

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**

Circulation Catalog Patrons	Equipment Reports Adm	inistration Search Help
	Add Equipment	
News And Messages	Edit Equipment	2
Welcome to Booktracks	Equipment Checked Out Equipment Expense Report Equipment Summary Import Equipment	for using Booktracks to protect our investment!
Please follow the schedule below:	List Of Equipment	
Yearly textbooks: Distribute Augu	ust 1	
Semester textbooks: Distribute	August 1 and January 3	
Resources		
Remember to click Help in the menu Downloads form (Administration)Ge /exclusive/booktracks) for instructi	bar to get context-sensitive instru meral/Downloads) or the Booktrac ons you can print out.	ctions for the current task; otherwise, refer to the ks exclusive site (http://www.booksys.com

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

Add Item : Equipmen	Record Save	. Cancel	
Name:			
Core			
Age Group:	Teacher	*	
Material Type:	Computers	¥	
Description:			1
Model Details:			
Base Components:			
Installation Instructions:			
Note:			

- 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.







Circulation Catalog Patrons	Equipment Reports Adn	ninistration Search Help
	Add Equipment	
News And Messages	Edit Equipment	
	Equipment Checked Out	
Welcome to Booktracks	Equipment Expense Report	
Percente to Dookingthis	Equipment Out Of Warranty	
The Textbook Coordinator and staff	Equipment Summary	encourage and thank everyone
Distribution schedules are as fo	Import Equipment	
Yearly textbooks: Distribute Augu	List Of Equipment	

## **Adding Holdings to Existing Equipment Record**

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

Lookup Equi	pment Reco	d
Please specify t	he equipment re	cord you want to edit.
Barcode:		Continue
Search:	нр	Keyword 💌 Search
Serial Number:		Continue

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

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





dit Item : Equipment F	Record				4
s	ave Delete	Make Copy	History	Review	Add Holdings
		Add Ne	w Equipmer	ıt	
ame: HP Scanjet Scanner				]	
Core					
Age Group:	Teacher			~	
Material Type:	Scanner			~	
JPC:				*	-
Description:	color scanner			* *	
Nodel Details:	up to 2400 dpi buttons	and 48 bit cold	or, 8 one-to	uch	
Base Components:	scanner, powe	r cord		* *	
nstallation Instructions:				A. ¥	
Vote:				^. 	
Equipment User Defined 1:				~ ~	
Equipment User Defined 2:				4 1	
Equipment User Defined 3:				4	
Equipment User Defined 4:				A V	
Media					
Documents					
Name:					
Jpload Documents:	0		Browse	ŧ	
Equipment Image					
Jpload Equipment Image:			Browse		
JRL				Note	
s	ave Delete	Make Copy	History	Review	Add Holdings
		Add Ne	w Equipmer	nt	
Active Holdings (4)					
Jarcodo	Cohool	Duilding			Action
JW00020566	SCHOOL	iah Seheel			ACUON
1000030500	Smith H	igil School			Ealt
1000034700	Jones N	Flomentary O	shool		Edit
1000038834	Easisid Droke H	e clementary St	1001		Edit
11100042300	Diake H	ign School			EUIL
	s. Inc. (version 5.2				EULA   Notes   Sear
					Uke us on Facebo

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





# Booktracks

	Save		
Name: New Record:	HP Scanjet Scanner	- [1]	
Barcode:	next available	49 is in line as the next av	ailable
Barcode Type:		barcode for Assets.	
Do Not Transfer	Assets	×	
Serial Number			_
Warranty Date:			
Item Loan Period:	Yearly	~	
Subject Area:	Unassigned		_
Condition:	1 New	~	
Cost:			
School Building:	Central Office	~	
Current Location:			
Physical Location:	Technology Department	×	
Vendor:	Staples	~	
Purchase Date:	09/16/2013		
Funding Source:			
Holdings Notes:			
Current Components:	scanner, power cord		
Have labels been print	ed?		
Entity Responsible For			
Tracking:	ATCHLEY, JR.	~	

- 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 Fo	or Equipment
1	Save Delete Make Copy History Review Item
Equipmer	nt Record] [Add New Holdings] [Add New Equipment] [Messages]
	Next Copy >>>
Record Saved Success	sfully
Name:	HP Scanjet Scanner
Barcode:	49
Barcode Type:	Assets
Do Not Transfer:	
Serial Number:	
Warranty Date:	
Item Loan Period:	Yearly
Subject Area:	Unassigned V
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 printe	ed?
Entity Responsible For	
Tracking:	ATCHLEY, JR.
Created: 09/16/2013 09	1:28:04AM MODIFIED: 09/16/2013 09:28:04AM
	Save Delete Make Copy History Review Item
Equipmer	nt 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**.

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	
Add Lookup Filter	Sort Queue By:	~	
		Print Labels In Queue	Clear Queue
			Clear Queue After Prin

2. Click **Filter**.

School Building Equals	Smith High School	×
Outriest Area Equate		
Subject Area Equais	Any Subject Area	× •
Barcode Labels		¥
Holdings Status	Any Status	<b>Y</b>
Bibliographic Type	Equipment Only 💌	
Holdings Barcode	greater than or equal to	
Holdings Barcode	💌 less than or equal to	×
Age Group	💌 💿 contains phrase	× [
	Use Advanced Filtering	ล

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







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

Print It	em Barcodes		
Barcode	0	Print Dumb Barcodes Choose Item Barcode Fields	
	~	Label To Print:	
		30 per page (BSI 70-BML30) Refresh Labels	
		Starting Row:	_
		Starting Column:	
		Copies Per Barcode:	
		Add Type And School Code:	
		Oberth Dieth Tures	
<u> </u>	<u> </u>	Check Digit Type: None 💉	
	ookup] [Filter]	Sort Queue By:	
		Print Labels In Queue) Clear Queue After Print	
Print Q	ueue		
	1 [2] [3] [4] [5] [6]	Next > Last >>> (Total Pages: 7) Jump To Total entries: 401	
Record	Holdings Barco	de Title	
1	46	Foray Magnetic White Board	
2	48	Bookcart- Smith Brothers	
3	00032746	Portable Screen	
4	HW0000001	iPad2	
5	HW0000002	iPad2	

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



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







# **Print Patron Barcodes**

Circulation	Catalog	Patrons Add Patro	Equipment	Reports	Administration	Search	Help
News And I	Messages	Delete Pa Edit Patro	trons				
Welcome	to Bookt	Form Lett	ters port				
The Textbook	Coordinato	Print Form	n Letters	ou	d like to encourage	and thank e	veryone for using Booktracks
Distribution	schedule	Print Patr	on Address L	abels			
Yearly textb	iooks: Dist	Print Patr Reclassify	on Barcodes y Patrons				
Semester to	extbooks:	<b>Review</b> Pa	atron				
9-Week text	t <b>books:</b> Dis	stribute Aug	just 1, October	7, January	3, March 7		

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

Print Patron Barcodes	
Barcode:	Print Dumb Barcodes Choose Patron 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 💌
Add Lookup Filter	Sort) Queue By:
	Print Labels In Queue Clear Queue Recall Queue
	🦵 Clear Queue After Print

Click **Filter**. 2.







neroom	Contains Phrase	
Loan Permission Equals Stud	ent	×
Teacher-Student Report Class E	quals Smith High Sc	hool
Patrons Who Have Items (	Dut	Patrons Who Have Items Overdue
Patrons Who Have Fines		Patrons Who Need Barcodes Printed
Patrons Who Have Fines F	or Lost Items	
Patrons Who Have Items With D	ue Date From	То
⊃atrons Who Have Not Been Mo	dified Since	
	Use Advance	d Filtering)

- 3. 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. 4.
- 5. Click Generate List.

Print Que	ue		
		1 [2] [3] [4] [5] [6] Next > (Total Pages: 6) Jump To Total entries: 323	
Record	Patron Barcode	Patron Name	112 A.M.
1	00000099	Fulmer, Ann	
2	00271	Luck, Jobe K	
3	00276	Metcalf, Michael D	
4/	00344	Acor, Robert W	
5	00356	Adams, Blake A	

- 6. 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. 7.

8	🛅 🍓 •   🌾   🛧 🦊 🚺 / 11	🖲 🖲 😽 🕶 拱 🛃 Find	÷
ß			
69	Fulmer, Ann	Luck, Jobe K	Metcalf, Michael D
	Student	Student	Student
	00000099	00271	00276
	Jackson City Schools	Jackson City Schools	Jackson City Schools
	Acor, Robert W	Adams, Blake A	Aleman, Oscar E
	Student	Student	Student
	00344	00356	00415
	Jackson City Schools	Jackson City Schools	Jackson City Schools

- Click the **Print** icon. 8.
- 9. Select your printer at the top, and then click **OK**.







### **Check Out Items**

Circulation Catalog Patr	ons Equipment Reports Administration Search Help
Assess Fee	
Assess Fine	0
Bookings	
Bulk Renew	
Check In Items	
Check Out Items	like to encourage and thank everyone for using Booktracks to protect our investment!
Inter-School Building Loan	W
Modify Credit	ugust 1
Pay Fines/Fees	to Assessed Assessed Barransi 2
Review Bibliographic	te August 1 and January 5
Review Item	
Self Check In	
Self Check Out	shu bar to get context-sensitive instructions for the current task; otherwise, refer to the
Upload Circ Transactions	ctions you can print out.

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

lease specify the patron	i that is checking out.
Name / Barcode:	Fulmer, Ann
Search:	Student Link 🕑 Search
Teacher-Student Report	Class: Browse
Checked Out Item L	ookup

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







MSG	Patron Barcode: 00000099 More				
arcode: twooooosool	Special Due Date	Check Ou	t] Check In		
ew Patron Name / Barcode	Search Browse	Print Circ	ulation Receip		
ew Patron Name / Barcode Items Checked Out (4)	Search Browse	Print Circ	ulation Receip ation On Rece		
ew Patron Name / Barcode Items Checked Out (4) Title	Search Browse Barcode	Print Circ All Inform Due On	ulation Receip ation On Rece Select		
ew Patron Name / Barcode Items Checked Out (4) Title Science Electronic Textbool	Search Browse Barcode 00032750	Print Circ All Inform Due On 03/07/2013	ulation Receip ation On Rece Select		
ew Patron Name / Barcode Items Checked Out (4) Title Science Electronic Textbool 3M Overhead Projector	Search Browse Barcode 00032750 HW00000262	Print Circ All Inform Due On 03/07/2013 05/28/2013	ulation Receip ation On Rece Select		
ew Patron Name / Barcode Items Checked Out (4) Title Science Electronic Textbool 3M Overhead Projector Pad2	Search Browse Barcode 00032750 HW00000262 HW00000009	Print Circ All Inform Due On 03/07/2013 05/28/2013 05/28/2013	ulation Receip ation On Rece Select		

- Scan or enter item barcodes in the **Barcode:** field. If entering barcodes manually, press **Enter** 3. 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 Whiteb	ooard	HVV00000300	05/28/2013	







## **Check In Items**

Circulation Catalog Patr	ons Equipment	Reports	Administration	Search	Help
Bookings					
Check In Items					8
Check Out Items					
Inter-School Building Loan					
Pay Fines/Fees					
Self Check Out	taff at the Central C	office would	like to encourage a	nd thank ev	veryone for using
\$	departments to tra-	ck textbooks	equipment and ass	etst	

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

Check In Items		
Barcode:	Special Check In Date:	Successful Check In: 0 Failed Check In: 0 Items With Warnings: 0

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

arcode: Spe	cial Check In Date:	Successful Check In: 1 Failed Check In: 0 Items With Warnings: 1
Successes Title: iPad2 Barcode: HW00000200 👎	Checked Out To: Fulmer, Ann (Ch	eck Out)
Author: Was Due On: 05/28/2013	Teacher-Student Report Class: S Fines Due For This Item: \$0.00	mith High School







#### **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.

Batch Check Out Items	Datron Parcodo: 0000000		
Patron Name: Fulmer, Ann	Pation Barcode: 00000099		More
Barcode:	Special Due Date	Check Out	Check In

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

1.0			
essage deleted successf	ully.		
culation Messages for Pa nessage(s)	tron: Fulmer, Ann (0000	0099)	
9/17/2013 11:05:57AM	Worker: trainer		
Student turned in dam No Computer Bag or (	aged computer on May 1 Charger were returned.	2, 2012	
			Save Delete
dd New Message — Iolding Barcode (optional Iessage:	D: HW0000009		
Computer broken by Anr	1 Fulmer. No computer ba	g or charger returned.	
			Save

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







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

Holding Record	For Equipment
	Save Delete Make Copy History Review Item
Equipri	Tent Record (Add New Holdings) (Add New Equipment) (Messages)
	Next Copy >>>
Record Saved Succe	issfully
Name:	iPad2
Barcode:	50
Barcode Type:	Assets
Do Not Transfer:	Γ
Serial Number:	
Warranty Date:	
ltem 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:	

Click Equipment\Edit Equipment, search for the main equipment record, click Edit next to a specific 1. 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

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







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

Review Item			
Name:	iPad2		
Barcode:	50 MSG	Cost:	0.00
		School Building:	Smith High School
Item Status:	Item is not checked out Current Location: Smith High Schoo	l	
Copy Status:	235 of 237 copies currently available		
Entity Responsible For Tracking:	r 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.

Report 3 Resu Displav	Results Fi It(s) Found ing Resul	rom School Buildii d. ts 1 - 3	ng: Smith High Sc	hool			
Edit Thi	s Report	Printable Versio	n Export Report	Data As Text			
Line #	Date		Worker Name	Patron Barcode	Patron Name	Holdings Barcode	Title
1	09/17/20	13 11:05:57AM Student turned in No Computer Bag	trainer damaged comput g or Charger were	00000099 ter on May 12, 2012 returned.	Fulmer, Ann		
2	09/17/20	13 11:05:59AM Computer broker	trainer h by Ann Fulmer. I	00000099 Vo computer bag or	Fulmer, Ann charger returned.	HW0000009	iPad2
3	09/17/20	13 11:34:01AM iPad was broken	trainer and can not be rej	00000099 paired.	Fulmer, Ann	50	iPad2

- 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**



- 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
1	Please enter your Username a	nd Password:		
	Username:	]		
	Password:	]		
	District: Jackson City Schools		~	
	School Building: Central Office	~		
BOOK Systems*	Log On Reset			

- 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.







6. 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.



7. 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.

Book Systems*	Jackson City Schools Smith High School		
			Jones, Bella
Fabre, Selina	Fann, Ashley	Fann, Beth	Fields, James
Fields, Rebekah	Fisher, Amanda	Fletcher, Wanda	Frost, Scott
Fulmer, Ann "Annie"	Fulton, Sarah		Suff Check In Log Off
С	HECI	κ οι	JT

10. Click the button with the correct name.







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

Book Systems*	Jackson City Schools Smith High School	<b>D</b> o	DNE
Name: Ann Fulmer		IC	Jones, Bella 0: 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 ar	natomy and physiology, Seventh	00000077	05/28/2013
Hole's essentials of human ar	natomy, 7th ed.	00014695	05/28/2013
			eff Check In Log Off
CH	IECK C	UT	

- If you see any errors, record the student/teacher and item information on the **Booktracks Check Out** 12. Exceptions Log (provided by trainer).
- Click **DONE** to return to the A to Z button list; the screen reopens automatically after inactivity. 13.
- 14. Repeat steps 9-13 for each new check out transaction.





## Self Check In



- 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.

	Booktracks	Log	On
191	Please enter your Username and Passwor	d:	
	Username:		
	Password:		
	District: Jackson City Schools	~	
	School Building: Central Office		
BOOK Systems*	Log On Reset		

- Enter selfcheckin in the Username: field. 3.
- 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.

Book Systems*	Jackson City Schoo	BACK
		Jones, Bella
	Barcode:	
		View History
C	HECK	IN

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.





# Booktracks

## **Reclassify Items**



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

ems: 3	🦵 Change Item Loan Period	Yearly 😽
HW00031085	🗖 Change Subject Area	Unassigned 💌
HW00031090 HW00031303	🗖 Change School Building	Central Office 🛛 😽
	🗖 Change Physical Location	Textbook Room 🛛 💌
	🦵 Change Age Group	Unassigned 💌
	🧧 Change Material Type	Textbook 💌
	🗖 Change Condition	1 New 💌
~	🗖 Do Not Transfer	No, Allow Transfers 🛛 💌
Add Lookup Filter	🗖 Barcode Labels Printed	No 💙
	🗖 Change Vendor	Baker and Taylor 🛛 💌
	📕 Change Entity Responsible For Tracking	UNASSIGNED
	🧮 Change Warranty Date	
	🗖 Change 🔽 🔽	

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







			Acce	ssion Entity School	🚽 (Load Temp
eating List: Holding	IS				
Create Filter					
School Building Equals	Smith High So	hool	*		
Subject Area Equals	Any Subject A	Area	*		
Barcode Labels		energie energie	*		
Holdings Status	Any Status		*		
Bibliographic Type	Equipment O	nly 💌	61		
Title	~	contains phrase	*	Computer	
Holdings Barcode	~	less than or equal to	~		
Age Group	~	contains phrase	*		
		Use Advanced Filte	ring		
		Gaparata List	Wizard		

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

Reclassify	Items Queue		
Record	Holdings Barcode	Title	
1	HW00031085	Dell Monitor	
2	HW00031090	Dell Monitor	
3	HW00031303	Dell Monitor	
			Remove Selected From Queue

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



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

R	eclassify Items
S	accessful Reclassifies: 3
Fa	iled Reclassifies: 0
Re	eclassifies With Warnings: 0



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## Last Checked Out To Report – Accession List

Circulation Catalog Patrons Equipment	Reports Administration	Search Help
	Accession List	
News And Messages	Course Data By Site	
	Course Data By Title	
Welcome to Booktracks	History	
Teleonie to Booktacks	List Of Titles	
The Textbook Coordinator and staff at the Central 0	Other Reports	thank everyone for using Booktracks in all schools and all departments
Distribution schedules are as follows:	Patron List	
	Patrons With Items	
Yearly textbooks: Distribute August 1	Statistical Reports	
Semester textbooks: Distribute August 1 and Ja	÷	
9-Week textbooks: Distribute August 1, October	7, January 3, March 7	

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

Columns Sorts Filters	Help	
		Accession Entity School 💙 Load Template
Creating Report: Acc	ession List	
Create Filter		
School Building Equals	Smith High School	¥
Subject Area Equals	Any Subject Area	
Barcode Labels		×
Holdings Status	Active	×
Bibliographic Type	Equipment Only 🛛 👻	
Last Checked Out T	o 🛛 🔽 is not empty	×
Holdings Barcode	less than or equal to	
Age Group	contains phrase	
	Use Advanced Filterin	Ig
	Concerto Report	Winned
	Generate Report Close (	

- 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.







reating Report: Accession List	Load Templa
Possible Columns Installation Instructions Is A Brief Record ISBN ISSN Item Loan Period Item Usage Kit Information Last Modified Date LC Control Number Lexile Loan Date Loan Due Date Location Grouping Location Status	<ul> <li>Selected Columns</li> <li>Entry Date Holdings Barcode Author's Name Title Cost</li> <li>Cost</li> </ul>

- 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.







eating Report: Accession List	Accession Entry School V
	Last generated on 09/11/2013 10:50:06AM View
ossible Sorts	Selected Sorts
SBN	*Maximum of Three
ISSN	Last Checked Out To
item Loan Period	
(it Information	
Last Checked Out To	
Last Modified Date	
exile	Sort Order
Loan Date	According
oan Due Date	C Descending
ocation Status	Descending
Material Type	Printed Report Options
Model Details 🛛 💌	
	📕 🛄 After first sort, insert page break

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

	911001	uits 1 - 0			
lit This F	Repor	t Printable Version Exp	ort Report Data As	lext .	
ction I	Line #	Title	Holdings Barcode	Last Checked Out To	Circulation Status
eview 1	1	3M Overhead Projector	HW00000262	Fulmer, Ann (00000099)	Out (due back on 2013-05-28
eview 2	2	Activboard +2 Whiteboard	HW00000300	Fulmer, Ann (00000099)	Out (due back on 2013-05-28
eview 3	3	Kodak USB Scanner	HW00030455	Fulmer, Ann (00000099)	In
eview 4	4	iPad2	HW0000009	Fulmer, Ann (00000099)	In
eview 5	5	iPad2	HW00000200	Fulmer, Ann (00000099)	In
eview 6	6	Kodak USB Scanner	HW00032500	Smith, Abbey G (09276)	Out (due back on 2012-05-28

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

Template Name:	Patron with Asset	Replace Existing Template: 🛄 Save Template

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







## **Equipment Summary**

Circulation Catalog Patrons	Equipment Reports Adm	ninistration Search Help
2	Add Equipment	
News And Messages	Edit Equipment Equipment Checked Out	2
Welcome to Booktracks	Equipment Expense Report	
Holeonic to Doolardolo	Equipment Summary	
The Textbook Coordinator would lik Please follow the schedule below:	Elmport Equipment List Of Equipment	for using Booktracks to protect our investment!

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

Equi	pment Summary	
0	Computers total: 87 out: 0 available: 87	
0	DVD Player total: 22 out: 4 available: 18	6
•	eReaders total: 62 out: 2 available: 60	e Book
•	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.





٢	DVD	Player total: 22 out: 4 available: 18	6
	0	Dynex DX-DVD2 - DVD Player total: 11 out: 4 available: 7	
	•	Magnovox DVD Player total: 9 out: 0 available: 9	
	0	Samsung DVD Player total: 2 out: 0 available: 2	
	0	Dynex DX-DVD2 - DVD Player total: 11 out: 4 available: 7	
	0	Magnovox DVD Player total: 9 out: 0 available: 9	
	0	Samsung DVD Player total: 2 out: 0 available: 2	4
٢	eRea	aders total: 62 out: 2 available: 60	e Book
	0	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	OVD Player total: 22 out: 4 available: 18		6	
9	Dyne	ex DX-DVD2 - DVD Player total: 11 out: 4 available: 7		
	0	Central Office total: 1 out: 0 available: 1		
	۲	Inspiration Elementary total: 1 out: 1 available: 0		
	0	Inspiration High total: 2 out: 0 available: 2		
	0	Inspiration Middle total: 1 out: 0 available: 1	÷.	
4	۲	Redwood Elementary total: 1 out: 1 available: 0		
2	0	Redwood High total: 4 out: 2 available: 2		
	0	Redwood Middle total: 1 out: 0 available: 1		

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



<mark>/sle</mark>ms \*

Rook





## **Equipment Expense Report**

Circulation Catalog Patrons	Equipment Reports Adm	ninistration Search Help
	Add Equipment	
News And Messages	Edit Equipment	2
	Equipment Checked Out	
Melcome to Booktracks	Equipment Expense Report	
Welcome to Dookitacks	Equipment Summary	
The Textbook Coordinator would lil	< Import Equipment	of for using Booktracks to protect our investment! Please follow
the schedule below:	List Of Equipment	

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

	Booktracks										
H C I	Expense Report [Subject Area] [Material Type] [Item Loan Period] [Age Group] [School Building] cation] Printable Version Washington County Schools										
١	Washington City, AL 55555 Filter Criteria: School Building: ALL  Generate Report Using New Filter										
	Equipment Expense Report By Subject Area										

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

[Subject Area] [Material Type] [It		[Item Loan Perio	[Item Loan Period] [Age Group		p] (School Building)		[Physical Location]		
Printable Version	ala								
Jackson City Scho 1111 Main Street	101S								
Smith, Alabama 5	5555								
	Earrig	mant Eunanca		Sahaal Du	ممنامان				
	Equip	ment Expense	Report by a	SCHOOL BU	nang				
School year: 08/01/2013 - 05/31/201									
			Lost			Fines			
Category / Class		Count	Cost	No Cost	Paid	Waived	Pending		
Central Office		1	\$0.00	1	\$0.00	\$0.00	\$0.00		
Drake High Scho	ol	0	\$0.00	0	\$0.00	\$0.00	\$0.00		
Eastside Elemen	tary School	1	\$500.00	0	\$0.00	\$0.00	\$0.00		
Jones Middle Sci	hool	5	\$2500.00	0	\$0.00	\$0.00	\$0.00		
None		0	\$0.00	0	\$0.00	\$0.00	\$0.00		
Smith High Scho	ol	1	\$500.00	0	\$0.00	\$0.00	\$350.00		
Total:		8	\$3500.00	1	\$0.00	\$0.00	\$350.00		
	amount los	t amou	int paid						
	( lost cost	) (fines	s paid )	calculated v	alue due to	loss			
				122					

