



Quick Start Guide for Tracking Assets

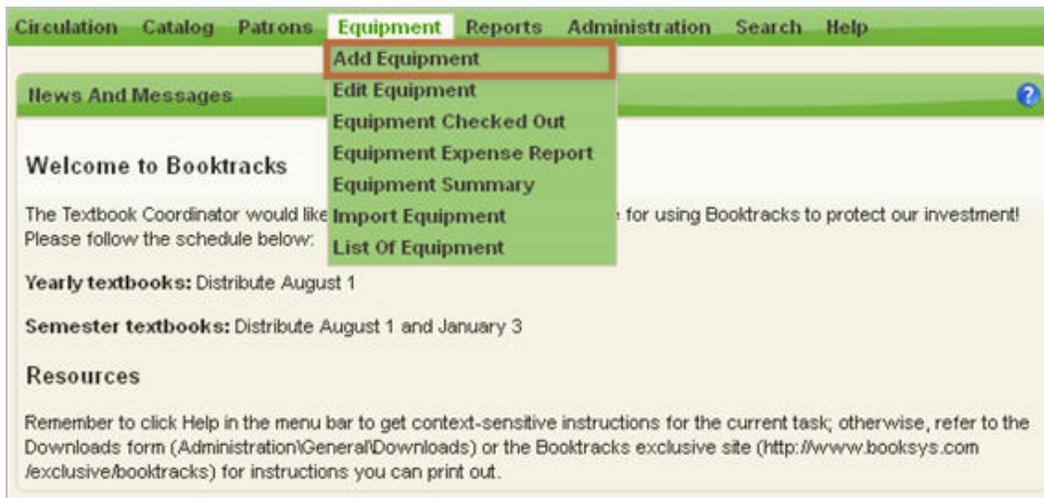
Note to the Administrator: This guide includes key tasks that may need to be preformed by different personnel. Book Systems, Inc. is providing this document to you in Word allowing you to make changes specific to your school's policies and procedures.

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Disclaimer! You can customize steps in the Word file as needed; Book Systems is not responsible for any errors contained in Word files that have been altered after delivery.

Add Equipment Records



1. Click **Equipment\Add Equipment** from Booktracks' **Menu Bar**.

The screenshot shows the 'Add Item : Equipment Record' form. At the top, there is a title bar with the text 'Add Item : Equipment Record'. Below the title bar, there are two buttons: 'Save' and 'Cancel'. Below the buttons, there is a 'Name:' label followed by a text input field. Below the 'Name' field, there is a 'Core' section with several fields: 'Age Group:' with a drop-down menu showing 'Teacher', 'Material Type:' with a drop-down menu showing 'Computers', 'Description:', 'Model Details:', 'Base Components:', 'Installation Instructions:', and 'Note:'. Each of these fields has a corresponding text input area. There are orange arrows pointing to the 'Save' button, the 'Name' input field, and the 'Description' input field.

2. Enter the name of the equipment, a description, model details, base components, etc. in the corresponding fields as needed.
3. Select the appropriate Age Group and Material Type from the drop-down lists.
4. Click **Save**.
5. Use the steps in the next section to add holdings; if you add holdings immediately, you can skip to step 5 in the **Adding Holdings to Existing Equipment Record** instructions.

Adding Holdings to Existing Equipment Record



1. Click **Equipment\Edit Equipment** from Booktracks' **Menu Bar**.

Lookup Equipment Record

Please specify the equipment record you want to edit.

Barcode:

Search:

Serial Number:

2. Enter the exact name of the equipment or a keyword in the **Search:** field.
3. Click **Search**.

Equipment Lookup Results

Search results for: Keyword contains phrase 'HP'
 2 Results Found
 Displaying results 1 - 2

Sort By: [Name](#) [Relevance](#)

[Printable Version](#)

1	<p>Hewlett Packard Laser Jet Printer Description: Hewlett Packard Laser Jet 4050 TN Working Copies: 2 Locations: Central Office</p>	 IN (2 available)
2	<p> HP Scanjet Scanner Description: color scanner Working Copies: 4 Locations: Drake High School, Eastside Elementary School, Jones Middle School, Smith High School</p>	IN (4 available)

4. If you see **Equipment Lookup Results**, click the **name** of the equipment you need.

Edit Item : Equipment Record

Name:

Core

Age Group:

Material Type:

UPC:

Description:

Model Details:

Base Components:

Installation Instructions:

Note:

Equipment User Defined 1:

Equipment User Defined 2:

Equipment User Defined 3:

Equipment User Defined 4:

Media

Documents

Name:

Upload Documents:

Equipment Image

Upload Equipment Image:

URL Note

Active Holdings (4)

Barcode	School Building	Action
HW00030566	Smith High School	Edit
HW00034700	Jones Middle School	Edit
HW00038834	Eastside Elementary School	Edit
HW00042968	Drake High School	Edit

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5. When the **Edit Item: Equipment Record** form opens, click **Add Holdings**.

Holding Record For Equipment

Save

Name: **HP Scanjet Scanner**

New Record: Number Of Identical Copies To Add:

Barcode: 49 is in line as the next available barcode for Assets.

Barcode Type:

Do Not Transfer:

Serial Number:

Warranty Date:

Item Loan Period:

Subject Area:

Condition:

Cost:

School Building:

Current Location:

Physical Location:

Vendor:

Purchase Date:

Funding Source:

Holdings Notes:

Current Components:

Have labels been printed?

Entity Responsible For Tracking:

Save

6. If you want to assign your own barcodes (for example, serial numbers), scan or enter the number in the **Barcode:** field; otherwise, accept the **"next available"** barcode.
7. In the **New Record: Number Of Identical Copies To Add:** field, leave the default **"1."**
8. **Enter the unique serial number of the asset in the corresponding field.**
9. Click the calendar icon next to **Warranty Date:**, and click again to select a day.
10. Select the correct loan period from the **Item Loan Period:** drop-down list.
11. Enter the price of the asset in the **Cost:** field.
12. Select your school from the **School Building:** drop-down list.
13. If needed, select the correct entity (teacher) from the **Entity Responsible For Tracking:** drop-down list.
14. Click **Save**. A **success** message displays.

Holding Record For Equipment

Save Delete **Make Copy** History Review Item

Equipment Record Add New Holdings Add New Equipment Messages

Next Copy >>>

Record Saved Successfully

Name: **HP Scanjet Scanner**

Barcode: 49

Barcode Type: Assets

Do Not Transfer:

Serial Number:

Warranty Date:

Item Loan Period: Yearly

Subject Area: Unassigned

Condition: 1 New

Cost: 295.00

School Building: Central Office

Current Location: Central Office

Physical Location: Technology Department

Vendor: Staples

Purchase Date: 09/16/2013

Funding Source:

Holdings Notes:

Current Components: scanner, power cord

Have labels been printed?

Entity Responsible For Tracking: ATCHLEY, JR.

Created: 09/16/2013 09:28:04AM Modified: 09/16/2013 09:28:04AM

Save Delete Make Copy History Review Item

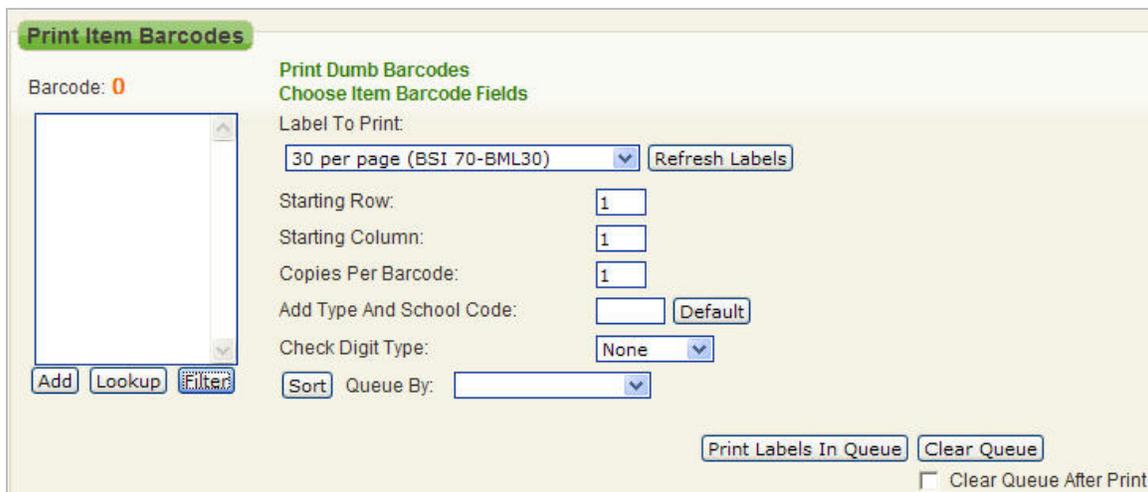
Equipment Record Add New Holdings Add New Equipment Messages

15. Click **Make Copy** to open a duplicate record.
16. Make changes to the barcode, serial number, and any other field that needs to be changed.
17. Click **Save**.

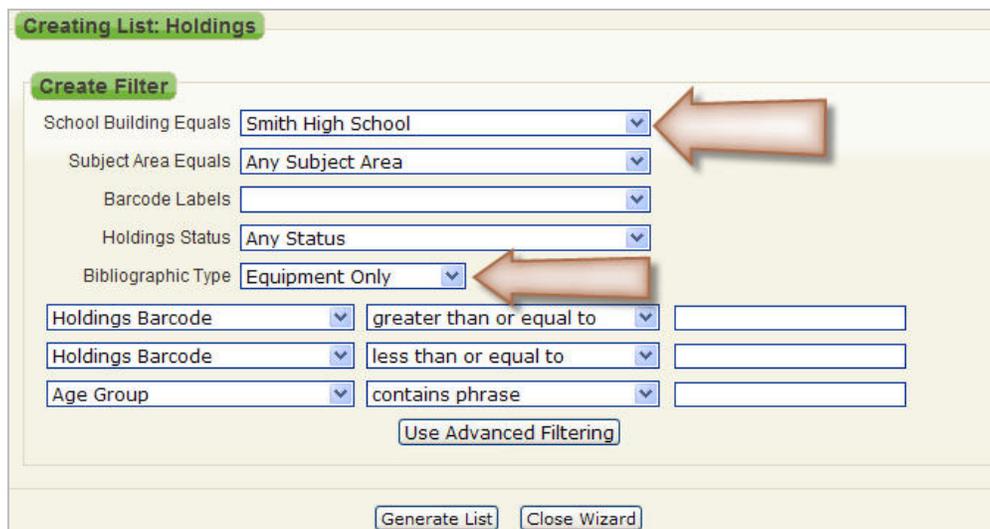
Printing Item Barcodes



1. Click **Catalog\Print Item Barcodes** from Booktracks' **Menu Bar**.



2. Click **Filter**.



3. Select your school from the **School Building Equals** drop-down list.

- Select **Equipment Only** from the **Bibliographic Type** drop-down list.
- Click **Generate List**.

Print Item Barcodes

Barcode: 0

Print Dumb Barcodes
Choose Item Barcode Fields

Label To Print: 30 per page (BSI 70-BML30) Refresh Labels

Starting Row: 1

Starting Column: 1

Copies Per Barcode: 1

Add Type And School Code: Default

Check Digit Type: None

Sort Queue By:

Print Labels In Queue Clear Queue

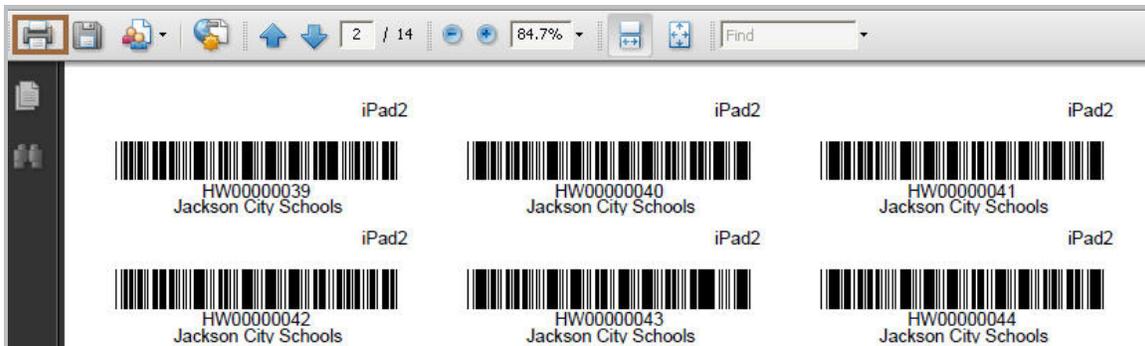
Clear Queue After Print

Print Queue

1 [2] [3] [4] [5] [6] Next > Last >>> (Total Pages: 7) Jump To Total entries: 401

Record	Holdings Barcode	Title
1	46	Foray Magnetic White Board
2	48	Bookcart- Smith Brothers
3	00032746	Portable Screen
4	HW00000001	iPad2
5	HW00000002	iPad2

- For **Label To Print:**, select the choice that matches your label pages. If you need to purchase equipment labels, contact Book Systems.
- Click **Print Labels In Queue**.

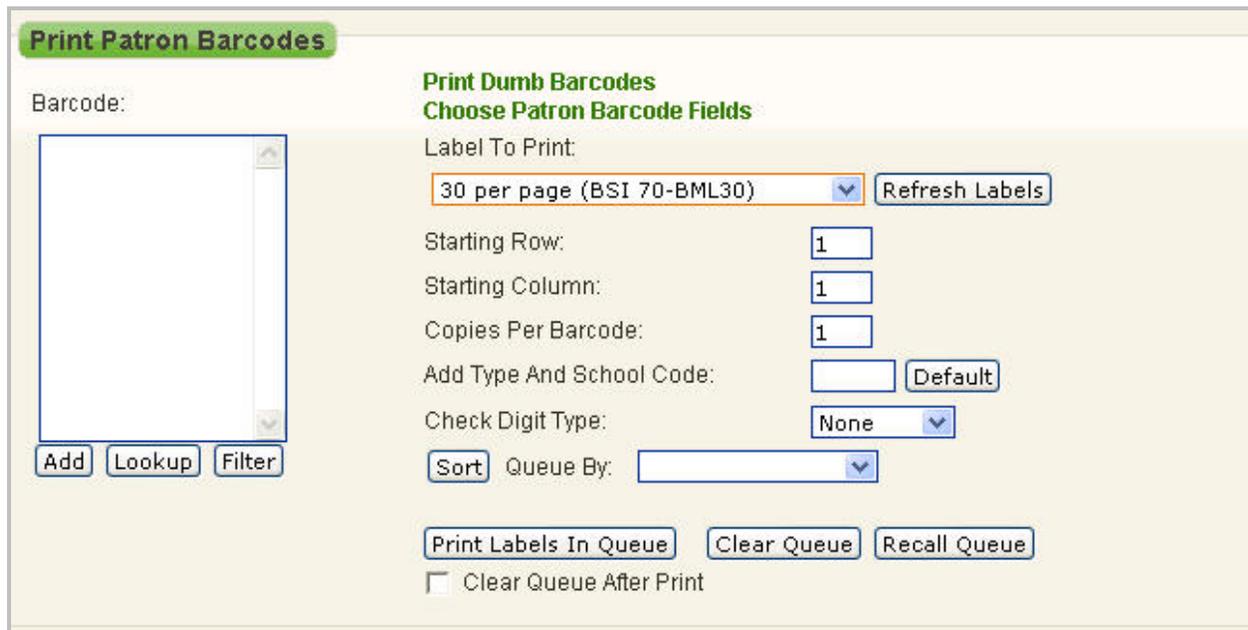


- Click the **Print** icon.
- Select your printer at the top, and then click **OK**.
- Place label consistently on the top of the computer.

Print Patron Barcodes



1. Click **Patron\Print Patron Barcodes** from Booktracks' **Menu Bar**.



2. Click **Filter**.

Creating List: Patron

Create Filter

Grade Level Contains Phrase

Homeroom Contains Phrase

Loan Permission Equals

Teacher-Student Report Class Equals

Patrons Who Have Items Out Patrons Who Have Items Overdue

Patrons Who Have Fines Patrons Who Need Barcodes Printed

Patrons Who Have Fines For Lost Items

Patrons Who Have Items With Due Date From To

Patrons Who Have Not Been Modified Since

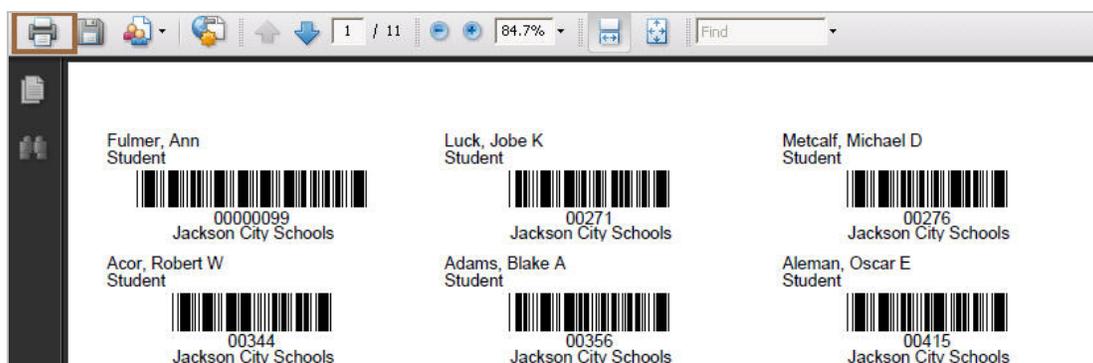
- Use the drop-down lists at the top to select criteria, such as Grade Level, Homeroom, etc. according to the data in your student records. Then enter your search term in the corresponding field, such as **Grade 10, Ms. Smith**, etc.
- Select a choice from the **Teacher-Student Report Class Equals** drop-down list.
- Click **Generate List**.

Print Queue

1 [2] [3] [4] [5] [6] Next > (Total Pages: 6) Jump To Total entries: 323

Record	Patron Barcode	Patron Name	<input type="checkbox"/>
1	00000099	Fulmer, Ann	<input type="checkbox"/>
2	00271	Luck, Jobe K	<input type="checkbox"/>
3	00276	Metcalf, Michael D	<input type="checkbox"/>
4	00344	Acor, Robert W	<input type="checkbox"/>
5	00356	Adams, Blake A	<input type="checkbox"/>

- For **Label To Print**, select the choice that matches your label pages. If you need to purchase equipment labels, contact Book Systems.
- Click **Print Labels In Queue**.

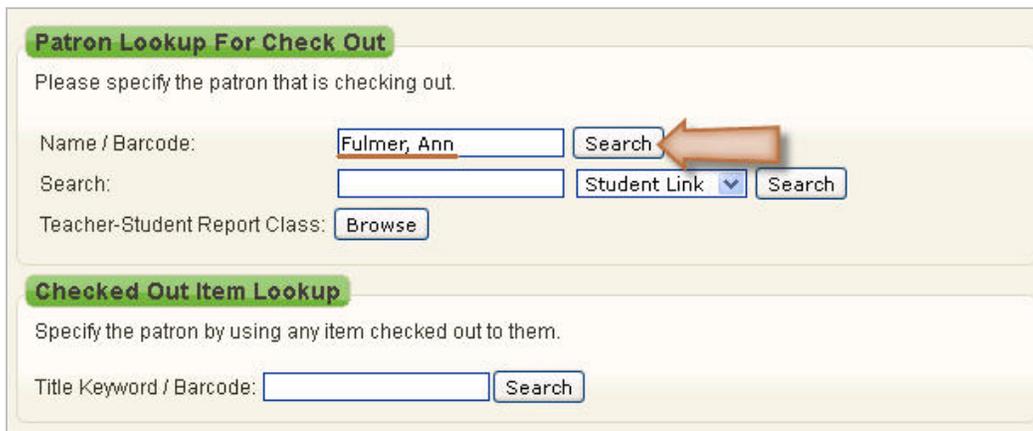


- Click the **Print** icon.
- Select your printer at the top, and then click **OK**.

Check Out Items



1. Click **Circulation\Check Out Items** from Booktracks' **Menu Bar**.



The screenshot displays the 'Patron Lookup For Check Out' section of the application. It contains the following fields and controls:

- Patron Lookup For Check Out** (Section Header)
- Please specify the patron that is checking out.
- Name / Barcode: (An orange arrow points to the Search button.)
- Search:
- Teacher-Student Report Class:
- Checked Out Item Lookup** (Section Header)
- Specify the patron by using any item checked out to them.
- Title Keyword / Barcode:

2. Enter the student's or teacher's name in the **Name / Barcode:** field, and click **Search**.

Batch Check Out Items

Alert: Changed to Advanced Math 8/12/2013

Patron Name: Fulmer, Ann MSG **Patron Barcode:** 00000099 More...

Barcode: Special Due Date Check Out Check In

Item List: 0

New Patron Name / Barcode: All Information On Receipt

Items Checked Out (4)

Title	Barcode	Due On	Select
+ Science Electronic Textbook	00032750	03/07/2013	<input type="checkbox"/>
+ 3M Overhead Projector	HW00000262	05/28/2013	<input type="checkbox"/>
+ iPad2	HW00000009	05/28/2013	<input type="checkbox"/>
+ iPad2	HW00000200	05/28/2013	<input type="checkbox"/>

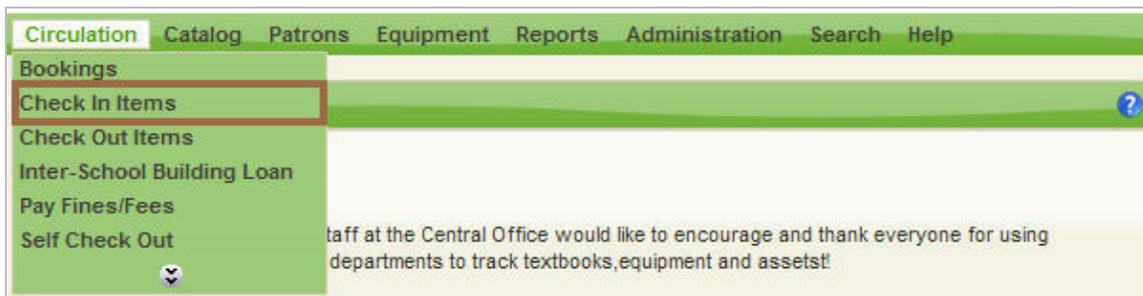
3. Scan or enter item barcodes in the **Barcode:** field. If entering barcodes manually, press **Enter** between each barcode.
4. Click **Check Out**. Items display on the **Check Out Results** form.

Check Out Results

Successful Check Out: 1 Failed Check Out: 0

Title	Barcode	Due On	Override?
+ Activboard +2 Whiteboard	HW00000300	05/28/2013	

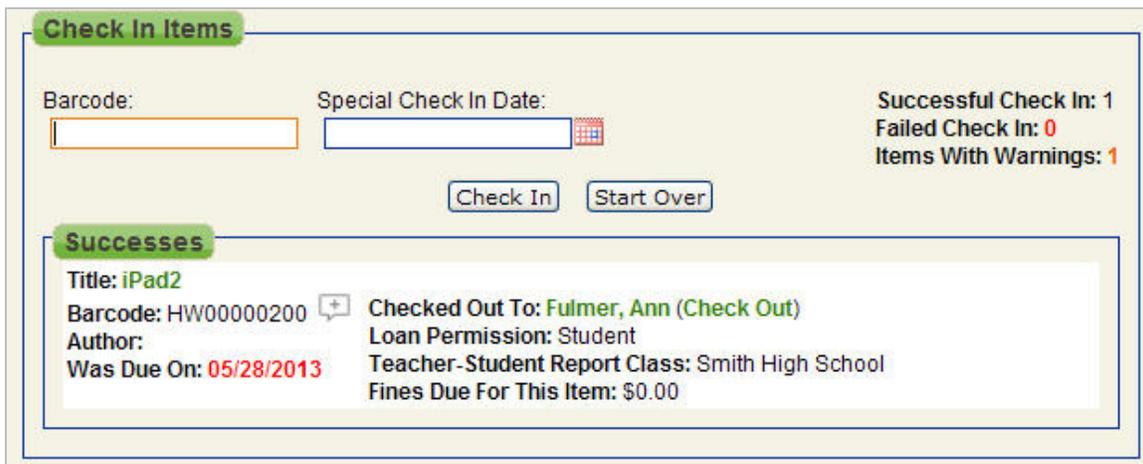
Check In Items



1. Click **Circulation\Check In Items** from Booktracks' **Menu Bar**.



2. Scan or enter the item barcode in the **Barcode:** field.
3. If entering barcodes manually, click **Check In**.



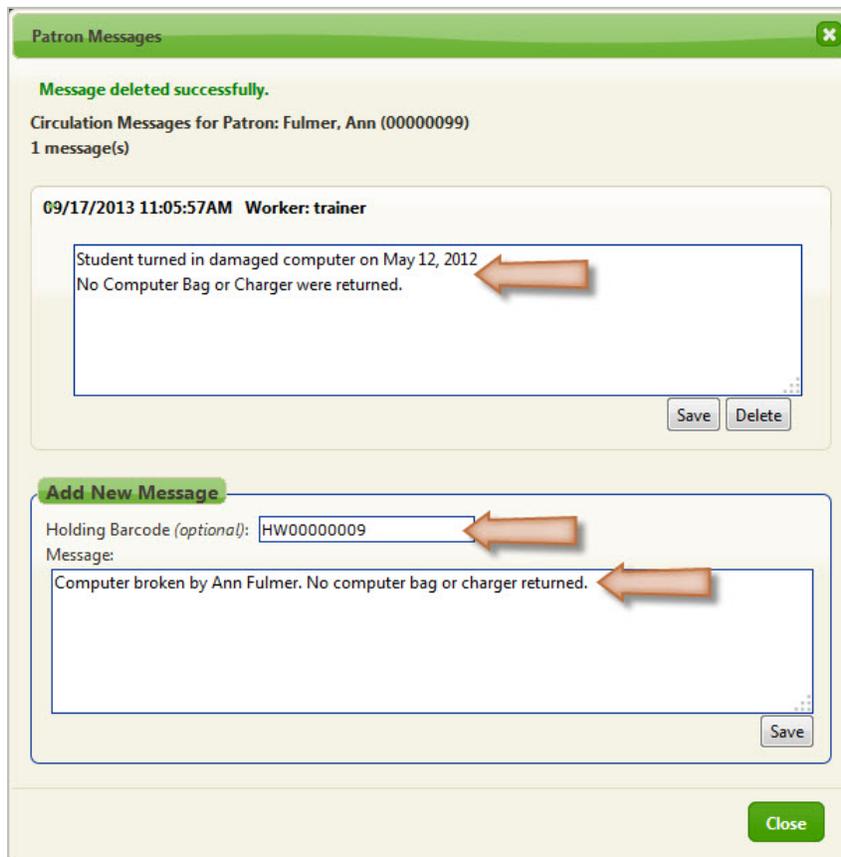
Patron and Item Messages

There are several ways that you can add or view messages on patron or item records. On related forms, you see a gray icon  if there are no messages yet or a red icon  if messages have already been added.

You can add/view messages during circulation transactions; one example is below.



1. Click **Circulation\Check Out Items**, look up the patron, and then click the messages icon next to the student's name.



2. If you want the message to display on the item record as well as the patron record, you can enter a holding barcode in the corresponding field.
3. Enter your message text.
4. Click **Save**.
5. Click **Close**.

You can add/view message from the **Holding Record For Equipment** form.

Holding Record For Equipment

Save Delete Make Copy History Review Item

Equipment Record Add New Holdings Add New Equipment **Messages**

Next Copy >>>

Record Saved Successfully

Name: iPad2
 Barcode: 50
 Barcode Type: Assets
 Do Not Transfer:
 Serial Number:
 Warranty Date:
 Item Loan Period: Yearly
 Subject Area: Unassigned
 Condition: 1 New
 Cost: 0.00
 School Building: Smith High School
 Current Location: Smith High School
 Physical Location: Textbook Room
 Vendor: Staples
 Purchase Date: 09/17/2013
 Funding Source:

1. Click **Equipment\Edit Equipment**, search for the main equipment record, click **Edit** next to a specific holding record, and then click the **Messages** button.

Holding Messages

Circulation Messages for Holding: 50 (iPad2)

There are no existing messages.

Add New Message

Patron Barcode (optional): 99

Message:
 iPad was broken and cannot be repaired.

Save

Close

2. You can enter the patron barcode for the person who had the item checked out.
3. Enter the text of your message.
4. Click **Save**.
5. Click **Close**.

You can also add/view item messages from the **Review Item** form.

Review Item

Name: iPad2

Barcode: 50 **Cost:** 0.00

School Building: Smith High School

Item Status: Item is not checked out
Current Location: Smith High School

Copy Status: 235 of 237 copies currently available

Entity Responsible For Tracking: ABBOT, JEFFREY

Holdings Note:
Current Components: Digital Av Adapter

1. Enter a barcode in the **Review Equipment Item:** field under **Equipment Lookup** in the **Left Column**. Then click the messages icon next to the *barcode*.

You can generate a list of all messages added in your database.

List Of Circulation Messages

Report Results From School Building: Smith High School
3 Result(s) Found.
Displaying Results 1 - 3

[Edit This Report](#) [Printable Version](#) [Export Report Data As Text](#)

Line #	Date	Worker Name	Patron Barcode	Patron Name	Holdings Barcode	Title
1	09/17/2013 11:05:57AM	trainer	00000099	Fulmer, Ann		<i>Student turned in damaged computer on May 12, 2012 No Computer Bag or Charger were returned.</i>
2	09/17/2013 11:05:59AM	trainer	00000099	Fulmer, Ann	HW00000009	iPad2 <i>Computer broken by Ann Fulmer. No computer bag or charger returned.</i>
3	09/17/2013 11:34:01AM	trainer	00000099	Fulmer, Ann	50	iPad2 <i>iPad was broken and can not be repaired.</i>

[Edit This Report](#) [Printable Version](#) [Export Report Data As Text](#)

1. Click **Reports\Other Reports** from Booktracks' **Menu Bar**.
2. Click **List Of Circulation Messages** to open the report in a new window.
3. Click **Printable Version** to generate a plain text version.
4. Use your browser's onscreen options to print.

Click **Help** from Booktracks' **Menu Bar** to open a topic related to where you are in the product; if needed, search for "messages" to find a topic with more details about where you can add/view messages.

Self Check Out

Booktracks®

District Name:

Parents and Students: Click My Items to log on to your account and view currently checked out items, any outstanding fines/fees, and any available resources.

Teachers and Staff Members: Click Self Check Out or Self Check In to circulate textbooks and equipment.

Administrators: Click Log On to access all Booktracks features, including administration, circulation, cataloging, reporting, and more.

1. Enter your Booktracks URL in your browser's address bar, and press **Enter** to open the main page.
2. Click the **Self Check Out** button to open the **Log On** form.

Booktracks®

Log On

Please enter your Username and Password:

Username:

Password:

District:

School Building:

3. Enter **selfcheckout** in the **Username:** field.
4. Enter the password provided in the **Password:** field.
5. Select your school from the **School Building:** drop-down list.

- Click **Log On**. Because the circulation setting for choosing entity has been enabled, a screen displays with a button for each Entity Responsible For Tracking.



- Click the button with the correct entity (teacher) name.



- Because the Self Check Station Settings (circulation settings) lookup method has been set to **Choose By Class**, the Teacher-Student Report Classes display. Click the button with the correct report class (school name).

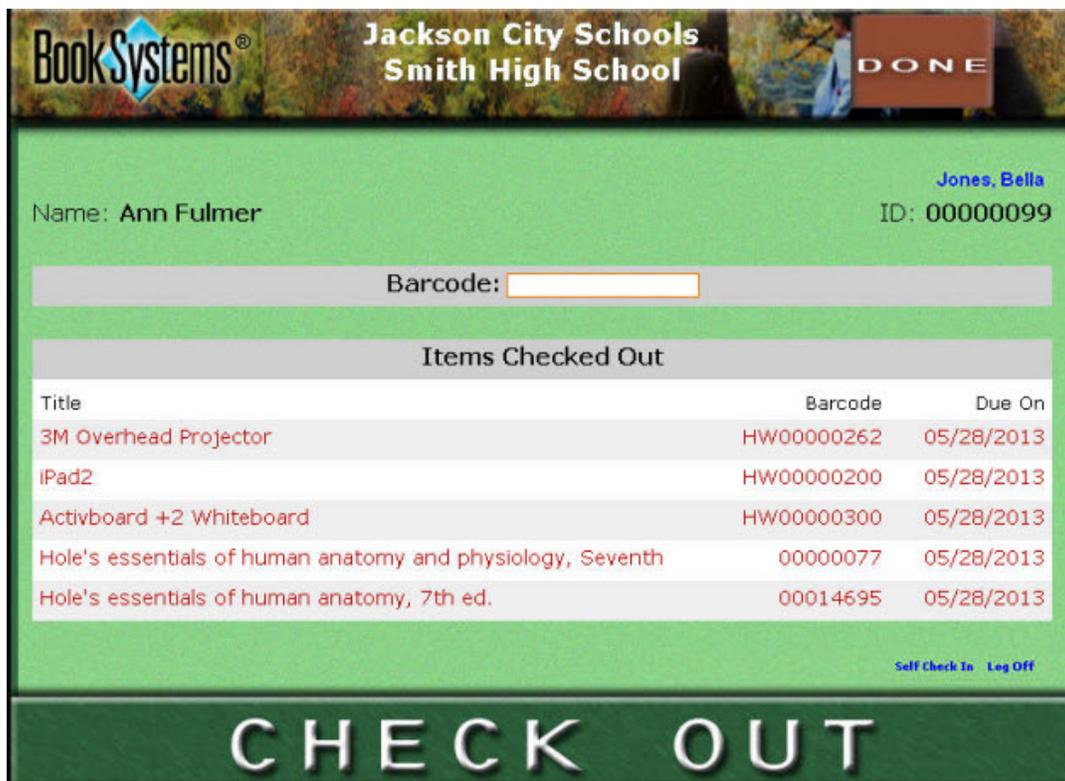


9. Click the letter that begins the student's or teacher's last name to open a list.



10. Click the button with the correct name.

- Scan or enter the item barcode into the **Barcode:** field. Repeat for each item.



BookSystems® Jackson City Schools Smith High School **DONE**

Name: Ann Fulmer Jones, Bella
ID: 00000099

Barcode:

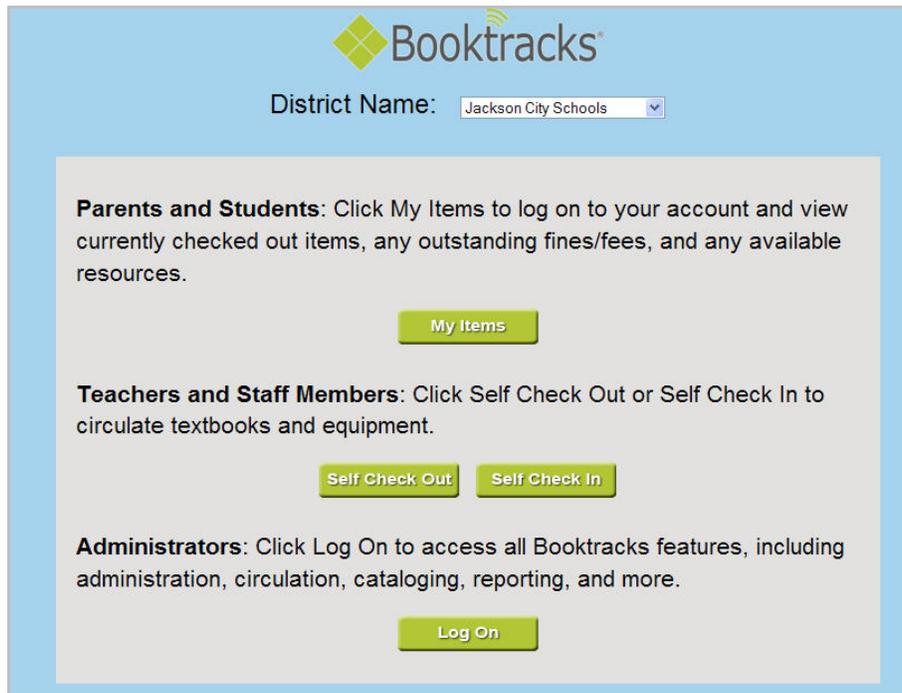
Items Checked Out		
Title	Barcode	Due On
3M Overhead Projector	HW00000262	05/28/2013
iPad2	HW00000200	05/28/2013
Activboard +2 Whiteboard	HW00000300	05/28/2013
Hole's essentials of human anatomy and physiology, Seventh	00000077	05/28/2013
Hole's essentials of human anatomy, 7th ed.	00014695	05/28/2013

Self Check In Log Off

CHECK OUT

- If you see any errors, record the student/teacher and item information on the **Booktracks Check Out Exceptions Log** (provided by trainer).
- Click **DONE** to return to the A to Z button list; the screen reopens automatically after inactivity.
- Repeat steps 9-13 for each new check out transaction.

Self Check In





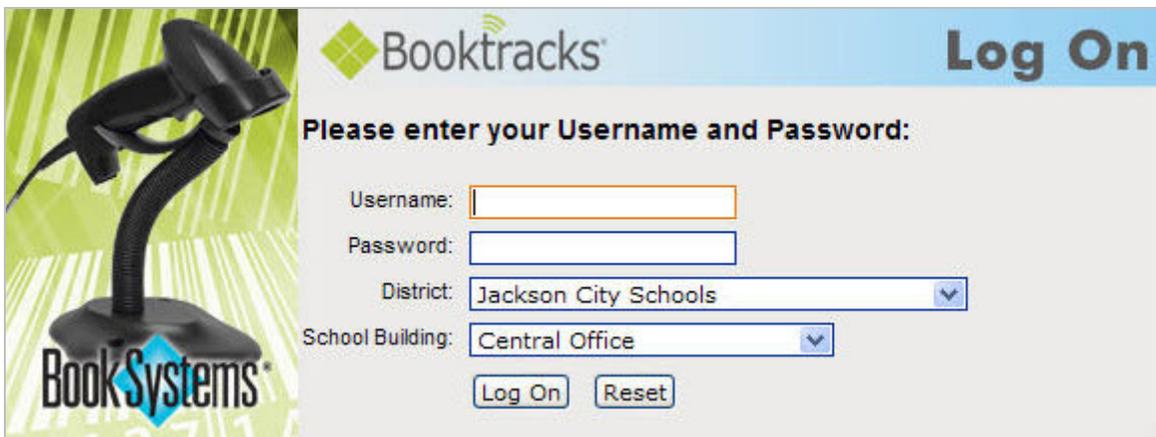
District Name:

Parents and Students: Click My Items to log on to your account and view currently checked out items, any outstanding fines/fees, and any available resources.

Teachers and Staff Members: Click Self Check Out or Self Check In to circulate textbooks and equipment.

Administrators: Click Log On to access all Booktracks features, including administration, circulation, cataloging, reporting, and more.

1. Enter your Booktracks URL in your browser's address bar, and press **Enter** to open the main page.
2. Click the **Self Check In** button to open the **Log On** form.



 **Log On**

Please enter your Username and Password:

Username:

Password:

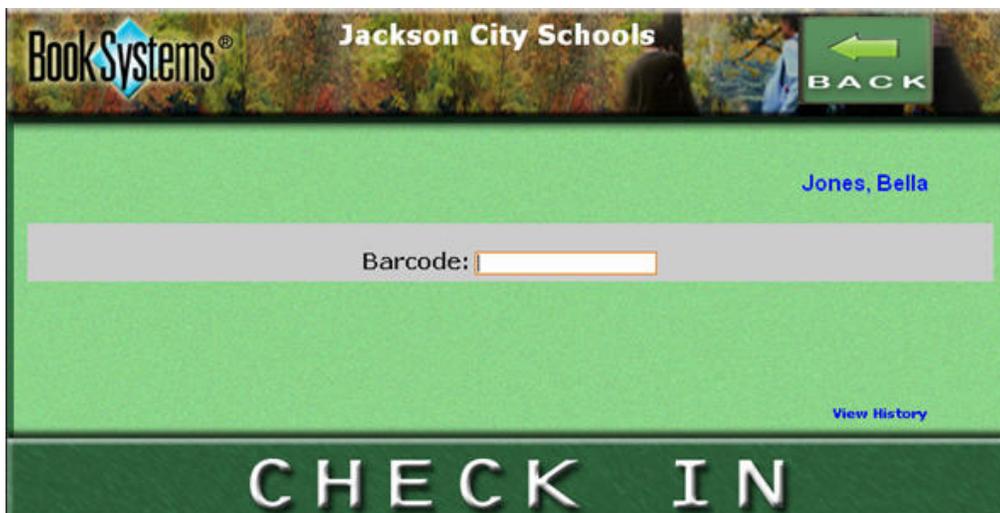
District:

School Building:

3. Enter **selfcheckin** in the **Username:** field.
4. Enter the password provided in the **Password:** field.
5. Select your school from the **School Building:** drop-down list.
6. Click **Log On**. Because the circulation setting for choosing entity has been enabled, a screen displays a button for each Entity Responsible For Tracking.



7. Click the button with the correct entity (teacher) name.



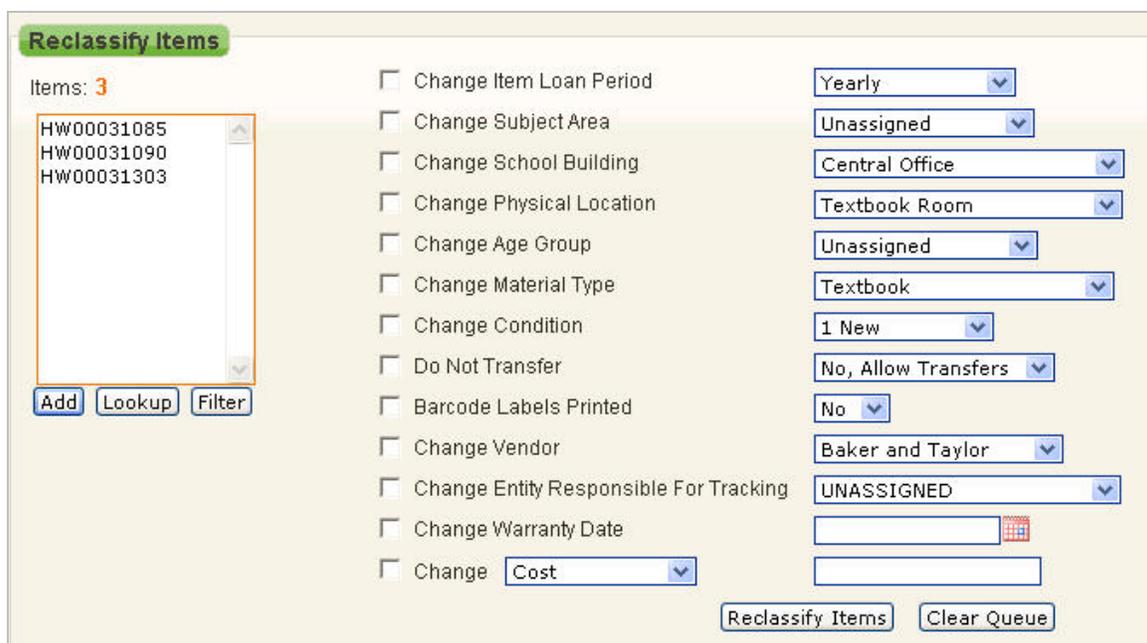
8. Scan or enter the item barcode into the **Barcode:** field. Repeat for each item.

Did you know? You may use **Self Check In** simply to change the entity in item records even if they are not currently checked out. If this is the case, when you scan the item, an **error** states that it cannot be checked in (because it was not checked out), and a message lets you know that the entity was successfully changed.

Reclassify Items



1. Click **Catalog\Reclassify Items** from Booktracks' **Menu Bar**.



2. Scan or enter item barcodes into the **Items: #** list and click **Add**.

3. You can also click **Filter** to open the **Report Wizard**.
4. Specify your criteria using the drop-down lists and fields. For instance, you might select your school, **“Equipment Only,”** and the title that you want to reclassify.
5. Click **Generate List**.

Record	Holdings Barcode	Title
1	HW00031085	Dell Monitor
2	HW00031090	Dell Monitor
3	HW00031303	Dell Monitor

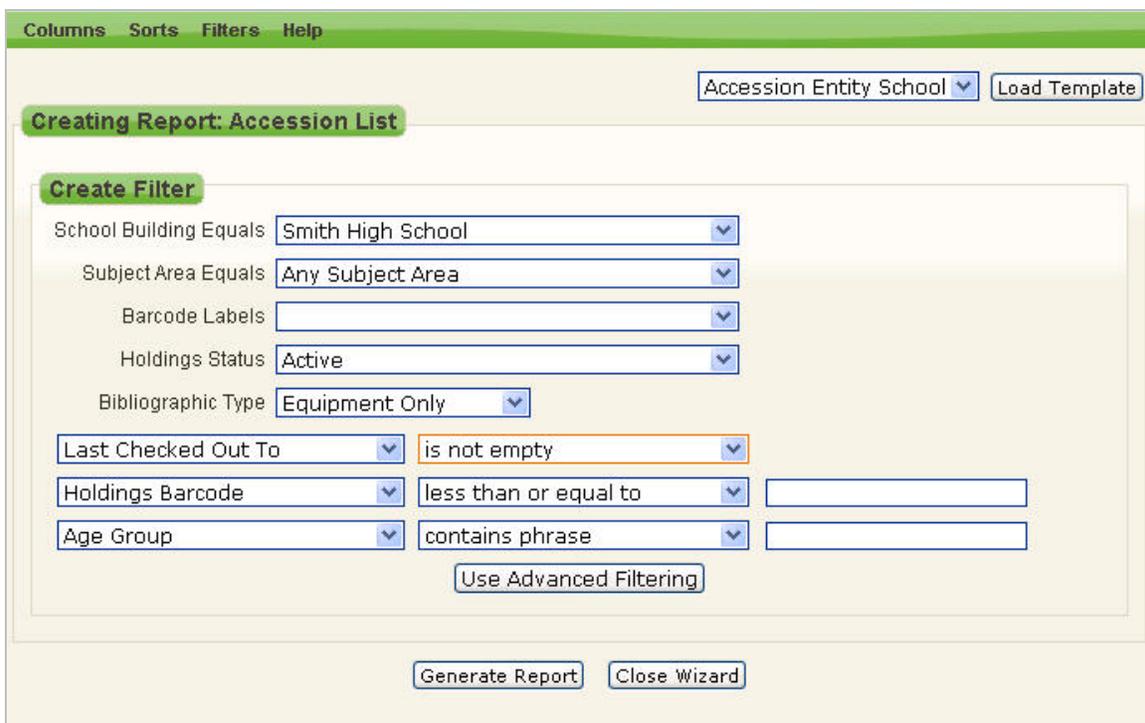
6. The items that you want to reclassify display in the **Reclassify Items Queue**.

7. Click the check box next to the category you need to reclassify.
8. Select your data from the drop down list or the date from the calendar icon.
9. Click **Reclassify Items**.
10. A **Successful Reclassifies** message with the number of items reclassified will appear when the changes have been made.

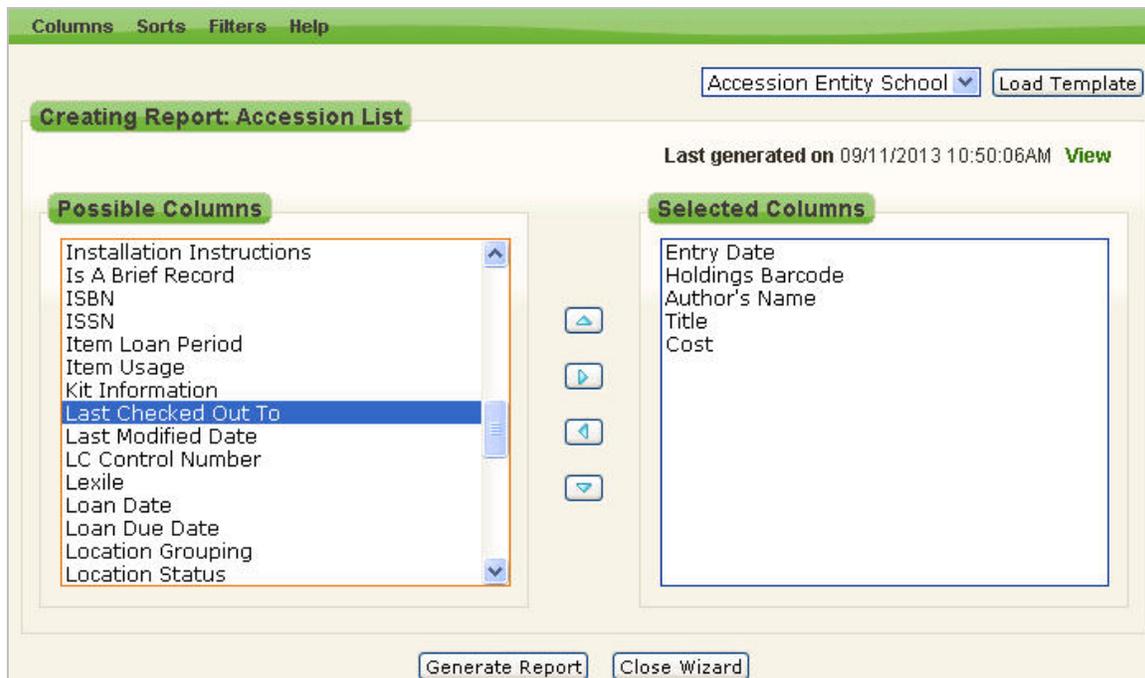
Last Checked Out To Report – Accession List



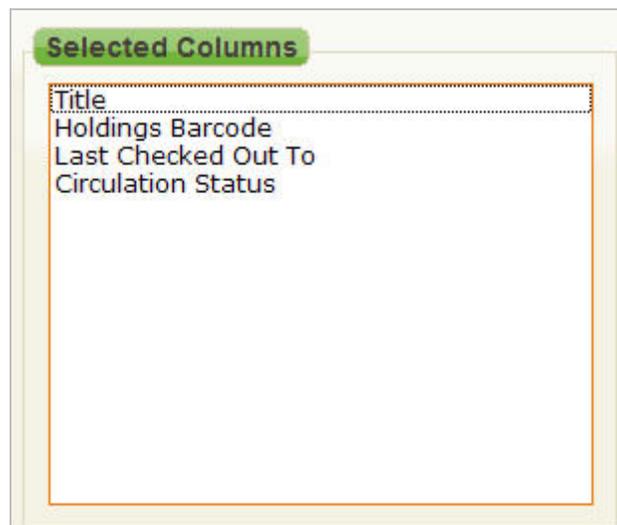
1. Click **Reports\Accession List** from Booktracks' **Menu Bar**.



2. Select your school from the **School Building Equals** drop-down list.
3. Select **Equipment Only** from the **Bibliographic Type** drop-down list.
4. Beneath **Bibliographic Type**, select **Last Checked Out To** from the first drop-down list and **is not empty** from the drop-down list to the right.



5. Click **Columns** from the **Report Wizard** menu bar.
6. Double-click **Last Checked Out To** which will add it to the **Selected Columns** form. The **Last Checked Out To** field shows you one of two types of information: this is either the patron who currently has the item checked out, OR this is the last person to have checked out the item but has checked it in.
7. Double-click **Circulation Status** under **Possible Columns**. This shows whether the item is currently "In" or "Out."



8. Double-click columns under **Selected Columns** to remove them, and use the arrow buttons to reorder the columns until they display like the picture above.
9. Click **Sorts** from the **Report Wizard** menu bar.
10. Double-click **Holdings Barcode** under **Selected Sorts** to remove that option.

11. Double-click **Last Checked Out To** for the students' names to be the sort option.
12. Click **Generate Report**.

Action	Line #	Title	Holdings Barcode	Last Checked Out To	Circulation Status
Review	1	3M Overhead Projector	HW00000262	Fulmer, Ann (00000099)	Out (due back on 2013-05-28)
Review	2	Activboard +2 Whiteboard	HW00000300	Fulmer, Ann (00000099)	Out (due back on 2013-05-28)
Review	3	Kodak USB Scanner	HW00030455	Fulmer, Ann (00000099)	In
Review	4	iPad2	HW00000009	Fulmer, Ann (00000099)	In
Review	5	iPad2	HW00000200	Fulmer, Ann (00000099)	In
Review	6	Kodak USB Scanner	HW00032500	Smith, Abbey G (09276)	Out (due back on 2012-05-28)

13. This report can be edited, printed or exported.

14. At the bottom, you can name the report and click **Save Template**. The report can be found under **Reports\Other Reports**; click the reports name.

Equipment Summary



1. Click **Equipment\Equipment Summary** from Booktracks' **Menu Bar**.

Equipment Summary			
	Computers total: 87 out: 0 available: 87		
	DVD Player total: 22 out: 4 available: 18		
	eReaders total: 62 out: 2 available: 60		
	Overhead Projector total: 2 out: 0 available: 2		
	VHS Player total: 0 out: 0 available: 0		

2. A list of all the Material Types with asset records displays in a new window. The following values are listed to the right of each type: the total number of holdings records, the number of holdings that are checked out, and the number of holdings that are currently available to be checked out. The color-coding also shows which types have available holdings (green) and which do not (red).
3. Click any icon with a plus sign (+) to view a list of individual asset records within that Material Type.

	DVD Player total: 22 out: 4 available: 18	
	Dynex DX-DVD2 - DVD Player total: 11 out: 4 available: 7	
	Magnovox DVD Player total: 9 out: 0 available: 9	
	Samsung DVD Player total: 2 out: 0 available: 2	
	Dynex DX-DVD2 - DVD Player total: 11 out: 4 available: 7	
	Magnovox DVD Player total: 9 out: 0 available: 9	
	Samsung DVD Player total: 2 out: 0 available: 2	
	eReaders total: 62 out: 2 available: 60	
	Kindle total: 61 out: 2 available: 59	
	Nook e-Reader total: 1 out: 0 available: 1	

4. Click any icon with a plus sign (+) to view the distribution of the assets at each school.

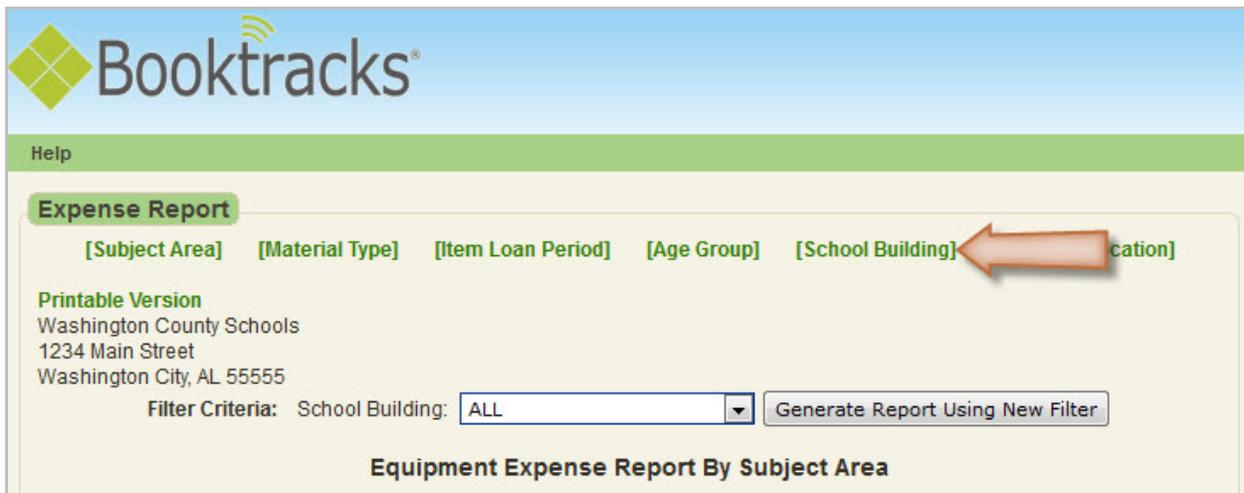
	DVD Player total: 22 out: 4 available: 18	
	Dynex DX-DVD2 - DVD Player total: 11 out: 4 available: 7	
	Central Office total: 1 out: 0 available: 1	
	Inspiration Elementary total: 1 out: 1 available: 0	
	Inspiration High total: 2 out: 0 available: 2	
	Inspiration Middle total: 1 out: 0 available: 1	
	Redwood Elementary total: 1 out: 1 available: 0	
	Redwood High total: 4 out: 2 available: 2	
	Redwood Middle total: 1 out: 0 available: 1	

5. When you are finished viewing the report, close the window.

Equipment Expense Report



1. Click **Equipment\Equipment Expense Report** from Booktracks' **Menu Bar**.



2. By default, the report is organized by Subject Area. Click the **[links]** at the top to organize the data by another category.

Expense Report

[Subject Area] [Material Type] [Item Loan Period] [Age Group] **[School Building]** [Physical Location]

Printable Version
Jackson City Schools
1111 Main Street
Smith, Alabama 55555

Equipment Expense Report By School Building

School year: 08/01/2013 - 05/31/2014

Category / Class	Lost			Fines		
	Count	Cost	No Cost	Paid	Waived	Pending
Central Office	1	\$0.00	1	\$0.00	\$0.00	\$0.00
Drake High School	0	\$0.00	0	\$0.00	\$0.00	\$0.00
Eastside Elementary School	1	\$500.00	0	\$0.00	\$0.00	\$0.00
Jones Middle School	5	\$2500.00	0	\$0.00	\$0.00	\$0.00
None	0	\$0.00	0	\$0.00	\$0.00	\$0.00
Smith High School	1	\$500.00	0	\$0.00	\$0.00	\$350.00
Total:	8	\$3500.00	1	\$0.00	\$0.00	\$350.00

amount lost (lost cost) amount paid (fines paid) calculated value due to loss
 \$3500.00 - \$0.00 = \$3500.00