

The following table defines various terms you will encounter as you work in Booktracks. The descriptions provided here are intended to help you become familiar with these concepts so that you will feel comfortable working with forms and features in the product. Please refer to Booktracks' online Help files or the documents/videos available from the **Downloads** form to find more detailed information on using all available features. Instructions for accessing these resources are included at the end of this document.

Term	Definition
Active Holdings	Textbook or equipment records that are available for circulation, including items that are currently checked in <i>and</i> those already checked out. In some cases, " Visible " is used in place of " Active ."
Adoption Date	The date you decide to begin using a new <i>textbook title</i> , whether it is brand new to your school or the latest edition of an existing title. When titles for a particular subject are up for adoption again (based on Adoption Cycle Lengths set up from the Catalog Administration submenu), they are referred to as "expired."
Barcode	A unique string of characters that represents an item or patron. Each textbook copy or piece of equipment you choose to catalog for distribution has a <i>holdings</i> barcode, while each student or teacher has a <i>patron</i> barcode. Booktracks uses barcodes to track the location and ownership of every item in your database.
Batch Barcode	A unique type of barcode used to store a group of textbook or equipment holdings as they are being transferred to different locations using Inter-School Building Loan (Centralized) only).
Bibliographic Record	A record that represents a textbook title and has attached <i>holdings records</i> representing individual copies. This record includes data for grade, unit, volume, etc. (combined to form the extended title) as well as ISBN, copyright and adoption dates, curriculum objectives, and more.
Bibliographic Type	This classification used in reports specifies whether a record is a non-equipment record or an equipment record. Non-equipment records are those you can create or modify on the Add Item/Edit Item: Bibliographic Record forms, such as textbooks, workbooks, teacher editions, supplemental materials, and more. Equipment records are those you can create or modify on the Add Item/Edit Item: Equipment Record forms, such as eReaders, projectors, printers, DVD players, and more. This description is used for the main records as well as any holdings associated with them.
Boolean Operator	A term, such as AND or OR , that connects multiple criteria in Expert Search or filters within the Report Wizard . Operator choices differ depending on the feature being used.
Centralized	Multiple schools in a district share this type of <i>database</i> . This means reports run from any location can include data from all schools, and textbooks and equipment can be loaned from one location to another.
Circulation Rules	Standards for when items are due, how many items students and teachers can check out at one time, and more. Each rule is associated with an Item Loan Period and a Loan Permission .
Common Tasks	Widget on the Booktracks Home Page which contains links to key features that you may use to track textbooks and equipment. Tasks display based on the time of year.
Consolidate Bibliographic	A feature that allows you to find two similar textbook bibliographic records <i>or</i> two similar main equipment records, choose the one you want to keep, and move all holdings from the redundant record to that one. This is useful for cleaning up your database if, for instance, textbook <i>copies</i> were added as separate bibliographic records when they should be multiple holdings on a <i>single</i> bibliographic record.

Term	Definition
Consumable Equipment	Items that are given to students/teachers but not officially barcoded, checked out, or expected to be returned. The Current Number and Number To Maintain can be recorded, but ownership is not tracked.
Consumable Item	Workbooks or other materials that cannot be reused because students write in them. Items can be marked “consumable” on the bibliographic record, allowing you to charge fines if students lose them and need replacements. This designation tells Booktracks that holdings should be deleted at the end of the year because they will not be returned.
Current Location	The School Building in a Centralized database where a textbook or piece of equipment is currently being used or stored. The item may need to be returned to its <i>home</i> School Building if it is on temporary loan.
Distributed	Multiple schools in a district have their own, <i>separate databases</i> . This means report data is run independently by each school.
Entity Responsible For Tracking	A teacher/staff member responsible for distributing and collecting textbooks and equipment or a room/location where textbooks or pieces of equipment are stored. This data, included in holdings records, provides an additional tracking tool for your items; for instance, it allows you to see the entity tied to a textbook along with the student who currently has the book checked out.
Expired	A <i>textbook title</i> that has become outdated, meaning brand new textbooks should be ordered. This is based on the Adoption Dates specified in bibliographic records and Adoption Cycle Lengths set up from the Catalog Administration submenu.
Filter	A set of criteria that allows you to find a specific group of item or patron records or particular circulation or history data. Filters are used for reports and several other features in Booktracks. Examples include <i>Subject Area equals Math</i> and <i>Homeroom equals Smith</i> .
Form Letters	A feature that allows you to print or e-mail notices to a group of students or teachers with information that is specific to each person. Form Letter Templates , which are included in these letters, pull item data tied to the student/teacher records, such as the title and barcode of textbooks they checked out, the name and barcode of equipment checked out, the exact amount of any fines owed to replace items, and more.
Holding Record	A record that represents an individual <i>copy</i> of a textbook or <i>piece</i> of equipment and includes a unique barcode, cost information, serial number (equipment only), and more. This is tied to a bibliographic or main equipment record.
Holdings Status	A classification that lets you know if a textbook or piece of equipment is available for check out. Holdings records may be considered <i>active</i> (available for circulation), <i>lost</i> (still in the database but no longer available for circulation), or <i>imported</i> (not yet fully added to the database or available for circulation).
Imported Holdings	<i>Textbook</i> MARC records that were imported into the database but must be reviewed and accepted before they become available for check out.
Inter-School Building Loan	A feature in Centralized databases that allows you to track textbooks and equipment that are transferred from one location to another. Depending on your circulation settings, loans can be <i>temporary</i> , meaning items should be returned to the original (home) location, or loans may be <i>permanent</i> , meaning the home location is changed to the new school because items will not be returned.
Item	Any textbook, teacher edition, workbook, piece of equipment, or other material that will be cataloged and circulated within Booktracks.

Term	Definition
Item Loan Period	A classification that allows you to group textbooks and equipment and then assign <i>rules</i> for checking them out. For instance, some textbooks may be checked out for a full Semester while others may be checked out for 9 Weeks ; equipment may be checked out on a Yearly or Weekly basis.
Left Column	An element of the Booktracks Desktop that includes various forms. You can view the current worker log on information, catalog <i>textbooks</i> using the ISBN or other data, and look up item or patron records. If applicable, you may see a form with news or reminders from administrators or information from Book Systems.
Loan Permission	A classification that allows you to group students and teachers and then assign <i>rules</i> for how many items they can check out and more. For instance, High School Students may have different circulation privileges than Elementary School Students .
Location Grouping	A classification in a Centralized database that allows you to group School Buildings according to level, such as High School, Junior High School, Middle School, Elementary School , etc. Each School Building is tied to one of these groups.
Lost Holdings	Textbook or equipment records that are still saved in the database for history purposes but cannot be checked out because the physical item is lost.
Main Equipment Record	A record that represents an equipment type/model and has attached <i>holdings records</i> representing each piece of equipment the school owns. This record includes data for name, model details, base components, and more.
MARC	A detailed cataloging record of your <i>textbook</i> that Booktracks can easily read and import.
My Items	A separate interface that allows students and teachers to log on and view currently checked out items and any fines owed.
My Reports	A drop-down menu that may be added to the Menu Bar for workers who choose to configure a list of reports they run frequently.
Patron	Any person who will check out (receive) textbooks, equipment, or other items in Booktracks. This will probably include <i>students</i> , who will check out textbooks and equipment for their courses; <i>teachers</i> , who will check out teacher editions or equipment; and possibly <i>staff members</i> , who will check out equipment.
Physical Location	An area within a School Building, such as an office, storage room, classroom, or computer lab, where textbooks or pieces of equipment are kept between terms or when students use them at school rather than take them home.
Reclassify	A feature that allows you to edit specific fields in bulk, such as Adoption Date or Cost (if items were cataloged quickly and this data needs to be added), Homeroom (as students change classes), and more. Booktracks offers two forms, Reclassify Items and Reclassify Patrons , for modifying both types of records.
Report Template	A collection of <i>customized</i> filters, columns, and sorts. Templates can be saved for future use to eliminate the steps of establishing criteria every time a report is generated.
Report Wizard	A tool that allows you to set filters to find specific results as well as choose preferences for how the generated report displays (columns and sorts).
School Building	The <i>home</i> location of a textbook or piece of equipment in a Centralized database. This is the school that has ownership of the item.
Teacher-Student Report Class	A classification that allows you to group student and teacher records for reporting purposes. You can set up as many report classes as needed for schools, homeroom classes, grade levels, or whatever classifications are best for you; if needed, you can rename this field.

Term	Definition
Toolbar	An element of the Booktracks Desktop that includes buttons to navigate to useful forms. Buttons display based on worker permissions.
Worker	Any person who will use Booktracks. Each worker has permissions based on tasks he/she is allowed to perform.
Worker Groups	A collection of workers who have the same set of permissions. For instance, all teachers may have circulation privileges while assistant principals have permission to circulate textbooks/equipment, run reports, process fines, and more.
Worker Permissions	Privileges that can be enabled for workers in the database, allowing them to perform certain tasks, such as cataloging, checking out textbooks/equipment, running reports, configuring administrative settings, and more. These control Menu Bar buttons and drop-down options, Toolbar buttons, and features on forms.
Z39.50	A database that stores <i>textbook</i> MARC records. Booktracks' Quick Cataloging feature pulls records from these databases for easy importing. These servers are also used for Compare Two Items .

Resources

Online Help is an excellent tool for finding detailed steps on how to use any feature or form in Booktracks. To access a topic directly related to your current task, click **Help** from Booktracks' **Menu Bar**. You may use the Contents, Index, and Search features to locate other useful topics in the Help files; the Glossary feature provides the same definitions for key terms included in this document.



You can also click the **Help** button from the **Toolbar**.

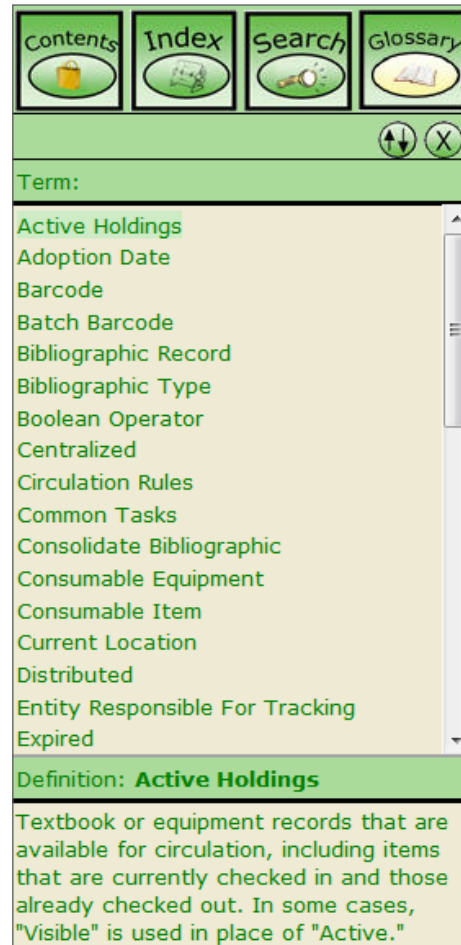
Along with the comprehensive Help files, you can access Booktracks' **Downloads** form to find documents that you can read online or print, such as the **Quick Menu Reference**, **Managing Your Database** document, and more. You can also find video tutorials on various features. To open this form, click **Administration\General\Downloads** from Booktracks' **Menu Bar**.



You can also click the **Downloads** button from the **Toolbar**.

Product Support

If you have a question about Booktracks terms or concepts that you cannot answer using this document or other resources, please call Book Systems' Technical Support Staff at (888) 289-1216. You may also send an e-mail to support@booksys.com. Business hours are Monday through Friday, 7 a.m. – 7 p.m. Central Standard Time.



Book Systems, the Book Systems logo, and Booktracks are registered trademarks of Book Systems, Inc. All other products listed are trademarks or registered trademarks of their respective owners. Book Systems believes the information in this document is accurate as of its publication date. Such information is subject to change without notice and is subject to applicable technical product descriptions. Book Systems is not responsible for inadvertent errors. © 2014 Book Systems, Inc. Huntsville, AL 35816. All rights reserved