

Administration

Booktracks has a multitude of settings and options to accommodate school systems and universities of different sizes and needs. Finding those rarely-visited administrative forms when you need to update a setting can be a challenge. Now you can use the **Settings Manager** (Administration | Settings Manager) to search for a keyword and find related forms.

Click **Help** in the **Menu Bar** to open a topic about the Settings Manager. Click the icon to open a Help topic about the current form (in this case Circulation Settings).

Circulation Catalog Patrons Equipment Ren	orts My Reports Administration Search Help	
encontrol catalog rations equipment rep	ons my reports Automatication Search help	
Settings Manager	Circulation Settings	
Search: entity 🛛 😵	Sav	e 😢
A Catalog	Show Failed Barcodes On Circulation:	Yes: 🖲 No: 🔘
Entity Responsible For	Pop-Up Kit Notifications:	Yes: 🖲 No: 🔘
Tracking	Show Patron Info On Check In:	Yes: 🖲 No: 🔘
▲ III Circulation	Show Patron Picture On Check In:	Yes: 🔘 No: 🔘
Circulation Settings	Waive Lost Fine And Assess Overdue Fine When Item Is Found:	Yes: 🖲 No: 🔘
▲ In General	Automatically Notify When Refund Is Due:	Yes: 🖲 No: 🔘
Add Ons	Require Reason To Waive Fines:	Yes: 🔘 No: 🔘
My Reports Setup	Play Sound Alerts During Circulation:	Yes: 🖲 No: 🔘
	Circulation Background Color:	#ffffcc
	Show Error If Item Is Already Checked Out:	Yes: 🖲 No: 🔘
	Default Bookings Buffer Period:	1 Days
	Display Patron Barcode During Circulation:	Yes: 🖲 No: 🔘
	Use Grace Period When Assessing Fines:	Yes: 🔘 No: 🔍
	Choose Entity Responsible For Tracking During Circulation	Yes: 🖲 No: 🔘
	Browse Should Choose By First Character Of Las Name:	^{it} Yes: 🔘 No: 🔘
	Mark Brief Record As Temporary:	Yes: 🔘 No: 🔍
	Automatically Remove Custom Item Status On Check In:	Yes: 🔘 No: 🔘
	Automatically Remove Custom Item Status On Check Out	Yes: 🔘 No: 🔘
	Automatically Mark Overdue Items Lost After:	30 Days

When you click one of the search results, your keyword is highlighted on the related form so you can easily find it.





Circulation

An **Email Confirmation** check box now displays at check in (Circulation | Check In Items) so that you can send a message to students letting them know that their items have been marked as returned in the database.

Check in Items]
Barcode:	Special Check In Date: Email Confirmation:	Successful Check In: 0 Failed Check In: 0 Items With Warnings: 0
	Check In Start Over	

The new setting **Automatically Remove Custom Item Status On Check Out** (Administration | Circulation | Circulation Settings) has been added to reinstate the regular circulation status when items are checked out. A warning displays with this information in the results.

Automatically F	Remove Custom Item	Status On Check Out:	Yes: 🖲 No: 🔘	
Check Out Results				
Successful Check Out: 1	Failed Check Out: 0 Barcode	Physical Location	Due On	Override?
迚 Dell Laptop Computer	EQ00000391	TRC	05/23/2016	
This item's custom item sta	tus has been reinstat	ted to the normal circu	lation status.	





The **Require Reason To Waive Fines** setting (Administration | Circulation | Circulation Settings) allows you to make it mandatory to document circumstances for waiving charges. Workers will see either a prompt to enter a reason (when using the **Waive Exactly** feature) or a reminder that the **Reason To Waive** field cannot be blank (when entering payment information in the related fields).

		Require Reason To	Waive Fines:		Yes: 🖲 No: 🔘	
г						
	Pay Fines/Fee	es For Patron Ebb,	Matthew			
	Patron Name: Eb	b, Matthew (1619822)				
	Check Out Items	To This Patron or Look	up New Patron		Search Browse	
	Total Amount Du	e: \$45.00	Pay Exactly \$45.0	0 Waive	Exactly \$45.00	
	Credit:	\$0.00				
	Enter amount be	low to pay partial amou	nt or when expecting ch	nange	Waive Fines/Fees	×
	Payment Amoun	t: 45		_	You must enter a reason to complete	e this
	Reason To Waiv	e:			transaction.	
	Total Change Du	ie: \$0.00				
	Apply Change To	Patron Credif. 📄				
		Pay	Waive Delete	Print Re	ок	Cancel
ERR	ROR		apply this a	action to, clič	k the Select: check box.	
Reas	son To Waive canr	iot be empty.			Select All Deselect All	
		1	or		Select: V	
			UK			





Self Check Stations

There are several new settings (Administration | Circulation | Circulation Settings) that let you customize the look and feel of the interface as well as the functionality of **Self Check Out** and **Self Check In**.

The **Booktracks** theme for the interface has been revamped to match the colors and graphics of the administrative side of Booktracks.



If you enabled the **Choose By Class** option for the **Check Out Patron Lookup Mode**, you will now see an **ALL** button allowing you to find students without knowing the **Teacher-Student Report Class**.

When using this lookup method, you can hide certain report classes that do not use self check by disabling the **Include In Self Check** option on the **Edit Teacher-Student Report Class** form (Administration | Patrons | Teacher-Student Report Class).





You can use the **Button Effects** options to choose animations that display when hovering over buttons or clicking them. The image to the right shows the **Color Hue Cycle** hover effect. The images below show the **Shatter** and **Book Worm** click effects.





You can also select **Page Navigation Effects** for moving between screens and turn on the **Enable Success Effects** option if you would like balloons or confetti to display for successful transactions.





		Book <mark>Sys</mark> tems °	Washington County Sc Inspiration High	hools	DONE
The student's total fines now display beneath the	>	Name: Ben Abram Total Fines: 51.77			ID: 1665810
existing name and ID (barcode).			Item Barcode: Items Checked Out		
The new Sort Currently Checked Out Items By Check Out Date circulation setting allows you to put items in order from the most recently	>	Title Glencoe Speech Language of Compositio iAvancemos!, Volume 1 Miller and Levine Biology Kindle	n: reading, writing, rhetoric	Barcode 00003005 00003953 00028152 00029294 EQ0002013 Self Check I	Due On 05/31/2016 05/31/2016 05/31/2016 05/31/2016 05/23/2016
checked out to the oldest.				SELF CH	ECK OUT

The **Allow Full Check Out Errors To Be Displayed** circulation setting lets all workers, regardless of permissions, hover over **error** text to see the reason why items could not be checked out.







Booktracks now offers **Self Check URLs** that store the **selfcheckout/selfcheckin** workers' usernames and passwords. These can be used to create desktop shortcuts so that teachers can quickly access the **Self Check Out/In** interfaces (without having to log on every time), process check out/in transactions, and get back to other important tasks for their classes.

Depending on your district's workflow, an administrator at each school can set this up on a computer that is wheeled from classroom to classroom or on teachers' classroom computers by clicking Administration | General | Self Check URLs. If teachers have administrative permissions, they could also set this up themselves.

Self Check URLs					
			2		
Saved Name	Worker	Location	Action		
Self Check Out Inspiration Elementary	selfcheckout	Inspiration Elementary	[Delete]		
Self Check In Inspiration Elementary	selfcheckin	Inspiration Elementary	[Delete]		
Self Check Out Inspiration High	selfcheckout	Inspiration High	[Delete]		
Self Check In Inspiration High	selfcheckin	Inspiration High	[Delete]		
Self Check Out Redwood High	selfcheckout	Redwood High	[Delete]		
Self Check In Redwood High	selfcheckin	Redwood High	[Delete]	Self Check	Self Check In
Self Check Out Redwood Middle	selfcheckout	Redwood Middle	[Delete]	Out	
Self Check URL Setup Create a new Self Check URL for selfchecki	n 💌 with label s	elf Check In Redwo			





Catalog

Now the Quick Add Holding feature (Catalog | Quick Add Holding) can process adding holdings to bibliographic records even if there are duplicate ISBNs. A new option displays when using either "mode" that allows you to choose the appropriate bibliographic record.

Outi	ola /	\dd		dina
Qui	-n /	-uu	nui	uniu

Mode: Textbooks have already been distributed. Multiple subjects will be cataloged rather than a single title. Change Mode

Scan the textbook's ISBN followed by the item's barcode to find an existing bibliographic record and add a new holding. If entering barcodes manually, click the Add button to complete the process.

The ISBN '9780618611492' is in use by more than one bibliographic record.

Select one of the bibliographic records with ISBN '9780618611492' to create a holding with barcode '00001637'.

Add Houghton Mifflin English, Grade 02 [Textbook] Add Houghton Mifflin English, Grade 02, Braille Edition [Textbook]

Scan ISBN:	
Scan Barcode:	
	Add

Quick Add Holdin	g		
Mode: Textbooks hav	e not been distributed yet. They will be catalog	ed by title.	Change Mode
Entity Responsible Fo	r Tracking: Hall, Naomi		Change Entity Responsible For Tracking
Scan the textbook's IS holdings records to ar after each barcode.	BN followed by each holding's barcode, and th n existing bibliographic record. If entering numb	en click the Add Holding pers manually, click the I	s And Move To Next Title button to add Find button after ISBN and the Queue button
Scan ISBN:	9780618611492 Rescan ISBN	Title:	English, Grade 02 [Textbook] English, Grade 02, Braille Edition [Textbook]
Scan Barcodes:	Queue	Number Of Barcodes	Scanned: 0, Successful: 0, Failed: 0
	Add Holdings And Move To Next Title		





The new Require Reason	Require Reason To Delete Items:	Yes	0	No	: 0)
The new Require Reason To Delete Items setting (Administration Catalog Catalog Settings) allows you to require workers to specify the circumstances for removing holdings records using the bulk Delete Holdings form or individual	Require Reason To Delete Items: Delete Item You must enter a reason to complete this transaction.	Yes	۲	No:	: ©)
Holding Record forms.	OK Cancel					

Catalog & Patrons

The new Require Reason

Print Item Barcodes			
Barcode: o	Print Dumb Barcodes Choose Fields And Set Alignme	nt	
	Label To Print:		
	30 per page (BSI 70-BML30)	Refresh Labels	
	Starting Row:	1	
	Starting Column:	1	
	Copies Per Barcode:	1	
	Print Test Border:		A Print Test Border option was
	Add Type And School Code:	Default	added to the Print Item Barcodes,
	Check Digit Type:	None	Print Patron Address Labels, and
Add Lookup Filter	Sort Queue By:		Print Patron Barcodes forms
			(available from either the Catalog
Print Patron Barco	des		or Patrons menu). This allows
Barcode: 0	Print Dumb Barcod Choose Fields And	es Set Alianment	you to compare printed labels on
Barcouc.	Label To Print:		a test sheet to your actual label
	30 per page (BSI	70-BML30) Refresh Labels	stock.
	Starting Row:	Print Patron Address Labels	
	Starting Column:	Barcode: o	
	Copies Per Barco	Che	ose Fields And Set Alignment
	Print Test Border:	Lat	el To Print:
	Add Type And Sch	3) per page (BSI 70-BML30) Refresh Labels
	Check Digit Type:	Sta	ting Row: 1
	Sort Queue B	Sta	ting Column: 1
		Co	vies Per Barcode: 1
	Print Labels In C	Pri	t Test Border:
	📃 Clear Queue Afi		ort Queue By:
L		Add Lookup Filter	
			et Lebele In Oueura
			lear Queue After Print





Patrons

You can now manually	Other Info		
add or modify a refund			
notice on students'	Homeroom:		
records; this option only	Advisor:		
displays if the Waive Lost	1st Period:		
Fine And Assess Overdue	English Teacher:		
Fine When Item Is Found	Guardian/Parent:		
and Require Reason To	Drivers Lic		
Waive Fines settings are	SSN:		
enabled (Administration	Comment:		
Circulation Circulation	Alert:		
Settings). Booktracks	Student Note:		~
automatically adds default			
text when students are	Refund Notice:		
due a refund.	Notaria Notice.		^
			\sim
	Birth Date:		
	Student Link:		Grade
	PIN:		Verify PIN:
	Patron Username:		Has Barcode Been Printed?
	Contact Preference: Send Email When: Send Text When:	Not Specified: Email: Home Phone: Items Are Due Items Are Due Items Are Due Items Have Been Overdue For 7 Days	Mobile Phone: O Work Phone: O

Patron Picture				YO
				yo Bo
Upload File:	Browse	Take Picture:	0	an
				on
				Pa

You can now take pictures of your patrons directly within Booktracks using a webcam and the new camera icon on the **Add Patron** or **Edit Patron** form.





Reports

View Bookings F

View Titles Book

View Titles Book

View Titles Book

View Titles Book

Emails sent concerning requests made on the **Course Data By Site** report (Reports | Course Data By Site) now include the **ISBN** for easier identification of textbooks.

The request for 10 copies of 'Science of Agriculture: A Biological Approach (1439057761)' has been edited. Click here to review this request

Standard Reports	
Demost Name	A - 41
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 Expired Titles	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
PayPal IPN Messages	View Edit
Title Usage	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 Datron	Viow Edit
View Bookings F Patrons Awaiting A Refund	

You can now run a report listing all students who are owed a refund (Reports | Other Reports |Patrons Awaiting A Refund).

Report Results For: Refund Notice is not empty Report Results From School Building: Main Street High 8 Result(s) Found. Displaying Results 1 - 8

Edit This Report Email Report Printable Version Export Report As CSV Export Report As Text

Action	Line #	Patron Barcode	Patron Name	Loan Permission	Student Link	Alert Refund Notice
Review	1	1666359	Abbit, Abigail	Middle School Students	1266359	Refund Owed of \$25.00. The Lost Fine for Item enVisionMATH Common Core, Grade 06 (00011986) had been paid on 12/12/2015, but the Item was found.
Review	2	1616567	Adams, Martha	High School Students	1616567	Refund Owed of \$84.31. The Lost Fine for Item World History, Grade 06 (00011871) had been paid on 05/31/2015, but the Item was found.
Review	3	1616513	Anderson, Karen	Middle School Students	1616513	Refund Owed of \$67.45. The Lost Fine for Item World History (Grade 06) (00203920) had been paid on 09/30/2015, but the Item was found.
Review	4	1618017	Baker, Aaron	High School Students	1618017	Refund Owed of \$50.36. The Lost Fine for Item Elements of Literature, 1st Course (Grade 07) (700008603) had been paid on 04/27/2015, but the Item was found.
Review	5	1616549	Booker, Jean	Middle School Students	1616549	Refund Owed of \$57.40. The Lost Fine for Item United States: Civil War to Present (Grade 05) (00202544) had been paid on 09/10/2015, but the Item was found.





A new **Currently Owed** column has been added to the **Cash Drawer Statistics** report (Reports | Statistical Reports) to show all outstanding assessed and projected fines for today only. Fees display at the bottom of the report.

Cash Drawer Statistics : 05/3	31/2016 to 05/31/2016								
Filter Criteria: Start Date: 05/31	/2016 School Building: ALL		Total Fines Received:	195.58					
00/01		Total Fines Refunded:	-42.43						
End Date: 05/31	End Date: 05/31/2016								
Ge	Credit Received:	4.41							
	Credit Received.	4.41							
Email Report Printable Version	Credit Refunded:	-0.00							
Charts: None	Charts: None								
Cash Drawer Statistics : 05/31/2016 to 05/31/2016									
Subject Area	Received	Waived	Refunded Curre	entlyowed					
Algebra	0.00	0.00	0.00	0.00					
Art	0.00	0.00	0.00	Assese					
Biology	0.00	0.00	0.00	0.00					
Business	0.00	0.00	0.00	30.30					
Calculus	0.00	0.00	0.00	0.00					
Chemistry	0.00	0.00	0.00	0.00					
Communication Skills	0.00	0.00	0.00	0.00					
Driver Education	0.00	0.00	0.00	342.37					
Earth Science	0.00	0.00	0.00	33.59					
English	0.00	0.00	0.00	87.11					
Family and Consumer Science	0.00	0.00	0.00	0.00					
French	0.00	0.00	0.00	0.00					
Geometry	0.00	0.00	0.00	0.00					
Health	0.00	0.00	0.00	0.00					
History	0.00	0.00	0.00	0.00					
Latin	0.00	0.00	0.00	0.00					
Life Science	0.00	0.00	0.00	0.00					
Literature	0.00	0.00	0.00	20.00					





The Holdings	Labinera Comm		un a ut							
Holdings Summary Report										
UMMARY REPORT [Subject Area] [Material Type] [Item Loan Period] [Age Group] [School Building] [Physical Location]										
Reports Statistical Email Report Printable Version Export Report As Text										
Reports) has been	Charts: None	-				Saved Rep	ports:		▼ S	how Report
indated so you can										
apuated so you call	Filters: School Bui	lding:	ALL		👻 🔽 Sho	ow Items Witho	out Data Sho	N: ALL		-
ave report data and										
access it later. For										
instance, you can Washington County Schools									01/26/2	016 04·21 PM
save reports from	1212 Inspiration Wa	1212 Inspiration Way Huntsville, AL 35866								
the end of each	Holdings By Subject Area									
						•				
semester or school	Category / Class				Have Lost	Out In		Cost	Cost	Copyright
year.	Algebra				3,411 31	38 3,373	\$22	5,103.21	\$66.21	2011
	Art				935 0	1 934	\$5	7,028.79	\$60.99	2009
Holdings Summary Report								,865.40	\$60.82	2012
[Subject Area] [Material	Type] [Item Loan I	Doirod		Group] [Sc	hool Building]	Dhysical Loca	tion1	,458.10	\$85.19	2014
[cabject riou] [muteriu	(Jeon Loon)	Silouj	[Age	bill [30	Line and any Line and Angle Line and Ang	. Ayonour Loca		,983.95	\$41.88	2010
Email Report Printable Version	Export Report As Text	t	- -					,554.54	\$56.23	2009
Charts: None 💌			Sa	aved Reports:	12/31/2015 11:	59 PM 💌 S	how Report	,634.12	\$72.13	2010
		_						,033.55	\$40.35	2010
Filters: School Building: ALL	•	🔽 S	how Iter	ns Without Da	ata Show: ALL		-	,488.22	\$40.21	2009
								,673.02	\$52.17	2007
	Apply F	iters	Relo	ао керот				,715.00	\$59.39	2012
Washington County Schools								\$0.00	\$0.00	0
1212 Inspiration Way Huntsville, AL	35866				12/31/201	5 11:59 PM (S	aved History)	,277.10	\$70.77	2009
		_						,581.79	\$77.78	2012
	Holdir	ngs By	/ Subje	ct Area				,692.32	\$77.27	2012
					_ .	Cost	Copyright	,293.49	\$60.31	2007
Category / Class	Have	Lost	Out	In	Cost	Average	Average	,423.08	\$531.94	0 2011
Algebra	3,411	31	18	3,393	\$225,103.21	\$66.21	2011	,848.37	\$89.54	2014
Biology	930	0	2	935	\$57,028.79	\$60.99	2009	\$0.00	\$0.00	0
Business	5,339	1	ō	5,339	\$502,599.65	\$94.14	2011	,638.66	\$61.42	2011
Calculus	656	3	1	655	\$55,458.10	\$85.19	2014	774.96	\$59.55	2011
Chemistry Communication Skills	893	0	0	893	\$36,983.95	\$41.88	2010	,303.19	\$56.42	2010
Driver Education	353	7	0	353	\$21,834,12	\$61.85	2009	,808.35	\$53.74	2009
Earth Science	1,173	1	0	1,173	\$84,605.58	\$72.13	2013	,536.14	\$457.92	0
English	18,148	3	445	17,703	\$732,033.55	\$40.35	2010	,309.04	\$10.03	2010
Family and Consumer Science	1,156	0	1	1,155	\$46,488.22	\$40.21	2009			
Geometry	925	0	ò	925	\$66,738,41	\$72.15	2012			
Health	1,157	1	0	1,157	\$68,715.00	\$59.39	2010			
History	0	0	0	0	\$0.00	\$0.00	0			
Latin Life Science	230	0	17	230	\$10,277.10 \$45 581 79	\$70.77	2009			
Literature	5,628	1	58	5,570	\$397,745.65	\$70.80	2009			
Math	5,575	2	206	5,369	\$430,692.32	\$77.27	2012			
Music No Subject	553	0	0	553	\$33,293.49	\$60.31	2007			
Physical Science	480	0	0	480	\$26,149.05	\$54.48	2011			
Physics	311	0	2	309	\$27,848.37	\$89.54	2014			
Psychology	0	0	0	0	\$0.00	\$0.00	0			
Reading	13,100	2	314	12,786	\$804,638.66	\$61.42	2011			
Social Studies	15.514	0	145	15,369	\$946.774.96	\$61.07	2010			
Spanish	927	0	2	925	\$52,303.19	\$56.42	2010			
Theatre	350	0	0	350	\$18,808.35	\$53.74	2009			
Total:	1,128 88 005	60 60	126	1,002	\$516,536.14 \$6,221,369.64	\$457.92 \$70.03	2010			
	00,000		.,010	51,002	+0,221,000,04	<i></i>	2010			







