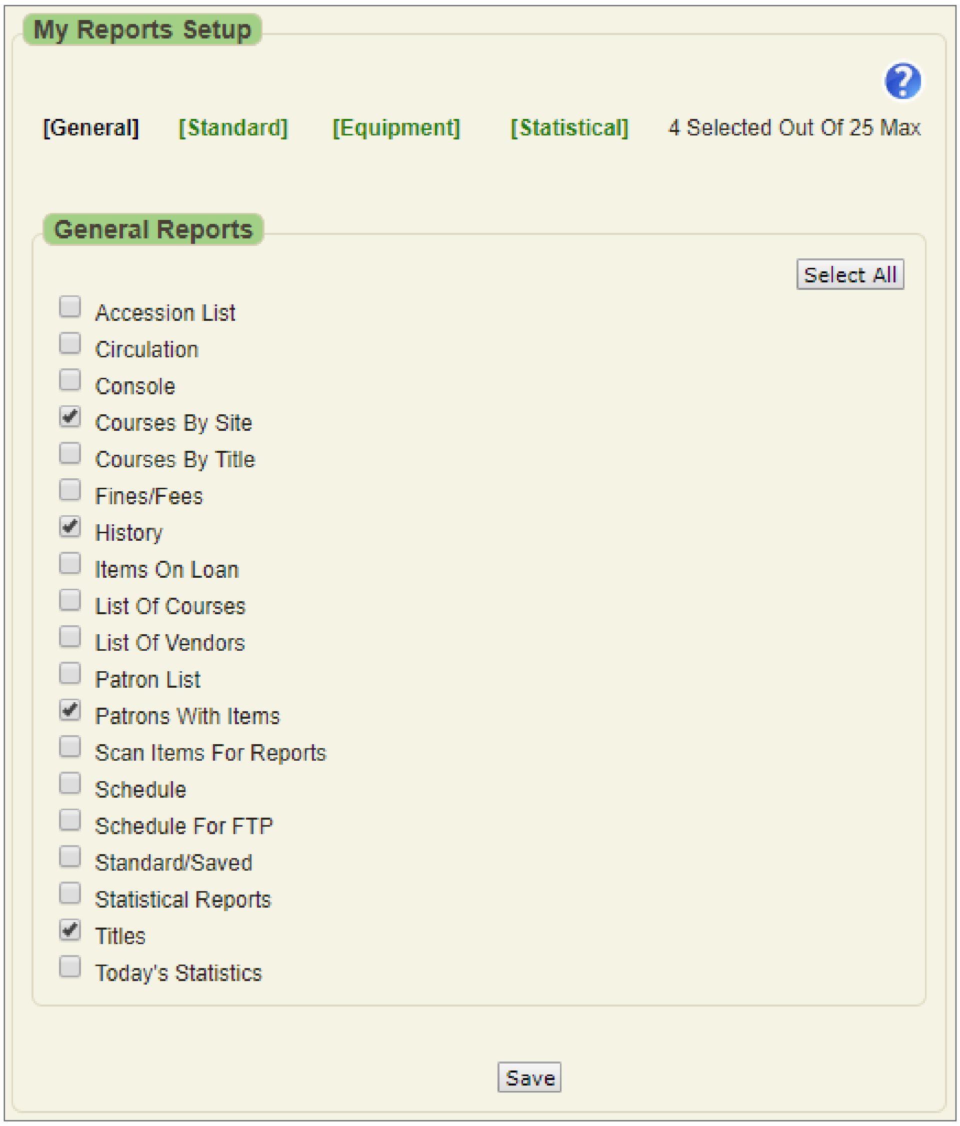
To customize sounds

- Click **Administration** from the **Menu Bar**, and then click **General**.
- Click **Custom Sounds**.
- To choose from a list of delivered sounds, click the drop-down button next to the transaction type, and click again to pick one.
- To upload your own sound, click the drop-down button, and select **Upload Local Sound**. Click **Browse...** or **Choose File**; find your audio file, and then click **Open** followed by **Save**
- To disable a specific sound, click the drop-down button, and then click **None**.
- When you are finished making selections, click **Save**.

My Reports

Workers with permission to view reports can customize a **My Reports** menu, accessible from the **Menu Bar**, with their favorite or most used reports and saved templates.

- Click **Administration** from the **Menu Bar**, and then click **General**.
- Click **My Reports Setup**.
- Click the check boxes next to reports that you want to include in the **My Reports** menu.
- Click any of the **links** at the top to display the related list of reports, and click check boxes to enable them as needed.



- Click **Save**.
- The new option displays on the **Menu Bar** after you refresh or navigate away from the administrative forms.

Note:
The **My Reports** menu is specific to each worker.

My Reports

Notes:

Downloads

All workers can access this form for *instructional documents*, e.g. **Managing Your Database**, **Distributing Items**, etc.

Additionally, you can access various *tutorials* about key features. There are also *drivers for receipt printers* and *other utilities* for administrators or network technicians to use.

Special Barcodes are available for download in the **Utility** section; you can also print directly from this manual. (See the "Appendix" at the end.)

- Click **Administration** from the **Menu Bar**, and then click **General**.
- Click **Downloads**.

Downloads

Go Back

Last Automated Backup	File Link	Description
Generated on 10/14/2019 02:00:17AM	Washington County Schools Backup	Backup Available For Download To Another Location

Instructional Title	File Link	Description
Booktracks Mobile Apps Guide	BooktracksMobileAppsGuide.pdf	Resource For MAT And AIM
Glossary	BooktracksGlossary.pdf	Guide To Booktracks Terminology
FAQs	View Help Topic	Answers To Common Booktracks Questions
Managing Your Database	BooktracksManagingYourDatabase.pdf	Administrative Tasks For Database Management
Maintaining Patron Data	BooktracksMaintainingPatronData.pdf	Steps To Load And Manage Patron Records
Cataloging Items	BooktracksCatalogingItems.pdf	Steps To Load And Maintain Textbook And Equipment Records
Distributing Items	BooktracksDistributingItems.pdf	Steps To Distribute Items (Textbooks And Equipment)
Collecting Items	BooktracksCollectingItems.pdf	Steps To Collect Items (Textbooks And Equipment) And Update Your Database
Running Reports	BooktracksRunningReports.pdf	Discussion Of Available Reports With Customized Examples
Server Setup	SelfHostedServerAdministratorsGuide.pdf	Server Administration Overview
Workstation Setup	WorkstationSetup.pdf	Workstation Technical Overview
License Agreement	LicenseAgreement.pdf	New Users Must Accept The License Agreement

Tutorials	Link	Description
Booktracks eLearning Series	View Video Library	Videos Demonstrating Key Booktracks Features

Receipt Printer Type	File Link	Description
BSI Slip Printer Installer	BSISlipPrinterInstaller.exe	Utility To Print Circulation Receipts
		Used With Star Printers And Epson USB Printers
Epson Drivers	EpsonDrivers.zip	Drivers For Epson Printers
		Used With Epson TM-U220A/B/D, Epson TM-T88III
Epson Slip Printer	EpsonSlipPrinter.exe	Utility To Print Circulation Receipts
		Used With Epson Serial Printers (TM-T88II, TM-T88III, And TM-U220D)
Addtional File	shw32.dll	Required To Run Epson Slip Printer
Cash Drawer Printer Installer	BSISlipPrinterCashDrawer.msi	Utility To Print Fine Receipts And Open Cash Drawer
		Used With Star Printers That Have A Connected Cash Drawer

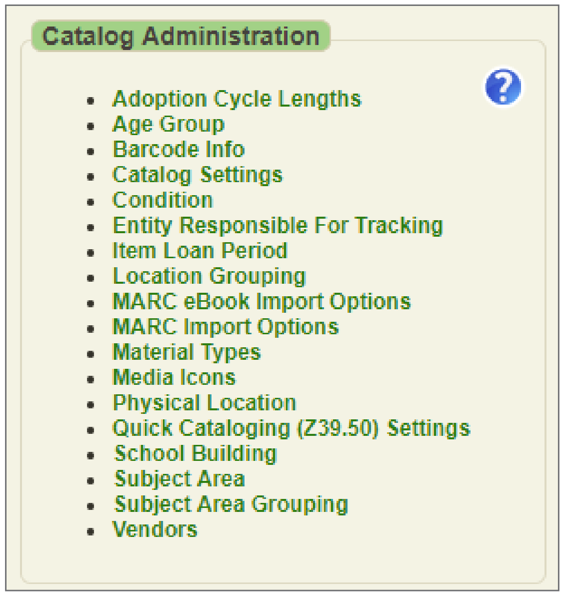
Utility Name	File Link	Description
Offline Circulation Setup (v0.5)	OfflineCirculationSetup.exe	Offline Circulation Tool For Windows
Apple Offline Circulation (v0.5)	AppleOfflineCircToolInstaller.dmg	Offline Circulation Tool For Mac
Offline Circulation Tool Guide	OfflineCirculationTool.pdf	Documentation For The Offline Circulation Tool
Special Barcodes	SpecialBarcodes.pdf	Barcodes Designed To Navigate Circulation

Go Back

Notes:

Catalog Administration

The **Catalog** option on the **Administration** menu takes you to the **Catalog Administration** submenu which contains links to important features and settings.



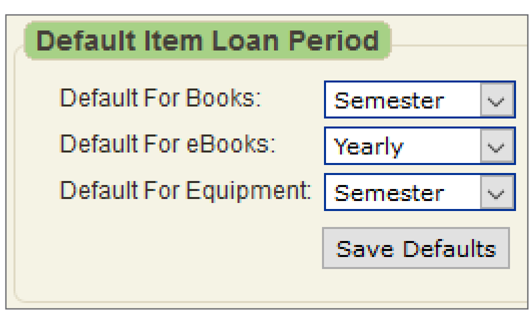
Booktracks provides item types, or categories, that are listed in your records so you can classify your items systematically. This allows you to filter reports or view statistics per each classification. Categories include the following: **Age Group** (Grade Level), **Condition**, **Entity Responsible For Tracking**, **Item Loan Period**, **Material Types**, **Physical Location**, **School Building** (**Centralized** only), **Subject Area**, and **Vendors**.

You can specify Book, eBook, and Equipment defaults for each classification. For instance, when making selections for Item Loan Period, you could set ***Semester*** as the **Default For Books** but ***Yearly*** as the **Default For Equipment**.

To change defaults

The steps below explain how to configure the defaults for Item Loan Period, but the steps are similar for all of the item types listed above.

- Click **Administration** from the **Menu Bar**, and then click **Catalog**.
- Click **Item Loan Period**.
- Select a different option from the **Default For Books** drop-down list; this default applies when you manually add bibliographic records, when you manually add textbook holdings records, and when you import records (importing a file, importing MARC records, or using **Quick Cataloging**).



- Select a different option from the **Default For eBooks** drop-down list; this default applies when you manually add eBook holdings (designated by Material Type on the bibliographic record) and when you import eBook MARC records.
- Select a different option from the **Default For Equipment** drop-down list; this default applies when you manually add equipment records and when you import equipment records.
- Click **Save Defaults**.

Important!
Several of the item types can be renamed using the **User Defined Fields** form; if these were changed during your setup process or training, keep in mind that your names will be different than those used in all documentation.

Note:
Several item types are listed in *textbook bibliographic* and *main equipment* records while others are listed in *holdings* records. See the online Help files for a detailed description of the differences between textbook bibliographic and main equipment records vs. their associated holdings records.

Notes:

Example:
You might assign all equipment records to a ***Yearly*** Item Loan Period if they will typically be checked out all year long. For textbooks, you might classify elementary level books as ***Yearly*** and high school level books as ***Semester*** or ***9 Weeks***, based on how long the students will keep them.

Note:
You can use **Circulation Rules** (covered later) to assign different due dates and max items out based on the type of student (**Loan Permission**) and type of item (**Item Loan Period**). For instance, a ***High School*** student might check out multiple ***Semester*** items but only one ***Yearly*** item.

Notes:

Item Loan Period

Item Loan Periods allow you to define circulation rules for groups of assets. You can configure lending and fine rules for each Item Loan Period when you create Loan Permission classes for your patrons, such as ***Faculty*** and ***Students***.

To add an Item Loan Period

- Click **Administration** from the **Menu Bar**, and then click **Catalog**.
- Click **Item Loan Period**.
- Click **Add New Item Loan Period**.
- Enter the new Item Loan Period in the **Name** field.
- You may enter a brief defining statement in the **Description** field.
- Click **Save**.

Material Types

Material Types allow you to define different types of assets. For example, you may have textbooks, teacher editions, laptops, eReaders, workbooks, desktop computers, etc.

To add a Material Type

- Click **Administration** from the **Menu Bar**, and then click **Catalog**.
- Click **Material Types**.
- Click **Add New Material Type**.
- Enter the new Material Type in the **Name** field.
- You may enter a brief defining statement in the **Description** field.
- Select the appropriate option from the **Type** drop-down list: **Book**, **eBook**, or **Equipment**.
- You may enter a dollar amount in the **Total Charge For Items Marked Lost With Missing Cost** field. If no cost is saved on the holding record, this amount is used as a base price (along with an item's **Condition**) to assess fines to a student when the item is marked lost.
- Click **Save**.

Entity Responsible For Tracking

This feature allows you to create entities, which are included in your item records and provide an additional method for tracking your items' whereabouts (either owner or physical storage) throughout the school year. Entities can be teachers or staff members who are in charge of distributing and collecting items in their classes. Entities could also be locations where classroom sets of books stay in the room rather than being checked out or for areas where assets are stored. Booktracks provides you with the flexibility to create entities in any way that will be most beneficial to you.

Once entities are created, you can assign them during circulation (based on settings) or when editing or reclassifying holdings records. Having this data available in the item records allows you to run reports based on entity as well as the student patrons who currently have assets checked out; this ensures that you can find out where items in your school are located at all times.

To add an Entity Responsible For Tracking

- Click **Administration** from the **Menu Bar**, and then click **Catalog**.
- Click **Entity Responsible For Tracking**.
- Click **Add New Entity Responsible For Tracking**.
- Enter the new entity in the **Name** field.
- Enter a brief defining statement, such as what subjects an instructor teaches or the location of a storage room, in the **Description** field.
- Select the correct school from the **School Building** drop-down list (**Centralized** only). For instance, you could select the school where the teacher works, or you could choose to select **"None"** if you do not need a school associated with the entity. By default, the School Building where you are logged on is listed here.
- Click **Save**.

Condition

Condition defines the level of use or wear of items in your database. After items have been returned, you may want to update the condition of some of your assets. There are several pre-configured conditions: ***1 New***, ***2 Like New***, ***3 Good***, ***4 Fair***, ***5 Poor***, ***6 Damaged***, etc.

To add a Condition

- Click **Administration** from the **Menu Bar**, and then click **Catalog**.
- Click **Condition**.
- Click **Add New Condition**.
- Enter the new Condition in the **Name** field.
- Enter the percentage of the total cost that you would charge if items are lost in this state in the **% Of Cost** field.
- Click **Save**.

Did you know?
You can import a file of teachers to populate your list of entities in bulk rather than adding them individually.

Note:
When you initially open the **Add/Edit Entity Responsible For Tracking** form, you'll see entities for the current School Building (where you are logged on); you may see a message saying ***"No Items Selected"*** if no entities are assigned to the current school.

Example:
You might set up your conditions so that students who lose an item already in ***Damaged*** condition might only have to pay 50% of the cost.

Notes:

Vendors

Note:
You must enter a vendor code and company name, but all other fields are optional.

Note:
You can click **Test** next to the **Website** field to open the URL in a new tab and make sure it works correctly.

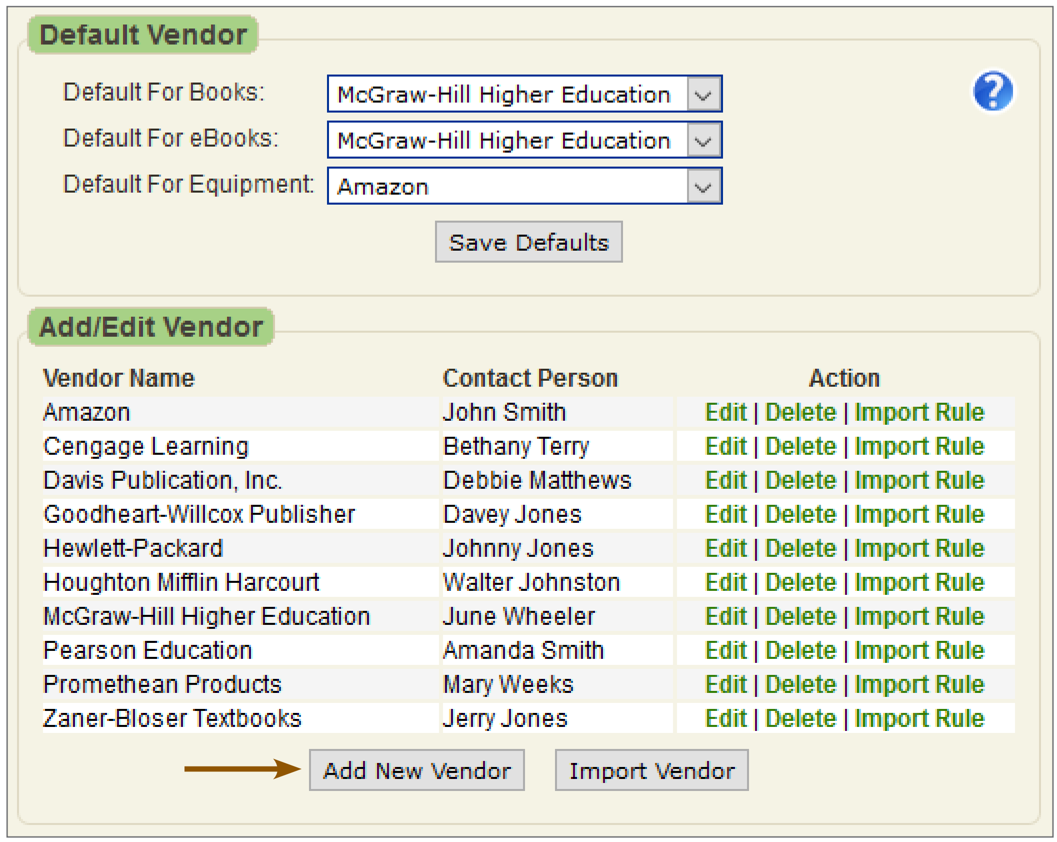
Notes:

Vendors

Identifying and keeping track of the **Vendors** that provide your textbooks and equipment is easy to do in Booktracks. You can enter specific information about each of your vendors; then, when you add holdings to an item's record, you can select the appropriate vendor.

To add a vendor

- Click **Administration** from the **Menu Bar**, and then click **Catalog**.
- Click **Vendors**.



- Click **Add New Vendor**.
- In the **Vendor Code** field, enter an abbreviation or acronym of the vendor's company name. For example, ***PEDU*** for Pearson Education or ***HP*** for Hewlett-Packard®.
- In the **Contact Person** field, enter the sales or customer service person's name with whom you deal.
- In the **Vendor Name** field, enter the vendor's company name.
- Enter the address and other contact information in the corresponding fields.
- In the **Website** field, enter the vendor's website address.
- Enter account information and comments as needed in the remaining fields.
- Click **Save**.

Subject Area

The **Subject Area** feature allows you to categorize your assets according to topic, course/curriculum, or which department owns them (may apply to equipment that isn't tied to a subject). For instance, ***Geometry***, ***Literature***, and ***World History*** are Subject Areas.

To add a Subject Area

- Click **Administration** from the **Menu Bar**, and then click **Catalog**.
- Click **Subject Area**.
- Click **Add New Subject Area**.
- Enter the new Subject Area in the **Name** field.
- You may enter a brief defining statement in the **Description** field.
- Select an option from the **Subject Area Grouping** drop-down list. See the next section for steps on setting up these categories.
- Click **Save**.

Subject Area Grouping

Subject Area Groupings allow you to organize your Subject Areas by broader categories; for instance, if you use specific subjects, such as ***Algebra 1***, ***Algebra 2***, ***Calculus***, etc., you could assign all of those to one general group, such as ***Math***.

To add a Subject Area Grouping

- Click **Administration** from the **Menu Bar**, and then click **Catalog**.
- Click **Subject Area Grouping**.
- Click **Add New Subject Area Grouping**.
- Enter the Subject Area Grouping in the **Name** field.
- Enter a brief defining statement in the **Description** field.
- Click **Save**.

Did you know?
You can run a **Holdings Summary** report by Subject Area or generate a **Circulation By Subject Area** report, available within the list of **Statistical Reports**. Various other reports also include Subject Area as a filter to narrow your search results.

Notes:

Important!
To run reports on “expired” items based on **Adoption Cycle Lengths**, be sure to enter Adoption Dates for your bibliographic records; see the “Add Item” section later in the manual for more information.

Notes:

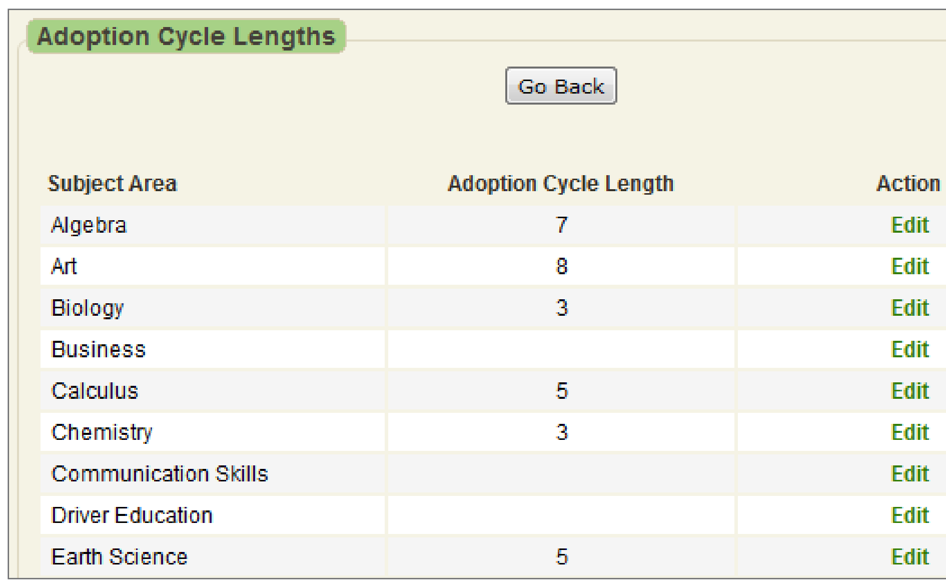
Adoption Cycle Lengths

Booktracks allows you to establish adoption information for your textbooks in order to track when the books were first adopted and when they “expire” or need to be replaced with newer editions. You can assign an **Adoption Date** to textbook titles when you add new bibliographic records to the database or edit existing records, and you can specify the length of your adoption cycles based on the textbooks’ Subject Area.

For example, if you assigned ***08/01/2019*** as the date you adopted *Mader Biology* (12th Edition) and you set your adoption cycle for Biology textbooks as ***3*** years, generating your **Expense Report** and **List Of Expired Titles** report in 2022 will alert you that the textbook expires that year.

To establish Adoption Cycle Lengths

- Click **Administration** from the **Menu Bar**, and then click **Catalog**.
- Click **Adoption Cycle Lengths**.


Adoption Cycle Lengths

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Subject Area	Adoption Cycle Length	Action
Algebra	7	Edit
Art	8	Edit
Biology	3	Edit
Business		Edit
Calculus	5	Edit
Chemistry	3	Edit
Communication Skills		Edit
Driver Education		Edit
Earth Science	5	Edit

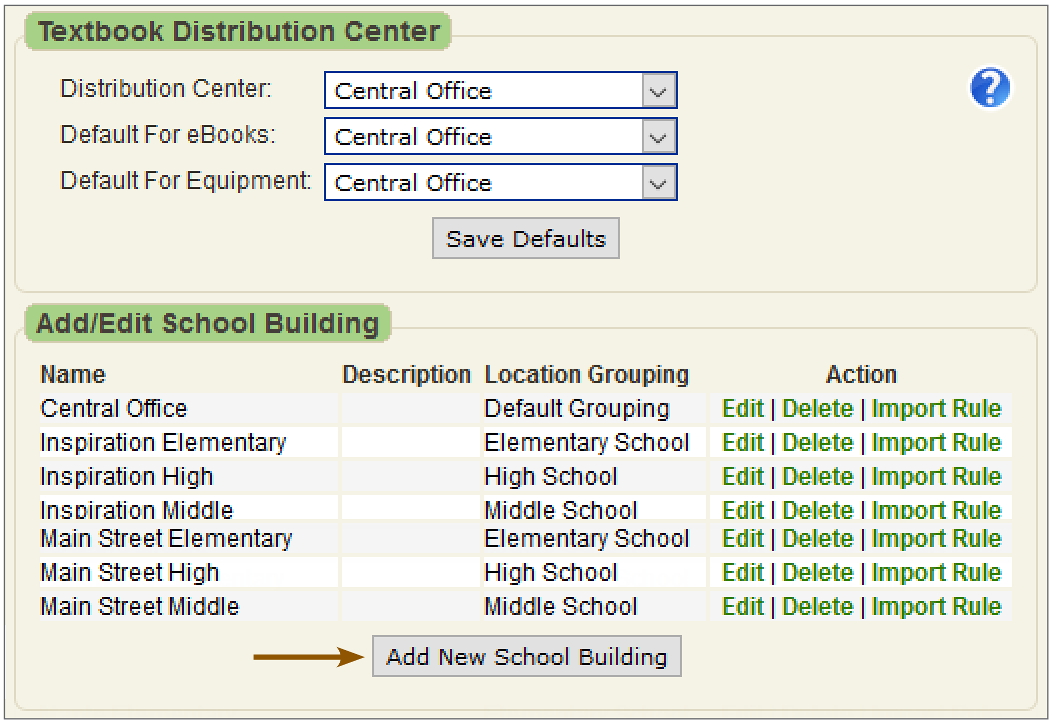
- Click **Edit** in the **Action** column next to the appropriate Subject Area.
- Enter the number of years you will use textbooks within this Subject Area in the **Adoption Cycle Length** field.
- Click **Save**.

School Building (Centralized only)

School Buildings refer to the schools in your district and any other buildings or offices you need to add to your database.

To add a School Building

- Click **Administration** from the **Menu Bar**, and then click **Catalog**.
- Click **School Building**.



- Click **Add New School Building**.
- Enter the new School Building in the **Name** field.
- Enter a brief defining statement in the **Description** field.
- Select the appropriate option from the **Location Grouping** drop-down list. See the next section for steps on setting up these categories.
- Click **Save**.

Location Grouping (Centralized only)

Location Groupings allow you to set up categories to organize your School Buildings by level; for instance, you could use ***High School***, ***Junior High School***, ***Middle School***, ***Elementary School***, and others as your groups. You can set up the Location Groupings you need and then assign each School Building to one of those categories; this lets you filter various holdings and course reports according to school level as well as specific locations. If you do not need to use this feature, you can leave the **Default Grouping** assigned to all schools.

To add a Location Grouping

- Click **Administration** from the **Menu Bar**, and then click **Catalog**.
- Click **Location Grouping**.
- Click **Add New Location Grouping**.
- Enter the Location Grouping in the **Name** field.
- Enter a brief defining statement in the **Description** field.
- Click **Save**.

Did you know?
Booktracks includes the **Inter-School Building Loan** feature (**Centralized** only), which allows you to update the location of your assets as they move from building to building.

Note:
The **Holdings Summary** report allows you to view statistics by School Building. The **Bibliographic Summary** and **Equipment Summary** reports allow you to drill down and view the number of available and checked out items at each school.

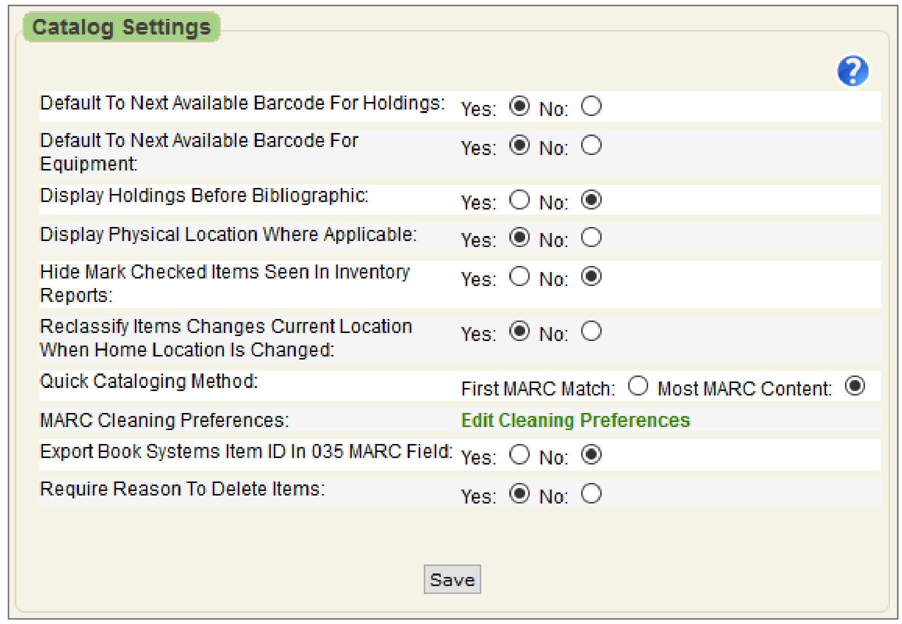
Notes:

Catalog Settings

Catalog Settings

This form allows you to change your catalog configuration options. Make your selections based on your district's or school's specific cataloging needs.

- Click **Administration** from the **Menu Bar**, and then click **Catalog**.
- Click **Catalog Settings**.



Catalog Settings

Default To Next Available Barcode For Holdings:	Yes: ◉ No: ○
Default To Next Available Barcode For Equipment:	Yes: ◉ No: ○
Display Holdings Before Bibliographic:	Yes: ○ No: ◉
Display Physical Location Where Applicable:	Yes: ◉ No: ○
Hide Mark Checked Items Seen In Inventory Reports:	Yes: ○ No: ◉
Reclassify Items Changes Current Location When Home Location Is Changed:	Yes: ◉ No: ○
Quick Cataloging Method:	First MARC Match: ○ Most MARC Content: ◉
MARC Cleaning Preferences:	Edit Cleaning Preferences
Export Book Systems Item ID In 035 MARC Field:	Yes: ○ No: ◉
Require Reason To Delete Items:	Yes: ◉ No: ○

Save

Notes:

- Read through the table below, and make changes as necessary.
- Click **Save**.

Catalog Settings	
Setting / Definition	**Action**
Setting: Default To Next Available Barcode For Holdings **Definition:** Choose this option to have Booktracks insert "**next available**" in the barcode field each time you add records for textbooks, workbooks, teacher editions, or other items using the **Holding Record** form. This saves you from typing this phrase or scanning/entering a barcode each time.	Click **Yes** if you want the barcode field to show the default "**next available**" (based on barcode type). Click **No** if you prefer to scan or enter the barcode into the field.
Setting: Default To Next Available Barcode For Equipment **Definition:** Choose this option to have Booktracks insert "**next available**" in the barcode field each time you add records for eReaders, computers, DVD players, or other assets using the **Holding Record For Equipment** form. This saves you from typing this phrase or scanning/entering a barcode each time.	Click **Yes** if you want the barcode field to show the default "**next available**" (based on barcode type). Click **No** if you prefer to scan or enter the barcode into the field.
Setting: Display Holdings Before Bibliographic **Definition:** Holdings information can be displayed above or below the bibliographic information on the **Edit Item: Bibliographic Record** form and the **Edit Item: Equipment Record** form.	Click **Yes** to view the holdings above the bibliographic record. Click **No** to display holdings below the bibliographic information.

Setting: Display Physical Location Where Applicable **Definition:** Booktracks displays the **Physical Location** (the area where items are stored or used) during check in and when reviewing records.	Click **Yes** to view physical locations on related forms. Click **No** to hide this information.
Setting: Hide Mark Checked Items Seen In Inventory Reports **Definition:** When enabled, Booktracks does not display the **Mark Checked Items Seen** button at the top of your **Inventory Reports**.	Click **Yes** to hide the **Mark Checked Items Seen** button to prevent items being inaccurately marked seen. Click **No** to be able to mark items as seen using this button.
Setting: Reclassify Items Changes Current Location When Home Location Is Changed **Definition:** When you change the School Building (**Centralized** only) for assets on the **Reclassify Items** form, Booktracks will update the Current Location as well as the Home Location in their holdings records.	Click **Yes** to change both locations. Click **No** to change the Home Location only.
Setting: Quick Cataloging Method **Definition:** You can choose the method used to determine which record is imported when you use basic **Quick Cataloging** (search by ISBN). All records are pulled from your specified Z39.50 servers.	Click **First MARC Match** to import the first record found. Click **Most MARC Content** to import the record with the most complete data.
Setting: MARC Cleaning Preferences **Definition:** If you import/export MARC records for textbooks, you can specify tags that should be “cleaned” (removed) or “preserved” (kept).	Click **Edit Cleaning Preferences** to open the **MARC Cleaning Preferences** form where you can enter tags in the **Clean** and **Preserve** columns.
Setting: Export Book Systems Item ID In 035 MARC Field **Definition:** When enabled, Booktracks places the BSI Item ID into the 035 field for MARC record exporting. Some of your vendors may prefer a unique ID for records.	Click **Yes** to export BSI’s ID. Click **No** to use the original contents of the 035 field.
Setting: Require Reason To Delete Items **Definition:** When enabled, workers must specify why they are deleting holdings records for textbook copies or pieces of equipment.	Click **Yes** to require workers to explain a deletion. Click **No** if you do not require a reason. By default, this is disabled.

Notes:

Quick Cataloging Settings

Note:
Most Z39.50 servers do not require a username and password. However, if you already work with a server that does ask for log on information to pull MARC records, enter that information to access the server using the **Quick Cataloging** form. When you enter an ISBN or UPC, Booktracks can search for matching records without the server prompting you to log on.

Notes:

Quick Cataloging (Z39.50) Settings

Booktracks allows you to easily catalog textbook and other materials using its built-in **Quick Cataloging** feature. Booktracks comes pre-configured with Z39.50 sites, but you can add servers, change the order, etc. as needed. This section covers adding a new server; see the online Help files for details on other customizations.

To set up an additional Z39.50 server

- Click **Administration** from the **Menu Bar**, and then click **Catalog**.
- Click **Quick Cataloging (Z39.50) Settings**.
- Click **Add New** to clear the fields and prepare to enter data for an additional server.
- Enter the name of the database you want to search in the **Name** field.
- Enter the IP address or host name for that Z39.50 server in the **IP Address / Host Name** field.
- Enter the port for that Z39.50 server in the **Port** field.
- Enter the database name for that server in the **Database Name** field.
- If the server requires you to log on to access its data, enter your username and password in the corresponding fields.
- The **Search Both 10- And 13-Digit ISBNs** check box is enabled by default to be compatible with all servers. If deselected, some servers may only return a MARC record with the same number of digits as the ISBN you scanned/entered.
- Click **Add**.
- If needed, highlight the server you just added and click **Test** to verify that Booktracks can connect to that database.

The table below lists several Z39.50 servers that are delivered with Booktracks. Refer to this information if you remove these servers in favor of trying other databases but would like to add any of these back to your list.

More Z39.50 Server Addresses	
Name: IP Address / Host Name: Port: Database Name:	**Library of Congress** **lx2.loc.gov** **210** **LCDB_MARC8**
Name: IP Address / Host Name: Port: Database Name:	**K12records** **z3950.booksys.net** **210** **k12records**
Name: IP Address / Host Name: Port: Database Name:	**Ohio Link** **olc1.ohiolink.edu** **210** **INNOPAC**
Name: IP Address / Host Name: Port: Database Name:	**Capital Area District Library** **opac.cadl.org** **210** **INNOPAC**

You can also obtain information about other Z39.50 server addresses from the **Z39.50 Target Directory** provided by IRSpy: http://irspy.indexdata.com.

Patron Administration

The **Patrons** submenu contains links to important features and settings. Decisions made in this area apply to patron forms and circulation. In this section, we will discuss the two most important areas: Loan Permission and Teacher-Student Report Class. Refer to Booktracks' online Help for additional assistance with other options listed in the **Patron Administration** submenu.

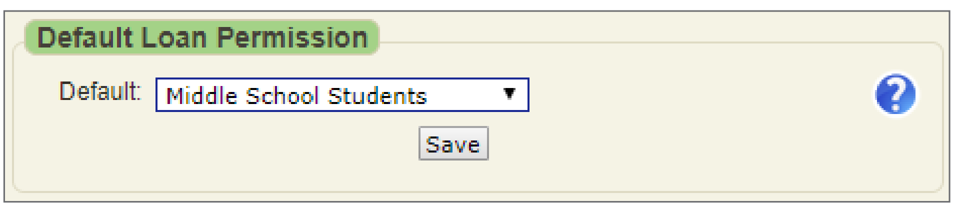
Each patron in Booktracks is assigned both of the following patron types:

- **Loan Permission** (broad category for establishing circulation rules)
- **Teacher-Student Report Class** (specific category for report purposes)

To change defaults

The steps below explain how to configure the defaults for Loan Permission, but the steps are similar for Teacher-Student Report Class.

- Click **Administration** from the **Menu Bar**, and then click **Patrons**.
- Click **Loan Permission**.
- Select the appropriate choice from the **Default** drop-down list.



- Click **Save**.

Loan Permission

Loan Permission refers to how patrons are grouped based on circulation rules for checking out assets.

Loan Permissions and Item Loan Periods *cross-reference* each other to establish the privileges and restrictions for members of each Loan Permission. If you converted electronically to Booktracks, this area was set up for you by Book Systems' Data Management Team.

You can create names for the patron groups and establish maximum limits for circulation. Numeric values established on this form complement circulation rules for limits based on the Item Loan Period of the assets patrons check out.

Note:
Limits set for each Loan Permission can block patrons from checking out assets. If a student reaches one or more of the limits established here, Booktracks requires an override from a worker with related permissions.

Note:
Update the default as needed when you begin adding a new group of patrons.

Notes:

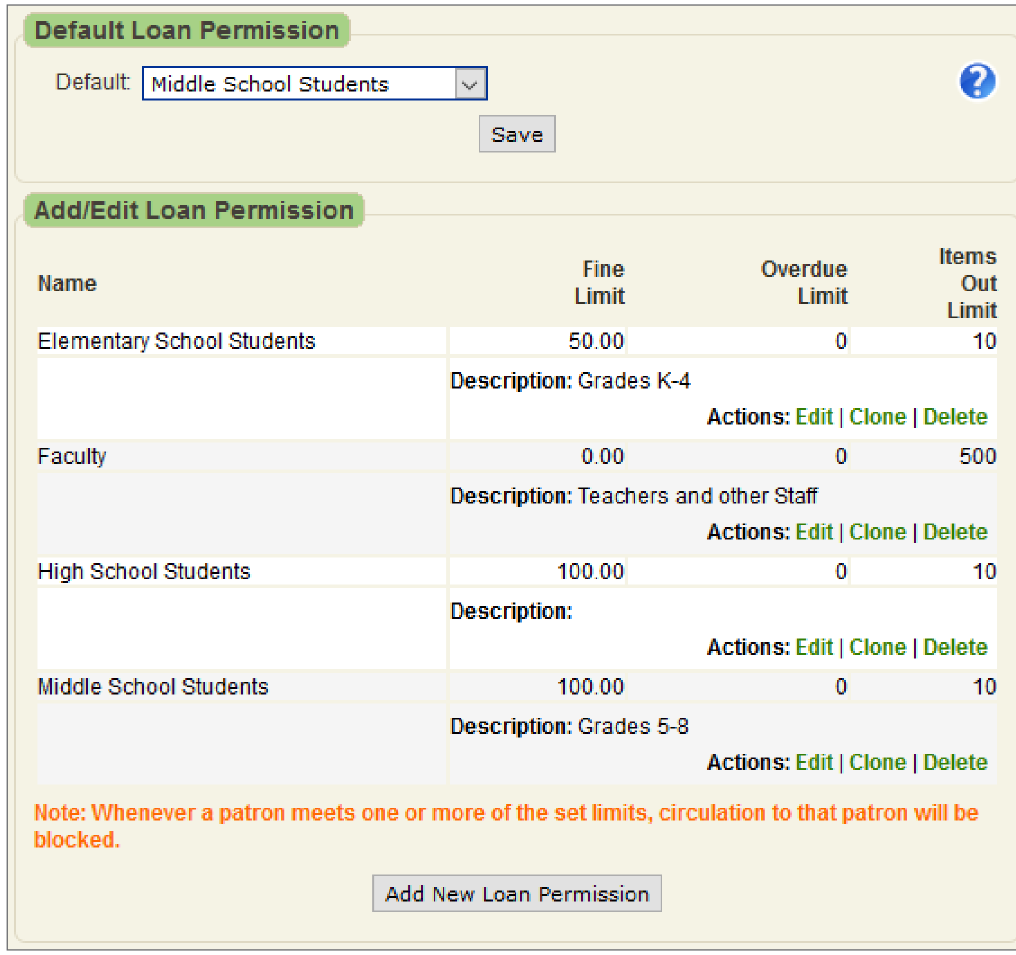
Loan Permission

Important!
The **Fine Limit** refers to the maximum amount of outstanding fines patrons can accrue before Booktracks blocks them from checking out additional assets, not the maximum fine that can be charged.

Notes:

To add a new Loan Permission

- Click **Administration** from the **Menu Bar**, and then click **Patrons**.
- Click **Loan Permission**.
- Click **Add New Loan Permission**.



Default Loan Permission

Default: Middle School Students

Save

Add/Edit Loan Permission

Name	Fine Limit	Overdue Limit	Items Out Limit
Elementary School Students	50.00	0	10
	Description: Grades K-4 **Actions:** Edit | Clone | Delete		
Faculty	0.00	0	500
	Description: Teachers and other Staff **Actions:** Edit | Clone | Delete		
High School Students	100.00	0	10
	Description: **Actions:** Edit | Clone | Delete		
Middle School Students	100.00	0	10
	Description: Grades 5-8 **Actions:** Edit | Clone | Delete		

Note: Whenever a patron meets one or more of the set limits, circulation to that patron will be blocked.

Add New Loan Permission

- Enter the new name in the **Name** field.
- Enter a defining statement in the **Description** field.
- Enter the maximum fine amount patrons in this class can accumulate before restrictions limit their check outs in the **Fine Limit** field.
- Enter the maximum number of overdue items for patrons in this class in the **Overdue Limit** field.
- Enter the maximum number of items patrons in this class can check out in the **Items Out Limit** field.
- Click **Save**.

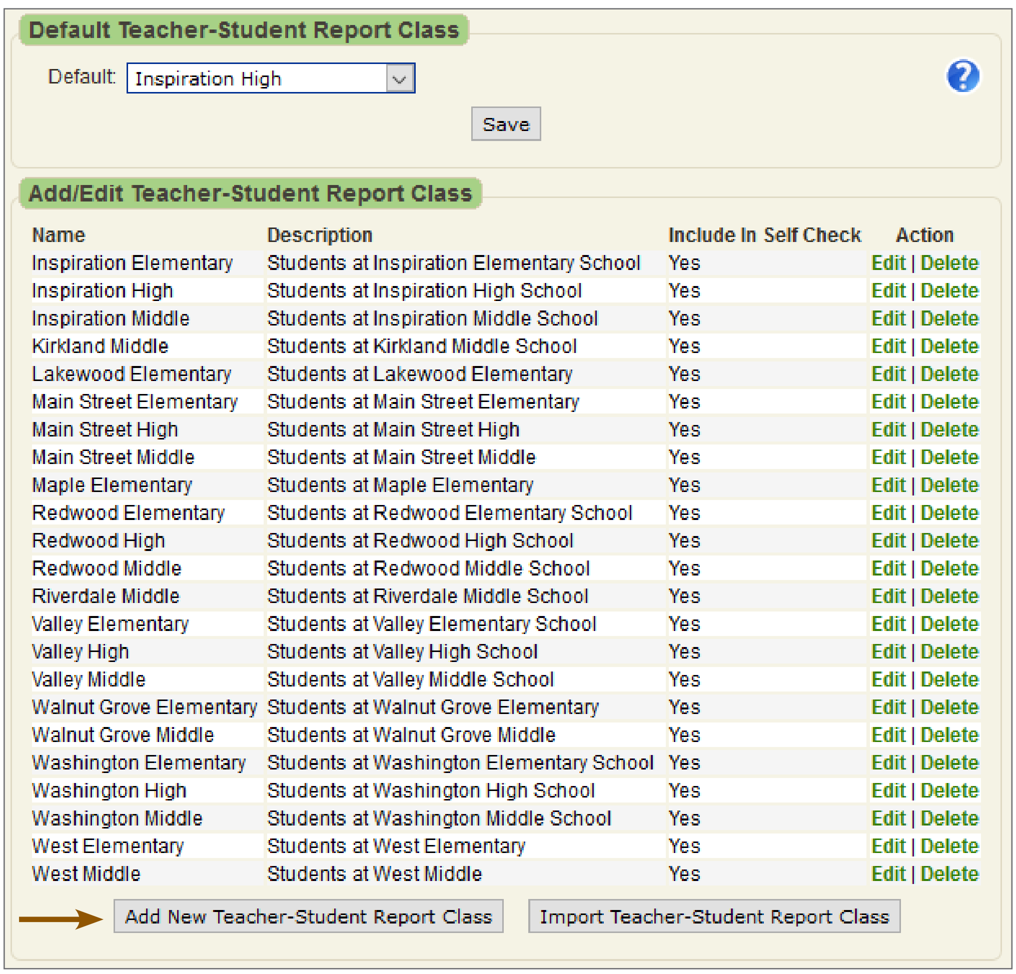
Teacher-Student Report Class

Booktracks allows you to group your patrons into various classes for reporting purposes. Teacher-Student Report Classes are used for quick generation of patron *report data*, whereas Loan Permissions are used to define *circulation privileges*. These report classes are also used to look up patrons using **Self Check Out**.

You may create Teacher-Student Report Classes for schools in your district, grades, homeroom teachers, etc.

To add a new Teacher-Student Report Class

- Click **Administration** from the **Menu Bar**, and then click **Patrons**.
- Click **Teacher-Student Report Class**.
- Click **Add New Teacher-Student Report Class**.
- Enter the new name in the **Name** field.


Default Teacher-Student Report Class

Default: Inspiration High

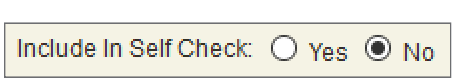
Save

Add/Edit Teacher-Student Report Class

Name	Description	Include In Self Check	Action
Inspiration Elementary	Students at Inspiration Elementary School	Yes	Edit | Delete
Inspiration High	Students at Inspiration High School	Yes	Edit | Delete
Inspiration Middle	Students at Inspiration Middle School	Yes	Edit | Delete
Kirkland Middle	Students at Kirkland Middle School	Yes	Edit | Delete
Lakewood Elementary	Students at Lakewood Elementary	Yes	Edit | Delete
Main Street Elementary	Students at Main Street Elementary	Yes	Edit | Delete
Main Street High	Students at Main Street High	Yes	Edit | Delete
Main Street Middle	Students at Main Street Middle	Yes	Edit | Delete
Maple Elementary	Students at Maple Elementary	Yes	Edit | Delete
Redwood Elementary	Students at Redwood Elementary School	Yes	Edit | Delete
Redwood High	Students at Redwood High School	Yes	Edit | Delete
Redwood Middle	Students at Redwood Middle School	Yes	Edit | Delete
Riverdale Middle	Students at Riverdale Middle School	Yes	Edit | Delete
Valley Elementary	Students at Valley Elementary School	Yes	Edit | Delete
Valley High	Students at Valley High School	Yes	Edit | Delete
Valley Middle	Students at Valley Middle School	Yes	Edit | Delete
Walnut Grove Elementary	Students at Walnut Grove Elementary	Yes	Edit | Delete
Walnut Grove Middle	Students at Walnut Grove Middle	Yes	Edit | Delete
Washington Elementary	Students at Washington Elementary School	Yes	Edit | Delete
Washington High	Students at Washington High School	Yes	Edit | Delete
Washington Middle	Students at Washington Middle School	Yes	Edit | Delete
West Elementary	Students at West Elementary	Yes	Edit | Delete
West Middle	Students at West Middle	Yes	Edit | Delete

Add New Teacher-Student Report Class   Import Teacher-Student Report Class

- Enter a defining statement in the **Description** field.
- If you look up students by their report class for **Self Check Out**, you can specify if you do not want a certain report class listed; simply click **No** next to **Include In Self Check**.
- Click **Save**.

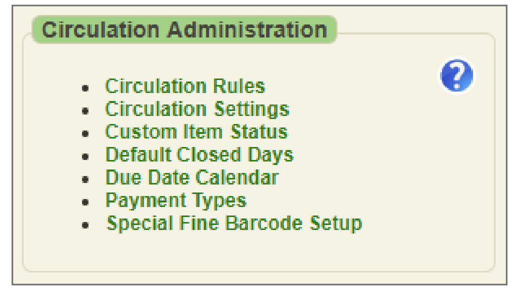


Teacher-Student Report Class

Notes:

Circulation Administration

The **Circulation** submenu contains links to important features and settings for distributing and collecting items.



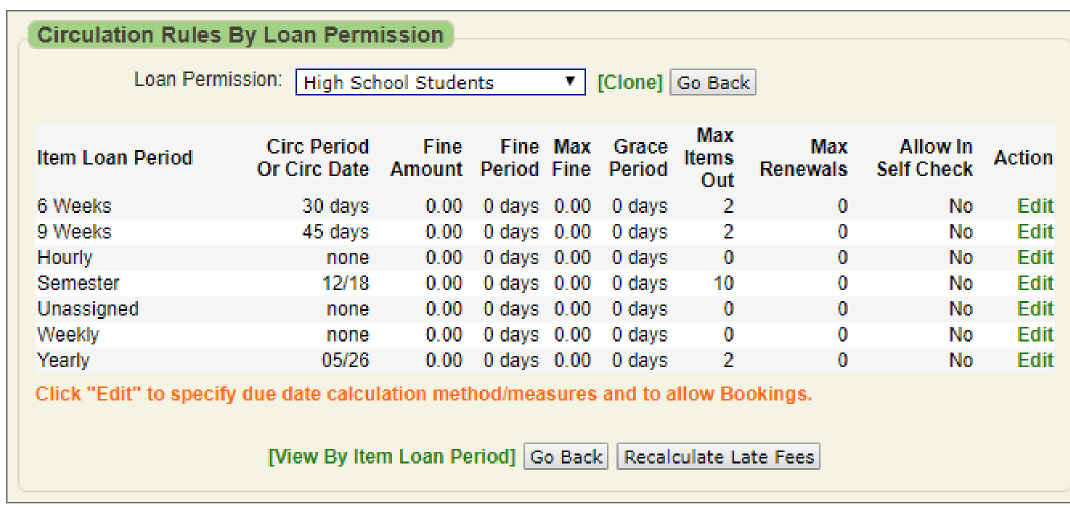
Circulation Rules

The **Circulation Rules By Loan Permission** form allows you to establish circulation periods or dates, maximum items out, and more. Each rule is defined for a Loan Permission and an Item Loan Period. When you open the form, you will see a single Loan Permission selected in the top drop-down list and the rules for all corresponding Item Loan Periods in the table. You can select a different Loan Permission to view the rules for that class.

Options on the **Circulation Rules By Loan Permission** form allow you to edit rules and clone Loan Permissions as needed.

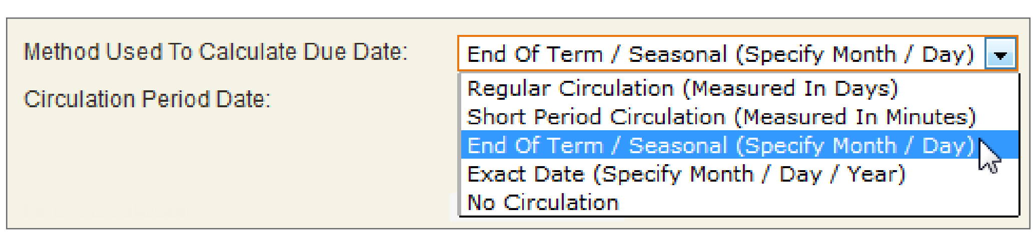
To change Circulation Rules

- Click **Administration** from the **Menu Bar**, and then click **Circulation**.
- Click **Circulation Rules**.



Item Loan Period	Circ Period Or Circ Date	Fine Amount	Fine Period	Max Fine	Grace Period	Max Items Out	Max Renewals	Allow In Self Check	Action
6 Weeks	30 days	0.00	0 days	0.00	0 days	2	0	No	Edit
9 Weeks	45 days	0.00	0 days	0.00	0 days	2	0	No	Edit
Hourly	none	0.00	0 days	0.00	0 days	0	0	No	Edit
Semester	12/18	0.00	0 days	0.00	0 days	10	0	No	Edit
Unassigned	none	0.00	0 days	0.00	0 days	0	0	No	Edit
Weekly	none	0.00	0 days	0.00	0 days	0	0	No	Edit
Yearly	05/26	0.00	0 days	0.00	0 days	2	0	No	Edit

- If needed, select another option from the **Loan Permission** drop-down list.
- From the row of the Item Loan Period you need to change, click **Edit** in the **Action** column.
- Click the **Method Used To Calculate Due Date** drop-down button.



Notes:

- Click one of the following choices and set up additional options as needed:
    - **Regular Circulation (Measured In Days)** - Choose this method to check out items for a certain number of days. Click **Yes** or **No** next to **Skip Closed Dates When Counting** to specify if weekends or other closed days are included. Then, enter a number in the **Circulation Period (Days)** field.
    - **Short Period Circulation (Measured In Minutes)** - Choose this method to check out items for a certain number of minutes. Enter a number in the **Circulation Period (Minutes)** field.
    - **End Of Term / Seasonal (Specify Month / Day)** - Choose this method if you need to specify a certain month and day items are due. Use the calendar icon to select a day, or enter a day, such as ***12/21*** or ***05/29***, in the **Circulation Period Date** field.
    - **Exact Date (Specify Month / Day / Year)** - Choose this method if you need to specify a date within a particular year when items are due. Use the calendar icon to select a date, or enter a date, such as ***05/29/20***, in the **Circulation Period Date** field.
    - **No Circulation** - Choose this option to block circulation.
- Under **Fine Calculation**, enter values in the fields:
    - In the **Fine Amount** field, if you charge a fine for overdue items, enter an amount.
    - In the **Fine Period (Days)** field, enter a number for how often the above amount should accrue, e.g., 1 = every day and 7 = weekly.
    - In the **Max Fine** field, enter the maximum amount of fines that can be assessed for each overdue item.
    - In the **Grace Period (Days)** field, enter a number of days past the due date for items to be returned; settings determine whether fines accrue if items are returned after this period.
- Under **Restrictions**, enter values or select a radio button:
    - In the **Max Items Out** field, enter a number of items within this Item Loan Period that patrons can check out.
    - In the **Max Renewals** field, enter a number of times items within this Item Loan Period can be renewed (consecutively).
    - Next to **Allow Bookings**, click **Yes** if patrons can book items they need ahead of time; otherwise, click **No**.
    - Next to **Allow In Self Check**, click **Yes** if patrons can use **Self Check** for that loan class permission; otherwise, click **No**. For instance, you may allow faculty to check in equipment such as tablets, laptops, etc. via self check stations but require students to see staff so that you can ensure that all pieces have been turned in.

Restrictions	
Max Items Out:	10
Max Renewals:	0
Allow Bookings:	Yes: ○ No: ◉
Allow In Self Check:	Yes: ○ No: ◉

- Click **Save**.

Example:
For the circulation method, you may select **End Of Term / Seasonal** for items due at the end of the semester or year; you may select **Regular Circulation** for items used for 9-week terms, or you may select **Exact Date** for workbooks or laptops that are kept longer than a year.

Note:
If you only charge fines for lost items and not overdues, you can leave all the **Fine Calculation** fields as the default **"0."**

Example:
You may allow bookings for teachers who need to reserve items for a whole class or want to request a DVD player to show a video with a particular unit.

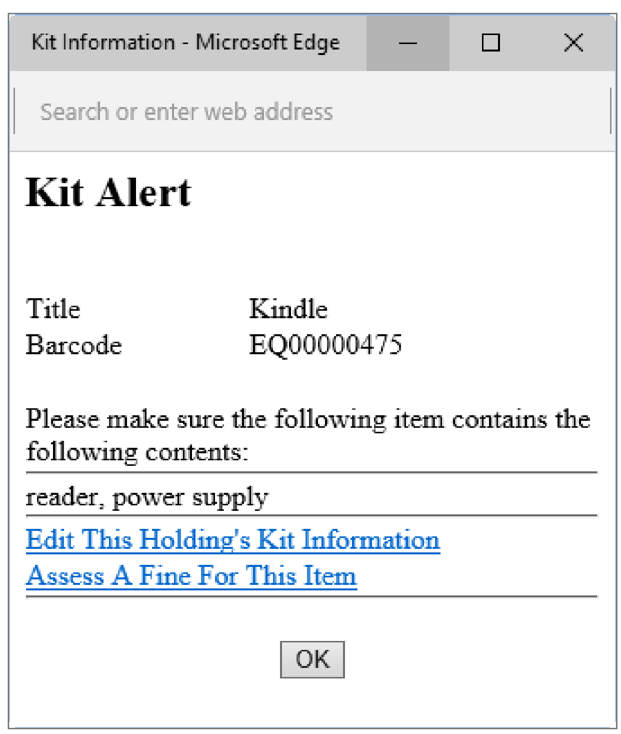
Notes:

Circulation Settings

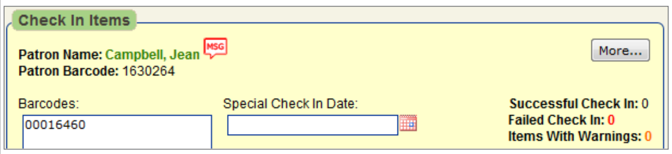
The **Circulation Settings** allow you to specify circulation configuration options. You can change these settings anytime by repeating the steps below.

- Click **Administration** from the **Menu Bar**, and then click **Circulation**.
- Click **Circulation Settings**.
- Read through the table below, and make changes as necessary.
- Click **Save**.

Circulation Settings	
Setting / Definition	**Action**
Setting: Show Failed Barcodes On Circulation **Definition:** When you receive an **error** on either check out form, the barcode that was not successfully checked out continues to display, allowing you to edit the barcode if it was not manually entered correctly.	Click **Yes** if you are manually entering barcodes so you can edit any that fail. Click **No** to clear any failed barcodes and prepare to scan another item.
Setting: Pop-Up Kit Notifications **Definition:** When a patron checks out or checks in a textbook with kit information or a piece of equipment with current components, Booktracks notifies you to verify the contents before continuing.	Click **Yes** to see this information in a pop-up notification. Click **No** to display the kit notification in the current window.



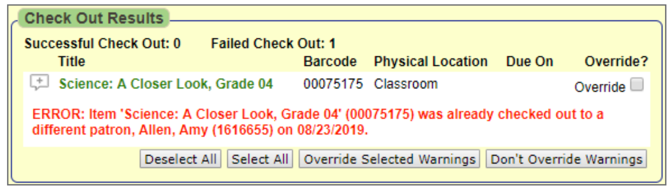
Notes:

Setting: Show Patron Info On Check In **Definition:** If you process a check in from either the **Check Out Items** form or the **Patron Information** form, enabling this setting allows you to see detailed patron information when the **Check In Items** form initially opens. Depending on your worker settings, you may need to click **More...** to see all the student or teacher information. 	Click **Yes** to view patron information when the check in form initially opens. Click **No** to see the regular form.
Setting: Waive Lost Fine And Assess Overdue Fine When Item Is Found **Definition:** If an item previously marked lost is found, enabling this option removes the lost fine and alerts you of any overdue fine assessed to the patron who misplaced the item.	Click **Yes** to remove a lost fine and assess an overdue fine when an item is found. Click **No** to leave the lost fine and not add an overdue fine.
Setting: Automatically Notify When Refund Is Due **Definition:** If you have the previous setting enabled, you can tell Booktracks to automatically display a refund notice if a lost item is found but a student already paid the lost fine. WARNING: Item 'US History: Beginnings to 1877, 2008' (00002069) was marked as found. $25.62 fine for Losing an Item (00002069) removed for patron Debra Allen (000000012).	Click **Yes** to enable this setting if you have a refund policy. Click **No** if you do not offer refunds.
Setting: Require Reason To Waive Fines **Definition:** When enabled, workers must enter an explanation when waiving fines/fees.	Click **Yes** to require a reason to waive charges. Click **No** if workers do not have to enter a reason. By default, this setting is disabled.
Setting: Play Sound Alerts During Circulation **Definition:** Activate an audible alert for circulation transactions.	Click **Yes** to enable sounds. Click **No** to disable.
Setting: Circulation Background Color **Definition:** Customize the background color for the check out and check in forms. We do not recommend dark colors for optimal usability.	Click the color swatch, and choose a color from the palette. To return to the default yellow color, enter **"#ffffcc."**

Note:
If you enable sound alerts, successful check outs produce a "book fairy" sound; failed transactions are indicated by a "whistle" sound. Successful check ins are indicated by a muted "gong" sound. Visit **Custom Sounds** (General Administration) to make your own selections.

Notes:

Circulation Settings

Setting: Show Error If Item Is Already Checked Out **Definition:** Enable this setting to display an **error** message for any items that are already checked out (pictured below). 	Click **Yes** to receive an **error** and require an override. Click **No** to perform the check out for the current patron without an override. Additionally, Booktracks displays an orange message with information about the previous student.
Setting: Default Bookings Buffer Period **Definition:** Configure Booktracks to supply a default buffer period (day[s] immediately prior to the requested booking schedule) when adding bookings; only patrons with the related circulation rule enabled can book items (based on Loan Permission and Item Loan Period). Patrons cannot check out items that would be due during this period, meaning items must be due back at least this number of days prior to the booking.	Highlight the default buffer period of **"1"** *day*, and enter a higher number if needed.
Setting: Display Patron Barcode During Circulation **Definition:** Configure Booktracks to display the patron's barcode in the **Patron Barcode** field at check out.	Click **Yes** to display the patron's barcode during check out. Click **No** to hide the barcode.
Setting: Use Grace Period When Assessing Fines **Definition:** You can tell Booktracks to assess fines with or without the grace period.	Click **Yes** to assess fines using the grace period. Click **No** to assess fines using only overdue days.
Setting: Choose Entity Responsible For Tracking During Circulation **Definition:** This option allows you to assign entities to items when you perform check out and check in transactions.	Click **Yes** to be prompted to choose an entity when you check items in or out. Click **No** to directly open circulation forms without choosing an entity.
Setting: Browse Should Choose By First Character Of Last Name **Definition:** If you use the **Browse** option to search for students or teachers during circulation, you can designate which screen will open after you select a Teacher-Student Report Class: a series of buttons from A to Z, sorting the patrons in that report class by last name, or buttons for all the students and teachers in the report class.	Click **Yes** if you have a large database and need to sort students and teachers by last name. Click **No** to directly open a list of all the students and teachers in the selected report class.

Notes:

Setting: Mark Brief Record As Temporary **Definition:** When you create brief records, Booktracks automatically tags them as temporary records, meaning they will be checked in and deleted at the end of the school year.	Click **Yes** to treat brief records as temporary. Click **No** to treat brief records as permanent additions.
Setting: Automatically Remove Custom Item Status On Check In **Definition:** If you set up **Custom Item Statuses** and holdings are assigned to these, you can choose to reinstate the normal circulation status on check in and display the *previous* status for reference.	Click **Yes** to remove the custom item status on relevant items. Click **No** to retain the custom status assigned to the holdings.
Setting: Automatically Remove Custom Item Status On Check Out **Definition:** If you set up **Custom Item Statuses** and holdings are assigned to these, you can choose to reinstate the normal circulation status on check out.	Click **Yes** to remove the custom item status on relevant items. Click **No** to retain the custom status assigned to the holdings.
Setting: Automatically Mark Overdue Items Lost After **Definition:** When enabled, this setting automatically marks overdue items as lost after a set number of days, saving you the time of marking textbooks or equipment lost that are not returned.	Highlight the default **"0"** (zero) and enter a new number of days to enable this setting.

Circulation Settings - School Building Settings (Centralized only)

Setting / Definition	Action
Setting: Keep Current Location While Circulating **Definition:** You can tell Booktracks to list the original location of a textbook or piece of equipment no matter which School Building currently has the item.	Click **Yes** if you do not want the Current Location to change even if items are checked in to a different School Building. Click **No** if you want the Current Location to be the School Building where the textbook or piece of equipment is currently checked in.
Setting: Check Home Location During Check In **Definition:** You can tell Booktracks to display a warning if a textbook or piece of equipment is returned to a School Building other than its home location.	Click **Yes** to display a **warning** at check in for items returned to non-home locations. Click **No** to hide the warning.
Setting: Allow Any Item To Be Checked Out At Any School Building **Definition:** You can tell Booktracks to allow check outs at any School Building without requiring an override.	Click **Yes** to allow items to be checked out at any School Building. Click **No** to receive an **error** stating where the item should be located.

Note:
You can set up **Custom Item Statuses** from the **Circulation Administration** submenu. See the last section in this chapter for more details.

Notes:

Circulation Settings

Tip!
If your district uses a combination of permanent and temporary loans, be sure to return to circulation settings and update this preference as needed.

Note:
Your receipt printer must support multiple colors if you enable the setting for colored text.

Notes:

Setting: Assign Custom Item Status To Items Checked In At Another School Building **Definition:** You can choose to assign the specified item status, such as ***Incorrect Location*** or ***Return Home***, to any item that was checked in to a school other than the **Current Location**.	Click **Yes** to change the status, and then use the drop-down list to select the appropriate choice. Click **No** to retain the normal circulation status.
Circulation Settings - Inter-School Building Loan Settings (Centralized only)	
Setting / Definition	**Action**
Setting: In Transit Transfer Step Is Optional **Definition:** When enabled, workers have the option of marking items arrived at their destination without first using other transfer steps. Workers can use all three steps, only two, or only one.	Click **Yes** to allow workers to mark items arrived without any other steps. Click **No** to require workers to at least mark items as **In Transit** before they mark them **Arrived At Destination**.
Setting: Enable Permanent Loan (Arrival Destination Equals New Home Location) **Definition:** When enabled, loans become permanent transfers, meaning the home location within holdings records changes along with the current location because you do not expect the items to be returned.	Click **Yes** to change the home location, meaning the receiving school is responsible for these items. Click **No** to leave the home location as is, meaning items should be returned.
Circulation Settings - Receipt Settings	
Setting / Definition	**Action**
Setting: Send Circulation Receipt To **Definition:** Select an option for printing circulation receipts: **HTML** or **Slip Printer Client**.	Click **HTML** to print receipts on a local printer. Click **Slip Printer Client** to print receipts on a slip printer.
Setting: Circulation Receipt Font Size **Definition:** Specify the font size for receipt text.	Highlight the default font size of **"8,"** and enter a larger number if needed.
Setting: Print Receipts In All Bold **Definition:** Configure Booktracks to print receipts in **bold** text for increased visibility.	Click **Yes** to print receipt text in **bold**. Click **No** to print plain text.
Setting: Print Colored Text On Receipts **Definition:** Configure Booktracks to print overdue items and fine amounts in **red** on circulation receipts.	Click **Yes** to print overdue items and fine amounts in **red**. Click **No** to print in black text.

Setting: Print Item Costs On Receipts **Definition:** Configure Booktracks to print the cost of each item on circulation receipts.	Click **Yes** to print each item's cost on receipts. Click **No** to omit each item's cost.
Setting: Print Patron Name On Receipts **Definition:** Configure Booktracks to print the student's or teacher's name on circulation receipts.	Click **Yes** to print the patron's name on receipts. Click **No** to exclude the patron's name.
Setting: Print Patron Barcode On Receipts **Definition:** Configure Booktracks to print the student's or teacher's barcode on circulation receipts.	Click **Yes** to print the patron's barcode on receipts. Click **No** to exclude the patron's barcode.
Setting: Print Today's Transactions On Receipts **Definition:** This setting instructs Booktracks to print the current day's transactions on circulation receipts.	Click **Yes** to include the day's transactions on receipts. Click **No** to exclude the current day's transactions.
Setting: Print Check Ins On Circulation Receipt For Today's Transactions **Definition:** If you include Today's Transactions on receipts, you can specify if that should list check in information as well as check out transactions.	Click **Yes** to include check ins in Today's Transactions. Click **No** to exclude check in information.
Setting: Print Checked Out Items Status on Receipts **Definition:** This setting instructs Booktracks to include all items checked out on receipts.	Click **Yes** to print items currently checked out on receipts. Click **No** to exclude checked out items.
Setting: Print Current Fine Status on Receipts **Definition:** This setting instructs Booktracks to include exisiting fines on receipts.	Click **Yes** to include all fines on receipts. Click **No** to exclude fines on receipts.
Setting: Print Fine Receipts By Default **Definition:** This setting instructs Booktracks to automatically print a receipt when a patron pays a fine.	Click **Yes** to automatically print a receipt for payment of a fine. Click **No** to print only when you click **Print Receipt**.
Setting: Automatically Email Patron Fine Receipt If Possible **Definition:** This setting instructs Booktracks to automatically email a receipt when a student or teacher pays a fine if there is an email address listed in the patron record.	Click **Yes** to enable automatic receipts. Click **No** to manually email receipts as needed.

Note:
If you select the **All Information On Receipt** check box on your check out form, both Today's Transactions and Current Status are printed regardless of your settings. If you leave the check box unchecked, the receipt may include Today's Transactions only, Current Status only, or both based on your enabled settings.

Notes:

Setting: Circulation Receipt Header **Definition:** Booktracks allows you to personalize receipt headers with the district or school name.	Enter the information that you want to display at the top of your circulation receipts. To exclude the header text, leave the field blank.
Setting: Circulation Receipt Footer **Definition:** Booktracks allows you to personalize receipt footers with information such as address or phone number.	Enter the information that you want to display at the bottom of your circulation receipts. To exclude the footer text, leave the field blank.
Setting: Open Patron Lookup After Printing Circulation Receipt **Definition:** Booktracks opens a fresh **Patron Lookup** form after printing a receipt so you can find the next student needing to check out.	Click **Yes** to open a new **Patron Lookup** form. Click **No** to keep the check out form open where you can use the related field to look up a student.

Circulation Settings - Self Check Station Settings

Setting / Definition	Action
Setting: Require Patron Password Before Check Out **Definition:** This setting requires teachers to enter the password for each student before being able to check out an item.	Click **Yes** to require entering a password. Click **No** to check out without a password.
Setting: Theme **Definition:** The **Self Check** module includes several themes. Accept the default or designate your choice of screen image for your **Self Check Stations**.	To change the theme, click the drop-down button, and click a background style.
Setting: Color Of Self Check In Background **Definition:** Booktracks allows you to customize the background color of the **Self Check In** interface.	Click the color swatch, and choose a color from the palette. To return to the default black, enter **"#000000."**
Setting: Color Of Self Check Out Background **Definition:** Booktracks allows you to customize the background color of the **Self Check Out** interface.	Click the color swatch, and choose a color from the palette. To return to the default black, enter **"#000000."**

Notes:

Setting: Background Pattern And Animation **Definition:** These options allow you to specify a shade, design, and movement for your background pattern.	Use the drop-down lists to select a shade, design, and movement. Choose **"No Design"** or **"No Movement"** if you prefer not to use this feature. Use the preview buttons to view the background colors/ images and make changes as needed before saving.
Setting: Button Effects **Definition:** These options let you select animations for clicking and hovering over buttons.	Click the **Click Effects (#)** or **Hover Effects (#)** button to open a pop-up where you can preview and select as many animations as you choose. Click **Set** when you are finished or **Cancel** if you change your mind.
Setting: Page Navigation Effects **Definition:** This option lets you select an animation for moving from one page to the next.	Use the drop-down list to select an animation.
Setting: Enable Success Effects **Definition:** This option lets you display visual effects (balloons or confetti) when items are successfully checked in or out.	Click **Yes** to enable effects. Click **No** to omit effects.
Setting: Check Out Patron Lookup Mode **Definition:** Booktracks allows you to choose the method for finding patron records using **Self Check Out**: **Choose By Class** or **Scan Barcode**.	Click **Choose By Class** if you want patrons to access their records via the Teacher-Student Report Class buttons. Click **Scan Barcode** to allow teachers to scan/ enter the student's barcode.
Setting: Choose By First Character Of Last Name (After By Class) **Definition:** If you select the **Choose By Class** lookup mode for check out, you can designate which screen will open next: a series of buttons from A to Z, sorting the patrons in that report class by last name, or buttons for all the students and teachers in this specific report class.	Click **Yes** to sort patrons by last name. Click **No** to see all patrons' names.

Notes:

Note:
If you enable pictures for patrons or for **Teacher-Student Report Classes** to display during **Self Check Out** but do not have images uploaded, a generic image will display.

Notes:

Setting: Search By Name After Barcode **Definition:** If you select the **Scan Barcode** lookup mode for check out, this option lets teachers enter numerical or text values; if Booktracks does not find a matching barcode, it will search for a name.	Click **Yes** to allow barcode and name searches. Click **No** to allow searches by numerical barcode only.
Setting: Display Keypad For Patron Barcode Entry **Definition:** If you select the **Scan Barcode** lookup mode for check out, this option tells Booktracks to display a numeric keypad onscreen for barcode entry.	Click **Yes** to display a keypad during check out. Click **No** to show a field only.
Setting: Display Patron Pictures During Self Check Out/In **Definition:** If you select **Choose By Class** as your lookup mode, this option tells Booktracks to include the images added to patron records along with the names for easy identification.	Click **Yes** to see patron pictures. Click **No** to show names only.
Setting: Display Teacher-Student Report Class Pictures During Self Check Out **Definition:** If you select **Choose By Class** as your lookup mode and upload pictures representative of your report classes, this option tells Booktracks to include the images during **Self Check Out**.	Click **Yes** to see report class pictures. Click **No** to show names only.
Setting: Sort Currently Checked Out Items By Check Out Date **Definition:** This option tells Booktracks to put the most recently checked out item at the top of the list of items out.	Click **Yes** to put the most recently checked out item first. Click **No** to add it to the bottom.
Setting: Display District Name (**Centralized** only) **Definition:** Personalize your **Self Check Station** with the name of your school district.	Click **Yes** to display your district's name. Click **No** to omit it.
Setting: Display School Name (**Distributed** only) **Definition:** Personalize your **Self Check Station** with the name of your school.	Click **Yes** to display your school's name. Click **No** to omit it.
Setting: Allow For Self Check Station Inter-Communication **Definition:** This option tells Booktracks to include **links** on the **Self Check Out** and **Self Check In** interfaces that allow users to switch between the two.	Click **Yes** if you want **Self Check Out/In** links to display on the self check interfaces. Click **No** to hide the links.

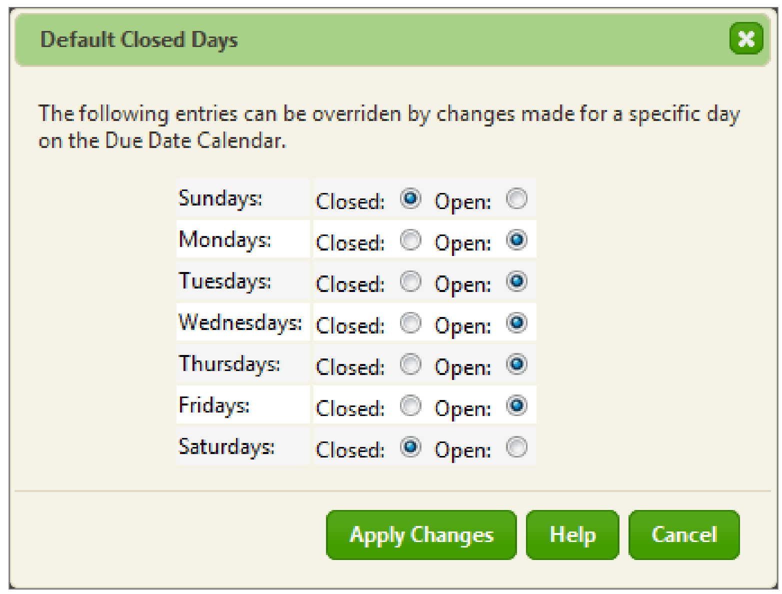
Setting: Expect Only One Item On Check Out **Definition:** This setting instructs Booktracks to restrict patrons to checking out only one item at a time.	Click **Yes** if patrons are only allowed to check out one item at a time. Click **No** to allow check outs up to the maximum number allowed to a patron.
Setting: Look Up Patron Barcode If Scanned Item Barcode Is Not Found **Definition:** On **Self Check Out**, when a patron barcode is scanned into the item barcode field, it aborts the check out process and retrieves the patron that matches the barcode number.	Click **No** (recommended) to receive an **error** and prevent potential substitution of a patron barcode for an item barcode. Click **Yes** to look up the scanned patron barcode and open a new check out screen where you can scan item barcodes.
Setting: Allow Full Check Out Errors To Be Displayed **Definition:** This option lets you decide if detailed **error** messages should display on **Self Check Out**, meaning all workers could view the message available on the administrative side of Booktracks regardless of permissions.	Click **Yes** to display detailed **error** messages when workers hover over the shortened messages onscreen. Click **No** to only display the shortened **error**.
Setting: Allow Warnings To Be Displayed **Definition:** This option lets you decide if **warning** messages should display directly on the **Self Check In/Self Check Out** interfaces. These do not interfere with circulation; hide messages only if students use the interface and should not see these notes.	Click **Yes** to display **warning** messages. Click **No** to hide these messages.
Setting: How Long To Display Messages Before Moving To Next Patron **Definition:** Designate in seconds how long Booktracks should pause before refreshing after a **success** or **error** message is displayed.	Highlight the default value (*seconds*), and enter another number as needed.
Setting: How Much Inactivity Allowed Before Moving To Next Patron **Definition:** Designate in seconds how long Booktracks should pause before refreshing after a period of inactivity.	Highlight the default value (*seconds*), and enter another number as needed.
Setting: Field Border Width **Definition:** Designate the border thickness of the patron and item entry fields. You can increase the width to help workers recognize when the fields are active or inactive. The default is **"1."**	Highlight the default, and enter a new width in pixels for the field border.

Notes:

Default Closed Days

The **Default Closed Days** form allows you to specify the days that school is always closed. K-12 schools can mark Sundays and Saturdays as closed. You can exclude these closed days from due date calculation (if you use the **Regular Circulation** method for Item Loan Periods, such as ***9 Weeks*** or ***6 Weeks***) and from fine calculation (if you charge fines for days overdue).

- Click **Administration** from the **Menu Bar**, and then click **Circulation**.
- Click **Default Closed Days**. A pop-up opens above the **View/Edit Calendar** form in a new window.
- If needed, click a **Closed** or **Open** radio button next to applicable days.



- Click **Apply Changes**.

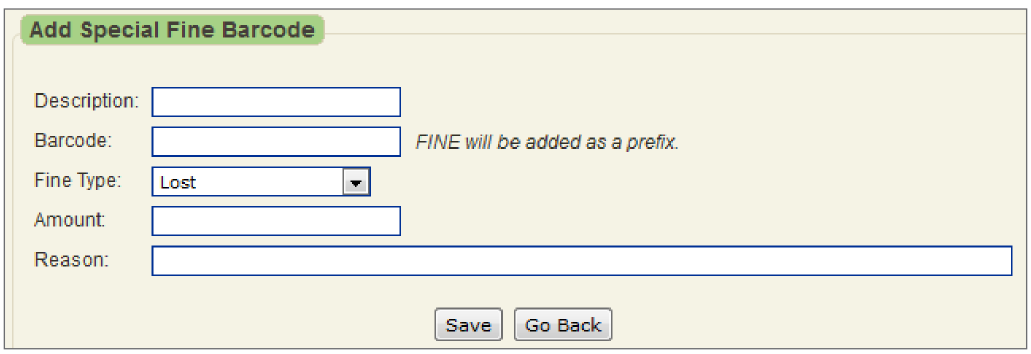
Notes:

Special Fine Barcode Setup

Administrators in charge of asset management can configure **Special Fine Barcodes** to automatically assess fines or fees to students. This is useful if you have recurring situations when you need to assign the exact same charges to students for the same reason.

For example, if your assets have accessories such as a case or charger, you might assess a $10 or $20 fine. Instead of entering the amount, selecting a fine type, and specifying a reason each time a fine is assessed, workers could simply scan the appropriate **Special Fine Barcode**.

- Click **Administration** from the **Menu Bar**, and then click **Circulation**.
- Click **Special Fine Barcode Setup**.
- On the **Add Special Fine Barcode** form, in the **Description** field, enter a name you will recognize, such as ***Lost Equipment Case***.



- In the **Barcode** field, enter an alphanumeric entry (letters and/or numbers only).
- Select a choice from the **Fine Type** drop-down list.
- In the **Amount** field, enter a dollar amount.
- In the **Reason** field, enter an explanation as needed.
- Click **Save**.
- Repeat as needed to add other barcodes.
- When you are ready to print, perform the following tasks under **Printing Options**:
    - Select a label from the **Label To Print** drop-down list.
    - Select a configuration from the **Print Configuration** drop-down list. To edit or create a print configuration, use the **Add/Edit** link.
    - If needed, in the **Starting Row** and **Starting Column** fields, highlight the default **"1"** and enter a higher number.
    - If needed, in the **Copies Per Barcode** field, highlight the default **"1"** and enter a higher number.
    - Click **Print Special Barcodes**. A progress bar displays in a new tab while the barcodes are being generated.
    - Use the onscreen options to print.
- Close the tab when you are finished.

Refer to the "Assess Fines" section later in this manual for instructions on how to use these barcodes.

Note:
After saving a **Special Fine Barcode**, Booktracks adds the word FINE to the beginning of the barcode.

Notes:

Custom Item Status

All items in Booktracks have a status based on whether they are currently checked in/out, lost, etc. The **Custom Item Status** feature allows you to create additional statuses that you can assign for specific circumstances based on your school situation.

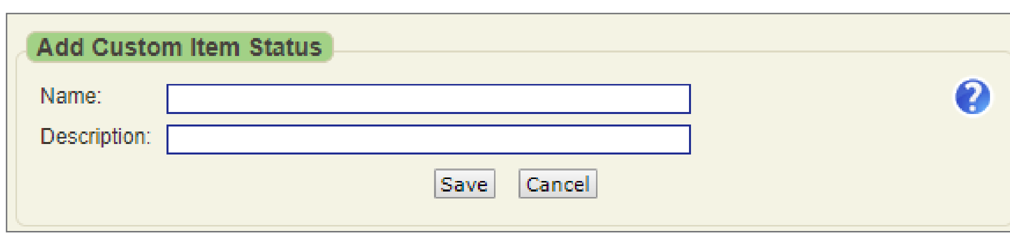
By default, several statuses are delivered including **Use Circulation Status**, which mean Booktracks will automatically list whether the item is in/out/lost, **In Repair**, which refers to items that have been sent to a warehouse or other location to be fixed, **Claims Returned**, which refers to items that are still out but a student says he/she has returned, and more.

You can also add any other statuses that would be helpful and modify or delete them as needed. For example, you might create the custom item status ***Software Update*** for laptops or other items that IT staff needs to collect and service periodically.

You can use the **Log Equipment Repairs** form to keep track of devices or other equipment that is sent to a warehouse or office for repairs and then returned (see “Equipment” chapter of this manual). You can update the status on individual items on the **Holding Records** form or a group of items on the **Reclassify Items** form (accessible via the **Menu Bar** or circulation forms). Reports allow you to filter by a particular **Custom Item Status** to stay updated on your items.

Use the following steps to create a new status.

- Click **Administration** from the **Menu Bar**, and then click **Circulation**.
- Click **Custom Item Status**.
- Click **Add New Custom Item Status**.



- Enter a name in the **Name** field.
- Enter a defining statement in the **Description** field.
- Click **Save**.

Notes:

Circulation Menu

Did you know?
This manual focuses on circulation methods available directly in Booktracks; however, you can also use **MAT**, the **M**obile **A**sset **T**racker™ app for supported Apple® devices and Android® devices, to circulate items. See details in the **Booktracks Mobile Apps Guide**, available from the **Downloads** form.

Note:
The background color of check out/in forms can be customized on the **Circulation Settings** form.

Notes:

Circulation Menu

The **Circulation** menu provides various options for you to distribute/collect assets, track loans (**Centralized** only), assess and process fines, review records, and more. This manual covers several key features.

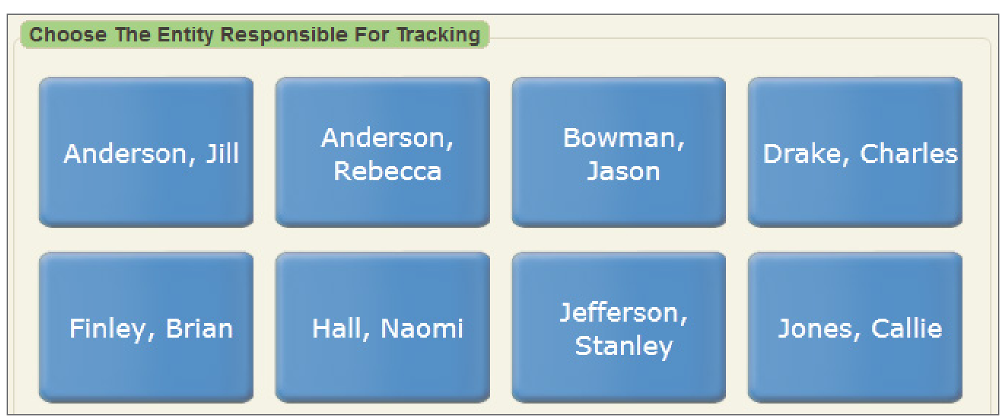
Check Out

Booktracks allows you to check out single or multiple assets. By default, the **Batch Check Out Items** form opens when you click **Check Out** from the **Circulation** menu and look up a patron. If you prefer processing single items, you can change the default setting found on the **Worker Settings** form. If you create **Cart** records (see the "Catalog" chapter later in this manual) to store a group of items with one batch barcode, use either form to check out the items at one time.

Booktracks provides the **Entity Responsible For Tracking** feature (see set up details in the "Administration" chapter earlier in this manual) which allows you to assign entities to your assets for tracking purposes. Entities can be teachers or staff members responsible for distributing/collecting items or locations where assets are stored. To assign entities during check out/in transactions, you must have the **Choose Entity Responsible For Tracking During Circulation** setting enabled on the **Circulation Settings** form.

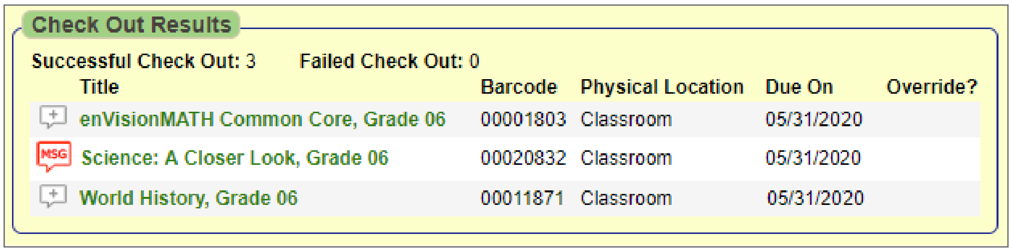
To check out assets to students

- Click **Circulation** from the **Menu Bar**.
- Under **Distribution**, click **Check Out**.
- If you have the entity circulation setting enabled, the **Choose The Entity Responsible For Tracking** form opens where you must click to assign an entity to the items being checked out. This entity is used for all subsequent transactions.



- The **Patron Lookup For Check Out** and **Checked Out Item Lookup** forms open. Scan a patron barcode, OR enter a patron name/barcode and click **Search**.
- If your search returns a list of results, click the correct **name** to continue.
- The **Batch Check Out Items** form opens. You may also see the patron's **Items Checked Out** and any **Outstanding Fines/Fees**.
- If your student or teacher requires a due date outside normal circulation rules and you have the correct worker permission enabled, click the **Special Due Date** check box. Then click the calendar icon, and click again to select a date. Otherwise, manually enter a date using the mm/dd/yyyy format.
- Scan item barcodes or a cart barcode in the **Barcode** field.

- Click **Check Out**. The **Check Out Results** form displays the items. **Errors** display as they apply.

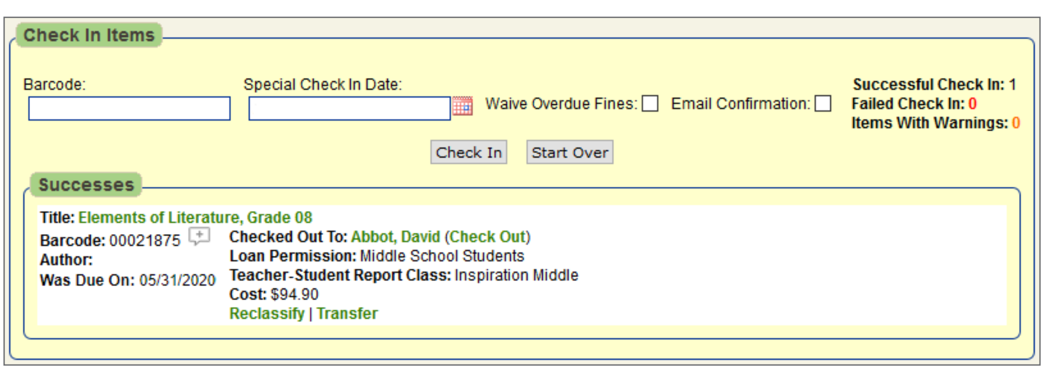


- Depending on your circulation settings, if a textbook is part of a kit or an asset has components, you will either see a pop-up or a warning on the **Check Out Results** form, reminding you to check all parts.
- Warnings display in orange. For example, if a student checks out an item marked lost, a warning alerts you that it has been marked found.
- If you need to print a receipt for the student or teacher, you have two options: click the **All Information On Receipt** check box if you need to include everything applicable, or leave it unchecked to include contents based on your circulation settings. Then, click **Print Circulation Receipt** and follow onscreen options to print.

Check In

Booktracks allows you to check in a single asset or multiple items at once using the **Check In Items** form.

- Click **Circulation** from the **Menu Bar**.
- Under **Collection**, click **Check In**.
- If you have the entity circulation setting enabled, the **Choose The Entity Responsible For Tracking** form opens where you must click to assign an entity. This entity is used for all subsequent transactions.
- If needed, click the calendar icon, and click again to insert a date in the **Special Check In Date** field. Otherwise, manually enter a date using the mm/dd/yyyy format. If you enter a special date, it will remain for the next check in. If you need to apply the same **Special Check In Date** to multiple textbooks, you can leave the date; otherwise, be sure to delete it before the next transaction.
- Scan the item barcodes or the cart barcode.
- The transactions complete. A **Successes** form displays with information, such as the title and barcode, patron name and loan permission, and any fines due. You may see **Errors** and **Warnings** forms with applicable messages.



- Depending on your circulation settings, if a textbook is part of a kit or an asset has components, you will either see a pop-up or a warning on the **Warnings** form, reminding you to check all parts.

Note:
If you assigned multiple loan periods to the bibliographic record of the textbook being checked out, you will be prompted to select which one applies to the situation.

Did you know?
If you have permission to waive fines, a **Waive Overdue Fines** check box displays on the **Check In Items** form. Click the check box to automatically waive any fines that have accrued for overdue items.

Tip!
If the students need verification that they returned their items, click the **Email Confirmation** check box before clicking **Check In**.

Notes:

Note:
When you check out/in with entities, those choices are based on the School Building field in the entity record; the form displays entities tied to the current School Building (where you are logged on) as well as those designated as **"None."** Once you have chosen an entity using this form, Booktracks will remember it for this and subsequent circulation transactions.

Note:
The **Entity Responsible For** link displays on the **Self Check Out/In** forms. If you need to change the entity for this transaction, click the link to reopen the **Choose The Entity Responsible For Tracking** form and select another one.

Notes:

Self Check Stations

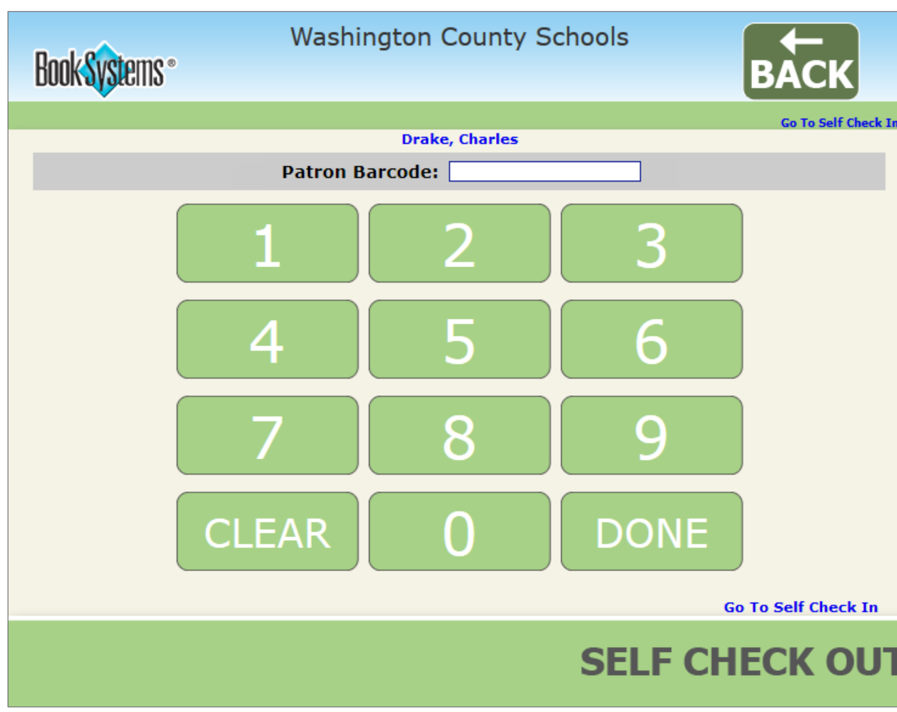
Booktracks' **Self Check Stations** allow you to easily distribute and collect assets. During distribution, you can look up students by their names or barcodes or by their Teacher-Student Report Classes (based on circulation settings).

To log on to Self Check Out

- Open the main Booktracks page and click **Self Check Out** to open the **Log On** form. Enter a username and password. Be sure to select your School Building from the drop-down list (**Centralized** only) so the location of your assets will be correct, and click **Log On**.
- If you are already using the administrative side of Booktracks, click **Circulation** from the **Menu Bar**. Under **Distribution**, click **Self Check Out**.
- If you are using the **Self Check In** interface, click the **Go To Self Check Out** link (based on settings).

To check out by patron barcode or name

- If you have the entity circulation setting enabled, the **Choose The Entity Responsible For The Items Checked Out** form opens where you must click to assign an entity to the assets being distributed.
- The **Self Check Out** form displays. Scan or enter the student's barcode into the **Patron Barcode** field. If you are using the numeric keypad (based on settings), click **DONE** when you're finished entering the barcode; otherwise, click **CLEAR** to start over.



- Scan the item barcodes or the cart barcode into the **Item Barcode** field.
- **Successes** and **Errors** display on your screen, and sounds play (based on settings) to help you easily distinguish if you can continue processing transactions or if you need to stop to address an issue.

To check out by Teacher-Student Report Class

- If you have the entity circulation setting enabled, the **Choose The Entity Responsible For The Items Checked Out** form opens where you must click to assign an entity to the assets being distributed.

- The **Self Check Out** form displays. Click a **Teacher-Student Report Class**, or click **ALL** if you do not know the student's report class.

- Depending on your circulation settings, if you see a series of letters, click the appropriate letter to open a list of students and teachers, and then click the appropriate name. Otherwise, simply click the appropriate name to open the record.
- Scan the item barcodes or cart barcode into the **Item Barcode** field.
- **Successes** and **Errors** display on your screen, and sounds play (based on settings) to help you easily distinguish if you can continue processing transactions or if you need to stop to address an issue.

To log on to Self Check In

- Open the main Booktracks page and click **Self Check In** to open the **Log On** form. Enter a username and password. Be sure to select your School Building from the drop-down list (**Centralized** only) so the location of your assets will be correct, and click **Log On**.
- If you are already using the administrative side of Booktracks, click **Circulation** from the **Menu Bar**. Under **Collection**, click **Self Check In**.
- If you are using the **Self Check Out** interface, click the **Go To Self Check In** link (based on settings).

To check in assets

- If you have the entity circulation setting enabled, the **Choose The Entity Responsible For The Items Checked In** form opens where you must click to assign an entity to the assets that are being collected.
- The **Self Check In** form displays.
- Scan the item barcodes or cart barcode into the **Item Barcode** field.

Note:
If you see errors based on the student's **Loan Permission** or **Circulation Rules**, these must be reconciled or overridden on the *administrative* side of Booktracks.

Tip!
When a Teacher-Student Report Class contains several hundred patron name buttons, it is recommended that you enable the **Choose By First Character Of Last Name (After By Class)** circulation setting to group patrons by alphabetical buttons based on the first letter of their last name.

Did you know?
You can also enable settings to display uploaded pictures for your report classes during **Self Check Out** using the **Patron Administration** submenu.

Notes:

Note:
You can perform loans when you're logged on to any School Building in your database if you have the correct circulation permission.

Tip!
The **Add** and **Lookup** options work well if you are sending a few extra items (such as eReaders) to another school. The **Filter** option works well for transferring groups of items from a central location to the schools in your district.

Note:
Depending on your circulation settings, you may use all transfer steps or skip steps as needed based on the situation (i.e., use all three, only two, or only one step); otherwise, you may require workers to at least mark items as **In Transit** before they are marked **Arrived At Destination**.

Notes:

Inter-School Building Loan (Centralized only)

Booktracks provides the **Inter-School Building Loan** feature so you can track your textbooks and pieces of equipment as you transfer them among the schools in your district. This would be helpful if you distribute items from a central location to all your schools and then need them to be returned when the school year is over or if you need to share items among schools to accommodate shortages.

You can configure settings so your loan is either *temporary* (meaning items will be returned to their home location) or *permanent* (meaning the home location will be changed to the new location). Whichever method you choose, this feature helps you know exactly where assets are and which schools are accountable for them at all times.

This manual covers how to insert records into a queue and update their current transfer status. Repeat these steps as needed to update this information as they are delivered and/or returned. See Booktracks' online Help files for detailed examples.

To perform an Inter-School Building Loan

- Click **Circulation** from the **Menu Bar**.
- Under **Distribution**, click **Inter-School Building Loan**.
- Insert barcodes into the **Transfer Queue** in one or more of the following ways:
  - If you are updating items that have already begun the transfer process, you can scan a batch barcode into the **Enter Batch Barcode** field and then click **Lookup Batch**. This adds all associated barcodes to the queue at once.
  - Scan barcodes into the **Enter Items To Transfer** list and click **Add**.
  - Click **Lookup**. Scan the barcode or enter a keyword into the **Barcode / Title Keyword** field and click **Search**. If your search returns a list of results, click the appropriate textbook **title** or equipment **name**.
  - Click **Filter**. Use the drop-down lists, check box, and fields to specify your search criteria, and then click **Generate List**.
- Click a radio button from the **Choose Transfer Step** options to designate the current status of the textbooks or equipment being moved. The options are as follows:
  - **Arrived At Destination** — items have arrived at the receiving location.
  - **In Transit** — items are on their way to another School Building. This option is selected by default.
  - **Waiting For Transit** — items are ready to go but are waiting to be picked up. This phase allows you to gather the textbooks or pieces of equipment before sending them.
- Click the **Choose Destination Location** drop-down button, and click again to select the location where the assets are being sent.
- Click the **Custom Item Status** drop-down button, and click again to select a different status. For instance, you might select "Damaged" if you are moving items to a warehouse for repair.
- When you are satisfied with the contents in the queue and your transfer directions, click **Transfer Queued Items**.

- The **Transfer Confirmation** pop-up displays, asking if you are sure you want to transfer these items. Use the following options as needed:
    - If you are marking items **In Transit** and have the circulation setting disabled for permanent loans, you can enter the date the items should be returned to their home location in the **Return Date (optional)** field. Click the calendar icon, and click again to insert a date. Otherwise, manually enter a date using the mm/dd/yyyy format.
    - If you are marking items **In Transit**, enter comments in the **Transfer Note (optional)** field. This information displays as an alert after you return to this form and mark items **Arrived At Destination**.
- Click **Continue Transfer**; otherwise, click **Cancel**.
- If you are updating items that had a **Return Date** or **Transfer Note** attached or were marked as **Do Not Transfer**, the **Transfer Alerts** pop-up displays that information. Click **OK** to close the pop-up.
- The **Inter-School Building Loan** form reopens, listing how many holdings were updated, their destination location, and instructions for what to do next as applicable.
- If items were marked **Waiting For Transit** or **In Transit**, Booktracks assigns them a batch barcode, and the following **links** display:
    - If needed, click **Print Batch Barcode(s)** to print a single barcode for the whole batch; when the physical items are moved from one place to another, you can include this printed barcode so the worker who receives the items can scan this label rather than scanning the holdings barcode for each item. The **Print Batch Barcodes** form opens, displaying all of your printing options. You can accept all defaults and click **Print Batch Label** or customize your options. Booktracks previews the label(s) in PDF format where you can complete the printing process.
    - If needed, click **Print Loan Summary** to generate a report in a new window with the following information: **Holdings Barcode**, **Title**, **Origination Location**, **Destination Location**, and **Batch Barcode**. A **Print** dialog box opens, where you can click **Print** to send the report to the printer.

Assess Fines

One of the most important tasks of asset management is to charge and collect fines for lost and damaged items to protect the large investment your district or school has made. Fines for lost items are assessed automatically to the students who had the items check out at the time they are *marked lost* (either manually using the **Mark Items Lost/Found** form or automatically based on circulation settings). The fine amount is based on that holding's cost and condition. See the "Mark Items Lost/Found" section later in this manual.

If you need to charge your own fines for damages, lost accessories (such as equipment cases or chargers), or other reasons, use the **Assess Fine** form. You can scan special fines barcodes (discussed earlier in this manual) if applicable or enter fine information manually.

To assess fines

- Click **Circulation** from the **Menu Bar**.
- Under **Fines**, click **Assess Fine**.
- The **Patron Lookup** and **Checked Out Item Lookup** forms open. Scan a patron barcode or enter a patron name/barcode and click **Search**.
- If your search returns a list of results, click the correct **name** to continue.
- The **Holdings Lookup** form opens. Scan a barcode or enter a keyword and click **Search**.

Did you know?
If you do not have enough textbooks for a class, you can submit a request for additional copies using the **Course Data By Site** report (**Centralized** only). An administrator can use the **Course Data By Title** report to see if another school has extra copies and then transfer the items using **Inter-School Building Loan**.

Note:
See Booktracks' online Help files for steps on customizing your options on the **Print Batch Barcodes** form.

Notes:

Pay Fines/Fees

Tip!
You can also waive, delete, or accept non-monetary payments for charges on the **Pay Fines/ Fees** form. For instance, if a student is on free lunches, their fines may be waived; if a teacher is automatically charged a fine when a teacher edition is lost, you can delete it; if you decide to accept volunteer hours or canned goods as payment, you can create **Payment Types** that display in the **Reason to Waive** drop-down list.

Note:
If students pay more than their fine amount (for example, if the fine is $73 and they give you $75 cash), you can specify that change will be treated as credit for future fines.

Did you know?
Students/parents can pay fines from **My Items** if you configure **PayPal** in your general settings.

Notes:

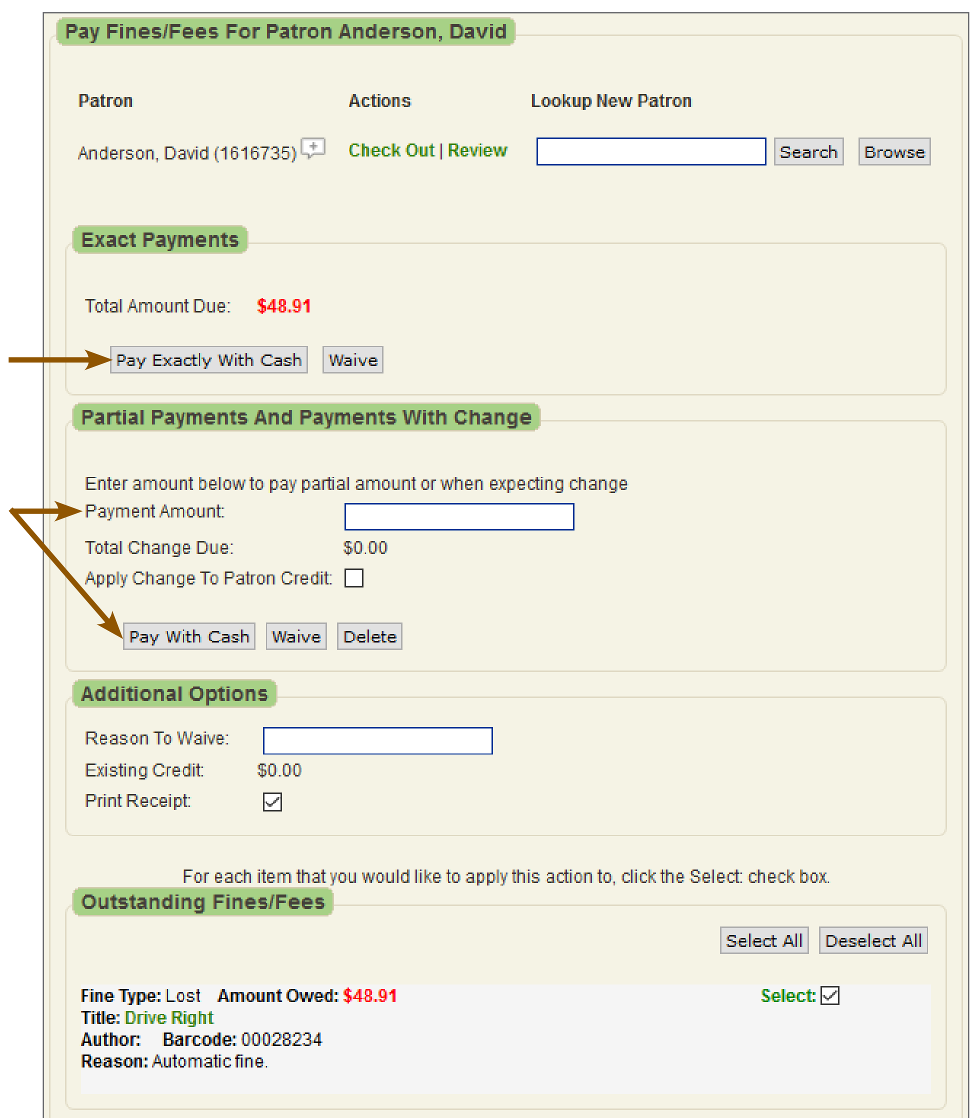
- If your search returns a list of results, click the correct textbook **title** or equipment **name** to continue.
- Scan a special fine barcode to automatically fill out an amount, specify a fine type, and designate a reason in the corresponding fields. Otherwise, complete the fields and make a selection manually.
- If you are manually assessing a fine, click **Assess Fine**.
- The fine displays on the **Outstanding Fines/Fees** form.

Pay Fines/Fees

Once fines have been assessed, student payments need to be processed. Workers with appropriate permissions can accept full or partial payments.

The **Pay Fines/Fees For *Patron Name*** form can be accessed in various ways. See the online Help files for more details; one method is covered below:

- Click **Circulation** from the **Menu Bar**.
- Under **Fines**, click **Pay**.
- The **Patron Lookup** and **Checked Out Item Lookup** forms open. Scan a patron barcode OR enter a patron name/barcode and click **Search**.
- If you see a list of results, click the correct **name** to continue.
- Process fine payments in one of the following ways:
  - Click the **Pay Exactly With Cash** button if the student pays the exact amount owed.
  - Enter an amount in the **Payment Amount** field, and click **Pay With Cash** if the student is only making a partial payment or if he/she needs change.



Reports Menu

List Of Overdue Items

Note:
If you would like to customize the data that displays in generated reports, you can click **Edit This Report** to open the **Report Wizard** and adjust filters, columns, and sorts. For more information, refer to the **Running Reports** document on the **Downloads** form, available through the **General Administration** submenu, or see the online Help files.

Tip!
You can use the **Scan Items For Reports** utility to scan holdings barcodes and create a unique version of either the **Accession List** or **List Of Titles** report. For instance, you might scan a group of worn textbooks that you need to keep an eye on to decide if they will hold up for another year.

Notes:

Viewing Reports

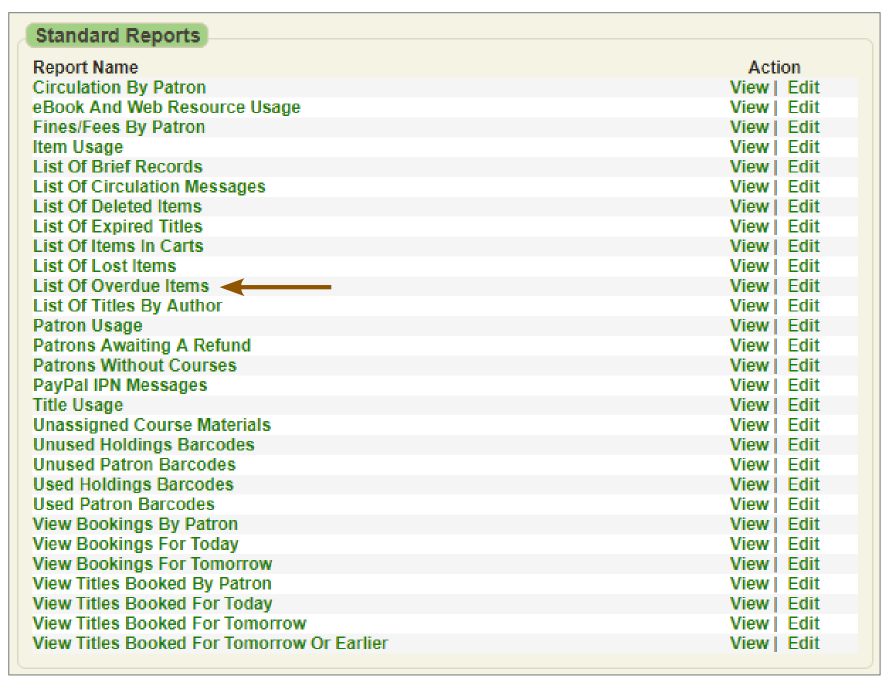
Booktracks provides many useful reports to help you track ownership of assets at any time during the school year, view course information, keep up with expenses and fines, and much more.

Once assets have been collected, Booktracks administrators may need to run reports to get an idea of what items have not been returned and which students are responsible for returning or paying fines to replace those items. Three useful reports for this task include **Patrons With Items**, **Circulation By Patron**, and **List Of Overdue Items**.

This section will focus on generating a standard **List Of Overdue Items** report, which includes a list of patrons who have assets out past the due date, along with corresponding data for those items.

List Of Overdue Items

- Click **Reports** from the **Menu Bar**.
- Under **Administration**, click **Standard/Saved**.
- Click **List Of Overdue Items**, or click **View** in the **Action** column. The report generates in a new window.



Standard Reports

Report Name	Action
Circulation By Patron	View | Edit
eBook And Web Resource Usage	View | Edit
Fines/Fees By Patron	View | Edit
Item Usage	View | Edit
List Of Brief Records	View | Edit
List Of Circulation Messages	View | Edit
List Of Deleted Items	View | Edit
List Of Expired Titles	View | Edit
List Of Items In Carts	View | Edit
List Of Lost Items	View | Edit
List Of Overdue Items	View | Edit
List Of Titles By Author	View | Edit
Patron Usage	View | Edit
Patrons Awaiting A Refund	View | Edit
Patrons Without Courses	View | Edit
PayPal IPN Messages	View | Edit
Title Usage	View | Edit
Unassigned Course Materials	View | Edit
Unused Holdings Barcodes	View | Edit
Unused Patron Barcodes	View | Edit
Used Holdings Barcodes	View | Edit
Used Patron Barcodes	View | Edit
View Bookings By Patron	View | Edit
View Bookings For Today	View | Edit
View Bookings For Tomorrow	View | Edit
View Titles Booked By Patron	View | Edit
View Titles Booked For Today	View | Edit
View Titles Booked For Tomorrow	View | Edit
View Titles Booked For Tomorrow Or Earlier	View | Edit

- If needed, click **Edit This Report** to open a **Report Wizard** where you can customize filters, columns, and sorts.
- If needed, click **Email Report** to open a dialog box where you can enter one or more email addresses and click **OK** to electronically send the report.
- If needed, click **Printable Version** to open a plain version of the report without links. Use the onscreen options to print.
- If needed, click **Export Report As CSV** to convert report data to comma-separated values for exporting. A progress bar displays while data is being exported, and the form refreshes. Click **Download Exported Report**. Use the onscreen options to save or open the report.

- If needed, click **Export Report As Text** to convert data to tab-delimited format for exporting. A progress bar displays while data is being exported, and the form refreshes. Click **Download Exported Report**. Use the onscreen options to save or open the report.

- If needed, click **Export Options**; then, click to deselect check boxes to hide column headers and line numbers from exported data. Click **OK**; otherwise, click **Cancel**.

- To exit the report window, click the close button.

Booktracks administrators can use this list to get an idea of how many assets have not been returned and which patrons are responsible for returning these items or paying fines for their replacement cost.

Note:
After requests are submitted on the **Course Data By Site** report, workers with permissions can click the number in the **Request** column to edit the number needed, fulfill or deny requests, add comments, and more. See the online Help files for more information.

Course Data Reports

The **Reports** menu in **Centralized** databases includes **Course Data By Site** and **Course Data By Title**. **Distributed** databases contain a single **Course Data** report (similar to **Course Data By Site**). These reports provide useful information including how many textbooks are assigned to each course, where those textbooks are currently located, and how many are checked out. To view specific information about students assigned to courses, use the **Enrollment** feature (covered in the online Help files).

To use the Course Data By Site report

This report allows Booktracks administrators to track course information by School Building.

- Click **Reports** from the **Menu Bar**.

- Under **Courses**, click **Courses By Site**.

- The **Course Data By Site** report for the School Building where you are currently logged on opens with the following data in the lower half of the report:

    - **Title** – The results are sorted by title. Click the **title** to open the **Course Data By Title** report for this textbook.

    - **ISBN** – The results list the ISBN for each title.

    - **Course Name** – This column displays the name of the related course; click the **name** to open the **Add/Edit Course** form and revise your course information.

    - **Enrolled** – This column displays the number of students or teachers listed in the course data for the School Building based on whether the title was flagged for students or teachers.

    - **Available** – This column displays the number of textbooks currently located at this School Building.

    - **Checked Out** – This column displays the number of textbooks that have been checked out from this School Building.

    - **Extra Copies** – This column displays the difference between the number of “Available” textbooks and the number of teachers or students “Enrolled” for the course. The number will be positive if there are more textbooks available than enrolled (there are spare copies). The number will be negative if there are fewer textbooks available than enrolled (there aren’t enough copies).

    - **In Transit** – This column displays the number of textbooks in the process of being moved to this School Building.

Notes:

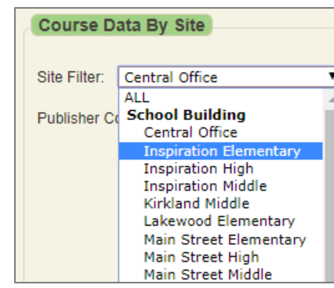
Did you know?
To view a printable version of the report, click the **Printable Version** link**.** The report opens in a new tab where you can print using the onscreen options.

Note:
If you look up course data for a title that has no related information, the **Course Data By Title** form will display the following error message below it: **No course data for this title.**

Notes:

- **Request** – This column displays any requests for additional textbooks. If no requests have been made, a blank field will display for each title. If requests have been made, the **number** of textbooks requested will display.

- If you do not have enough copies of a title and you have the correct permissions enabled, enter the number of needed textbooks in the corresponding field under the **Request** column.
- Enter your email address in the **Send Updates About This Request To** field (above the course data) to receive information about your request as it is processed.
- Click **Submit Request For Course Items** at the bottom of the report to complete the request.



- If you would like to open a vendor site, select the appropriate vendor from the drop-down list in the upper right-hand corner and then click **Go To Vendor**.
- To view data for another school or multiple schools, click the **Site Filter** drop-down button, and click again to make a selection. You can choose ***ALL*** to view data for all your schools at once, a different School Building to see data specifically for that site, or a Location Grouping to view all data for schools of a specific level (such as ***High School***).
- To view a list of *all the items* available at the school or schools you selected (rather than only items tied to courses), click the **Show All Items Available Here** check box.
- If needed, enter a company in the **Publisher Contains** field to only view items printed by that publisher.
- Click **Generate Report Using New Settings** to refresh the report.

To use the Course Data By Title report

This report allows Booktracks administrators to track course information by textbook title.

- Click **Reports** from the **Menu Bar**.
- Under **Courses**, click **Courses By Title** to open the **Lookup Bibliographic Record** form.
- To search for the appropriate title, do one of the following:
    - Scan the item's barcode in the **Barcode** field and click **Continue**.
    - Enter term(s) in the **Search** field with or without selecting a specific search type and click **Search**. If you receive a list of results, click the appropriate **title** to continue.
    - Enter the item's LCCN (Library of Congress Control Number) and click **Continue**.
    - Enter the item's ISBN (International Standard Book Number) and click **Continue**.
- The report opens with two forms: **Course Data By Title** and **Distributions At Each School Building**.

- The **Course Data By Title** form includes the following information:
  - **Title** – This displays the title of the textbook. Click the appropriate **title** to open the **Edit Item: Bibliographic Record** form.
  - **ISBN** – This displays the textbook's ISBN.
  - **Cost** – This displays the cost of one textbook.
  - **Copies At Textbook Distribution Center** – This displays the number of textbooks currently at your default Distribution Center.
  - **Course Name** – Click the course **name** to open the **Add/Edit Course** form and revise your course information.
  - **Location Grouping** – If you only want to see title distribution at schools of a particular level (such as ***High School***), click this drop-down list, and click again to make a selection. By default, **"ALL"** is selected.
  - **Publisher** – This displays the textbook's publisher.
  - **Total Cost** – This displays the cost of all copies of this title saved in your database.
  - **Copies Owned** – This displays the total number of holdings for this title in your database.
- The **Distributions At Each School Building** form includes the following information:
  - **School Building** – School Buildings are listed in alphabetical order. Click the **name** to open the related **Course Data By Site** report.
  - **Location Grouping** – This column displays the category assigned to the corresponding School Building. If needed, click the **group** to open the **Course Data By Site** report for those schools, and then click the **title** to return to the **Course Data By Title** report.
  - **Enrolled** – This column displays the number of students or teachers listed for each School Building in the course data based on whether the title was flagged for students or teachers.
  - **Available** – This column displays the number of textbooks currently located at each School Building.
  - **Checked Out** – This column displays the number of textbooks that have been checked out from each School Building.
  - **Extra Copies** – This column displays the difference between the number of "Available" textbooks and the number of teachers or students "Enrolled" for the course. The number will be positive if there are more textbooks available than enrolled (there are spare copies). The number will be negative if there are fewer textbooks available than enrolled (there aren't enough copies).
  - **Total Cost** – This column displays the total cost for all the textbooks at each School Building.
  - **In Transit** – This column displays the number of textbooks in the process of being moved to each School Building.
  - **Request** – This column displays any requests for additional textbooks. If requests have been made, the **number** of textbooks requested will display.

Note:
Some School Buildings may display on the report if they have holdings of the title even if you did not add them to the course information. This means they will have a **"0"** in the **Enrolled** column but will have applicable information in other columns.

Did you know?
You can select a vendor from the drop-down list on the **Course Data By Title** form and click **Go To Vendor** to open the related website.

Notes:

Schedule Reports

There may be reports you run on a regular basis at the beginning and ending of each term to monitor expenses, lost items, etc. You can schedule any saved template, standard report, or applicable statistical report to be sent to email addresses you specify. You can designate the day, time, and format of the generated report.

- Click **Reports** from the **Menu Bar**.
- Under **Utilities**, click **Schedule**.
- The **Scheduled Reports For District *Name* Worker *Name*** form opens.
- Make changes on the **Settings** form as needed:
  - Click **Email Settings** to open the corresponding form if you need to enter or change the sender's address.
  - Select how you want the report to look next to **Default Report Format**. **HTML** is best for online viewing or printing; **Text** and **CSV** are delimited formats best for converting to a spreadsheet.
  - Enter a standard time most emails should be sent in the **Default Time To Send Reports** field.
  - At the end of the year, click **Yes** next to **Disable All Reports?** so they will not be sent while school is out. Return and click **No** when you are ready to send reports again or enter a date so Booktracks will automatically do that for you.
- Schedule reports that need to be sent:
  - Click the **Available Reports** drop-down button, and click again to make a selection.
  - Click **Add To Schedule**.
  - Enter the addresses for whomever should receive the reports in the **Send Report To** field.
  - If you need to use a different format than the standard, click the **Report Format** drop-down button, and click again to select your choice. Two additional options display for applicable reports: **MARC** and **PSV** (pipe-separated values).
  - If needed, in the **Report Options** column, click to deselect the **Use Column Headers** and/or **Use Line Numbers** check boxes to remove them from emailed reports.
  - If the report should be sent at a different time than the default, enter a new time of day under **Time And Frequency**.
  - Click the drop-down button under **Time And Frequency**, and click to select **Daily**, **Hourly**, **Monthly**, **Weekly**, or **Yearly**.
  - Depending on your frequency, select a day of the week, month, or year.
- Click **Save**.

Refer to Booktracks' online Help files for information about editing/deleting your own reports and managing others' scheduled reports (if you have permission).

Notes:

Patrons Menu

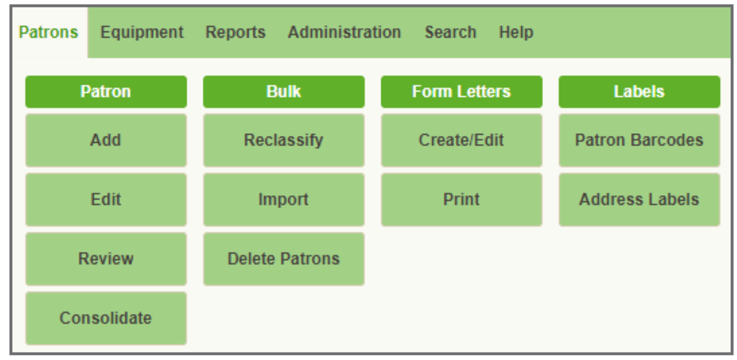
Note:
If you consistently enter your own barcodes rather than accepting the next available number, you may configure your patron settings so that Booktracks does not default to the next available barcode.

Tip!
The Teacher-Student Report Class you assign not only applies to how you filter patron reports but also impacts how you look up patrons using **Self Check Out**.

Did you know?
You can use the **Required Fields For New Patron Records** form to specify mandatory fields when manually adding new records or updating existing ones. Access this form via the **Patron Administration** submenu or the **Patron Settings** form.

Notes:

Patrons Menu



The **Patrons** menu allows you to manage your database by adding, editing, and/or deleting patron records. You can perform these processes individually or in bulk. Features for setting up and printing form letters (for fines/fees due, items out, etc.), address labels, and patron barcodes are covered in this chapter.

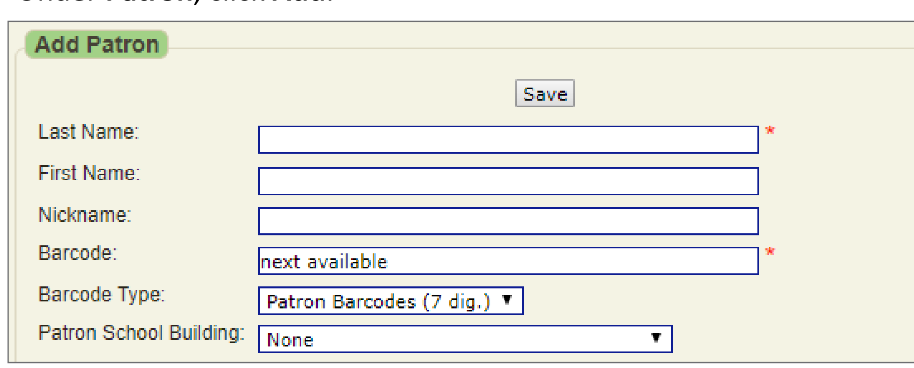
Most of your patrons will be imported, meaning student records will be added to the database initially and then updated periodically as students move up grades and as new students come in. The Book Systems Data Management Team will probably perform the import initially and then set up **Automatic Patron Import**. During each import, Booktracks will match records based on the **Student Link** (school ID) and either add a new record if no match is found or update the record if there is a match.

You will only need to add a patron record manually if a student enrolls in the middle of a term and you want to immediately check items out to him/her before the patron data has been imported into the system. When manually entering records, you can enable the **Default Patron School Building To Worker School Building** setting to default the student location to the worker's logged on location (**Centralized** only).

Add Patron

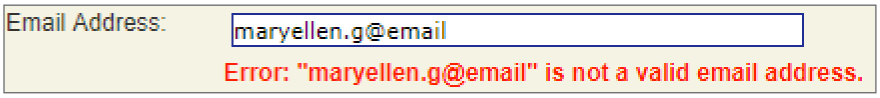
These are abbreviated steps for quickly adding a student record to be able to circulate items. The patron's name, barcode, and Student Link are required to ensure that it is updated correctly during import; all other information is optional during this manual process.

- Click **Patrons** from the **Menu Bar**.
- Under **Patron**, click **Add**.



- In the name-related fields, enter the student's name.
- In the **Barcode** field, either accept the **"next available"** barcode, or highlight **"next available"** and enter your specific barcode.
- If applicable, select a different type from the **Barcode Type** drop-down list.
- Select the patron's current school from the **Patron School Building** drop-down list (**Centralized** only).
- On the **Primary Demographics** form, select choices from the **Loan Permission** and **Teacher-Student Report Class** drop-down lists to designate circulation rules for the student and a category for easily running reports, sending form letters, etc.

- In the remaining fields, enter contact information, and make selections from drop-down lists as needed. If an email is formatted incorrectly, an error message displays when you save the patron record.

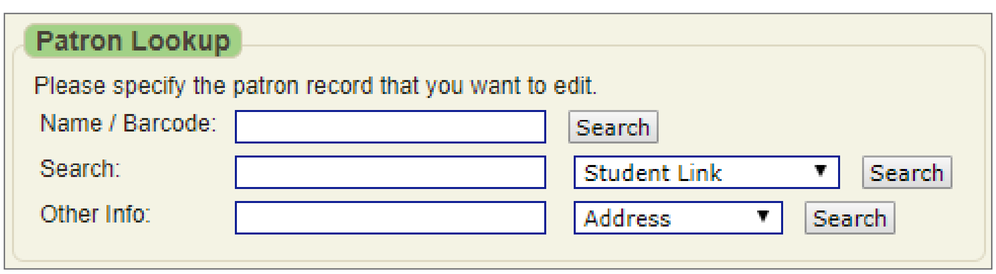


- On the **Other Info** form, enter the homeroom and other information in the applicable fields as needed.
- In the **Student Link** field, enter a unique identification number that will be used to identify a student during patron import. When the Student Link value is matched, Booktracks will update the patron's information. When the value isn't matched, Booktracks will add a new patron record.
- In the username/password fields, enter the information the student will use to access **My Items**.
- On the **Media** and **Patron Picture** forms, upload files if needed. You can also use the camera icon if you have a webcam for taking your own pictures.
- Click **Save** to add this patron to your database.
- To add another patron manually, click **Add New Patron** on the **Edit Patron** form and repeat the process above.

Edit Patron

Keep in mind that any information included in your district's/school's student database will be automatically imported, but if needed, you can manually modify data that is specific to Booktracks.

- Click **Patrons** from the **Menu Bar**.
- Under **Patron**, click **Edit.**



- To look up a patron, do one of the following:
  - Scan/enter the patron's barcode or enter the name in the **Name/Barcode** field and click **Search**.
  - Enter a word or phrase in the **Search** field, select a search type from the drop-down list, and click **Search**.
  - Enter a physical address, email address, phone number, or birth date in the **Other Info** field, select a corresponding choice from the drop-down list, and click **Search**.
- If your search returns a list of results, click the patron's **name** or image (depending on your patron settings) to continue.
- Modify information in any of the fields on the **Edit Patron** form. For instance, you may change the username/password, alert, contact preferences, etc. that would not be overridden by imports.
- Click **Save**.

Note:
Patrons can be looked up by their whole name with the last name followed by a comma and then first name (smith, brian), a partial or whole last name (smith or smi), or a partial or whole first name beginning with a comma since the last name is not included (,brian or ,bri). Be sure to enter the characters/punctuation exactly as described here to get the expected results.

Note:
Booktracks is capable of updating your patron data automatically from the district Student Management System. Book Systems' technician(s) and your district technician(s) will set up the appropriate protocol between the Student Management System and Booktracks.

Notes:

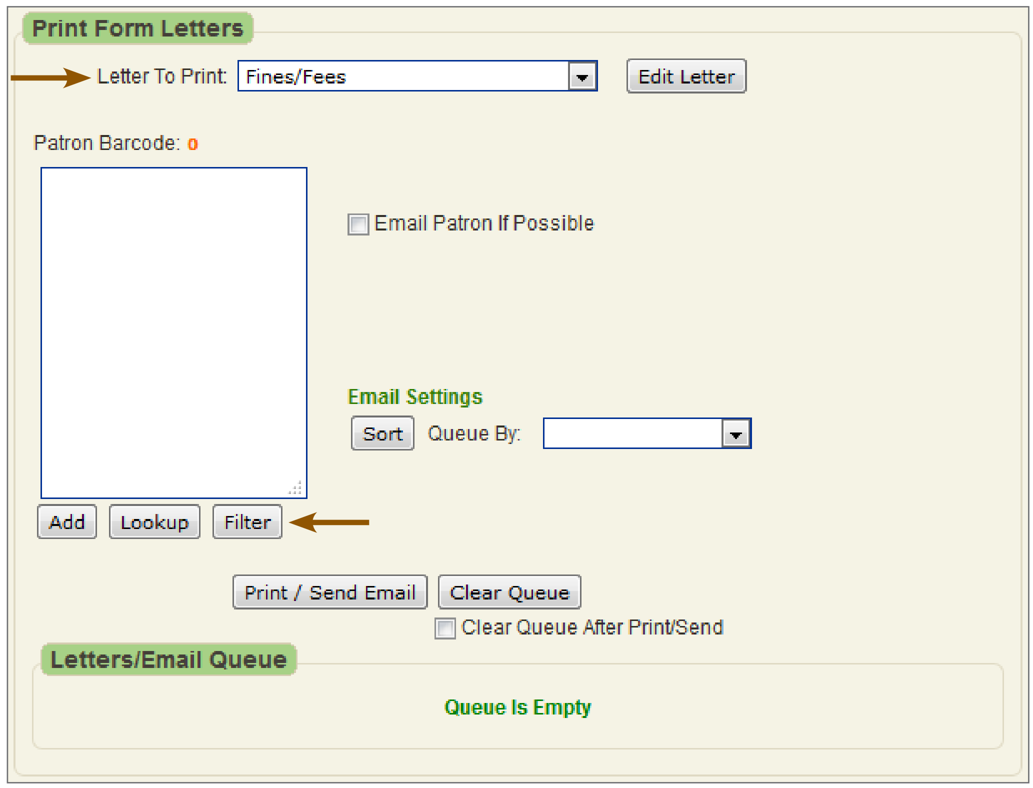
Tip!
You can click the **Edit Letter** button to open the **Edit Form Letter** form, where you can choose the number of letters you want printed on a single sheet of paper using the **Print Format** options. For example, you may choose **Three Per Page** and print three short letters on a single page to save paper.

Notes:

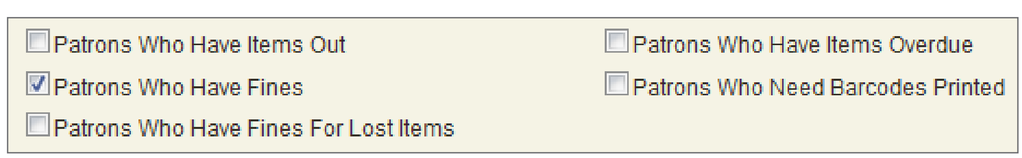
Print Form Letters

Booktracks provides a variety of **Form Letters** for your use. This feature allows you to send a batch of letters to students with unique data based on what each patron has checked out or owes in fines. You may edit any of the existing form letters to meet your needs or add letters as needed. See the online Help files for add/edit instructions; this manual explains how to print the delivered ***Fines/Fees*** form letter.

- Click **Patrons** from the **Menu Bar**.
- Under **Form Letters**, click **Print**.
- If needed, select **Fines/Fees** from the **Letter To Print** drop-down list.



- To insert records into the **Letters/Email Queue**, click **Filter**.
- Click the **Patrons Who Have Fines** check box.



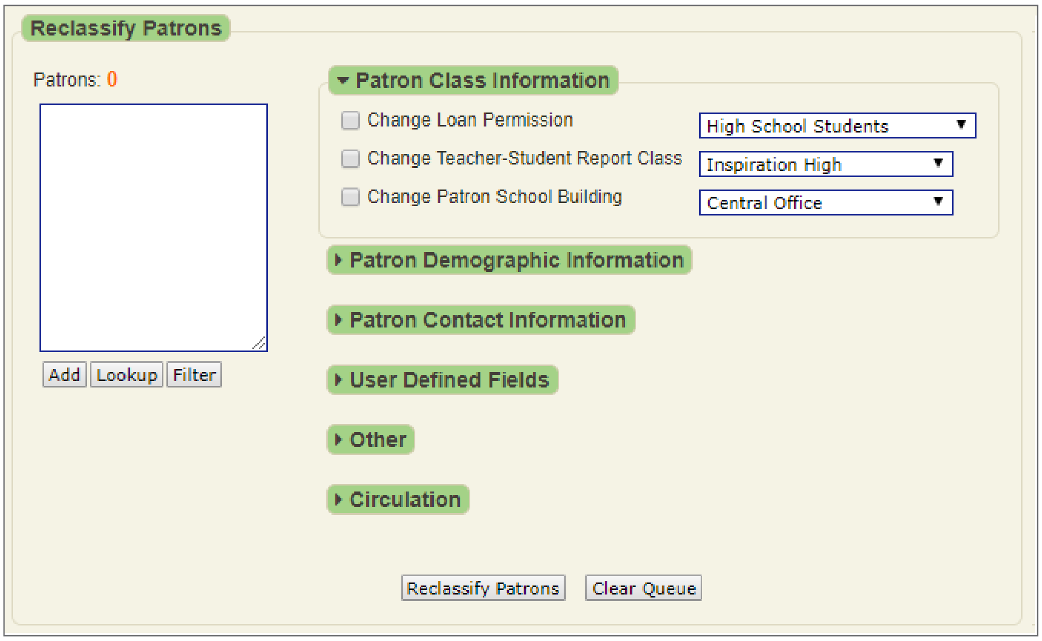
- Click **Generate List**.
- Click **Print / Send Email**.
- Once the form letters are generated, they automatically display in a PDF tab for your review. Use onscreen options to print.

Reclassify Patrons

Occasionally, you may need to update data in your student and teacher records, particularly at the end of the year. The **Reclassify Patrons** form allows you to update these records in bulk. Keep in mind that your automatic imports will update some data.

To reclassify patrons

- Click **Patrons** from the **Menu Bar**.
- Under **Bulk**, click **Reclassify**.



- To insert records in the **Reclassify Patrons Queue**, use one or more of the following options:
  - Scan or enter the patron barcode(s) in the **Patrons** list and click **Add**.
  - Click **Lookup**. Scan/enter a patron's barcode, enter a patron's name, or enter search criteria and select a search type. Click **Search**. If needed, click a patron's **name** from search results to continue.
  - Click **Filter**. On the **Report Wizard**, use the drop-down lists, fields, check boxes, and calendar icons to set up your filter. Click **Generate List**.
- Different options are grouped into related categories. If needed, click to expand a section, then click one or more of the check boxes to designate which category you need to reclassify.
- Once you select which option(s) you want to reclassify, use the drop-down list(s) or enter the appropriate text into the blank field(s) to specify how you want the student or teacher records changed.
- When all criteria are set, click **Reclassify Patrons** to update your records.
- If the queue contains more than 100 patron records, a warning dialog box prompts you to confirm the change before continuing. Click **OK** to reclassify; otherwise, click **Cancel**.
- A progress bar opens showing what percentage of patron records has been reclassified. Once it finishes, the **Reclassify Patrons** form refreshes displaying the number of successful changes.

Note:
Options that already display in drop-down lists are the defaults for those check boxes; however, you can click the drop-down button and click again to make a different selection. For example, if you need to reclassify a group of student records from one 1st period to another, you can use the drop-down list to select ***1st Period*** instead of ***Grade Level***.

Important!
The **Change Entity Responsible For Tracking** option is listed separately under the **Circulation** section the because that choice changes the entity in the *item* records checked out to the designated students rather than changing the actual *patron* records.

Notes:

Note:
If you need to delete an individual patron record, such as a student who moves away, use the **Edit Patron** form to find the correct student. Then, click **Delete**.

Notes:

Delete Patrons

Delete Patrons

While automatic patron importing adds new records and updates information in existing records, it does not clear out records of students who have graduated. Periodically, you need to delete those patron records. This manual explains the procedure recommended by Book Systems Technical Support Team; contact us if you have any questions.

First, reclassify all students to a **Teacher-Student Report Class** specifically created for this purpose; your class might be either ***Graduated*** or ***Withdrawn***. The previous section explains these steps in detail; here is an overview of what you would do in this scenario.

- Open the **Reclassify Patrons** form and choose the filter option.
- Set filters to exclude teacher records and drill down your student list, such as ***Loan Permission does not equal 'Faculty'*** and ***Grade Level Contains Phrase '12th'*** (based on the categories in your database).
- Generate your list to queue relevant student records.
- In the **Patron Class Information** section, click the **Change Teacher-Student Report Class** check box and select ***Graduated*** or ***Withdrawn*** from the drop-down list.
- Click **Reclassify Patrons**.

Second, wait for the next automatic update, which will change all current students to their appropriate report class. Only students no longer in the system should still have the ***Graduated*** or ***Withdrawn*** designation. Make sure other records were updated correctly.

Third, filter for the remaining ***Graduated*** or ***Withdrawn*** students and delete them.

- Click **Patrons** from the **Menu Bar**.
- Under **Bulk**, click **Delete Patrons**.
- Click **Filter**.
- Select ***Graduated*** or ***Withdrawn*** from the **Teacher-Student Report Class Equals** drop-down list.
- Click **Generate List**.
- If needed, use the **If Patrons Have Fines** drop-down list to specify what happens to records that have attached fines. You can either waive the fines so the patron record can be deleted, or you can keep the record and try to recover the money.
- Click **Delete Queued Records**.
- If the queue contains more than ten records, a warning dialog box displays prompting you to confirm the deletion.
- Click **OK**. **Successes** and **Errors** display as they apply.

Catalog Menu

Important!
Several features available from the **Catalog** menu apply to both textbook and equipment records, but add item, edit item, and import features are specific to textbooks.

Note:
After saving your bibliographic record, the basic name plus other related information you enter is listed as the **Extended Title**, which displays above the **Title** field, on reports, in **My Items**, and in other areas of Booktracks.

Notes:

Catalog Menu

The **Catalog** menu allows you to add, edit, and delete item records. When adding items to your database, you'll complete two processes: creating and saving a bibliographic record and adding holding records (for each copy).

A bibliographic record won't have a barcode and won't be available for students and teachers to check out until you add copies using the **Holding Record** form. If a textbook doesn't have a holding record, a **warning** will display on its bibliographic record.

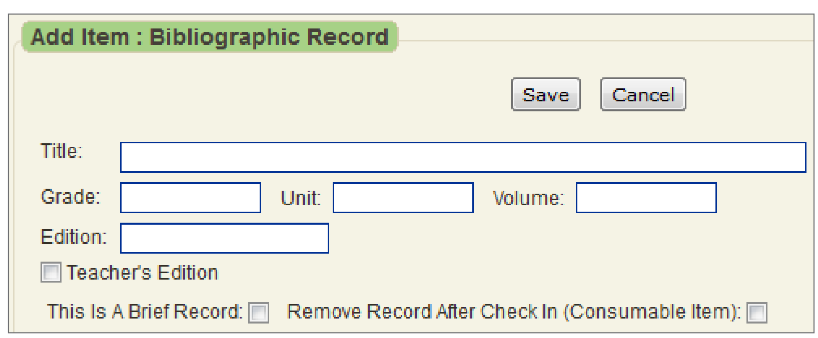
This chapter covers two ways to add a bibliographic record to your database: **Add Item** and **Quick Cataloging**. Once a bibliographic record is added using either method, you can use the **Holding Record** form to add as many holdings (copies) as you need. The following sections provide instructions for all of these tasks.

Add Item

One way to add a new textbook record is from the **Add Item: Bibliographic Record** form.

To create a bibliographic record

- Click **Catalog** from the **Menu Bar**.
- Under **Item**, click **Add.**



- Enter the name of the textbook in the **Title** field. This is the basic part of the title. You can add more specific information in the fields below.
- Enter data in the following fields as needed to distinguish between similar titles and format them consistently. This information is part of the **Extended Title** and ensures that records are found in searches and are easy to spot in a list of results.
    - Enter a number in the **Grade** field. For instance, you might enter ***5*** or ***05*** for fifth grade titles.
    - Enter a number in the **Unit** field. For instance, the teacher editions of *Treasures Reading, Grade 06* are broken into six units, so you would enter a number 1-6 here if you were cataloging one of those items.
    - Enter a number in the **Volume** field. For instance, *Fundamentals of Physics* has two volumes: Volume 1 includes chapters 1-20 and Volume 2 includes chapters 21-44.

- Enter the edition in the **Edition** field. Examples include the following: ***4th Edition***, ***Critical Edition***, ***2017 Edition***, or ***Alabama Edition***. The data entered in this field is only added to the **Extended Title** if it is longer than three characters.
- Click the **Teacher's Edition** check box if the item is a teacher edition or supplementary material that teachers use. Booktracks adds the letters ***TE*** to the **Extended Title**.

- Click the **This Is A Brief Record** check box if you only intend to complete certain fields at this time. Booktracks will flag the record as brief, but any holdings added will be available for circulation.
- Click the **Remove Record After Check In (Consumable Item)** check box if this is a workbook or other item you distribute to students but do not expect back. This allows you to track which students received workbooks so you can charge fines if students lose them and need new copies. Then at the end of the year, these holdings are checked in and removed so they are not tied to students' records or retained in your database.
- On the Core form, select the appropriate option from the **Age Group** drop-down list.
- Select the appropriate option from the **Material Type** drop-down list.
- Enter the author's name in the **Author's Name** field.
- Select the **Specified By Holding** or **Specified On Check Out** radio button next to **Item Loan Period**. If you selected **Specified On Check Out**, drop-down lists and fields display so you can designate multiple loan periods that may be used for this title. Click the drop-down button, and click again to select an Item Loan Period. Then, enter a description, such as the course name, in the **Caption** field. When any of these textbooks are checked out, these captions display in a list of choices to help you decide which loan period to assign.
- Select the appropriate option from the **Subject Area** drop-down list.
- Enter the name of the person or corporation that published the textbook in the **Publisher** field.
- Enter the name of the city where the publisher is located in the **Place of Pub.** field.
- Enter the year in which the exclusive legal right to reproduce, publish, and sell the textbook was obtained in the **Copyright Date** field.
- Enter the year the textbook was published in the **Pub. Date** field.
- Click the calendar icon, and click again to insert a date in the **Adoption Date** field; otherwise, enter the date in mm/dd/yyyy format.
- Enter the Library of Congress Control Number in the **LCCN** field.
- Enter the International Standard Book Number in the **ISBN** field.
- Enter the cost for one copy in the **Price / Availability** field.
- Enter the 12-digit Universal Product Code in the **UPC** field; this may display along with the ISBN on the back of the item.
- On the Analytics form, enter the name in the **Series Title** field if this item is part of a series.
- Enter a number in the **Series Volume** field if this item is part of a series.
- Enter any additional content in the **Note** field.

Note:
Booktracks checks in and deletes consumable holdings between school years based on dates entered on the **General Settings** form. Only holdings that were due at the end of the previous school year will be deleted; the bibliographic records remain in Booktracks so you can add more holdings for the next group of students who need workbooks.

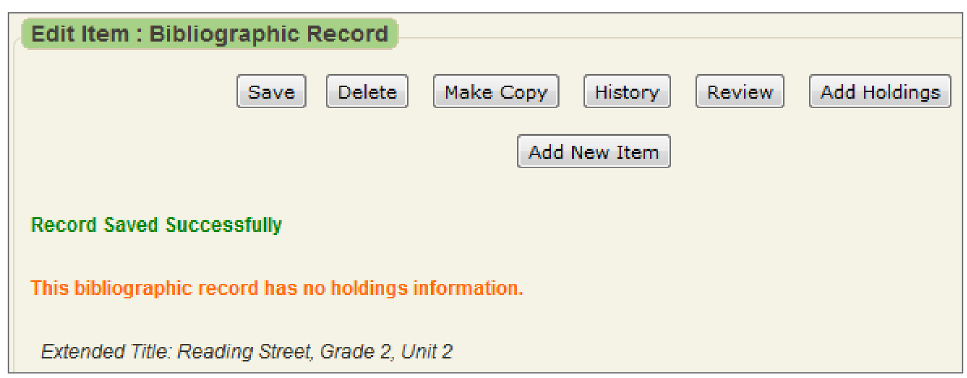
Notes:

Add Item

Tip!
If you can't find your item by ISBN or UPC using **Quick Cataloging**, click **Advanced** to open a pop-up where you can enter additional criteria for finding items. See the online Help files for more information.

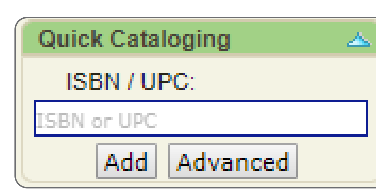
Notes:

- Enter a brief summary of the textbook in the **Summary** field.
- On the **Curriculum Objectives** form, enter a term, such as ***History***, to describe the general course-of-study in the **Main Curriculum Objective** field.
- Enter more specific curriculum objectives, such as ***Learning the History of Western Civilization***, in the **Subordinate Curriculum Objectives** field.
- Enter a code representing the textbook's main curriculum objective and/or subordinate curriculum objectives, such as ***HY*** and ***101***, in the **Curriculum Code** field.
- Enter a statement that rates how well the textbook correlates to the curriculum objective in the **Correlation Factor** field.
- On the **Media** form, in the **Upload Cover Image** field, click **Browse...** or **Choose File** (depending on your browser) to open a dialog box and select a file to upload.
- Enter a web address which will display when students/teachers log on to **My Items** in the **URL** field. By default, the link is named **View Online Resource**; if you prefer to use a customized name instead, enter a label or link name in the corresponding **Note** field. For instance, you might enter ***View eBook*** if the URL goes to the full text of the item or ***Practice Problems*** if the URL opens a site with math or grammar exercises.
- Click **Save**. A message indicates that no holdings have been added.



Quick Cataloging

Booktracks provides the **Quick Cataloging** form so you can scan an ISBN or UPC to pull a MARC record from Z39.50 servers. This saves you the time it takes to enter information manually.



To find a bibliographic record using Quick Cataloging

- Scan or enter the ISBN or UPC (usually found on the back of the item) in the **ISBN/UPC** field, and click **Add**. 10- or 13-digit ISBNs as well as 12-digit UPCs are acceptable.
- If there is a match, the **Add Item: Bibliographic Record** form opens. Select the appropriate choices from the **Age Group**, **Material Type**, and/or **Subject Area** drop-down lists.
- Make any other changes as needed.
- Click **Save**. A message indicates that no holdings have been added.

Add Holdings

- Click **Add Holdings** from the **Edit Item: Bibliographic Record** form.
- Either accept the **"next available"** barcode, or highlight **"next available"** and enter your specific barcode in the **Barcode** field. A message displays this item's tentatively queued barcode.
- Select the appropriate option from the **Barcode Type** drop-down list if there is more than one choice.
- Enter the numeric value in the **Number Of Identical Copies To Add** field to reflect the actual number of copies of this textbook.
- Click the **Do Not Transfer** check box (**Centralized** only) if the textbooks should always stay at the home location. For instance, you might use this for items purchased using specific funds for a particular school, such as Title I funds.
- Select the appropriate choice from the **Item Loan Period** drop-down list. Item Loan Period refers to how long textbooks should be kept, such as ***Yearly***, ***Semester***, ***9 Weeks***, etc.
- The **Subject Area** selected on the **Add Item: Bibliographic Record** form displays in the corresponding field.
- Select the **Condition** from the drop-down list.
- If the price was entered on the bibliographic record, that amount displays in the **Cost** field; if not, manually enter the replacement cost.
- Select the appropriate choice from the **School Building** drop-down list (**Centralized** only). This is the home location. After saving, this school populates the **Current Location** field.
- Select the appropriate choice from the **Physical Location** drop-down list.
- Select the appropriate choice from the **Custom Item Status** drop-down list. **"Use Circulation Status"** is most common for new items, but you can change this as needed.
- Select the appropriate choice from the **Vendor** drop-down list.
- The **Purchase Date** defaults to today's date. To change this, click the calendar icon, and click again to insert a date. Otherwise, manually enter a date in mm/dd/yyyy format.
- Designate the fund account, special funds, Title I money, etc. used to purchase the textbooks in the **Funding Source** field. Consistency of entry is always important for reporting purposes.
- Enter the number associated with this textbook order in the **Purchase Order** field.
- Enter comments specific to this holding in the **Holdings Notes** field. For example, you might enter ***severely damaged*** here. These notes are searchable via reports using an appropriate filter.
- Enter contents of multi-part items in the **Kit Information** field. It may be a teacher edition with supplementary materials, a textbook with a CD, etc.
- If you haven't printed the barcode label yet, leave the check box for **Barcode** empty. Once you print the label, Booktracks automatically inserts the check mark.
- Select the appropriate entity from the **Entity Responsible For Tracking** drop-down list. If you do not want to designate an entity for this textbook, be sure the delivered option **"Unassigned"** is selected.

Note:
If you consistently enter your own barcodes rather than accepting the next available number, you may configure settings using the **Catalog Settings** form so that Booktracks does not default to the next available barcode.

Note:
Depending on preferences you configured on the **Circulation Settings** form, the information recorded for kits will either "pop-up" or display as a warning message during circulation transactions, i.e., check out and check in, to remind you to inspect for complete distribution and return.

Notes:

Did you know?
Based on permissions, you can click the **Display Edit History** link on the **Edit Item** form to open a report listing what information on the record has been modified, when, and by which worker. The report (with related information) can also be found on patron and bibliographic records.

Tip!
As you use the **Lookup Bibliographic Record** form, a **Search History** form displays and provides quick links to previous search results. This saves you time if you need to reopen a record or perform another similar search.

Notes:

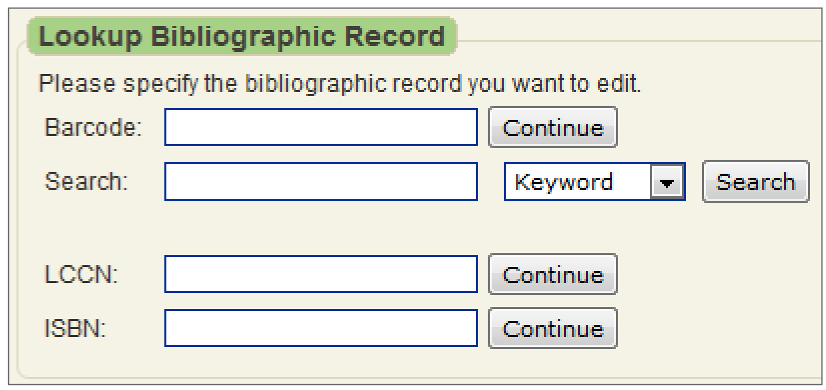
- Click **Save**.
- If you are entering holdings one at a time to assign your own barcodes, click **Add New Holdings** on the **Holding Record** form and repeat the field entry process as described above.

Edit Item

Once items have been added to your Booktracks database, you can modify those records at any time.

To modify an item record

- Click **Catalog** from the **Menu Bar**.
- Under **Item**, click **Edit**.



- Use one of the following search options:
  - Scan the item's barcode in the **Barcode** field and click **Continue**.
  - Enter a word or phrase in the **Search** field with or without selecting a specific search type and click **Search**.
  - Enter the item's **LCCN** (**L**ibrary of **C**ongress **C**ontrol **N**umber) and click **Continue**.
  - Scan or enter the item's ISBN (**I**nternational **S**tandard **B**ook **N**umber) and click **Continue**.
- If you see a list of results, click the item's **title**.
- Modify information in any of the fields on the **Edit Item: Bibliographic Record** form. See previous sections for information about each field.
- Click **Save**.
- If you need to modify an associated *holding* record, click **Edit** in the **Action** column on the **Active Holdings** form.
- Make changes as needed.
- Click **Save**.

Carts

This feature allows you to store a group of items in one record the way you would group physical items on a cart or bin. Once you create a **Cart** record, all the associated items can be checked out using a single cart barcode. For example, if you have containers with a class set of iPad devices, Kindle™ devices, laptops, etc., you can easily check those out to the teacher with one easy scan.

First, create a cart:

- Click **Catalog** from the **Menu Bar**.
- Under **Bulk**, click **Add Cart**.
- Accept the "next available" barcode or enter your own.
- Use the drop-down list to select a barcode type if you have more than one.
- Enter a name to identify the cart.
- Enter a description of what items are included (optional).
- Click **Save Cart**.

Then, add holdings to your new cart record; this document only covers the two most common options:

- If you have a physical cart with items in front of you, scan the item barcodes in the **Holdings** field and click **Save Cart**.

  OR

- If you do not have physical items close by but you assigned them a particular **Physical Location** or **Entity Responsible For Tracking**, click **Filter**, use the options to set search criteria, and click **Generate List**.

If any of those holdings were already checked out or associated with another cart, errors display that you can choose to override (similar to overriding circulation errors).

If needed, click **Remove** to clean out individual items that you did not want added or click **Empty Cart** to start over.

Once you are finished, print a barcode and attach it to your cart so you are ready to check out the associated holdings:

- Click **Print Barcode Label**.
- Verify your printing configuration.
- Click **Print Labels In Queue**.
- Print the label from the PDF preview tab.

Note:
There is a barcode type specifically for carts. Click **Administration** from the **Menu Bar**, and then click **Catalog.** Click **Barcode Info** to edit or create your own cart barcode.

Notes:

Important!
You must select a **For Teacher** or **For Student** check box for each item in order to save it for the course.

Notes:

Add Course

Add Course

Booktracks' **Course** feature allows you to enter item and enrollment data for the courses taught by your schools. You can designate which textbooks and assets are associated with particular courses and how many are needed at each School Building. Booktracks allows you to add, edit, and delete courses.

When you add a new course, you can include a course name, an identifier code, and as many titles/equipment as needed. You can also specify how many teachers and students are associated with the course so that you can make sure there are enough items. When you have your course information added, you can generate specific reports to view detailed information about the status of these items.

To add a course

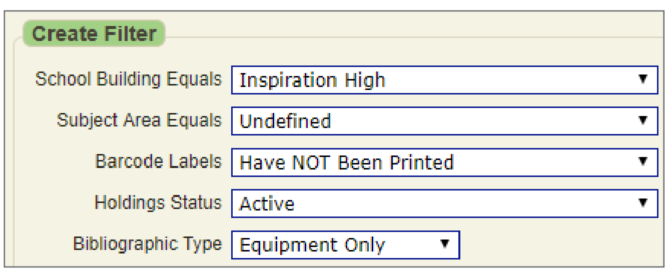
- Click **Catalog** from the **Menu Bar**.
- Under **Courses**, click **Add**.
- In the **Course Name** field, enter the name of the course.
- In the **Course Identifier** field, enter the alphanumeric code for the course.
- Select a school level (such as ***High School*** or ***Middle School***) for this course from the **Default Location Grouping** drop-down list (**Centralized** only).
- On the **Titles Required For This Course** form, do the following to add titles:
  - Click **Add New Title**.
  - Search for a textbook title or piece of equipment. If you receive results, select individual items by clicking the textbook **title** or equipment **name** or multiple items by clicking the check boxes and then clicking **Add All Checked Items**. The title, ISBN, and publisher display as applicable.
  - Click either the **For Teacher** or **For Student** check box to designate who will use this item.
  - Repeat this process until all items are added; for instance, you need to add each textbook the students will use, the related teacher edition, etc.
- On the **Number Of Teachers And Students For This Course** form, do the following to enter enrollment:
  - If needed, select a school level from the **Location Grouping** drop-down list (**Centralized** only). If you selected a default grouping earlier, that selection already displays here.
  - If you have the exact enrollment numbers for each school, enter that information in the corresponding fields under the **Number Of Teachers** and **Number Of Students** columns.
  - If you do not have enrollment numbers at this time, either click the green plus icon next to the **School Building** column heading to enable all schools currently displayed (based on the **Location Grouping**), or click the check boxes next to individual school names. This inserts zeros in the corresponding fields under the **Number Of Teachers** and **Number Of Students** columns, ensuring that the course information will display on related reports.
- Click **Save Changes**.

Print Item Barcodes

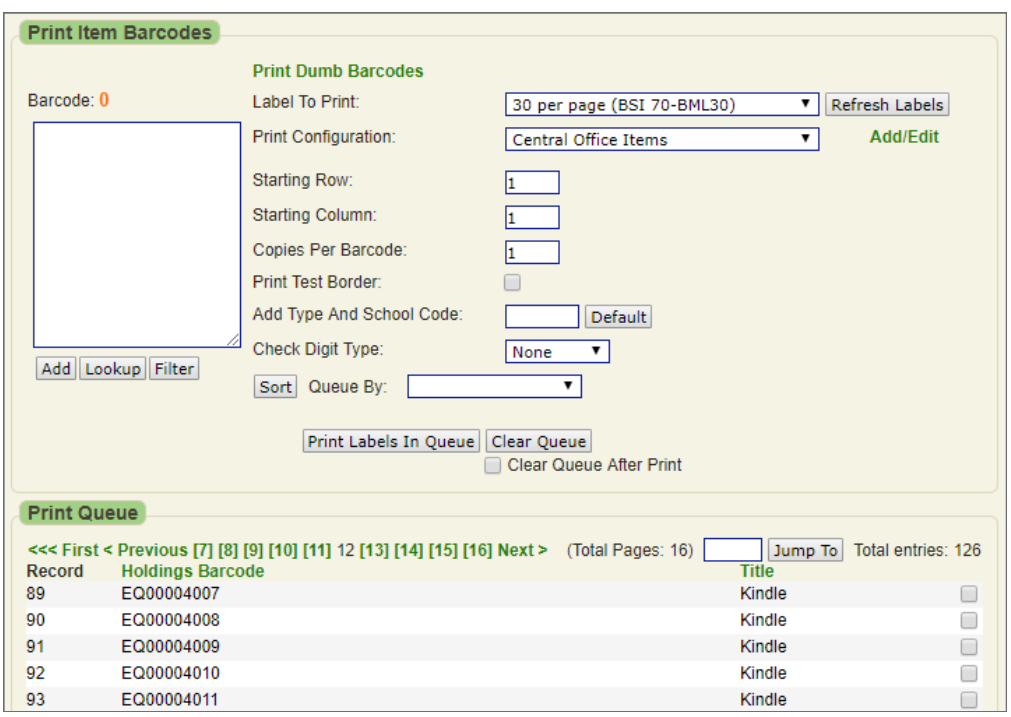
Booktracks allows you to print smart or dumb barcodes for your items. Smart barcodes have already been assigned to items and contain item information on the top of the barcode. Dumb barcodes only contain the barcode number because they have not been assigned to items; this allows you to place barcodes on your items first and then scan the barcodes as you add corresponding records in the database. This section discusses how to customize and print smart barcodes.

To queue Item Barcode Labels

- Click **Catalog** from the **Menu Bar**.
- Under **Item**, click **Item Barcodes**.
- On the **Print Item Barcodes** form, use one or more of the following options to insert records into the **Print Queue**:
    - Enter the item barcode numbers in the **Barcode** list; click **Add**.
    - Click **Lookup**. Enter a search term in the **Barcode / Title Keyword** field; click **Search**. Click the textbook **title** or equipment **name** to insert the barcode and repeat the steps as needed.
    - Click **Filter**. The **Report Wizard** opens. Use the drop-down lists and fields to set up your criteria (the example image below focuses on a portion of the **Report Wizard**). Click **Generate List**.



To print queued barcodes



- Select your label stock from the **Label To Print** drop-down list.
- Select a configuration from the **Print Configuration** drop-down list. To edit or create a print configuration, use the **Add/Edit** link.
- The **Starting Row** and **Starting Column** fields are set to **"1."** Change this value if you need to print a partial page of labels (not recommended).

Tip!
To filter for item records that have not had barcodes printed, find the **Barcode Labels** drop-down list on the **Report Wizard** and click **Have NOT Been Printed**.

Note:
By default, using a filter to queue barcodes includes both equipment and non-equipment records. If you need to filter for one type or the other, make a selection from the **Bibliographic Type** drop-down list.

Tip!
If the **Label To Print** drop-down list is empty, click **Refresh Labels**; then make a selection.

Notes:

- Change the number of **Copies Per Barcode** if you need duplicate, triplicate, or more copies. Highlight the default **"1"** and enter a higher number.
- If you are doing a test print and would like borders to make it easy to compare to your label stock, click **Print Test Border**.
- If needed, enter your school's code or click **Default** to populate the **Add Type And School Code** field.
- If needed, select an option from the **Check Digit Type** drop-down list.
- The **Print Queue** may be sorted before printing. To do so, select a choice from the **Queue By** drop-down list, and then click **Sort**.
- If you have successfully printed barcode labels from Booktracks before, click the check box next to **Clear Queue After Print** to remove the barcodes from the **Print Queue**. It is not recommended that you check this box until your printer has been properly aligned.
- Once you have inserted the correct barcodes and all criteria are set, click **Print Labels In Queue**.
- A **Print Catalog Barcodes** progress bar displays the label generation process in a new tab.
- When complete, Booktracks previews your labels as a PDF. If the barcodes display as expected, use the onscreen options available from the PDF tab to print.
- Close the tab when you are finished.

To establish print settings and customize Item Barcode Labels

When printing any type of item barcodes (textbooks, equipment, or carts), you can edit or create and save a settings configuration with a specific barcode layout by using the **Choose Item Barcode Fields For *Print Setting Name*** form (accessible by clicking **Add/Edit** next to the **Print Configuration** field). This is helpful for schools who have multiple printer types in different buildings.

- To edit an existing configuration, click the **Print Settings:** drop-down button, and click again to select the one you need to modify. You can also create a new print configuration by clicking the **Add Custom** button.
- Review the **Sample** area of this form first; then make the appropriate selections of the fields to be printed in each of the drop-down lists next to **Barcode Field(s) 1 – 4**.
- Click **Font**… where applicable to open a pop-up where you can change the font, style, size, color, and/or position of the text on the printed label. Click **Set Font**.
- Next to **Display Human Readable**, click **Yes** to print the number below the barcode stripe; **No** will print only the barcode stripe without the corresponding barcode number. The default selection of **Yes** is recommended.
- Next to **Display District/School Name**, click **Yes** to print the district (**Centralized**) or school (**Distributed**) name on the barcode label; **No** will cause the district/school name not to be printed. The default selection of **Yes** is recommended.
- When checked, **Use Static District/School Name** allows you to enter the name of your district/school as you want it to print on the barcodes. The number of characters is dependent on font size and/or label width.
- Click **Save Changes**.

To align your printer

To align your printer, make changes to the horizontal and vertical adjustments for the print head by entering the new values in the appropriate fields in the **Choose Barcode Alignment Settings For *Print Setting Name*** form (accessible by clicking **Add/Edit** next to the **Print Configuration** field).

Notes:

Print Item Barcodes

The default values are **"0."** It is recommended that you use increments of 5, 10, 15, 20, etc. when changing a value in these fields.

- For **Horizontal Offset (in points)**, enter a smaller number to move the print head to the left or a larger number to move the print head to the right. If the horizontal offset is not aligned when you are at **"0,"** use a negative number to continue left.
- For **Vertical Offset (in points)**, enter a smaller number to move the print head up or a larger number to move the print head down. If the vertical offset is not aligned when you are at **"0,"** use a negative number to continue up.
- **Internal Label Padding (in points)** is the space (margin) between the label's edge and its printed information. For more space between them, specify a larger number. For less space between them, specify a smaller number.
- Click **Save Changes**.
- Click **Back** to return to the **Print Item Barcodes** form.

Suggested Method for Barcoding Assets

- After you have added holdings records (one for each textbook copy and each piece of equipment), print your barcode labels. You might filter for a specific title to barcode all the copies of a particular textbook at one time; you might also filter for a group of related equipment, such as all iPad® devices, student laptops, etc.
- Choose what information is included on the labels, such as textbook title or equipment name, barcode, serial number, etc. using previous steps.
- Attach the printed labels to your assets in a uniform place. For instance, you might put textbook barcodes in the upper, right-hand corner of the front or back cover; you might put all equipment barcodes on the lid of your laptops, on the back of iPad devices, etc.
- If needed, place a protective label on top of the barcode label to safeguard it from wear.

Reclassify Items

Global changes of bibliographic and main equipment records as well as their associated holdings records are done via **Reclassify Items**. You can modify item types within your records, the status of barcode labels, warranty and adoption dates, etc.

- Click **Catalog** from the **Menu Bar**.
- Under **Bulk**, click **Reclassify**.
- Insert records in the **Reclassify Items Queue** by using one of the following options (filter option is preferable unless you have the barcodes for the items in hand):
  - Scan the item barcodes in the **Items** list; click **Add**.
  - Click **Lookup** and enter a word or phrase in the **Barcode / Title Keyword** field; click **Search**. If needed, click the textbook **title** or equipment **name**.
  - Click **Filter** (recommended). The **Report Wizard** opens. Use the drop-down lists and fields to set up criteria. Click **Generate List**.
- Click one or more of the following check boxes to enable the option(s) you want to change:

Notes:

Important!
Be sure that a **cost** has been added to holdings records prior to marking items lost so Booktracks can *automatically assess a fine* to the student who had the items checked out.

Fine = % of Cost

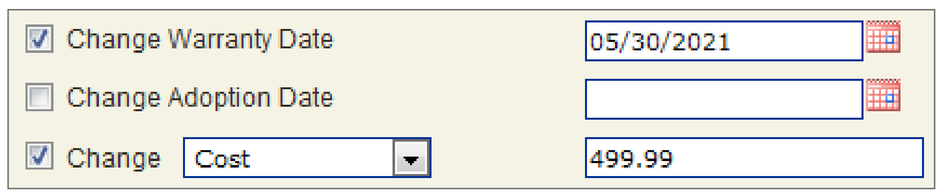
(based on Condition)

Tip!
If you did not have the **Purchase Order** number on hand when you cataloged textbooks or equipment or forgot to include it, you can reclassify groups of item that were ordered together and add this information by selecting **Purchase Order** on the last **Change "Miscellaneous"** drop-down list.

Notes:

- **Change Item Loan Period**
- **Change Subject Area**
- **Change School Building** (**Centralized** only)
- **Change Physical Location**
- **Change Age Group**
- **Change Material Type**
- **Change Condition**
- **Change Custom Item Status**
- **Do Not Transfer** (**Centralized** only)
- **Barcode Labels Printed**
- **Change Vendor**
- **Change Entity Responsible For Tracking**
- **Change Warranty Date**
- **Change Adoption Date**
- **Change "Miscellaneous"** (Select a different option from the drop-down list as needed.)

- For each check box you enable, select an option from the drop-down list, use the calendar icon to select a date, or enter criteria in the field as needed to tell Booktracks how you want the records changed. See the example pictured here.

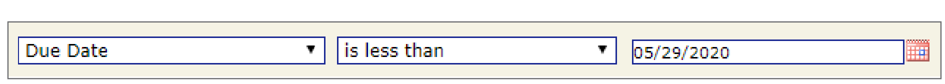


- Click **Reclassify Items** to make the changes to queued records.
- If the queue contains more than 100 items, you will see a pop-up prompting you to confirm the change before continuing. Click **OK** to confirm.
- A progress bar opens showing the percentage of records that has been reclassified. Once it finishes, the **Reclassify Items** form refreshes displaying the number of successful changes.

Mark Items Lost

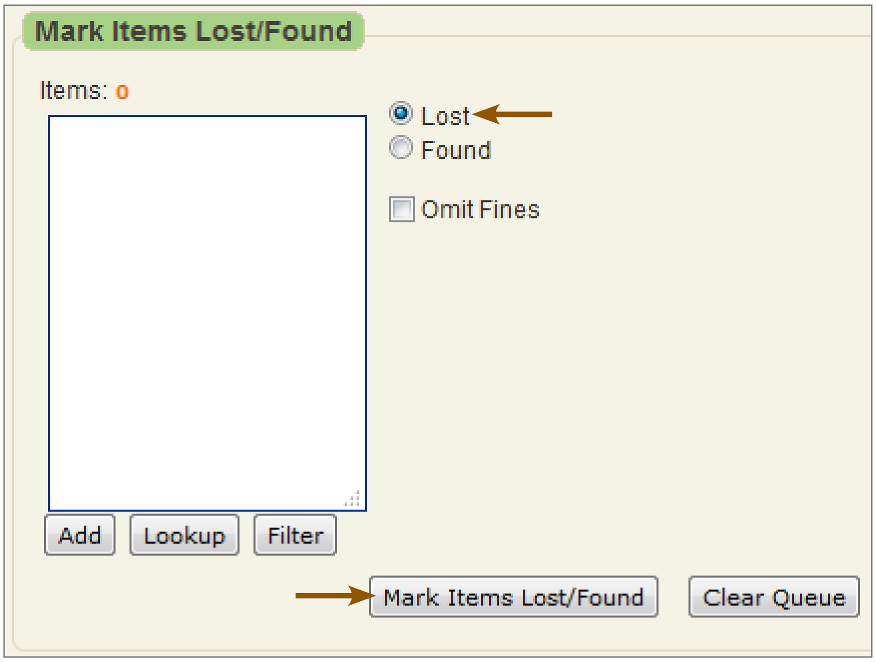
After items have been checked in and it is clear what items students have not returned, workers need to mark those items lost. Booktracks provides the **Mark Items Lost/Found** form to make this process easy and efficient.

- Click **Catalog** from the **Menu Bar**.
- Under **Item**, click **Lost/Found**.
- Insert the barcodes of your missing assets into the **Items Marked For Lost/Found** queue using the following steps:
  - Click **Filter** to open the **Report Wizard** in a new window.
  - Use the drop-down lists and fields to create a customized filter, such as ***Due Date is less than '05/29/2020'*** or ***Circulation Status contains phrase 'out.'***



  - Once you are satisfied with your filter, click **Generate List**.
- When you are satisfied with the contents in the queue, click the **Lost** radio button to designate that these items will be marked lost.

- Click **Mark Items Lost/Found** to initiate this process.



- If the queue contains more than 100 items, a warning dialog box prompts you for verification before continuing. Click **OK**.
- A progress bar displays. Then the **Mark Items Lost/Found** form refreshes, listing the number of items marked lost and displaying messages if fines were assessed and the items were checked in for patrons who had them.

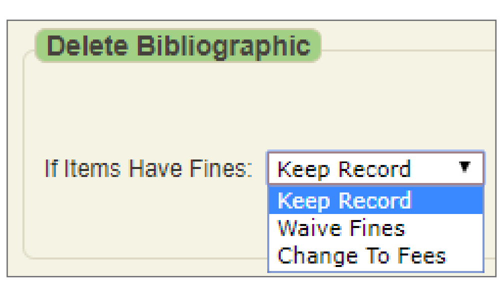
Delete Items

When you buy new textbooks and discard old titles or when individual copies become too worn/damaged to use, you need to delete the bibliographic (title) or holdings (copies) records.

Delete Bibliographic

Use these steps if you are replacing a title with a newer version or different title and no longer plan to use these textbooks. Both the bibliographic record and all associated holdings will be deleted together.

- Click **Catalog** from the **Menu Bar**.
- Under **Bulk**, click **Delete Bibs**.
- In case any associated holdings have fines, use the **If Items Have Fines** drop-down list. Click to select what to do with any fines attached to records' holdings: ***Keep Record*** (items with attached fines cannot be deleted), ***Waive Fines***, or ***Change To Fees*** (fees are attached to patron records only).



Tip!
If you are marking teacher editions lost or any items for which you do not need to charge fines, you can click **Omit Fines** before clicking **Mark Items Lost/Found**.

Notes:

Note:
If you need to delete a single title or copy, you can open the **Edit Item: Bibliographic Record** form or the **Holding Record** form and click **Delete**.

Tip!
You can use the **List Of Deleted Items** report to keep track of all the textbook and equipment holding records that were removed from your database. The actual records are done, but essential data is pulled from the history table for your record keeping.

Notes:

- Click **Filter**.
- Use the options to filter by Subject Area, ISBN, Age Group, etc.
- Click **Generate List**.
- If any titles are in the queue by mistake, click the corresponding check box and click **Remove Selected From Queue** or click **Clear Queue** to remove all items and start over.
- When you are ready to remove the records, click **Delete Queued Records**. This action cannot be undone and only essential history is maintained after deletion.
- A warning dialog box displays detailing the number of records (and associated holdings) that will be removed.
- Click **OK**. **Successes** and **Errors** display as they apply.

Delete Holdings

In situations where a textbook or other item has been damaged or so worn it cannot be used anymore, you can delete the record for that specific copy without deleting the bibliographic record and other holdings (copies).

- Click **Catalog** from the **Menu Bar**.
- Under **Bulk**, click **Delete Holdings**.
- Scan/enter the barcodes of the items if they are still readable; otherwise, look up the item or filter for the ones you need using the **Lookup** and **Filter** buttons.
- Click the appropriate radio button to designate what should be deleted: only the specific holdings records added to the queue (most common) or the holdings plus any of their bibliographic records that would be left with no attached holdings.
- In case any of these items have fines, use the **If Items Have Fines** drop-down list. Click to select what to do with any fines attached to holdings records: ***Keep Record*** (items with attached fines cannot be deleted), ***Waive Fines***, or ***Change To Fees*** (fees are attached to patron records only).
- If any items are in the queue by mistake, click the corresponding check box and click **Remove Selected From Queue** or click **Clear Queue** to remove all items and start over.
- When you are ready to remove the records click **Delete Queued Records**. This action cannot be undone and only essential history is maintained after deletion.
- If the queue has more than ten items, a warning dialog box displays prompting you to confirm the deletion.
- Click **OK**. **Successes** and **Errors** display as they apply.

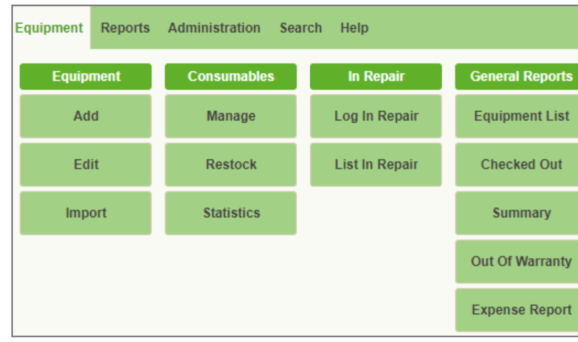
Equipment Menu

Important!
Equipment will not have a barcode or be available for check out until you add holdings using the **Holding Record For Equipment** form. If an equipment record does not have any associated holdings, a warning displays on the **Edit Item: Equipment Record** form.

Note:
You can create additional **Material Types** to correspond with the types of equipment at your school.

Notes:

Equipment Menu



Booktracks allows you to manage your schools' equipment holdings, including computers, eReaders, projectors, printers, scanners, and more. The **Equipment** menu provides access to forms for adding/editing equipment records, importing equipment records if needed (though Book Systems may help you with this), logging the number of times equipment has been repaired, and more. You can also generate reports specific to these items; for instance, you can run the **Equipment Checked Out** report to find out which items are currently out, run the **Equipment Out Of Warranty** report to see which items are past their warranty, view the **Equipment Summary** to see a break-down of all your equipment by type, and more.

This chapter covers how to add equipment records and run the **Equipment Summary** report. When you are ready to check out equipment, refer to the "Circulation" chapter.

Add Equipment

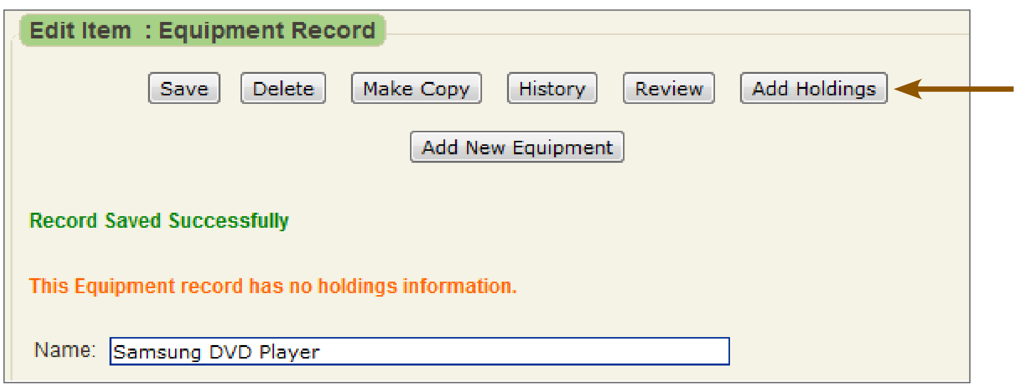
You can create records for computers, eReaders, electronic devices, and more using the **Add Item: Equipment Record** form; each individual piece must be entered on an associated **Holding Record For Equipment** form in order to assign a barcode and circulate it.

Once these records have been added to your database, you can check equipment in and out just like other items. You can also review and reclassify equipment, mark equipment lost/found, and delete equipment records or associated holdings using the same forms you use to manage textbook records. You can also view equipment information in reports. A standard **List Of Equipment** report includes all equipment in your database. Circulation reports, such as **Patrons With Items** and **Circulation By Patron**, list all textbook and equipment holdings that are checked out to students or teachers.

To create an equipment record

- Click **Equipment** from the **Menu Bar**.
- Under **Equipment**, click **Add**.
- In the **Name** field, enter the name of the equipment.
- On the Core form, select the appropriate option from the **Age Group** drop-down list.
- Select the appropriate option from the **Material Type** drop-down list.
- In the **UPC** field, enter the 12-digit Universal Product Code. This may display on the back/bottom of the equipment or on the box.
- In the **Description** field, enter a defining statement for the equipment.
- In the **Model Details** field, enter more specific information about the item, such as model number, warranty information, weight, size, capacity, or other features.
- In the **Base Components** field, enter the parts of the equipment, such as a monitor, hard drive, keyboard, protective case, power cord, etc.
- In the **Installation Instructions** field, enter brief directions to install or set up the equipment.

- In the **Note** field, enter any comments about this equipment.
- In the **Equipment User Defined 1-4** fields, enter appropriate information. These can be customized to suit your needs on the **User Defined Fields** form (see the related section earlier in the manual).
- On the **Media** form, in the **Name** field, enter a document name, such as ***User's Guide***.
- In the **Upload Documents** field, click **Browse...** or **Choose File** (depending on your browser) to locate the file on your computer and insert the file path.
- In the **Upload Equipment Image** field, click **Browse...** or **Choose File** to locate the image file on your computer and insert the file path.
- In the **URL** field, enter the web address of a related site, such as the vendor page that lists the specifications of the equipment.
- In the **Note** field, enter the link name you want to display for this URL. For instance, if you ordered a DVD player from Amazon, you might enter ***Sony DVD Player on Amazon*** if the URL opens the product details page.
- Click **Save**. A message indicates that no holdings have been added.



Example:
When you are deciding how to add main equipment records and holdings records, consider the type of item. If you have ten computers in a lab and all of these are the same brand and model, you could enter one equipment record with ten holdings. If each computer is a different brand/model, you could enter ten separate equipment records with one holding each.

Notes:

Add Equipment Holdings

- Click **Add Holdings** from the **Edit Item: Equipment Record** form.
- In the **Barcode** field, either accept the **"next available"** barcode, or highlight **"next available"** and enter your specific barcode. A message displays this item's tentatively queued barcode.
- Select the appropriate option from the **Barcode Type** drop-down list if there is more than one choice.
- Enter the numeric value in the **Number Of Identical Copies To Add** field to reflect the number of identical pieces of equipment you are cataloging; you may add them one at a time to assign unique serial numbers.
- Click the **Do Not Transfer** check box (**Centralized** only) if the items should always stay at the home location.
- In the **Serial Number** field, enter the serial number indicated on the physical piece of equipment.
- Click the calendar icon, and click again to insert a date into the **Warranty Date** field. Otherwise, manually enter the date using the mm/dd/yyyy format.
- Select the appropriate option from the **Item Loan Period** drop-down list.

Important!
Remember to add a cost to every holding record in order to track expenses for acquiring new equipment and to ensure that fines are automatically charged if equipment is lost.

Example:
If you are cataloging eReaders and all are the same model and have the same main equipment record, you might include parts all the devices have in common, such as the power cord, in the **Base Components** field (**Edit Item: Equipment Record**), and you might include something that only specific devices have, such as a protective case, in the **Current Components** field (**Holding Record For Equipment**).

Notes:

Log Equipment Repairs

- Select the appropriate option from the **Subject Area** drop-down list. If computers, projectors, televisions, etc. belong to a particular department in your school, you might select ***English*** or ***Math***. If the equipment can be used by any teacher for any class, you might select ***Undefined***.
- Select the appropriate option from the **Condition** drop-down list.
- Enter the amount to replace the equipment in the **Cost** field.
- Select the appropriate option from the **School Building** drop-down list (**Centralized** only). This is the home location. After saving, this school populates the **Current Location** field.
- Select an area from the **Physical Location** drop-down list where the equipment is kept while not in use or when it is used at the school rather than taken home.
- Select the appropriate choice from the **Custom Item Status** drop-down list. **"Use Circulation Status"** is most common for new items, but you can change this as needed.
- Select the appropriate option from the **Vendor** drop-down list.
- The **Purchase Date** defaults to today's date. To change this, click the calendar icon, and click again to insert a date. Otherwise, manually enter the date using the mm/dd/yyyy format.
- In the **Funding Source** field, designate the origins of the funds used to purchase this equipment, such as a school account, a district fund, or a grant.
- Enter the number associated with this equipment order in the **Purchase Order** field.
- Enter any notes about this equipment in the **Holdings Notes** field.
- Enter any additional parts specific to this piece of equipment in the **Current Components** field. Base Components from the main record already display here.
- If you have not printed the barcode label yet, leave the **Have labels been printed?** check box empty. Booktracks will automatically insert the check mark when the label is printed.
- Select the appropriate entity from the **Entity Responsible For Tracking** drop-down list. If you do not want to designate an entity, confirm that **"Unassigned"** displays in this field.
- Click **Save**.
- If you add more than ten holdings, a dialog box prompts you to verify the number before continuing. Click **OK** to add the holdings.
- If you are adding holdings one at a time to assign unique serial numbers, click **Add New Holdings** and repeat the field entry process, or if all the information is the same except for the serial number, click **Make Copy** to duplicate the record and edit that one field.

Log Equipment Repairs

This feature allows you to record every time pieces of equipment are sent for repair and when they are returned. This changes the **Custom Item Status** of the designated holdings so that you can review items and run related reports to find out which items are in repair, how many times they have been repaired, etc.

- Click **Equipment** from the **Menu Bar**.

- Under **In Repair**, click **Log In Repair**.
- On the **Log Equipment In Repair/Returned** form, use one or more of the following options to insert records in the **Equipment Marked In Repair/Returned** queue:
    - Scan the barcodes in the **Items** list; click **Add**.
    - Click **Lookup** and enter search term(s) in the **Barcode / Title Keyword** field; click **Search**. Click the equipment **name** to insert the barcode and repeat steps as needed.
    - Click **Filter**. The **Report Wizard** opens. Use the drop-down lists and fields to set up your criteria. Click **Generate List**.
- When you are satisfied with the contents in the queue, click the **Mark In Repair** or **Mark Returned** radio button to designate how these items should be updated.
- If needed, enter notes in the **Message To Attach To Items** field.
- Click **Mark Equipment In Repair/Returned** to initiate this process.

Did you know?
By default, when you select **Mark In Repair** for queued items, their **Custom Item Status** will change to **In Repair**. If needed, you can click the **Change** link in the middle of the form to designate another **Custom Item Status** as the one that should be used for this feature.

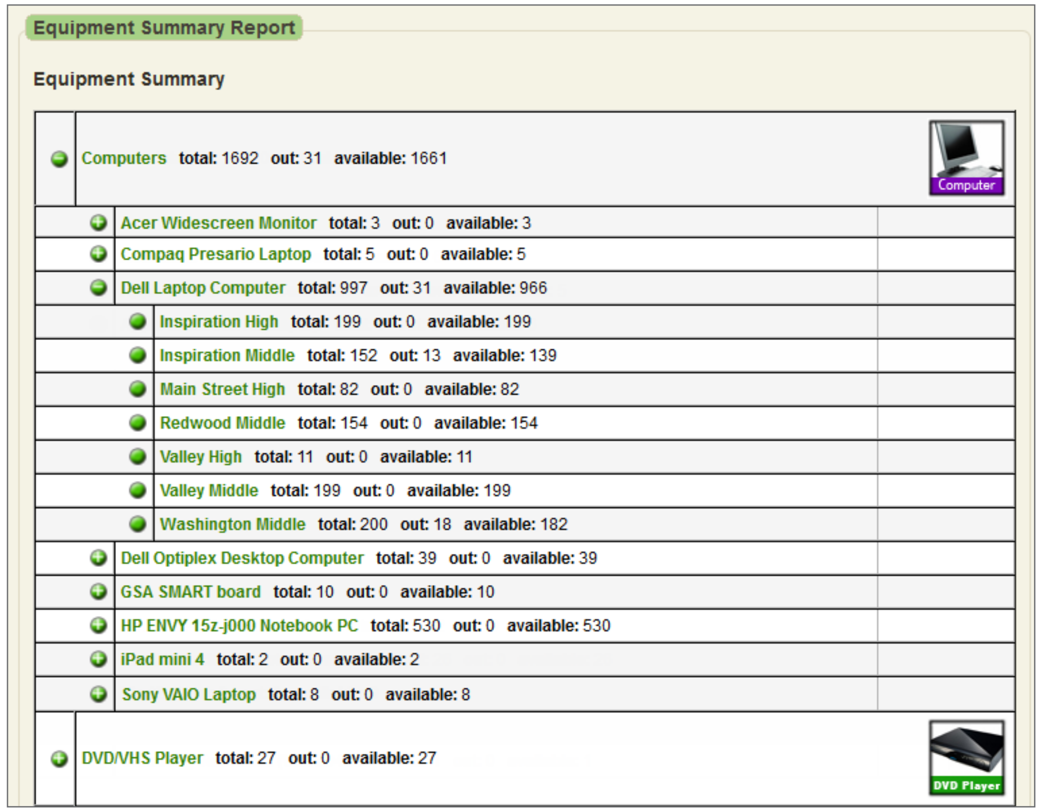
Equipment Summary

This report lists each **Material Type** that contains equipment records; you have the ability to drill down to see the name of equipment records within each Material Type and how those records are distributed among your schools. You can also open secondary reports to view even more details about your equipment holdings, such as location, serial number, cost, etc. This helps you get an overview of the equipment you have and then find out more specific information about where the equipment is being used or stored.

To generate an Equipment Summary

- Click **Equipment** from the **Menu Bar**.
- Under **General Reports**, click **Summary**.
- On the generated report, a row displays for each Material Type that has associated equipment records. A green plus icon displays if there are any holdings available for check out; a red plus icon displays if the corresponding equipment record(s) have no attached holdings or if all the holdings are currently checked out, meaning there are none available to other patrons. You also see the total number of holdings, the number currently checked out, and the number still available.
- Click a plus icon next to a Material Type to expand the entry and view the name of each associated equipment record. A green plus icon displays next to equipment with attached holdings currently available for check out; a red plus icon displays if all attached holdings are already checked out, and a red bubble icon displays if there are no attached holdings. The following statistics are listed as well: **total**, **out**, and **available**.
- If applicable, click a green plus icon next to an equipment name to expand the entry and view statistics for each **School Building** where holdings are located (**Centralized** only) or for the main **School** (**Distributed** only). A green bubble icon displays next to schools with available holdings; a red bubble icon displays next to schools that do not have any holdings available for check out. The following statistics are listed as well: **total**, **out**, and **available**.

Notes:



- Click the green and red minus icons (● or ●) to collapse rows when you are finished viewing them.
- If needed, click available links to view secondary reports:
  - Click a **Material Type** to open a **List Of Equipment** report in a new window, listing the **Name**, **Material Type**, **Description**, **Model Details**, **Number Of Copies**, and **Number Of Checked Out Copies** for each equipment record.
  - Click an equipment **name** to open an **Accession List** report in a new window, listing the **Title**, **Current Location**, **Holdings Barcode**, **Serial Number**, and **Cost** for each piece of equipment.
  - Click a **School Building** to open an **Accession List** report in a new window, listing the **Title**, **Current Location**, **Holdings Barcode**, **Serial Number**, and **Cost** for each piece of equipment *at that school*.
- Close any open report windows when you are finished.

Notes:

Appendix

Comments or Suggestions?

At Book Systems, we pride ourselves on listening and responding to our customers as we have done for the past 25 years. We need your comments and/or suggestions to help us enhance Booktracks going forward and to improve our instructional process, i.e., training, printed manuals, and online Help.

This **Training Manual** can serve as a supplement to your initial training session. The step-by-step instructions provided will guide you to features and functions within Booktracks. The administrative functions have been presented to help you set up Booktracks for your asset management process. The menu options have been described, with examples in many cases, to assist you in making decisions that best suit your needs. Instruction beyond this level is provided in Advanced (follow-on) Training. This manual should provide adequate instruction concerning significant features that you will use often. Booktracks Training is most effective after you have become sufficiently acquainted with the functionality of the product. Because you will have learned to navigate the system effectively at that point, you can concentrate on additional functionality that adds to the basic understanding that this manual provides.

At the conclusion of your initial training you are considered equipped to "Go Live" using Booktracks. Remember that once you start using Booktracks, you can click **Help** from the **Menu Bar** at any time to open a topic related to what you are doing. You can also find useful documents on the **Downloads** form. Click **Administration** from the **Menu Bar**, and then click **General**. Click **Downloads** to find documents you can read online or print, instructional videos, and more.

Use the following contact information if you have any questions, comments, or suggestions.

Address:
Book Systems, Inc.
4901 University Sq., Ste. 3
Huntsville, AL 35816

Business Hours:
7:00 am to 7:00 pm CST.

Website:
http://www.booksys.com

Support Forum:
Go to www.booksys.com/asset-management/. Click **Customer Support** to find information about signing up for the Booktracks Listserv and getting assistance from our support team.

Technical Support:
Phone: 1-888-289-1216
Email: support@booksys.com
FAX: 1-800-230-4183

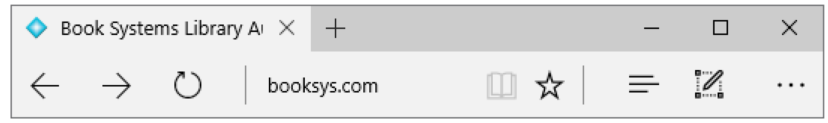
Data Management:
Phone: 1-800-219-6571
Email: data@booksys.com
FAX: 1-888-289-6008

Sales Department:
Phone: 1-800-219-6571
Email: sales@booksys.com
FAX: 1-800-230-4183

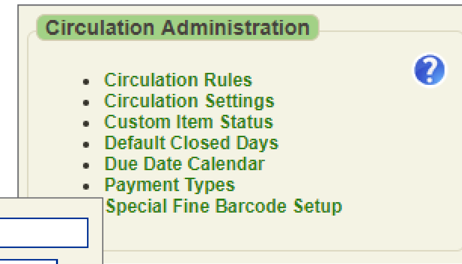
Computer Skills

When working with web-based software programs, there are key terms and concepts that are helpful to know.

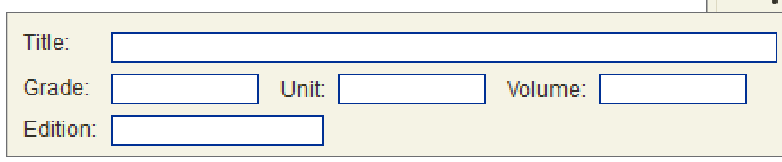
Address Bar - All web browsers have an address bar, which displays the user's current location. Entering a website's address or a file name in the browser's address bar will open that site or file, just as entering the correct address will open Booktracks for you.



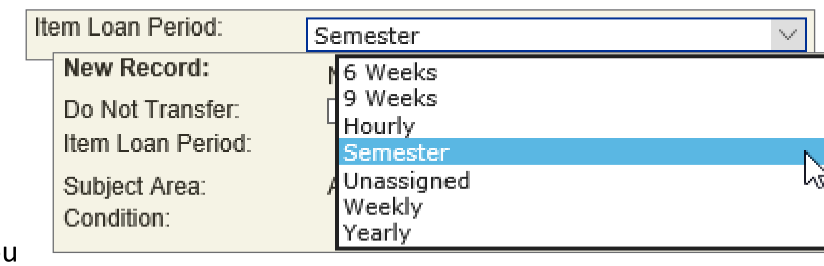
Link - A link is a reference that will take you from your current location to a related area. Links in Booktracks will take you from one form to another, reducing the time you spend on certain tasks. To distinguish these shortcuts, links display in **green bold** and are not underlined.



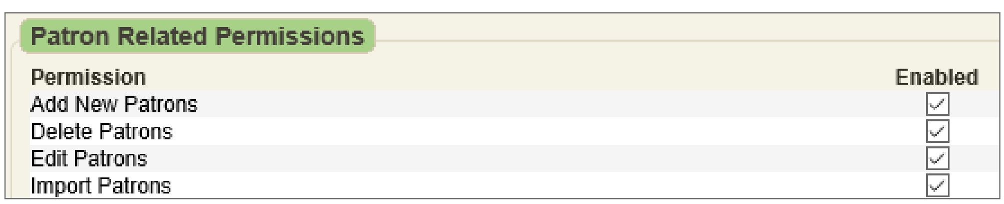
Field - A field is an area for entering data. You can enter information into fields by using the keyboard or by scanning a barcode.



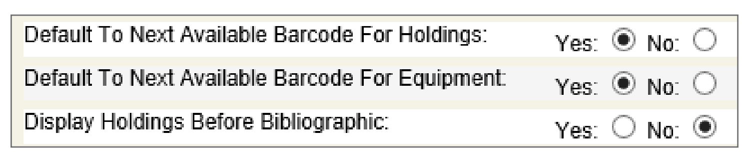
Drop-Down List - A field with an arrow beside it indicates a drop-down list. Clicking that arrow lets you choose from one or more options to replace the current choice. Once the new option is selected, the list closes.



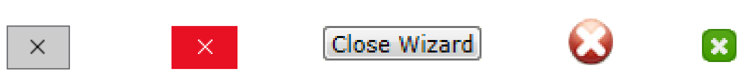
Check Box - A check box is a special field that has two states, checked and unchecked. To change the state of a check box, click on it. A grouping of check boxes means you can select more than one option.



Radio Buttons - These paired buttons allow you to interact with material on a web page. Once you click one radio button to select an option, the other button is automatically deselected.

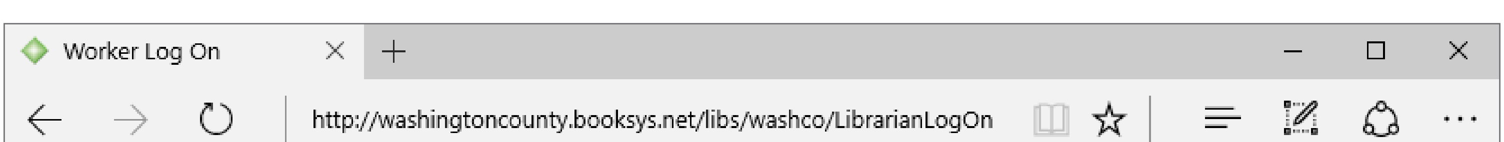


Close Buttons - Click close buttons to exit report wizards, panels, forms that open in new windows, etc.



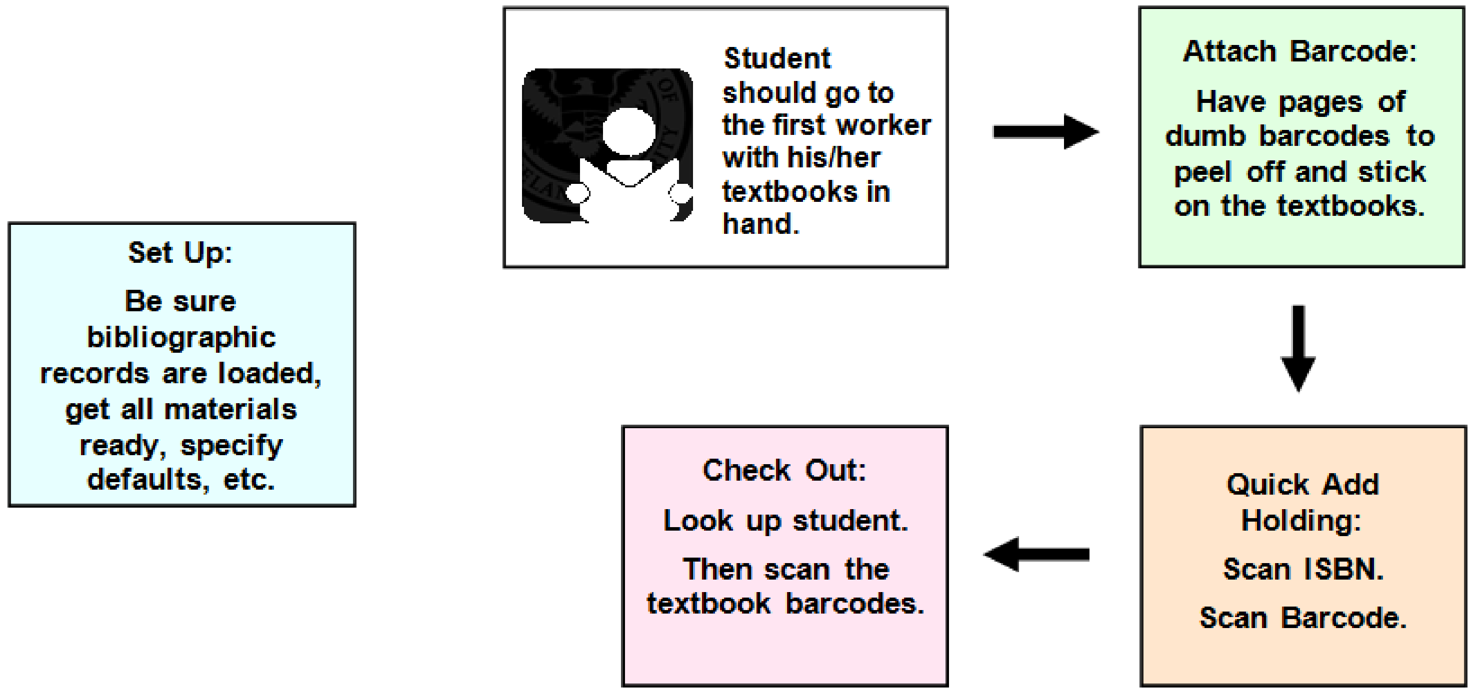
Taskbar - This is a bar that displays at the bottom of all Windows® desktops. Click buttons on the taskbar to navigate among Booktracks forms and other open programs. If you have multiple windows of a single browser/program open at once, click the button on the taskbar to view thumbnails of each window, and then click to open one.

Title Bar/Tab - The title bar runs across the top of open windows and may contain the name of the application, dialog box, browser, website, etc. Some browsers may only include the name of the web page on the tab, rather than a title bar.



Mid-Year Implementation of Booktracks

If you need to implement Booktracks after distributing textbooks to your students, you can use these steps to catalog items and track ownership in the database. This section provides a diagram of the workflow, suggestions for how the administrator should set this up, and steps for the workers at each check point.



Set Up

Administrator Instructions Prior to Implementation

- Bibliographic records must be loaded!
- Scanners must be programmed to decode ISBN.
- Defaults can be set for holdings records. See more details below.
- Pages of dumb barcodes must be printed to attach to textbooks. If barcodes and protectors could be attached before the implementation process, that would save time while students are waiting in line.
- Steps and Exceptions Logs (multiple copies) must be printed for workers. To do this, print a specific selection of pages from the electronic copy of this **Training Manual** (front sides only) or make copies of those specific pages.

Defaults for Holding Records

When you add holdings, Item Loan Period, Condition, Physical Location, School Building (**Centralized** only), and others will be assigned automatically based on the defaults you set in the **Catalog Administration** submenu. Your holdings records may need some clean up when this process with the students is complete, but setting defaults ahead of time can help ensure the data is as accurate as possible from the outset. For instance, you can select the School Building where you are implementing that particular day, and you can select the typical Item Loan Period for that school, such as ***Semester*** for a high school or ***Yearly*** for an elementary school.

Important!
You must have an amount listed in the **Price / Availability** field of the bibliographic records for Booktracks to assign a cost when you add new holdings with the **Quick Add Holding** feature; make sure this information was added so that fines can automatically be assessed for lost items without you taking additional steps.

Be sure your workers log on to the correct School Building during implementation. The location in the holdings records and the location where the worker is logged on must match.

Attach Barcode

- Peel barcode off the label sheet.
- Attach to the textbook. All barcodes should be attached to the same place on the book to make it easy for the workers to always look in the same place to scan barcodes, such as the upper, right-hand corner on the front or back cover.
- Repeat these steps for all textbooks.

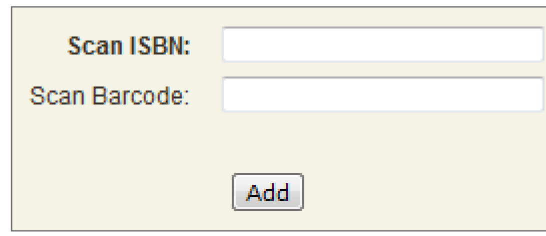
Quick Add Holding

- Log on to Booktracks: enter your username and password; select the correct school from the **School Building** drop-down list (**Centralized** only). Then, click **Log On**.

- Click **Catalog** from the **Menu Bar**.

- Under **Item**, click **Quick Add**.

- If you see options to select your mode of operation, click the radio button next to **Textbooks have already been distributed. Multiple subjects will be cataloged rather than a single title.** The next time you use this feature, this mode will already be selected for you.



- Scan the ISBN in the **Scan ISBN** field.

- Scan the barcode attached to the textbook in the **Scan Barcode** field.

- Booktracks looks for a bibliographic record matching the ISBN and adds a new holding to that record. **Successes** and **Errors** display as they apply. An **error** may display for several reasons:

  - If the ISBN cannot be found, the worker should click **Add Item**. The **Add Item: Bibliographic Record** form opens in a new tab. Enter the title and ISBN and click **Save**. Close the new tab to return to the **Quick Add Holding** form; then rescan the ISBN and barcode to add the holding.

  - If more than one record uses this ISBN, click the **Add** button next to the correct bibliographic record. The ISBN and barcode automatically display in the fields, and your new record is added.

  - If there is another type of error, write down the textbook's title and ISBN on the **Exceptions Log for Cataloging** so the administrator can handle this issue at a later time.

Batch Check Out Textbooks

- Log on to Booktracks: enter your username and password; select the correct school from the **School Building** drop-down list (**Centralized** only). Then, click **Log On**.
- Click **Circulation** from the **Menu Bar**.
- Under **Distribution**, click **Check Out**.
- Find the student's record in one of the following ways:
    - Scan or enter the student's barcode or enter the name in the **Name / Barcode** field and click **Search**.
    - Click **Browse** next to **Teacher-Student Report Class** to open a list of report classes. Choose a class. If needed, select the first letter of the student's name. Then, select the student's **name**.

      Important!
      If you cannot find the student record, write down the student's information as well as data for that person's textbooks in the attached **Exceptions Log for Check Out**.
- The **Batch Check Out Items** form opens with the student's information.
- Scan the textbook barcodes in the **Barcode** field. Multiple entries populate the **Item List** queue.
- After all textbooks have been entered, click **Check Out**. Textbook data displays on the **Check Out Results** form.

  Important!
  If you receive **errors**, fill out the student and textbook information in the attached **Exceptions Log for Check Out**. If Booktracks tells you that the textbook's Current Location (**Centralized** only) does not match the School Building where you are logged on, check to see if you are logged on to the correct school; if you are, go ahead and fill out the information in the Exceptions Log.
- To check out a book to the next student, scan or enter that student's name or barcode in the **New Patron Name / Barcode** field, and click **Search**. Otherwise, click **Browse** to find the student by report class, and repeat the steps for checking out.

Exceptions Log for Cataloging

If you are unable to successfully add a new holding, log each exception using the form below and give this information to a Booktracks Administrator.

Exceptions that may occur:

1. Booktracks cannot find the ISBN. A worker should stop and add the bibliographic record using the **Add Item** link before moving on.
2. Multiple bibliographic records contain the ISBN you scanned. Use the onscreen options to choose the correct record.
3. The holdings barcode is not the expected length.

Complete ALL information in the form below. In the reason column, enter the corresponding number from the list above or provide a new reason if it is not covered in the list.

Textbook Title	ISBN	Textbook Barcode	Reason for Exception

Exceptions Log for Check Out

If you are unable to successfully check out a student textbook, log each exception using the form below and give this information to a Booktracks Administrator.

Exceptions that may occur:

1. Booktracks does not recognize the student barcode.
2. Booktracks does not recognize the textbook barcode.
3. Booktracks tells you the textbook's Current Location is another School Building.

Complete ALL information in the form below. In the reason column, enter the corresponding number from the list above or provide a new reason if it is not covered in the list.

Student's Name	Textbook Title	ISBN	Textbook Barcode	Reason for Exception

Special Barcodes for Circulation

Check Out

Check In

Pay Fine

Print Receipt

Review Patron

Renew All

Bulk Renew

Next Patron

Edit Patron

Edit Item

Special Barcodes

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