

Textbook Tracker

User's Manual

For Macintosh and Windows

Textbook Tracker v3.03

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Table of Contents

Introduction	1
Where is My Textbook Tracker Data Folder Located?	2
Note and Warning Alerts	2
Preparing for Textbook Tracker	3
Archiving Your Data	3
Backing Up Your Data	4
Why You Must Backup Your Data	4
Determining a Backup Strategy	5
Barcode Your Collection	7
One and Two-Part Labels	9
Barcode Readers	10
Enter Item Data	11
Enter Patron Data	12
Set Your Preferences	12
Installing Textbook Tracker	15
Hardware and Operating System Requirements	15
Installation Summary (read this first)	17
Installing Textbook Tracker for Macintosh OSX	18
Installing Textbook Tracker for Windows	22
Installing Textbook Tracker Clients	27
Configuring Textbook Tracker WEB	31
Transferring data from Textbook Tracker v2	32
Textbook Tracker Basics	37
About/Help Menu	38
Tech Support	38
File Menu	40
Edit Menu	41
Show Menu	42
Reports Menu	43
Window Menu	44
Management Command Menus	45
The Textbook Tracker Word Processor	50
Introduction to Preferences	53
Global vs. Local Preferences	55
Administration Preferences	57
Administration Tab	57
Updates Tab	64

Archive Preferences.....	67
Archive Tab.....	67
Calendar Preferences	69
Calendars Tab	69
Circulation Preferences	73
Circulation Tab.....	73
Statistics Tab	77
Miscellaneous Tab.....	78
Circulation Tab.....	79
Miscellaneous Tab.....	81
Display Preferences	83
Display Settings Tab.....	83
Miscellaneous Tab.....	84
Item Management Preferences	87
Items Tab.....	87
Leading Articles Tab	88
Terminology Tab.....	89
Items Tab.....	90
Terminology Tab.....	92
School Information Preferences	93
School Information Tab.....	93
School Information Tab.....	95
Patron Management Preferences	97
Patron Management Tab	97
Patron Management Tab	99
Policy Preferences	101
Patrons Tab	101
Items Tab.....	104
Circulation Tab.....	107
SIF Preferences	111
Connection Tab	113
Message Handling Tab.....	115
Messages Tab	117
Sound Preferences.....	119
Sounds Tab	119
Web Preferences	121
Web Tab	121

Word Preferences	123
Word Processor Tab	123
Patron Management	125
Finding Records	127
Modifying Patron Information	128
Paste Patron Picture	130
Special Patrons	131
Patron Information Fields	132
Item Management	139
Finding Records	141
Changing Item Information	143
Authority Control.....	144
Adding New Titles or Copies	145
Item Information Fields.....	148
Title Information (tab)	155
Copy Information (tab).....	164
Circulation	169
Modes, Commands and Help.....	170
Current Patron and Current Item Information.....	170
Circulation Log	170
Using the Circulation Window	171
Using the Command Line.....	171
Using Help for Commands	172
Using the Circulation Menu	173
Checking Items Out.....	174
Checking Items In.....	176
Temporary Items	177
Special Patrons	179
Import Script / File	182
Fee Charges and Payments.....	191
Inventory Control	195
Make Item/Patron Current	202
Textbook Tracker Web	203
Introduction to Reports.....	205
How to Create a Report.....	205
Adaptive Dates	208
Quick Reports.....	209
Special Reports.....	211
Preparing Special Reports	211
Policy List	212
Calendar	213

Calendar Notes	214
Manual Checkout Sheet	215
Command Barcodes	216
Code Barcodes	217
Preferences Report.....	218
Custom Barcode Labels	219
Authority Reports	221
System Analysis	222
Patron Reports	223
Preparing Patron Reports	223
Patron List.....	224
Patron Desk Reference Reports.....	225
Patron Payment History	226
Refund Letters	227
Patron Counts.....	228
Barcode Labels.....	229
Mailing Labels.....	230
Rolodex Cards	231
Overdue List	232
Payment Summary Statistics.....	233
Textbook Titles Reports	237
Preparing Textbook Title Reports	237
Item List	238
Publication Date Summary	239
Item Analysis	240
Textbook Copies Reports	243
Preparing Copy Reports	243
Copy List.....	244
Inventory	245
Barcode Labels.....	246
Status.....	248
Circulation Reports	251
Preparing Circulation Reports.....	251
Loaned Items	252
Overdue Listings.....	253
Hold Requests	254
Overdue Notices	255
Patron Notices	257
Charges and Overdue Fines.....	258
Special Item Lists Reports	259
Usage Statistics.....	265
Preparing Usage Statistics Reports.....	265

Usage by Period	266
Return Statistics	267
Usage by Item Policy	268
Usage by Patron Policy	269
Usage by Item-Patron Policy	271
Title Utilities	273
Titles: Verify	275
Titles: Replace Information	276
Titles: Modify Call Numbers	277
Titles: Remove Title	278
Titles: Remove Copy	279
Titles: Remove Archived Copies	280
Titles: Remove Lost Copies	281
Titles: Remove Discarded Copies	282
Titles: Remove Copy Transactions	283
Titles: Match Title Call Numbers	284
Titles: Match Title Policies	285
Copy Utilities	287
Copies: Verify	289
Copies: Replace Information	290
Copies: Modify Call Numbers	291
Copies: Remove Copy	292
Copies: Remove Archived Copies	293
Copies: Remove Lost Copies	294
Copies: Remove Discarded Copies	295
Copies: Remove Copy Transactions	296
Copies: Check Out	297
Patron Utilities	299
Patrons: Verify	301
Patrons: Replace Information	302
Patrons: Remove Patron	303
Patrons: Clear Patron History	304
Patrons: Renew Patron Cards	305
Patrons: Import Patron Pictures	306
Patrons: Keep Patron History	307
Patrons: Remove All Transactions	308
Other Utilities	309
Circulation	311
Check for Updates	312
Database	313
Catalog Utilities	314
Verify Utilities	316

Data Import	317
Display Field Mapping Window.....	326
Importing Patron Information	327
Rules for Importing Patron Information.....	327
Importing Item Information.....	329
Importing Transaction Files	331
Data Export	333
Exporting Data.....	333
Export Copies	334
Export Titles.....	336
Export Patrons	337
Export Other	339
Patron Export Fields: (Field Name, Field Number).....	340
Item Export Fields: (Field Name, Field Number)	340
MARC/MicroLIF Records	341
Central Administrator	343
Configuring the Central Administrator.....	345
Technical Details	347
Shortcut Keys	349
Circulation Commands	351
Glossary	355

Introduction

Congratulations on selecting **Textbook Tracker™** as the textbook management tool for your school. Textbook Tracker is a powerful application with facilities to help manage textbook inventory, circulation, and usage. Although Textbook Tracker is simple to use, you'll learn its capabilities much faster by reviewing this User's Manual, which is divided into chapters that correspond to the program's major areas.

The Textbook Tracker system consists of a main information server called the *Textbook Tracker Data Station* (or Data Station for short) and various *clients* (or Client Workstations) that communicate with the Data Station.

The Data Station is the central repository for all your Textbook Tracker institution/school system information; it stores all Textbook Tracker data and performs the work required to process information and command requests from Textbook Tracker Client Workstations. The first machine that Textbook Tracker is installed on (and registration information entered into) is your Data Station. There is only one Data Station for each Textbook Tracker license.

The Data Station can perform all the functions of the **Textbook Tracker Workstation™** and **Textbook Tracker Central Administrator™** clients. You'll know it's the Data Station when you launch it because a window will appear and notify you. Inside the same folder as the Textbook Tracker application is the **Data** folder, where all your information (data) is saved.

Textbook Tracker client computers communicate with the main Textbook Tracker Data Station to perform institution/school functions. Multiple clients can access the same Textbook Tracker Data Station. Your Textbook Tracker license determines which clients you can use and how many can be simultaneously connected.

There are a variety of expanded Textbook Tracker client programs that can access the data on your Data Station. Your license allows a fixed number of simultaneous users, no matter which client you are running. Your Data Station does not count as a client except for a "single user" license where no other clients are allowed. Clients are available for both Macintosh and Windows depending on your license.

- **Textbook Tracker Workstation** is used to perform all institution/school functions such as circulation, cataloging and other functions. Since the Textbook Tracker Workstation capabilities are contained in the Data Station, many institutions/schools will choose to use the Data Station to perform these functions. You may use as many Textbook Tracker Workstation clients as your license permits—but you will always have only *one* Data Station.
- **Textbook Tracker Central Administrator** provides access to multiple collections across a district using a wide-area network or to a centralized Textbook Tracker database. With this workstation, an administrator can manage multiple institutions/schools in a district.
- **Textbook Tracker WEB™** is purchased as a Textbook Tracker option. When activated in your Data Station, it allows searching of your Textbook Tracker collections using a standard World Wide Web browser such as America Online, Netscape Navigator, or Microsoft Internet Explorer.

Communication Protocols

Textbook Tracker Client Workstations always communicate with the Data Station using TCP/IP communications protocols. Textbook Tracker does not support Macintosh's AppleTalk protocol.

- **TCP/IP** (Transmission Control Protocol/Internet Protocol) is the protocol used for the Internet and is supported as part of the basic operating systems for both Macintosh and Windows.
- **PPP** (Point to Point Protocol) communication protocol provides a TCP/IP connection using a modem and Internet Service Provider (ISP). If you dial up an on-line service to access the Internet, you can use PPP to connect. PPP should be connected before Textbook Tracker is launched.

Where is My Textbook Tracker Data Folder Located?

Your Textbook Tracker **Data** folder is stored in your operating system's shared application support folder.

On Macintosh OSX machines, this folder is located in the following directory:

**Hard Drive > Users > Shared > Library > Application Support
> Textbook Tracker Support**

On a Windows machine, the shared application folder should be kept here:

- **Hard Drive** (*typically C:*) > **Documents and Settings > All Users > Documents > Textbook Tracker Support**

Note and Warning Alerts

- N O T E -

Look for a box like this for special notes or comments that should be carefully examined by the user.

W A R N I N G !

Look for a box like this for warning messages or important comments that should not be ignored!

Preparing for Textbook Tracker

This chapter provides information about how to prepare for Textbook Tracker.

Automating Your School Overview

Use the following steps to prepare for Textbook Tracker automation.

- Step 1. Develop a secure backup strategy
- Step 2. Determine a strategy for entering your item information
- Step 3. Determine a strategy for entering your patron information
- Step 4. Barcode your collection
- Step 5. Install Textbook Tracker
- Step 6. Set your school/institution preferences
- Step 7. Add your Item Information
- Step 8. Add your Patron Information
- Step 9. Develop a machine-maintenance strategy
- Step 10. Develop a Textbook Tracker maintenance strategy
- Step 11. Evaluate the security your Data Station and situation requires

Archiving Your Data

Textbook Tracker has a built-in archiving utility (see “*Archive Preferences*” on page 67) that can be configured to make complete, regular copies of your valuable Textbook Tracker **Data** and store them in a folder on your hard disk.

The major difference between a backup and an archive is that backups are made on removable media that can be physically stored away from the school. Archiving provides a quick and automatic method of saving your database before you perform large changes (i.e. through importing, updates, upgrades, or utilities).

Backing Up Your Data

Backups are duplicate copies of files on a computer that should be saved to an external source. You should have a backup strategy in place to ensure that you always have a current backup of your Textbook Tracker data files.

Daily backup of your Textbook Tracker data is highly recommended!

What to Backup

Textbook Tracker data files change every time you use the Textbook Tracker system. For example, every time you update an item record or a patron, check an item in or out, or perform any other transaction, the data files change to reflect your updates.

All Textbook Tracker information is stored in the **Data** folder. This makes it easy to backup your data on a regular basis.

Why You Must Backup Your Data

Inevitably, sometime during the life of your computer, you will suffer from hardware malfunction. When this happens, your data can be irreparably corrupted or lost. Although you can reinstall the Textbook Tracker application from your original CD, doing so does not retrieve your data files.

Your only options for recovering data when you have suffered a malfunction are to either re-enter all the data by hand or to recover your most recent data from a backup copy—and then update only the data that changed since the last backup was made. The more current the backup copy of the data, the less data you will have to re-enter.

All Textbook Tracker data is stored in the **Data** folder, which makes it easy to backup your data on a regular basis. You should have a backup strategy in place to ensure that you always have a current backup of your Textbook Tracker data files. With adequate backup procedures in place, only small amounts of information will be lost, even after the worst conceivable failure.

Your backup procedure for Textbook Tracker should copy the **Data** folder. Some schools may choose to only archive their transactions on a daily basis. Although this technique results in a fast backup, it's not complete, and recovery can take much longer than a full backup.

If you make a backup copy of the **Data** folder at the end of every day, you'll be able to recover all the changes you've made through the end of each day. You can then recover the data easily and rapidly, should it be required.

For the purpose of backups, there are two kinds of files.

- **Program Files** are the files that make your applications run. These files are sent to you on disks or CDs, or downloaded from the internet, and you install them. In case of a failure in your system, you can reinstall these program files. For this reason, you are allowed to make *one* backup copy of the original disks or CDs to archive before storing both the original and backup copy in a safe place.
- **Data Files** are where your system information is stored. When you enter and change your information using applications such as Textbook Tracker, Microsoft Excel, and ClarisWorks, your data files are updated. Because these files can change every time you use the application, and because losing all the data you have entered can be a major loss, you must make backup copies of your data on a regular basis.



NOTE:

Daily backups of your Textbook Tracker data are highly recommended!

Determining a Backup Strategy

A backup strategy is a schedule for performing backups at regular intervals. It is highly recommended that you use the following guidelines in your backup strategy.

- Before using a new system, perform an initial backup to create a permanent archive of your data.
- **Backup your Data folder at the end of every day.**
- Make additional backups before and after you make any major changes in your system. For example, after you do an inventory and use Utilities to update your records at year-end, you should backup your data.
- To minimize data loss due to bad backup devices (such as a damaged tape) avoid using the same tape, disk, or CD-RW for consecutive backups.
- Keep more than one backup copy of data and store older copies off-location. This protects your data in case of fire or theft in the school. Some institutions will choose to take backup copies off location each week; others daily, and others monthly. The more recent the backup less information that will need to be reentered.
- Test your backup strategy and recovery procedures to make sure they work and that you know how to recover data. Do this *before* you have a problem so you'll know that you can recover data when needed.

Backup Hardware

Although you can use any computer mass storage device for backups, the most reliable and cost effective choices are tape (DAT, DLT, etc.) and removable media (Zip, Jaz, CD-R, CD-RW, etc.). COMPanion recommends that you **DO NOT** backup on floppy disks or any hard disks connected to your computer. For the best reliability, backup media should be stored *away* from your computer in case of theft, fire or other physical loss.

If you have a large amount of data, tape backup is the most reliable, cost effective and efficient method. With tape drives, you can set backup procedures to run at a predetermined date and time without operator interaction. More so, modern tape drives hold several gigabytes of data on a single tape cartridge.

Your choice of backup hardware will depend on your budget, the amount of data you need to backup, and the policies and procedures within your district or institution/school.

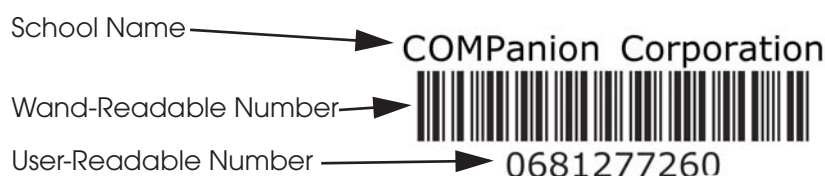
Sample Backup Strategy

The following is a sample strategy for routine backup during normal operations. It requires a minimum of **eight** tapes or cartridges.

- Step 1. Label four tapes: Monday, Tuesday, Wednesday, and Thursday.
- Step 2. Label four additional tapes: Friday-1, Friday-2, Friday-3, and Friday-4.
- Step 3. Backup Monday through Thursday at the end of the day, using the assigned tape. Use the same tape for the same day of each week. For example, use the Monday tape every Monday, copying over last week's Monday backup with this week's Monday backup.
- Step 4. Backup Friday at the end of the day *using a new tape every Friday*. Use the tapes labeled Friday-1, Friday-2, and so on. Do *not* copy over the previous Friday's backup.
- Step 5. If you have more tapes or cartridges available, use these to keep more than four Friday backup tapes.
- Step 6. Store your Friday backup tapes or cartridges in a location other than the school. This guards against loss of data in case of fire or theft.

Barcode Your Collection

Each item and patron in your school is assigned a unique number that Textbook Tracker uses for identification. These numbers appear as barcode numbers on school items and patron cards.



A typical barcode label consists of three pieces of information:

- The name of the school or institution.
- The barcode, usually printed in the middle of the label.
- The barcode number (written in numerals) at the bottom of the label.

A barcode can be read quickly by powerful, low-cost scanning devices that you can purchase from COMPanion Corporation. Using a barcode reader makes your job easier and reduces the chance for errors. If you don't have a scanner, you can type the User-Readable number in the command line.

The format of the barcode is called its *symbology*. The symbology COMPanion uses, Code 39 (also known as Code 3 of 9), is the industry standard for industrial and commercial applications. This symbology provides a high level of data security with error rates between 1 in 3 million and 1 in 70 million characters scanned. Code 39 does not require a check character in normal commercial and industrial applications. It is also bi-directional, which means it can be scanned from left to right or from right to left.

You need barcode labels on all the items in your school that will be managed with Textbook Tracker. You may also want to barcode objects such as audio-visual equipment, computers, desks, and tables, so you can use Textbook Tracker to inventory these items.

You can also keep temporary records of items such as evaluation copies of textbooks that the school does not currently own. Temporary items can be assigned a barcode number and then circulated like permanent items. A barcode number is assigned to a temporary item only while it's checked out.

Guidelines for Choosing Barcode Numbers

You can set up barcode numbers (according to your needs) using up to fourteen digits. The following are general guidelines for determining your barcode numbering:

- Use the same number of digits for items and patrons.
- Consider using an employee ID or student number for patron barcodes (be sure employee IDs or student numbers do not coincide with item numbers).
- If you have more than one school on your system, use a unique barcode numbering scheme for each school's supply. This will make it easier to manage a central catalog with holdings from all schools within the system. If items are moved between stockrooms, the barcodes will remain unique and do not interfere with existing item barcodes.
- Use the simplest numbering scheme possible that still meets your needs.

Sample Barcode Numbering Scheme

The following is a school/district sample barcode numbering scheme. This scheme supports management of up to 899 schools with each school having up to 300,000 patrons and 700,000 items. You can vary this scheme to handle more schools, groups within a school, or independent items.

- N O T E -

It is recommended that you avoid starting barcodes with zero ("0") as the first digit. Barcodes can contain letters and numbers; spaces and punctuation are not allowed.

The sample scheme below uses a 9-digit barcode number for items and patrons.

- **Digits 1 to 3** identify the school. For example, 100 is Eastside School, 200 is Westside School, and so forth.

You can use the three digits within this group to further breakdown the schools. For example:

- 110 — Eastside Elementary School
- 130 — Eastside Middle School
- 150 — Eastside High School
- 210 — Westside Elementary School
- 230 — Westside Middle School
- ...and so on

If you have more than one school on your system, using unique barcodes for each school makes it easier to manage a central database with holdings from all schools in the district. All barcodes are unique and do not interfere with barcodes for existing items.

- **Digit 4** can tie a barcode to a patron group such as students or staff, to a medium type or vendor, or to an item group such as fiction or reference. For example, if you use 0 through 2 for patrons and 3 through 9 for items, you will have unique barcode numbers for 3 patron groups and 7 item groups.
- **Digits 5 through 9** identify the individual patrons or items in the group.



NOTE:

The spaces between numbers in the barcode example to the right are for readability. The actual barcode would be entered as:
110200361.

Using the above scheme, you would have barcodes like the following. The bold digits identify the school, the underlined digit identifies the patron or item group, and the remaining digits identify the particular patron or item.

- 110** 2 00361 **110** identifies the school
- 2** identifies the patron or item group
- 00361** is the specific patron or item's number

If you have a smaller number of patrons, you can choose a simpler code with fewer digits. The main objective is to keep the number of digits the same for items and patrons to ensure that each school in a district has a unique range of barcode numbers, and to use the most straightforward numbering scheme that meets your needs.

Classes of Barcode Labels

There are two classes of barcode label.

- **Photocomposed labels** are made using a photographic process to create high-quality, long-lasting labels. Rather than printing ink on paper, the photocomposed process makes the barcode image an integral part of the label. These labels usually come with high-quality lamination and adhesives that make them durable and easy to attach. You should use photocomposed labels on all permanent items.
- **Printed labels** are made using a printing process that places the ink on top of the label. These labels require protection of some kind to keep the ink from rubbing off. An extra protection label of transparent Mylar can be placed on these to extend their lives. Although the cost of these labels is less than photocomposed labels, the protection and labor they require can cause them, in most cases, to cost more. Printed labels without extra protection are most cost-effective when printed by you in your school and used for temporary items such as magazines and newspapers.

One and Two-Part Labels

You can purchase either one or two-part barcode labels, depending on how you plan to use them. One-part labels include the school name, barcode, and written number.



If you want to place a barcode label in two different locations on an item, you can order two copies of these one-part labels.

Two-part labels include the same information as the one-part label. The two-part labels also include a second portion on the label, which display the written barcode number.



The second part of the label is useful to attach to a shelf list card or placed in the book in a different location than the upper portion.

Two-part labels provide the benefits of having two labels for each item, at a lower overall cost.

Where to Place Barcode Labels

You can place barcode labels on the inside or outside of items. A label on the outside is easy to locate, but is subject to much greater wear and tear, therefore shortening its life.

Most Textbook Tracker users place their labels on the inside back cover of books and on the outside of items such as records, tapes and CDs.

If you plan to place barcode labels under a clear jacket cover, test your barcode reader to make sure it can read the labels through the jacket cover.

Placing barcodes vertically on the spine can make inventory easier since you wouldn't need to fully remove the books from the shelf to scan them with a barcode reader.

When to Label Items

You can label items either before or after you enter item information.

For an existing collection, it's usually easier to purchase your barcode labels early and place them on the textbooks before the textbook information is entered into the computer. Use two-part labels for this method. As you place the barcode on the textbooks, place the second label on the shelf list card that will be used for entering item data into the computer.

If you are starting a new collection, be sure to purchase bibliographic information for your items in a computer-readable format (MARC or MicroLIF). Either order your books with barcode labels attached, or tell your supplier which numbers to assign (in the MARC/MicroLIF records). Have the numbers assigned in call number order so it's easy for you to locate the item for each barcode label you apply.

Barcode Readers

Your computer requires a special device designed to read a barcode number and enter the corresponding value into the computer. This device is called a *barcode reader* or *scanner*.

There are a number of different types of barcode readers available, including light pen readers, laser readers and portable readers. The device you choose depends on your budget and the school's requirements.

Wand or pen-type readers are the least expensive devices for reading barcodes. CCD wedge or laser scanners are more expensive, but do a better job reading the labels (especially in those hard-to-scan places).

Portable readers give you the freedom of going to your bookshelves to scan labels, rather than having to take the books to the computer to be scanned. Portable readers are especially useful during inventory.

Enter Item Data

The process of taking existing catalog information (usually on card catalogs) and converting the information into a machine-readable format is called *retrospective conversion*. This process takes time and effort. If you have an existing collection, now is a good time to examine your collection and remove unused and outdated items.

There are several methods of converting your data for Textbook Tracker.

- **Retrospective Conversion**—You can hire a retrospective conversion company to create MicroLIF and MARC records for all items in your collection.

Before sending your shelf list to the conversion company, assign barcode numbers to the items in your collection and record the barcode and other local information on the catalog cards. The MARC records you receive and import into Textbook Tracker will be complete, and you will have no additional data to enter.

This process can be time-consuming and expensive, but it is the most complete retrospective conversion method available.

- COMPanion offers **SmartMARC**, a software program that can access hundreds of Z39.50 collections over an internet connection. **SmartMARC** can also be purchased with **Brodart's Precision One** CD-ROM database of MARC records. You input minimal information (i.e. title, author, ISBN and/or LCCN) and then SmartMARC searches for MARC records matching that information.

Once the process is complete, you can add local information such as call number (tag 852_h), barcode number (tag 852_p), price (tag 852_9), special funds (tag 852_1), and volume (tag 092_v) to your MARC records.

This process can save several hours of retrospective conversion. If you plan to do your own retrospective conversion, this is the best alternative.

- **Import item records into Textbook Tracker from another source**—You can enter information using any database program that can create a TEXT file in a tab-delimited format.
- **Enter the information directly into Textbook Tracker**—This direct approach is more time-consuming, but is also cost-effective.

Many book vendors offer MARC/MicroLIF records on disk or CD-ROM for the items they sell. Conveniently, Textbook Tracker can read MARC or MicroLIF records directly, saving you the time and energy of typing item information directly into the computer. If you are automating a new collection, ask for these records when you order items.

Enter Patron Data

In the same way that you must enter item information into Textbook Tracker, you must also enter information about the patrons who use your school. Patron information can be entered one patron at a time from the **Patrons** window or imported from another source.

Imported patron data can come from any source that provides a *tab-delimited* file format. In many cases, patron data is available in machine-readable format from a school's office or district office. Check with the school or district office to find out how patron data is stored.

Set Your Preferences

There will always be rules that govern how patrons use textbooks, how items are managed and how the school operates. Textbook Tracker uses system preferences to establish and apply these rules.

Schools, for example, can set preferences that allow teachers to check items out for a longer period of time than students. The check out period for teacher's edition reference books can be set for one semester, while short term literary works can be set for two weeks.

Textbook Tracker collects statistics on groups of patrons, such as the types of items they borrow and when they return these items. These statistics are generally used to determine usage patterns for the school to help schedule staff and make management decisions.

For each group of patrons and items for which you collect usage statistics, you should assign a separate policy. For example, if each classroom has its own policy, the statistics generated are more useful than if you have only one policy for all students.

See the related preference chapters for information about how to apply and set rules for your school.

Develop a Machine Maintenance Strategy

Although computers today are very useful tools, they can experience damage through excessive use, power fluctuations, crashes, and incorrect operations. To discover and postpone such damage, you should run maintenance utilities such as **Scandisk** or **Disk Defragment** on Windows and **Norton Disk Doctor** on Macintosh. Textbook Tracker should *not* be running during these maintenance operations.

In addition, you should regularly perform a virus scan with products such as **Norton Anti-Virus** or **McAfee Virus-Scan**. Again, Textbook Tracker should *not* be running when performing such virus scans.

Since severe power surges can destroy computer hardware, it is recommended that your Data Station be connected to a UPS (uninterruptible power supply)—also known as a battery back-up. Follow your UPS directions to test its charge and capability.

Develop a Textbook Tracker Maintenance Strategy

Corruption can occur to any database of information via hardware or operating system mishap. It is recommended that you use Textbook Tracker's **Rebuild** utility on a regular basis (once a month is usually sufficient). However, hardware or system failure may necessitate using the utility more often. The **Rebuild** utility disables all services while it is cleaning your data and can take several hours depending on the size of your data and speed of your machine. You should backup or archive prior to running **Rebuild**, just as you should with any other utilities.

Evaluate the Security of Your Data Station

Some schools may not have the funds or hardware necessary to have a dedicated Data Station. If your Data Station is accessible to your employees or patrons, you may want to enable additional security that would prevent unauthorized users from deleting, renaming, or moving your Textbook Tracker application or **Data** folder. Some file security may be built into your operating system; some operating systems have no such security and would require purchasing third party software to provide that file security.

If you don't have file security on your Data Station, you should be extra vigilant in backing-up your **Data** folder.

Installing Textbook Tracker

This chapter describes how to install the Textbook Tracker Data Station and other standard Textbook Tracker clients. The instructions in this chapter assume you have a working knowledge of your computer operating system.

Before you install Textbook Tracker, make sure you have the registration letter that came with your program. This letter contains information required during the installation process.

Hardware and Operating System Requirements

Textbook Tracker can operate with MacOS and Windows based systems. With the exception of minor differences between the controls at the top of windows and minor differences in the operating systems, the program operates identically across both platforms.

Here are the hardware and operating system requirements for Textbook Tracker:

Hardware & System Recommendations

Textbook Tracker Data Stations & Client Workstations

Macintosh Data Stations & Workstations:

Macintosh OS 10.2.8 or higher.
G4 Power PC suggested, G3 Power PC minimum.
512 MB RAM suggested, 256 minimum.
Minimum resolution 1024x768, 256 colors.
or

PC Data Stations & Workstations:

Windows 2000, NT, or XP (with latest updates).
Pentium 4 equivalent, or better.
512 MB RAM suggested, 256 minimum.
Minimum resolution 1024x768, 256 colors.

Textbook Tracker Central Administrator

A fixed TCP/IP address is required
(single user systems do not require networking).

Textbook Tracker WEB

Textbook Tracker WEB requires a Web browser for remote access and TCP/IP active on the Data Station. Use the Data Station's TCP/IP address in your web browser to search your collection.

Textbook Tracker Communication Systems

Textbook Tracker uses TCP/IP *see “Communication Protocols” on page 2* to communicate between the Data Station and its clients.

W A R N I N G !

If you use clients, the Textbook Tracker Data Station must have a fixed address. The address for the Textbook Tracker Data Station cannot be dynamically allocated and must be static.

If you have questions during installation, contact COMPanion's Technical Support services at (800) 347-4942 or (801) 943-7277, by fax at (801) 943-7752, by toll-free fax at (888) 515-3883, or by email via “support@companioncorp.com”

If you have a full time internet connection, you can send email directly to COMPanion from Textbook Tracker if you have a personalized return email address *see “School Information Address” on page 95*. To email Technical Support, choose **Tech Support** under the **Apple Menu** on Macintosh, or under the **Help** menu on Windows.

Installation Summary (*read this first*)

If it doesn't already exist, the Windows installer creates a **Textbook Tracker folder** and installs the Textbook Tracker program inside this folder. You will have to manually create the **Textbook Tracker folder** for Macintosh installers. This folder is where all your valuable data will be saved. Once installed, the Textbook Tracker program (also called the Data Station) will then allow installation of the other clients.

The Data Station is where all data is saved. The Data Station can also perform all the functions of the **Textbook Tracker Workstation** clients.

If you have a single user license, you'll only be using the Data Station and no further clients will be created.

If you only have a few computers, you may want your Data Station to also be your main textbook circulation machine. In this case, you wouldn't typically install another **Textbook Tracker Workstation**. Your Data Station will be used by the administrator for circulation and reporting.

In a middle-sized configuration, you may have a machine in the "back room" for infrequent administrator use only. Install the Data Station on this machine and use the **Textbook Tracker Workstation** on other machines.

If you are planning to have a large number of clients, you'll want to install your Data Station on a dedicated machine (i.e. the machine will only be running the Data Station and will not typically be used by an operator). In this configuration, you'll be running **Textbook Tracker Workstation** on other machines.

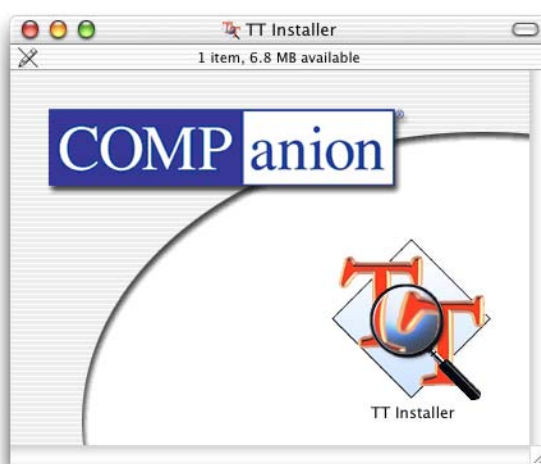
The following are the general steps required to install Textbook Tracker. More detailed instructions are included in the remaining sections of this chapter.

- Step 1. On the machine you are going to use for your Data Station, insert the Textbook Tracker CD-ROM and double-click on the **Textbook Tracker folder**. The **Mac/Win Installers** are located inside this folder. You can also visit COMPanion's Web site (www.textbooktracker.com) and download the latest **Textbook Tracker Installer**.
- Step 2. Once Textbook Tracker is installed, double-click on the **Textbook Tracker** program icon. Enter your registration information. If your system doesn't have the necessary resources to allow client installation, Textbook Tracker will attempt to download them from COMPanion's update server. In this case, installations may not be possible until the next time you launch Textbook Tracker.
- Step 3. To install Textbook Tracker clients over the web, you'll need to open an internet browser on the machine you wish to install the client. In the address bar of the browser window, type in the IP address of the main **Textbook Tracker Data Station** followed by `/install`. Follow the instructions that appear on the browser page and you'll be able to install your clients. For more information on installing clients from the web, see "Installing Textbook Tracker Clients" on page 27.
- Step 4. If you've licensed **Textbook Tracker WEB**, your activation code turns it on—all you need to do is set **Textbook Tracker WEB Preferences**.

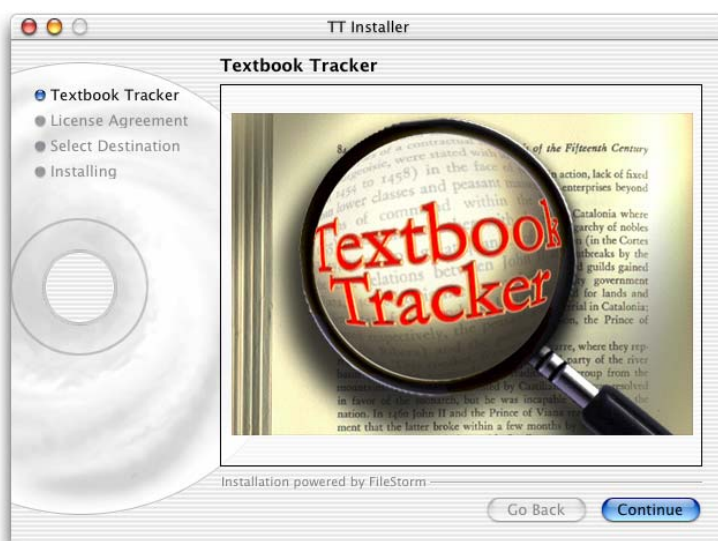
Installing Textbook Tracker for Macintosh OSX

If you are installing Textbook Tracker on a Macintosh OSX machine for the very first time, please use these easy-to-follow steps.

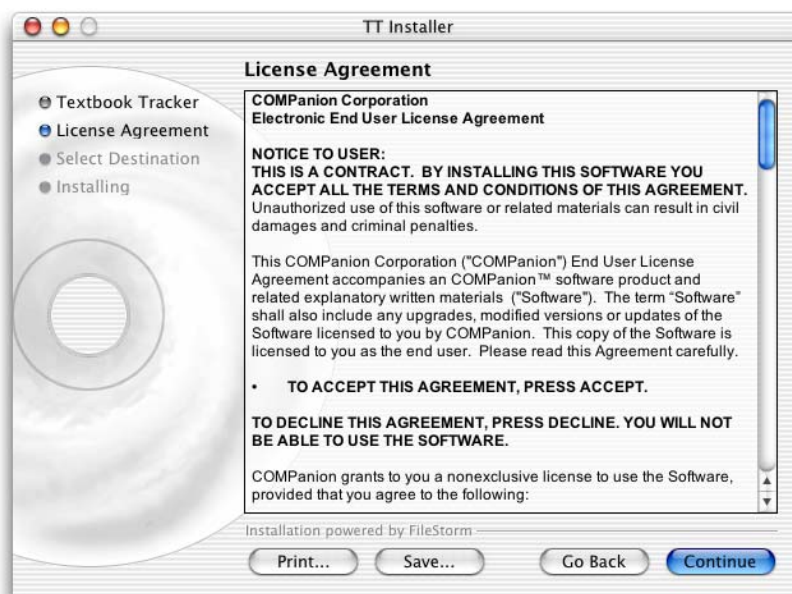
- Step 1. Insert the COMPanion CD and double-click on the **Textbook Tracker v3** folder. The installers for your operating system will be located inside this folder. You can also visit COMPanion's Web Site and download the latest Textbook Tracker installer (www.textbooktracker.com). Remember, the machine that you install Textbook Tracker on will be used as your Data Station.
- Step 2. Double-click on the file called **TT Installer.dmg**. Doing this will mount the **TT Installer** window. Double-click on the **TT Installer** icon that appears on your desktop. The window below will appear.



- Step 3. Double-click on the **TT Installer** icon located inside this window. When the Textbook Tracker installer splash screen appears, click on **Continue**.



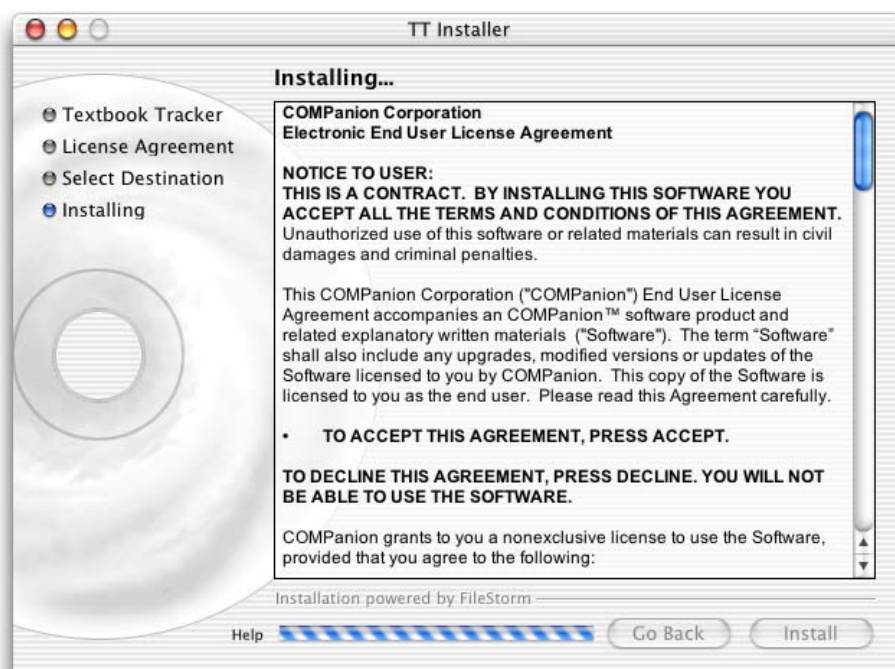
- Step 4. Next, the COMPanion Corporation Electronic End User License Agreement appears. Read the license carefully and once you have finished, click on **Continue**. A **License Agreement** drop-down menu will appear. Click on the **Agree** button if you accept the terms of the license. If you do not accept the terms of the license, click on the **Disagree** button.



- Step 5. When the following window appears, verify that the destination disk specifies where you want Textbook Tracker installed. The default is the hard drive where the currently active System Folder is located. Unless special circumstances apply, this is usually the best location to install Textbook Tracker. Select the icon of the hard drive so that a green arrow appears above it. Click **Install**.



- Step 6. During installation, the **License Agreement** window will reappear, showing the installer's progress.



- Step 7. When the installation is complete, a confirmation window appears. Click **Quit**.



- Step 8. If you installed using a CD-ROM, eject the CD by dragging its icon to the **Trash Can** icon. Store the CD-ROM in a safe place for future use.
- Step 9. Note: The user documentation is included on the Textbook Tracker CD-ROM (in ".pdf" format) but is not installed with the application. You can double-click the documentation icon on the CD-ROM to open it directly or you can copy it to your hard drive and open it there.

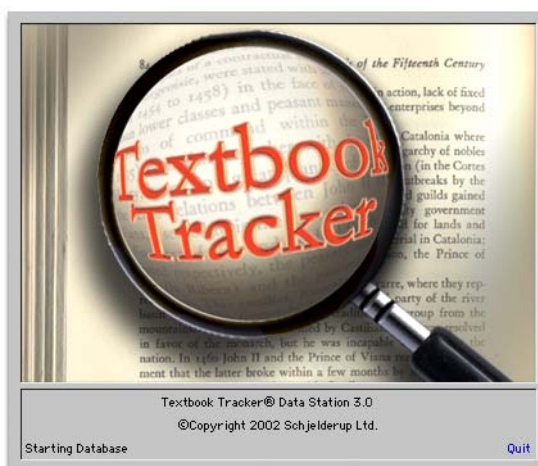
If you don't have **Adobe's Acrobat Reader** installed on your machine, an installer is included in the **Utilities** folder of the COMPAnion CD or from Adobe's web site:
"http://www.adobe.com/products/acrobat/readstep.html"

- Step 10. Locate the **Textbook Tracker folder** newly installed to your hard drive. If it pleases you, you may now move the **Textbook Tracker folder** to an alternate location on your hard drive. Inside the folder, double-click the **Textbook Tracker** icon to start the program.

W A R N I N G !

If you have PPP installed, but not running, the Textbook Tracker Data Station may try to connect through PPP. If the connection window appears, click **Stop** to keep the Data Station from connecting through PPP.

- Step 11. When you start Textbook Tracker, the following window appears. If you have not yet registered Textbook Tracker, a registration window appears (described in Step 12). Otherwise, the **Circulation** window appears.



- Step 12. The first time you start the Data Station, the following registration window appears. Enter your institution/school **Name**, **Product Codes**, **Serial Number** and **Validation Code** from your registration letter and click **OK**.

Language English

Please enter your registration information in the spaces provided.
This information is printed on the registration letter you received with your product.

Press the TAB key to move between fields.

Registered To

Product Codes

Serial Number

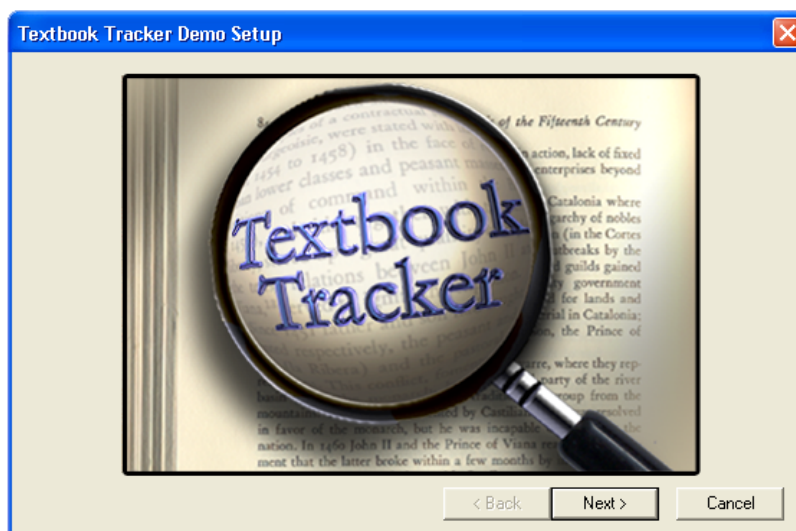
Validation Code

- Step 13. That's it. You've installed your Textbook Tracker Data Station. If you've purchased a single user license, you're finished installing. If you've licensed additional clients, see "Installing Textbook Tracker Clients" on page 27.

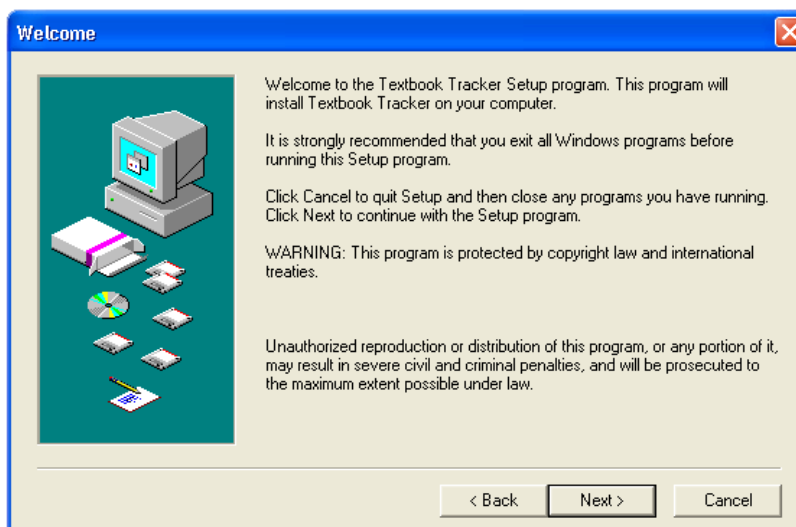
Installing Textbook Tracker for Windows

Use the following instructions to install **Textbook Tracker** or **Textbook Tracker Central Administrator** for Windows. If you are installing the **Textbook Tracker Central Administrator**, follow these directions using the **Central Administrator Installer.exe** instead.

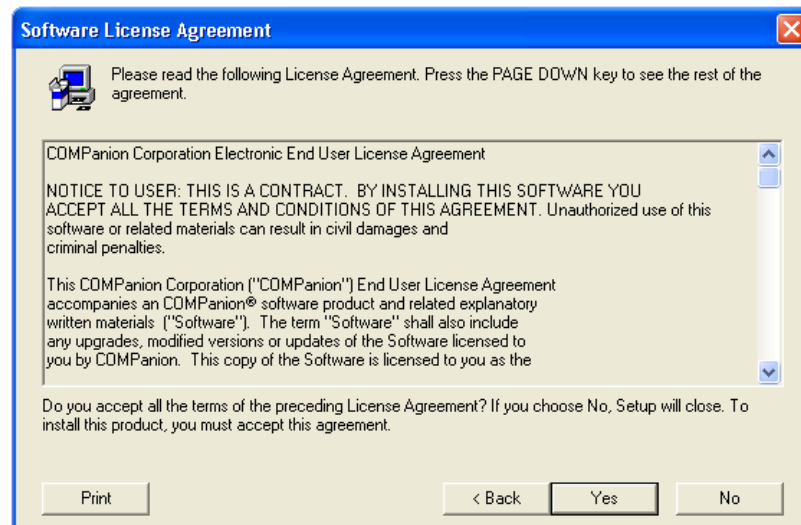
- Step 1. On the machine you are going to use for your Data Station, insert the COMPanion CD-ROM, locate it using the **My Computer** icon on your desktop or from your **Start Menu**. Double-click the CD icon and then double-click on the **Textbook Tracker** folder. The installer (**Textbook Tracker Installer.exe**) is located inside this folder. You may also go to COMPanion's Web site (www.textbooktracker.com) and download the latest Textbook Tracker Installer.
- Step 2. Double-click the **Textbook Tracker Installer.exe** icon. When the Textbook Tracker Installer splash screen appears, click **Next** to continue.



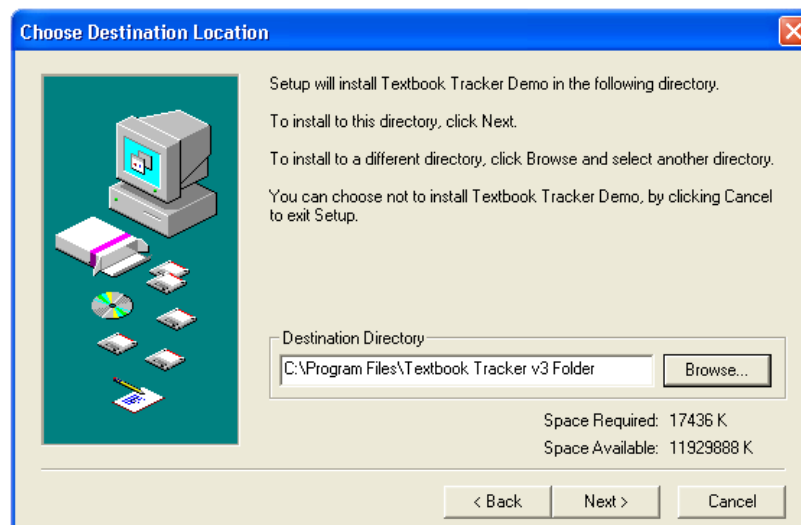
- Step 3. On the "Welcome" window, click **Next** to continue.



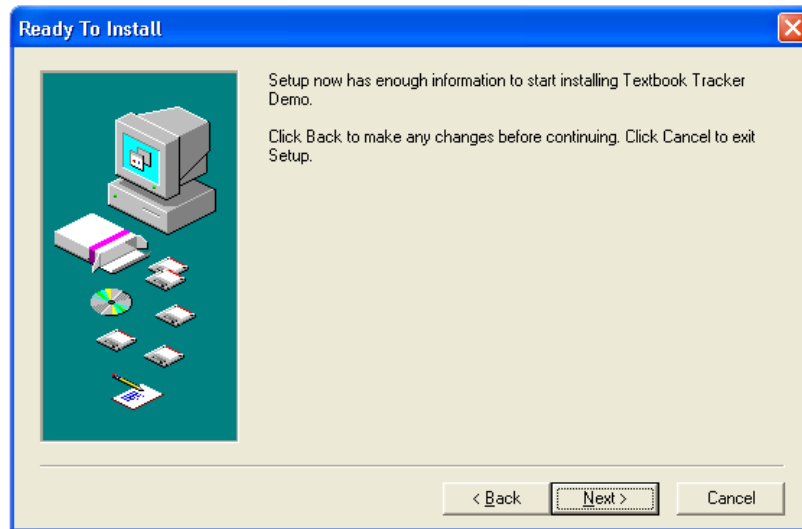
- Step 4. The COMPanion Corporation Electronic End User License Agreement appears. Read the license carefully and click the **Yes** button if you accept the terms of the license. If you do not accept the terms of the license, click the **No** button.



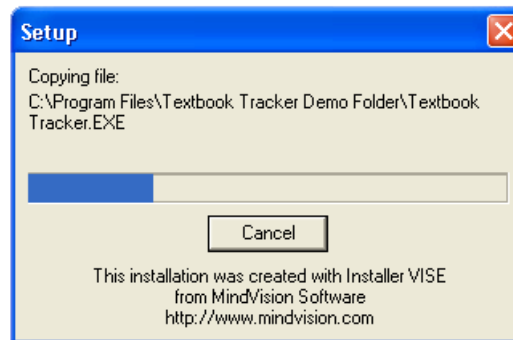
- Step 5. Verify that the **Destination Directory** specifies the location where you want Textbook Tracker installed. The default is the **Program Files** directory. This is typically the best location to install Textbook Tracker. Click **Next**.



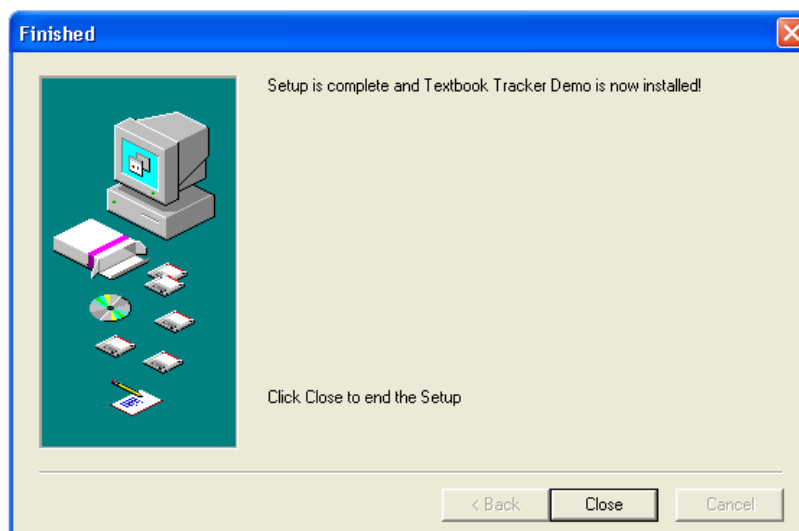
Step 6. On the “Ready to Install” window, click **Next** to continue.



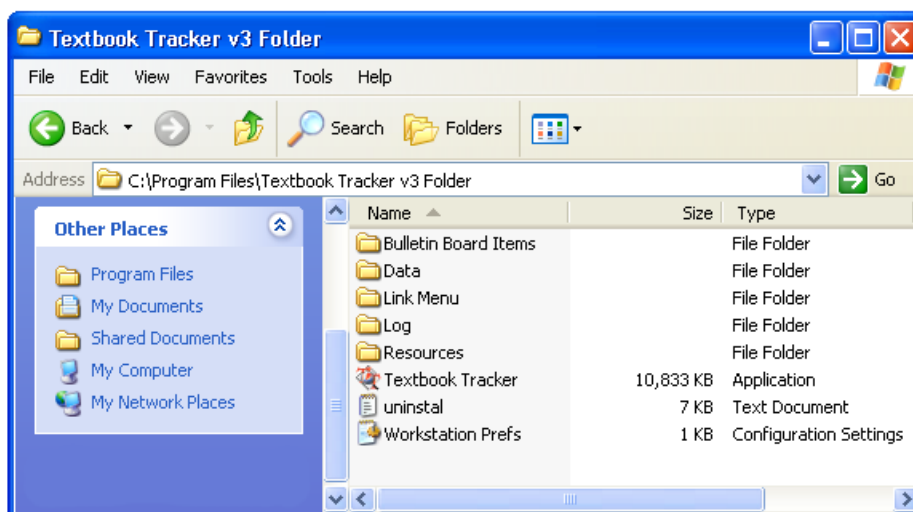
Step 7. During installation, a window similar to the one below shows the installer’s progress. To cancel installation, click the **Cancel** button.



- Step 8. When the installation is complete, a confirmation window appears. Click **Close**.



- Step 9. Eject the CD-ROM and store it in a safe place for future use.
- Step 10. A **Textbook Tracker** folder is now installed. Below is an example of the folder that appears when you install a site license.



- Step 11. Note: The Textbook Tracker's User Manual is also included on the Textbook Tracker CD-ROM but is not installed with the application. You can double-click the documentation icon on the CD-ROM to open it directly or you can copy it to your hard drive and open it there. If the document is copied into the **Link Menu** folder, you can access it from within Textbook Tracker.

If you don't have **Adobe's Acrobat Reader** installed on your machine, an installer is included within the **Utilities** folder of the COMPANION CD or from Adobe's web site:

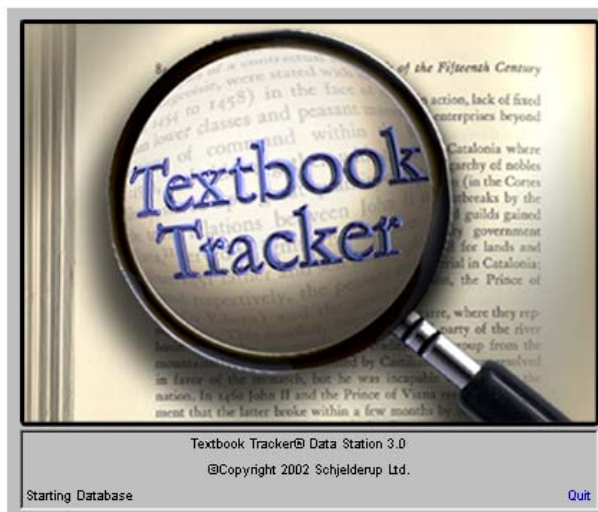
"<http://www.adobe.com/products/acrobat/readstep.html>"

Step 12. Double-click the **Textbook Tracker** icon to start the program.

W A R N I N G !

If you have PPP installed, but not running, the Textbook Tracker Data Station may try to connect through PPP. If the connection window appears, click **Stop** to keep the Data Station from connecting through PPP.

Step 13. When you start Textbook Tracker, the following Startup window appears. If you have not yet registered Textbook Tracker, a registration window appears (described in Step 14). Otherwise, the **Circulation** window appears.



Step 14. The first time you start the Data Station, the following registration window appears. Enter your **Institution Name**, **Product Codes**, **Serial Number** and **Validation Code** from your registration letter and click **OK**.

Language ENGLISH (US) ▼

Please enter your registration information in the spaces provided.
This information is printed on the registration letter you received with your product.

Press the TAB key to move between fields.

Registered To

Product Codes

Serial Number

Validation Code

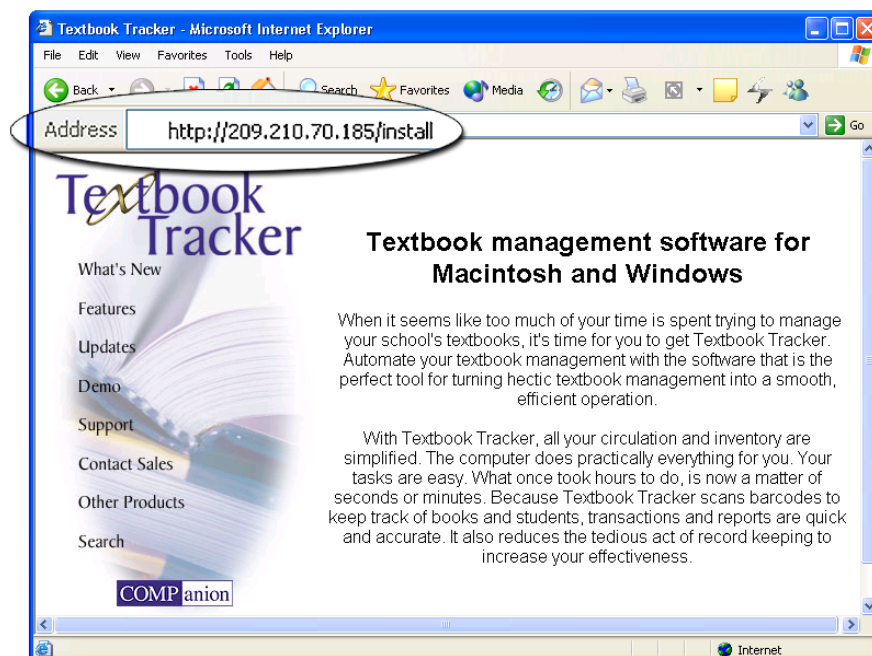
Step 15. That's it! You've installed your Textbook Tracker Data Station. If you've purchased a single user license, you're finished installing. If you've licensed additional clients, continue to the next section.

Installing Textbook Tracker Clients

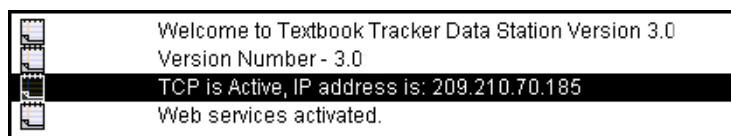
If you have a license that supports multiple users, you can install Textbook Tracker clients on other computers. Textbook Tracker will install over the world wide web.

To install Textbook Tracker over the web, make sure that you have an **Administrator User Name** and **Password** set up in the **Administration Preferences** of your Data Station. You must have the latest **Java** applet installed on your computer. If you don't, the following steps will instruct you on download and installation procedures.

- Step 1. Your main **Textbook Tracker Data Station** must be running in order for you to install clients.
- Step 2. Determine which computer that Textbook Tracker will be installed on. On that machine, open an internet web browser (e.g. an **Internet Explorer** or **Netscape Navigator** web browsing window).
- Step 3. In the browser **Address** field (located in the upper left corner of the window), type the IP address of the **Textbook Tracker Data Station** followed by **"/install"** (for Windows users or those running Macintosh OSX).



If you are not sure what IP address your Data Station uses, it appears on your **Circulation Log** each time Textbook Tracker is launched. It is located approximately three lines down and will display **TCP Is Active, IP address is: [your IP address here]**.

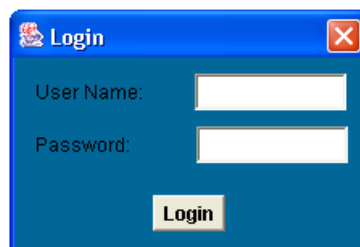


If you have problems locating your IP address, please contact your Network Administrator for further assistance. If your Network Administrator is not available, feel free to contact the COMPAnion Technical Support team.

- Step 4. If you performed the latter step correctly, the **Textbook Tracker Web Installer** page should appear.



- Step 5. If you don't have the correct **Java** applet installed on your computer (in this case, **Java Plug-in 1.3**), you will be required to install it before you can download installer. Your browser should automatically detect whether you have the correct Java version installed. If it does not, follow the links and install instructions the page provides.
- Step 6. If your **Java** plug-in is up-to date or you have just installed it, click the **Grant this session** button on the Java page to begin your **Web Install** session. Textbook Tracker allows you to download a Windows or Macintosh **Workstation**.
- Step 7. A pop-up dialog box will require you to input your **Login User Name** and **Password**. Your user name and password are the same found on the **Administration Preferences** window of your **Textbook Tracker Data Station**.



- Step 8. The Textbook Tracker installer will be downloaded to your machine. After it has finished downloading, a **Textbook Tracker** folder will appear on your operating system desktop with the appropriate installation files inside (this folder can be moved anywhere on your machine, it's only installed on the desktop to make it easier to find).



- Step 9. Double-click on the **Textbook Tracker** installer icon to begin installation.

Client Installer Resources

If you have a permanent internet connection, Textbook Tracker will automatically verify that you have the necessary **Installer Resources** and if any are missing, they will be automatically downloaded from our COMPanion server or created by the Data Station. However, if this process fails, you'll have to manually place these resources into your **Textbook Tracker folder** following the rules specified below. Copies of these files can be found on COMPanion CDs or the COMPanion Web site: "www.textbooktracker.com".

Mac DS.caf—Contains the resources necessary for client installers to create a Macintosh Data Station Client. If you don't have this file, you will not be able to install or update Macintosh based Data Station Clients.

Mac Installer.caf—Contains the resources necessary to create a Macintosh Installer for Macintosh Data Stations. A Macintosh installer can only be created by Macintosh Data Stations. When this installer is used with an ".acf" file, TextbookTracker will install the proper client.

If you need Macintosh installers for Windows Data Stations, you'll need to copy the **Macintosh Installer** program (found on your COMPanion CD or downloaded from the COMPanion Web site) and the appropriate ".acf" files from your Windows Data Station **Installers** folder onto your Macintosh systems in order to install Macintosh based clients.

Win DS.caf—Contains the resources necessary for client installers to create a Windows Data Station Client. If you don't have this file, you will not be able to install or update Windows based Data Station Clients.

Win Installer.caf—Contains the resources necessary to create a Windows Installer. Windows installers can be created by both Windows and Macintosh based Data Stations. When this installer is used with an ".acf" file, Textbook Tracker will install the proper client.

Win Update Helper.caf—Contains the resources necessary for client installers to create a Windows Update Helper. If you don't have this file, you will not be able to install or update Windows based update helpers.

Configuring Textbook Tracker WEB

Textbook Tracker WEB is an optional feature of Textbook Tracker. This feature is activated by information you enter on the Registration window during installation.

- Step 1. Under the **Edit** menu select **Preferences**.
- Step 2. In the **Preferences** window select **Web** in the field.
- Step 3. Use the Web preference window to set preferences for Web access users *see "Web Preferences" on page 121*.
- Step 4. To use Textbook Tracker WEB, launch your web browser (for example, Netscape Navigator or Microsoft Internet Explorer).
- Step 5. In the **Address** bar (URL field) of your browser window, enter the IP address of your Data Station (the IP address is displayed in the Circulation Log when you first launch the Data Station) or DNS name assigned to that IP address by your system administrator. The **Address** bar (URL field) is usually at the top of the browser window. On the Netscape Navigator window, the field is labeled either **Location** or **Go To**.
- Step 6. If you changed the port value when setting the web preferences, type a colon followed by the port number at the end of your address. For example, if the location of your Data Station is (`www.a.lexweb.com`) and you changed the port value to 81, type "`www.a.lexweb.com:81/`" in the **Address** field without the quotation marks.

- N O T E -

If you are not familiar with browsers, domain names, IP addresses and other information referenced above, see your system administrator or other qualified individuals in your organization to help you get set up.

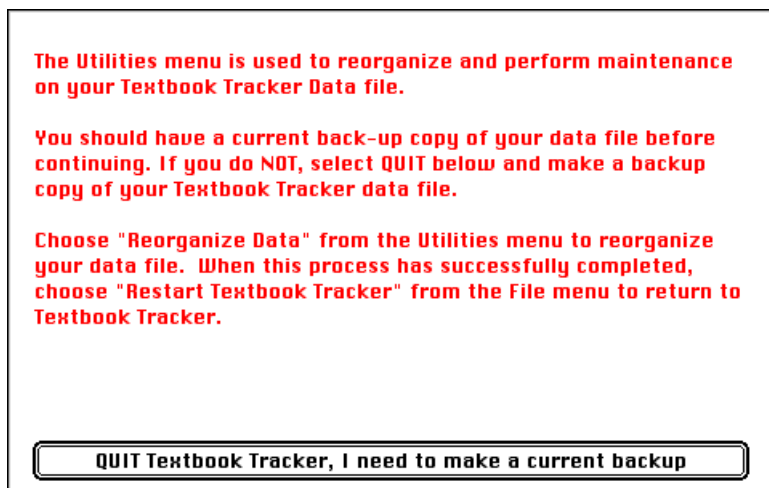
Transferring data from Textbook Tracker v2

Although you may transfer your old data from **v2**, **Textbook Tracker v3** does not support teachers, courses, and classes in the same format as **v2**, and will not export. Instead of teachers, courses, and classes, **Textbook Tracker v3** uses circulation groups, which can be custom configured and used as **Select By** or **Sort By** options for **Circulation Reports**.

Please preview **Textbook Tracker v3** and its new functionality before transferring your precious data from **v2**, especially if you are one who utilizes the teacher, course, and class features that **v2** offers.

If you are upgrading from **Textbook Tracker v2**, follow these simple instructions to transfer your data into **Textbook Tracker v3**¹.

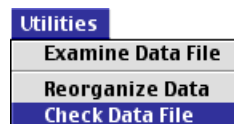
- Step 1. Backup your Textbook Tracker v2 Data.
- Step 2. Confirm you are using Textbook Tracker version 2.50 for the best conversion results. If not, update to the latest version of Textbook Tracker v2 before converting data.
- Step 3. Start Textbook Tracker v2 in Single User mode by holding down the <shift> key when Textbook Tracker is launching.
- Step 4. The warning window you see below will appear.



- Step 5. Along with the warning window above, a new menu will appear along the top of your screen. This menu will contain the **File**, **Edit**, **Utilities**, and **Help** selections. Choose the **Utilities** command drop-down menu.

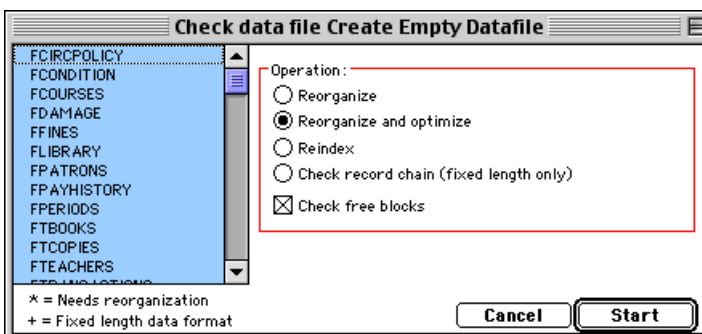


- Step 6. From the **Utilities** drop-down menu, select **Check Data File**.

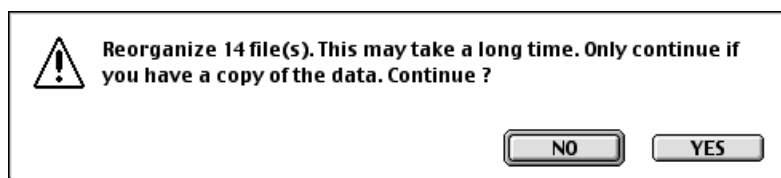


1. COMPanion offers an Textbook Tracker v2 to v3 conversion service. Send your v2 data to COMPanion with a PO for part number 200 D5660 (Mac)/D7660 (Win) and we'll convert your data for a flat \$200. This includes full conversion from v2 to v3—you'll receive back a CD-ROM via Federal Express with an Textbook Tracker v3 folder ready to drag to your desktop. Your data will be imported and your system registered. All you have to do is drag an icon.

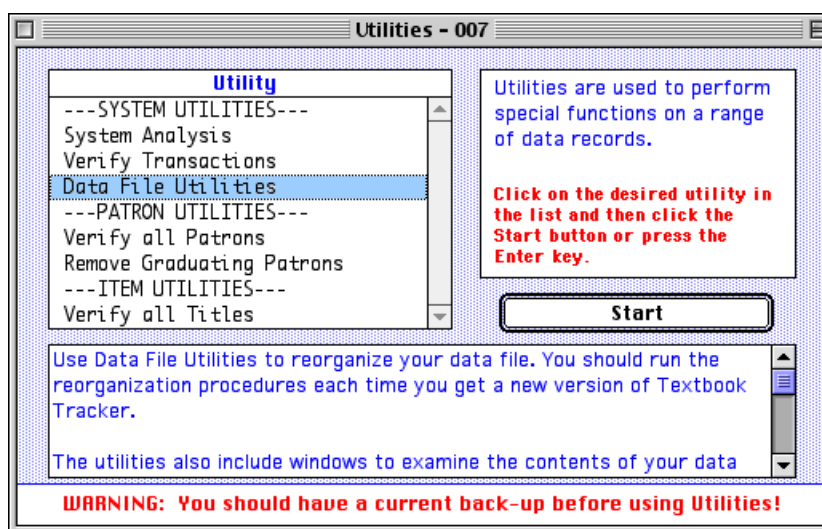
- Step 7. Just to be sure your Textbook Tracker v2 data is in perfect condition, perform the **Reorganize and optimize** procedure on all files. Make sure you have **Check free blocks** checked as well. Hold down <shift> and highlight (select) all the items in the box on the left hand side of the window. When you are ready to perform the utility, click **Start**.



- Step 8. The confirmation dialog should indicate you are reorganizing 14 files. If you didn't select all the files, click **NO** and try again.

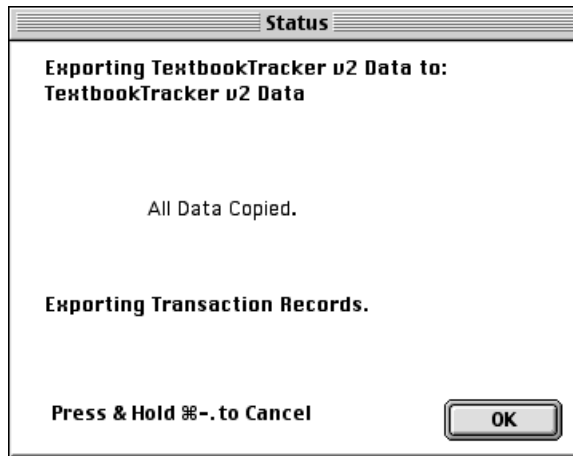


- Step 9. When you've finished reorganizing your data, reset Textbook Tracker v2.
- Step 10. After Textbook Tracker has restarted, select **Utilities** from the **File** menu. Run the **Verify all Patron**, **Verify all Titles**, and the **Verify Transactions** utilities.

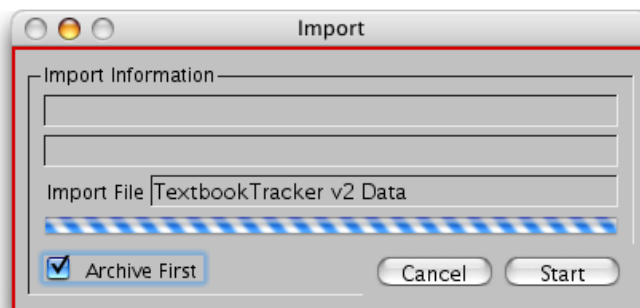


- Step 11. When you have finished performing the utilities indicated above, close the **Utilities** window.
- Step 12. From the Textbook Tracker v2 **Circulation** window, type "EXPORT" into the command line and press <enter> or <return>.

- Step 13. During export, a status window will appear, detailing your progress. When the export is complete, the status window will display “**All Data Copied.**” Click **OK**.



- Step 14. All your v2 data (excluding teachers, courses, and classes) has now been exported and can be found in the same folder as your Textbook Tracker program with the name **Textbook-Tracker v2 Data**.
- Step 15. Copy this file to your Textbook Tracker v3 folder.
- Step 16. Drop this file on top of the **Textbook Tracker v3** Data Station **Circulation** window or program icon. Or, select the **Textbook Tracker v2 Data** file using **Import** from the **File** menu.
- Step 17. The **Import** window is displayed.



- Step 18. Click the **Start** button to begin the data transfer process. You may check the **Archive First** option if you would like to make an archive of your current data before import. For more information about archiving your very valuable data, see “Archive Preferences” on page 67.

- Step 19. As your data is being imported, you'll see the Circulation Log updated. For best results, don't use your computer for other activities until the import is complete.
- Step 20. You should save your **Textbook Tracker v2 Data** and v2 backup file for archive purposes.
- Step 21. Congratulations! When the import is completed, you are ready to use Textbook Tracker v3 to manage your collection.
- Step 22. It is recommended that you review and renew all of your preferences, as there are several new options, calendars, and passwords that do not transfer from **Textbook Tracker v2**.

Textbook Tracker Basics

This chapter describes menus and basic operational rules used in Textbook Tracker.

Textbook Tracker menus follow operating system standards for Macintosh and Windows. For example, the **File** and **Edit** menus in Textbook Tracker are very similar to the **File** and **Edit** menus in other applications. Additional menu items have purposes specifically related to textbook management.

Textbook Tracker looks and operates almost exactly the same on Macintosh and Windows. However, the operating systems *are* different, and there are some minor dissimilarities between environments. For example, on the Macintosh you press the <command> key for menu shortcuts and in Windows you select the <ctrl> key. Windows and Macintosh have different controls for minimizing, closing, and resizing windows. In order to keep the documentation as clear as possible, this manual will generally discuss actions rather than operating system specific commands or controls.

Rather than “click the close box at the upper right of your window,” the manual will read “close the window,” and let the user select the operating system specific commands required to control Textbook Tracker.

This manual contains images from both Windows and Macintosh versions of the Textbook Tracker.

Macintosh vs. Windows command differences

Macintosh Command Key	Windows Command Key	Usage
<command>	<ctrl>	Perform Menu shortcuts.
<option-tab>	<ctrl-tab>	Perform Authority Control.
<option>	<ctrl>	Display Tool Tip.
<option>	<alt>	Used to modify commands.

The following sections describe the basic operational elements found in Textbook Tracker.

Help

About Textbook Tracker
Tech Support
Textbook Tracker Help
Open Release Notes

About/Help Menu

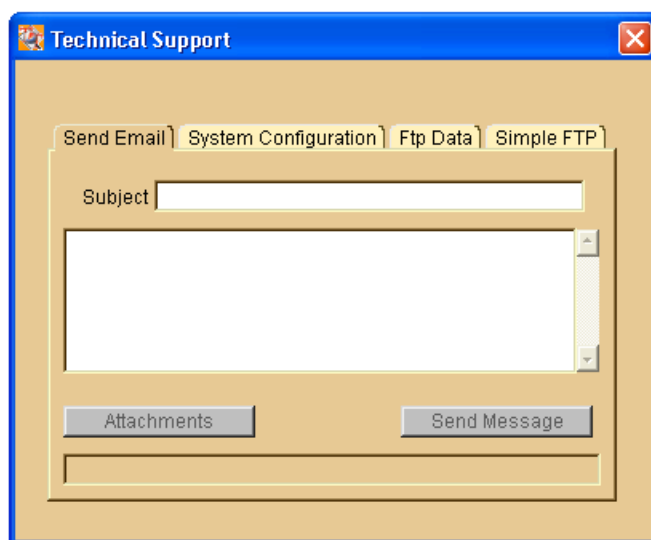
On Macintosh there is an “Apple Menu”(🍏) which contains the **About Textbook Tracker** and **Tech Support** selections. There is also a “Help Menu” which contains help selections. On Windows, all these selections are located under the **Help** menu.

About Textbook Tracker

Shows copyright and version information.

Tech Support

This opens the **Technical Support** window, allowing you to send email to COMPanion if you are connected to the internet—even if you don’t have a personal STMP address configured.



Send Email—If you have an open connection to the internet, you can use the **Send Email** tab to send questions to COMPanion’s Technical Support group. Describe the nature of the problem you need help with or a question you need answered. Click **Send Message** to send the notice directly to: “support@companioncorp.com”

If you haven’t entered an email address in your school information preferences (see “*School Information Address*” on page 95 for more information), you will not be able to send email to Technical Support. However, Textbook Tracker doesn’t check to see if this address is valid, so any address that looks legitimate will be accepted by Textbook Tracker. If you are using this technique to fool Textbook Tracker, don’t forget to explain this in your message, and provide your return contact information—otherwise Technical Support will respond to your fabricated email address and you won’t receive the help you need.

System Configuration—This tab contains information about your system. This information is automatically attached to your email messages so our Technical Support staff has all the basic information possible to help solve your problems and questions.

Textbook Tracker FTP

FTP Data—This tab allows the user to Send or Get Data from the COMPanion FTP site. The **Send** and **Get** options should only be used when Technical Support requests a copy of your data or informs you that your data is available for download.

Send Data—Sends the user's Textbook Tracker data to the COMPanion FTP site for Technical Support to review and (in case of problems) modify.

Get Data—Used specifically to retrieve modified data from COMPanion's FTP site.

Simple FTP—This tab allows the user to connect to COMPanion's FTP site to send and get other non-data files. Select (highlight) an **FTP Host** from the list field, input the **Username** and **Password** that you received from Technical Support and press the **Connect** button.

You will be shown a list of files and folders from which you can download from or upload to. Use the **Get**, **Disconnect**, or **Send** buttons accordingly.

Textbook Tracker Help

If the **Textbook Tracker Help** documents are installed on your system, this selection brings up the "**Help Index.vwp**" document. **Textbook Tracker Help** documents are installed in the **Help** folder inside your **Textbook Tracker** folder.

Open Release Notes

If the Textbook Tracker release notes are available, this selection displays them. If available, this document is in your **Textbook Tracker** folder and is named **Textbook Tracker Release Notes.txt**.

File	
New Document	Ctrl+Shift+N
Open	Ctrl+O
Close Window	Ctrl+W
Close All	Ctrl+Alt+W
Save	Ctrl+S
Save As Text	Ctrl+Alt+S
Save As	
Revert	
Import Utilities	
Page Setup	
Print	Ctrl+P
Log Out	Ctrl+Shift+Q
Restart	Ctrl+Shift+E
Exit Textbook Tracker	Ctrl+Q

File Menu

The Textbook Tracker **File** menu provides the following selections.

New Document—Opens a new VWP document. VWP stands for Virtual Word Processor, Textbook Tracker’s integrated word processor.

Open—Shows the standard operating system window to locate a file. When you select a document in this window, Textbook Tracker opens it. Use this command to open VWP documents, TEXT documents, MARC documents, MicroLIF documents and other files for viewing.

Close Window—Closes the top window.

Close All—Closes all windows except for the **Circulation** window.

Save—Saves the contents of the top window.

Save As Text—Saves a copy of the currently visible word processing document as a TEXT format.

Save As—Allows you to save “.vwp” documents to specific locations on your hard drive.

Revert—Changes made to the current record are discarded and the original record is displayed in the window.

Import—Shows an open dialog for selecting an import file. Import files can also be “dropped” onto the transaction window. The **Import** and **Open** commands are different in that the **Import** command ASSUMES you want to import data if the selected file is a valid import file. The **Open** command ASSUMES you want to view the data file, even if it’s a valid import file (*see “Data Import” on page 317 for more information*).

Utilities—Utilities are used to export data or make global changes on information in the Textbook Tracker data file (*see “Textbook Tracker Utilities” on page 229 for more information*).

Page Setup—Operating system standard function which sets the page up for printing.

Print—Prints the information in the top window. For example, if the **Patron** window is on top, information for the Current Patron is printed when this command is selected. If the **Circulation** window is on top, then the Circulation Log is printed.

Log Out—This command closes the **Circulation** window and disallows anyone without proper authorization to access Textbook Tracker. Instead, a **Textbook Tracker Login** window appears, awaiting a correct **User Name** and **Password**. If a high-level user steps away from the Data Station and doesn’t want to quit or restart the program, the **Log Out** function will provide this option. The **Require User Login** box in **Administration Preferences** must be checked for this option to work.

Restart—Logs out the current users, closes all windows, restarts the Textbook Tracker program, and if security is turned on, brings up the login window. If no security has been activated, Textbook Tracker just restarts.

Quit/Exit Textbook Tracker—Quits the Textbook Tracker program.

Edit	
Undo Cut	Ctrl+Z
Can't Redo	Ctrl+Shift+Z
Cut	Ctrl+X
Copy	Ctrl+C
Paste	Ctrl+V
Clear	
Select All	Ctrl+A
Find	Ctrl+F
Find Again	Ctrl+G
Paste From File	
Preferences	Ctrl+;

Edit Menu

This menu includes standard editing functions. You can cut, copy and paste text, clear a field, select all text, and paste from a file. Information about commands which are specific to Textbook Tracker are included below.

Undo—This command only undoes typing or cut and paste operations in individual fields or in the word processor. It does NOT undo operations from other menus, commands and controls.

Redo—An Undo for the Undo.

Cut, Copy and Paste—You can cut, copy, and paste text from certain fields to others within Textbook Tracker. For example you can cut text from the **Title** field and place it in the **Notes** field. You cannot cut and paste entire school records. If you need to transfer entire records into another application, use the **Export** function to save the records you need in a format compatible with other programs.

Clear—Clears the selected text or selected list elements.

Select All—Selects all the text in the current edit field, current word processor document, or list.

Find—This selection opens the **Find** window. Depending upon what window is on top, **Find** can be used to locate a specific record from your database or text in a word processing file.

Find Again—Finds the next matching record or data in the word processor.

Paste From File—Allows the user to paste information from a file.

Preferences—This selection opens the **Preferences** window. Preferences are used to customize Textbook Tracker for your needs (see “Introduction to Preferences” on page 53 for more information).

Show

Patrons	Ctrl+L
Items	Ctrl+I
Circulation	Ctrl+T

Show Menu

Use this menu to move between various Textbook Tracker modules such as Patrons, Items, and Circulation. For example, if you need to manage patron information, select **Patrons** from the **Show** menu. To check out items or perform other transactions, select **Circulation**.

Each option in the **Show** menu has a corresponding chapter in this manual. Refer to the specific chapter for more detailed information about the function.

Patrons—shows the **Patron** window. Select this command to examine, add, modify, or remove patron records.

Items—Shows the **Item** window. Select this command to examine, add, modify, or remove items, titles, or copy records from your school.

Circulation—Shows the **Circulation** window. Select this command if you want to check out, check in, place holds, charge fines, place reservations, accept payments, perform inventory and other circulation functions. The **Circulation** window is always open while Textbook Tracker is running; use this menu command to bring it to the forefront.

Reports

Special Reports

Patron Reports

Textbook Titles

Textbook Copies

Circulation Reports

Usage Statistics

Reports Menu

Use the **Reports** menu to select a report category such as Patron Reports, Textbook Reports, or Circulation Reports. To read more about reports see:

“Introduction to Reports” on page 205

“Special Reports” on page 211

“Patron Reports” on page 223

“Textbook Titles Reports” on page 237

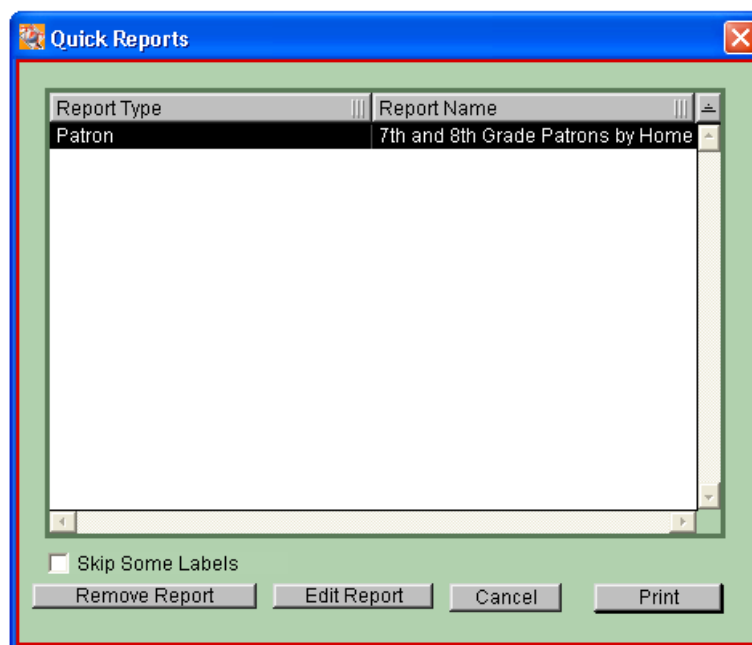
“Textbook Copies Reports” on page 243

“Circulation Reports” on page 251

“Usage Statistics” on page 265

When you make a selection from this list, the **Report** window appears with a list of reports available in that category.

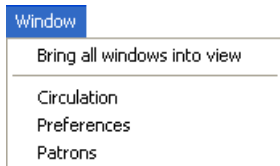
To access a list of frequently used reports that do not require you to choose any sort or search values, choose **Quick Reports** from the **Reports** menu. The following window appears.



You can select a report and click on **Print** or double-click to generate the report without further data entry.

- N O T E -

You create the reports that are shown in the Quick Reports window. To create a quick report, choose a report (with options) and then click on the **Create Quick Report** button (see “Quick Reports” on page 209 for more information).



Window Menu

As you open new windows in Textbook Tracker, the **Window** menu will display a list of all currently active windows. The example **Window** menu to the left shows that the **Circulation** window is open and active and the **Preferences** and **Patrons** windows are also open.

To choose a window, select it from this menu. The window you select gets focus and becomes the active window.

When you close a window, it is removed from this menu.

Patrons	
First	Ctrl+Shift+[
Previous	Ctrl+[
Next	Ctrl+]
Last	Ctrl+Shift+]
Browse	Ctrl+B
Find	Ctrl+F
Lock Record	Ctrl+U
New Patron	Ctrl+N
Duplicate	Ctrl+D
Remove Patron	Ctrl+R
Paste Patron Picture	Ctrl+Y
Remove Patron Picture	
Show Details	Ctrl+Shift+D
Show History	

Management Command Menus

When each management window (Patrons, Items, Groups, Circulation) is selected, a separate command menu will appear (be available). The commands within these drop-down menus are not always the same for every function. The following section describes how to use the standard functions in most of the management command menus.

The following section describes how to use the **Patrons** command menu, which is active when the **Patron** window is in the forefront. Use these menus to browse, find, add, and remove records. The other management windows have similar controls.

The **First**, **Previous**, **Next**, and **Last** commands display the indicated record based on the order of the records shown in the **Browse By** field. The arrows to the left of the **Browse By** field perform the same action as the **Next** and **Previous** commands.¹

First—Shows the first record according to the current **Browse By** order.

Previous—Shows the previous record according to the **Browse By** order.

Next—Shows the next record according to the **Browse By** order.

Last—Shows the last record according to the **Browse By** order.

1. Shortcut—Hold the <shift> key down when you click on the left arrow to select the **First** record and <shift>-click on the right arrow to get the **Last** record.

Edit

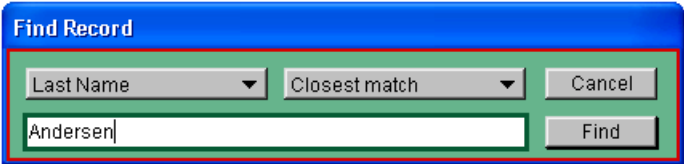
Undo Cut	Ctrl+Z
Can't Redo	Ctrl+Shift+Z
Cut	Ctrl+X
Copy	Ctrl+C
Paste	Ctrl+V
Clear	
Select All	Ctrl+A
Find	Ctrl+F
Find Again	Ctrl+G
Paste From File	
Preferences	Ctrl+;

Finding Records

The **Find** command can be used to locate a specific record. Textbook Tracker searches for a record that matches information you enter and shows the complete record in the main window.

For example, if you search for a patron with the name **Andersen**, Textbook Tracker finds the first patron record with that name and shows it as the Current Patron in the **Patrons** window. The **Browse By** selection is automatically set to match your **Find** field.

When you select the **Find** command, the following window appears.



Click the arrows at the end of the **Last Name** field to choose to search other fields¹. Click the arrows at the end of fields to choose to search for an item that starts with the information you enter or exactly matches the information you enter. If no record can be located, Textbook Tracker will sound an audio alert and the current record will not be changed.

Click the **Find** button to locate the record, or click the **Cancel** button or close window box to cancel the **Find** operation.

1. Note—Because the terms shown in this menu can be customized by the user, your choices may have different names.

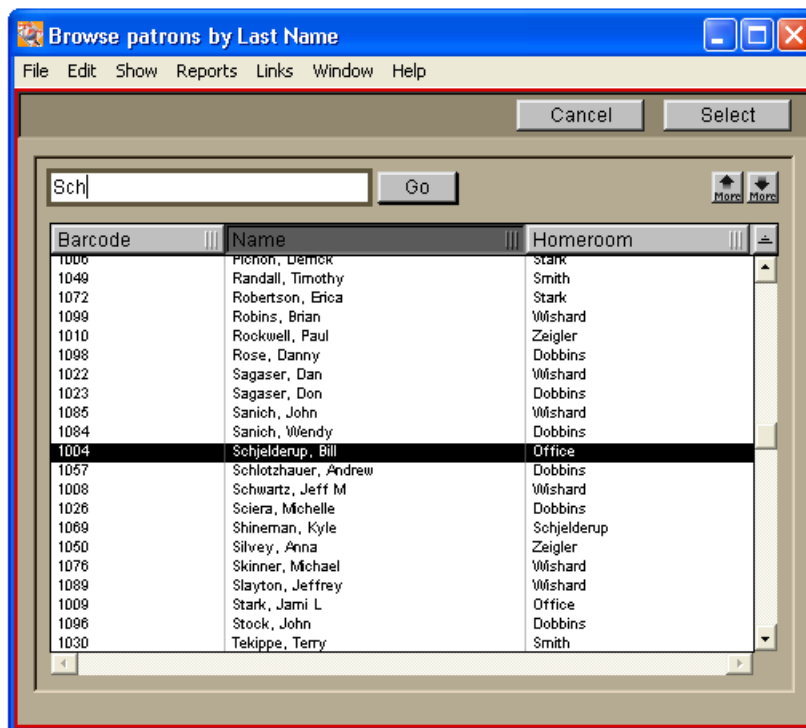
Patrons		
First		Ctrl+Shift+[
Previous		Ctrl+[
Next		Ctrl+]
Last		Ctrl+Shift+]
Browse		Ctrl+B
Find		Ctrl+F
Lock Record		Ctrl+U
New Patron		Ctrl+N
Duplicate		Ctrl+D
Remove Patron		Ctrl+R
Paste Patron Picture		Ctrl+Y
Remove Patron Picture		
Show Details		Ctrl+Shift+D
Show History		

Browsing Records

An alternative to the **Find** command is the **Browse** command located under (**Show, Patrons, Patron (command menu), Browse**) for locating the records you want to view. The initial window shows records before and after the currently selected record.

Use the up and down arrow keys on your keyboard to move through the list. To display more items, click on the **More** buttons on the top right of the window.

To make another search, enter text in the empty field to the left of **Go** and then click the **Go** button. For example, if you enter "Sch" for a patron name, a list of names that begin with "Sch" will be displayed. You can then select a specific record from the list.



To select an item from the list, either double-click on the item or click the item once then click on **Select**—or press <enter> | <return> on your keyboard.

When you select a record in the **Browse** window, that record is displayed. To exit the **Browse** window without changing the current record, click the close box or **Cancel**.

The **Browse** window shows entries in the order specified by the **Browse By** setting of the initial record management window.

In this example, records displayed in the window are sorted by **Name**, the value displayed in the **Browse By** field at the top of the **Patron** window.

Changing the **Browse By** field also changes the index drop-down menu on the **Find** menu.

Items	
First	Ctrl+Shift+[
Previous	Ctrl+[
Next	Ctrl+]
Last	Ctrl+Shift+]
Browse	Ctrl+B
First Copy	Ctrl+Alt+Shift+[
Previous Copy	Ctrl+Alt+[
Next Copy	Ctrl+Alt+]
Last Copy	Ctrl+Alt+Shift+]
Browse Copies	Ctrl+Alt+B
Find	Ctrl+F
Lock Record	Ctrl+U
New Title	Ctrl+N
Remove Title	Ctrl+R
Add Copy	Ctrl+Y
Remove Copy	
Duplicate	Ctrl+D
Duplicate Copy	
Transfer Copies From	
Show Details	Ctrl+Shift+D
Show Title Editor	Ctrl+Shift+T
Show Author Editor	Ctrl+Shift+A

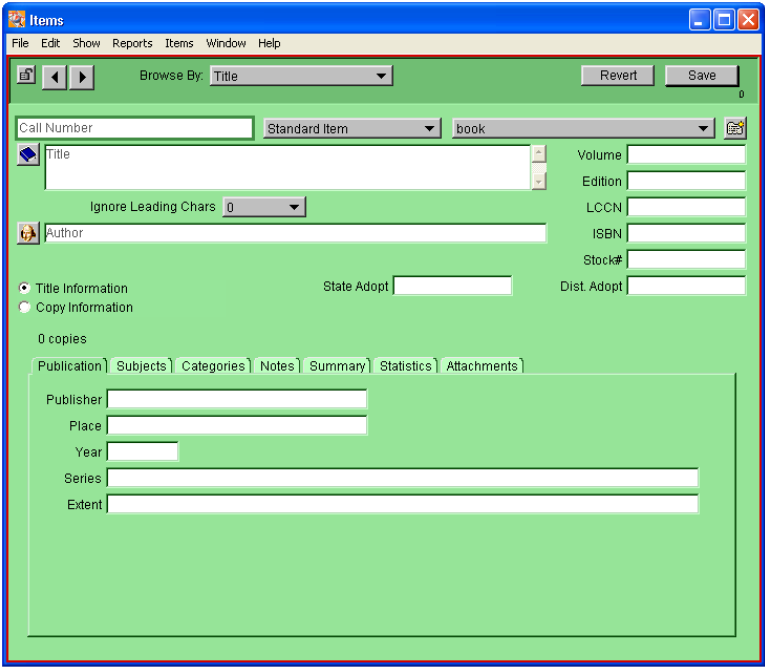
Changing Records

Before records can be changed, they must be unlocked. Use the **Unlock Record** command in the control menu or click the lock icon to **Unlock** the current record. **Display Setting** preferences can be set to automatically lock or unlock records for modification (see “*Display Preferences*” on page 83 for more information).

Adding Records

Use the **New Title** command from the **Items** menu to add records to your Textbook Tracker database.

When you select this command, a window pops up—prompting you for information. The following example shows the **New Title** display window.



Type over the grayed-out data entry fields in the window (such as **Title**, **Author**, and so forth in the example above) to add a new record.

To move to the next data entry field (drop-down menu or button), press the <tab> key. To move to the previous data entry field (drop-down menu or button), press <shift-tab>. To edit a data entry field, click in the corresponding field. To change a selection in a drop-down menu using only your keyboard, use the <up> and <down> arrow keys when the drop-down is outlined. When a button is outlined and you wish to perform that action, press the <spacebar>.

When you enter any type of specially formatted information such as dates, phone numbers, and social security numbers, you can enter values in a wide range of formats. For example, you can enter the date December 1, 2004 as: “Dec 1, 2004” or “12/1/04”¹ or “12.1.04” or “12 1 04”. If the year is 2004, you can just enter “12/1”. If the current month is December, you can just enter “1”.

1. When you enter a two digit date, values between 0-30 are assumed to be 2000-2030 and values between 31-99 are assumed to be 2031-2099.

When you have entered all the information for this record, click the **Save** button in the upper right-hand of the window. The record has now been saved. If you want to disregard the information you have entered, click the **Revert** button and the previous record information will be restored.

If you try to select another record or leave the window without saving your changes, the following warning message will be appear:



If you click on **Cancel**, you'll return to the previous window with your newly entered information intact. Click the **Discard** button if you want to disregard the data you just entered. Otherwise, click the **Save** button to save your input.

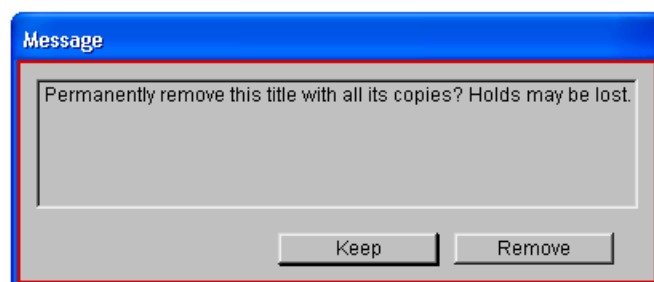
Duplicating Records

Use this command to copy information from the current record into a new record. You can then modify the record to create a new one. This will save time when adding records that are similar.

Removing Records

Use this command to permanently delete a selected record.

In most cases, a warning window will ask you to verify that you want the record permanently removed.



Click the **Remove** button to permanently remove the record or the **Keep** button to ignore the request to remove the record.

W A R N I N G !
You cannot undo a remove!

When a record is removed, all associated information is also removed. For example, removing a patron also removes any holds or reservations the patron has pending.

The Textbook Tracker Word Processor

Integrated into Textbook Tracker is a powerful word processor. These days, everyone owns at least *one* word processor. So why is the Textbook Tracker approach to an integrated Word Processor so much better? Here are a few reasons...

- The word processor is used throughout Textbook Tracker to display reports and other informational windows. In most programs, this information is displayed in a standard window.
- Allows users to save reports for future reference. Word processor documents can be viewed, saved and printed.
- Allows users to customize reports. You can pick the font, eliminate unwanted information, enter notes, change the font size, update the heading, and much more. You can have your reports done YOUR WAY.
- Quickly create your OWN reports by cutting and pasting information from Textbook Tracker reports.
- Send reports to others via email attachments—since you can save reports, you can electronically send them.
- The Textbook Tracker word processor can open HUGE files that many word processors can't. Thus, you can view large import files before you import them—even 100MB files!
- Since all reports are created as word processor documents, you can preview each report before you print them. Other word processors might allow you to view reports on-screen, but usually only one page at a time, or a very limited page range. With Textbook Tracker's Virtual Word Processor, you can see it all.
- The Textbook Tracker Virtual Word Processor can provide your institution with a standard cross platform tool for creating and exchanging reports. All documents are supported across Macintosh and Windows systems.
- Textbook Tracker can prepare several reports for printing simultaneously. Most systems won't let you print more than one report at the same time—after all, in what order would the pages come out of the printer? With the Textbook Tracker approach, all reports are prepared in the Virtual Word Processor and can be printed at a later time.

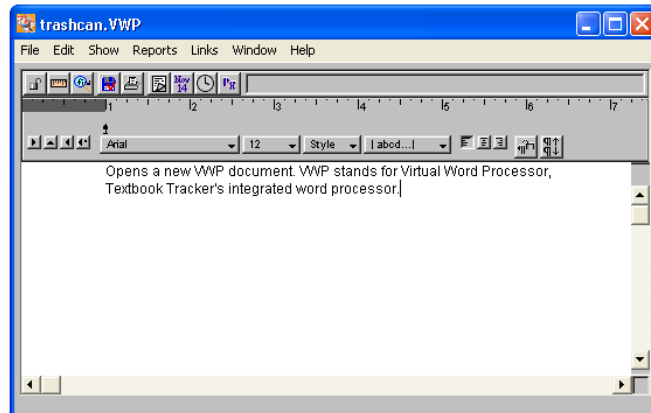
The Textbook Tracker word processor is named VWP (**V**irtual **W**ord **P**rocessor) since it uses a highly efficient virtual memory scheme, which allows it to support very large documents in a limited amount of memory.

VWP is available integrated within Textbook Tracker, and as a stand-alone product. VWP is available for both Macintosh and Windows-based operating systems. VWP documents are fully cross platform—a document created on one can be viewed on the other.

VWP has the ability to support pictures files created in drawing or paint programs—just paste them into your document.

Special support is specifically provided for code 39 barcodes so that they are printed at the highest possible resolution your printer is capable of handling. Therefore, with barcodes, what you see isn't exactly what you'll get. When printed, barcodes are printed at the highest possibly quality setting.

To create a new word processor document, select **New Document** from the **File** menu. You'll see a window similar to this one.



As you move your cursor over window controls, tool tips are displayed on the top right of the window. Since most people are familiar with word processors, Virtual Word Processor basic operations will not be documented. However, here is an overview of some of the special features available within the Virtual Word Processor.

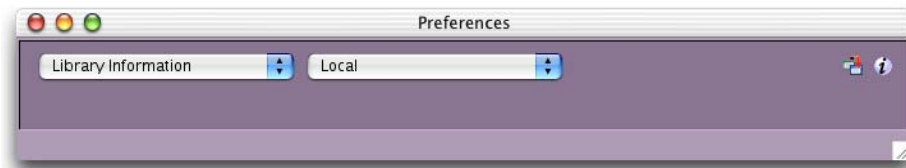
- Use the icon above the vertical scroll bars to hide/show the word processor controls.
- Click on the ruler icon to show or hide the graphical ruler.
- Click on the lock icon to lock or unlock the document. Locked documents can not be modified.
- Use the other icon controls to find text, save a document, print your document, set a page break, insert the date, insert the time, insert the current page number.
- Indents, margins, left, right, center and decimal tabs are supported.
- **Left**, **Center** and **Right** aligned paragraphs are supported.
- **Font**, **Size** and **Style** controls are available for any character. Style includes colored text.
- Paragraph "keep together" controls are supported.
- Supports headers and footers. To create a header or footer, drag the controls above and below the vertical scroll bars to create a header or footer area.
- Supports restricted column viewing for tabbed columns. When this is turned on, text that might overflow into another column is visibly truncated so that printed columns look nice. Since the data is still in the report, adjusting column width will expose more data. This is a very useful feature for viewing tabular-type reports.
- Supports URL links; <command>-click on a URL in VWP to open the link in your selected browser.
- Supports internal hot links for URL, VWP links and multi-media display. This capability is only available (right now) for documents created by Textbook Tracker. It's mentioned here because it's a valuable capability of Virtual Word Processing that makes using Textbook Tracker much more enjoyable and powerful.

Introduction to Preferences

Preferences are used to customize Textbook Tracker to meet your institution's specific needs. You can customize security settings, colors, sounds, default values for barcodes, and restrictions for **Textbook Tracker Client Workstations**.

With **Preferences** you can also configure your institution's policies (i.e. the rules that dictate how your institution is used). You can set policies that determine how each item in your collection circulates and how certain patron types are allowed to use these items. You can also configure policies that determine how long an item can be checked out to a patron, how long a hold request can be kept, and so forth.

Edit		
Can't Undo	Ctrl+Z	
Can't Redo	Ctrl+Shift+Z	
Cut	Ctrl+X	
Copy	Ctrl+C	
Paste	Ctrl+V	
Clear		
Select All	Ctrl+A	
Speak Text		
Find	Ctrl+F	
Find Again	Ctrl+G	
Paste From File		
Preferences	Ctrl+;	



The top portion of every preference window consists of two drop-down menus and two standard Textbook Tracker buttons. The drop-down menu on the left is the **Preference** selection menu. Use this menu to shuffle through Textbook Tracker's various preference windows. For more information on an individual Textbook Tracker preference window, please review its corresponding chapter in this User's Manual.

The drop-down menu to the right is the **Local/Default Local/Global** menu. For more information on **Global/Local** preferences, please see page 55.

On the far top-right of every preference window are two Textbook Tracker standard buttons. The first button is a preference specific **Restore Defaults** button. This button will restore Textbook Tracker preference windows back to their original, factory settings; reinstating any information or fields that were supplied via registration codes.

The second button is the Textbook Tracker standard **Help** button. For more information on how to use this button, please review page 40 of the **Textbook Tracker Basics** chapter.

The preference chapters that follow this one will describe, in detail, each preference window and then demonstrate how to use them.

To set up or change Textbook Tracker preferences, you must first access the **Preferences** window from the **Edit** menu. You may also use the <ctrl+;> (Windows) or <cmd+;> (Macintosh) shortcut command. Once the **Preferences** window appears, click on the drop-down menu in the upper-left corner of the window to view your available preferences.

✓ Administration
Archive
Calendars
Circulation
Display Settings
Item Management
School Information
Patron Management
Policies
SIF
Sounds
Web
Word Processor

Textbook Tracker Preferences

The following is a summary of all available Textbook Tracker preferences. The remaining preference chapters will describe each preference window in detail.

Please keep in mind that certain preferences will only become active after you have licensed them (e.g. **Web**, **SIF**). If you have not licensed a particular feature, the corresponding preference will not appear in the **Preference** drop-down menu (shown to the left).

Administration—Set up users and access levels; activate passwords. Configure updates and enable services (see “Administration Preferences” on page 57).

Archive—Textbook Tracker will automatically create a copy of your data at pre-determined times throughout the week (see “Archive Preferences” on page 67).

Calendars—Set up calendars; these are used to schedule open days, closed days, period due dates and notes (see “Calendar Preferences” on page 69).

Circulation—Configure information about temporary barcodes and determine how often the transaction log is saved. Create text for inclusion in the body of patron notices, set slip printers, or view statistics (see “Circulation Preferences” on page 73).

Display Settings—Choose color schemes for Textbook Tracker’s appearance and individual window settings (see “Display Preferences” on page 83).

Item Management—Configure information about textbooks, such as: barcode ranges, barcode leaders, default policies, terminology, and catalogue settings (including leading articles to automatically ignore). See “Item Management Preferences” on page 87 for more information.

Institution Information—Configure general information about your school or institution (see “School Information Address” on page 95).

Patron Management—Configure information about your patrons, such as: barcode ranges, barcode leaders, default policies, and terminology (see “Patron Management Preferences” on page 97).

Policies—Set guidelines for school or institution operation (see “Policy Preferences” on page 101).

SIF—Enables and configures the **Schools Interoperability Framework** agent (see “SIF Preferences” on page 155).

Sounds—Assign Textbook Tracker sounds for events such as check out, check in and program shutdown (see “Sound Preferences” on page 119).

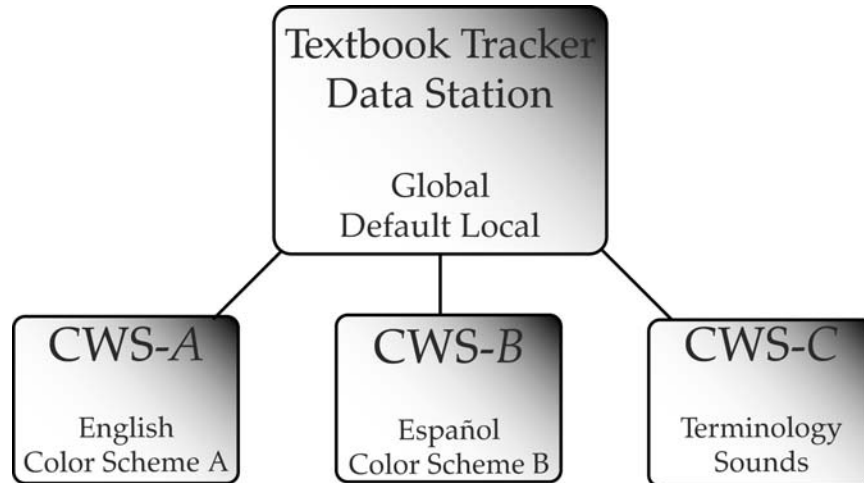
Web—Determine settings for Textbook Tracker Web (see “Web Preferences” on page 121).

Word Processor—Add default settings for new word processor documents (see “Word Preferences” on page 123).

Global vs. Local Preferences

Textbook Tracker users are able to switch between **Global**, **Local**, and **Default Local** preference settings.

Global and **Default Local** preferences are saved and stored on the Textbook Tracker Data Station. For this reason, in the diagram below, the Data Station contains the words **Global** and **Default Local**. After installation, any **Local** preference information you configure on a Client Workstation will be saved and stored to *that* individual client workstation only.



In the diagram above, there are three Client Workstations (CWS) connected to the main Textbook Tracker Data Station.

To reiterate, **Local** preferences basically start out the same as **Default Local** preferences and can later be overridden “locally” (i.e. on the individual client workstation).

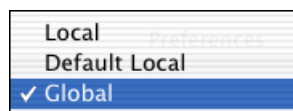
For instance, in the above, *Client Workstation-A* has their **Local Textbook Tracker** language preference set to **English** and their pre-defined color scheme set as **Philosophy** (Color Scheme A). *Client Workstation-B* has their **Local Textbook Tracker** language preference set to **Español** and their pre-defined color scheme set as **Religion** (Color Scheme B). *Workstation-C* has been set up to use different **Terminology** and **Sounds** preferences than either *Client Workstation-A* or *-B*.

In the same way, *Client Workstation-A* can have a different local color scheme, different sound events, or word processor defaults than *Client Workstation-B*.

Users with the appropriate **Administration** permissions (see page 65) can access and change the Data Station’s **Global/Default Local** preferences using a remote client (e.g. a Client Workstation). If changes are made to the **Global/Default Local** preferences, the Data Station will immediately broadcast those changes to all connected clients.

- N O T E -

Any changes that are made to the **Global/Default Local** preferences from a remote client (e.g. via a Client Workstation) will be saved and stored on the main Textbook Tracker Data Station.

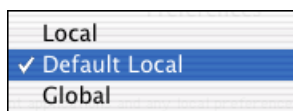


Global—Textbook Tracker’s **Global** preferences are configured and stored on the Textbook Tracker Data Station. However, users may also configure **Global** preferences remotely, using a Textbook Tracker Client Workstation that has been accessed by someone with administrator privileges.

The **Global** preferences on the Data Station will be the same **Global** preferences for every single Client Workstation that’s connected to your Data Station.

Hence, any changes you make to your Data Station’s **Global** preferences will automatically (and instantly) change the **Global** preferences for every client within your Textbook Tracker system network.

For example, the **Circulation** preference’s temporary barcode range will be exactly the same on all the computers throughout your district.

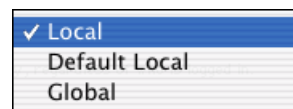


Default Local—When you install a new Textbook Tracker Client Workstation, they will automatically import the **Default Local** preferences from the Data Station. However, these preferences can later be overridden on a machine-by-machine basis. This is accomplished by adjusting the **Local** preferences (described below) of an individual workstation. Any client machine’s **Local** preferences will automatically override its **Default Local** preferences, but only for the machine whose **Local** preferences were changed.

Like **Global** preferences, **Default Local** preferences are configured and stored on the Textbook Tracker Data Station. However, they too can be remotely configured on a Textbook Tracker client that has been accessed with administration privileges.

The **Default Local** preferences on the Data Station will be the same **Default Local** preferences for every single client workstation that’s connected to your Data Station. Hence, any changes you make to your Data Station’s **Default Local** preferences will automatically (and instantly) change the **Default Local** preferences for every client within your Textbook Tracker system network.

Changes to the **Default Local** preferences will only affect a Textbook Tracker Client Workstation if it doesn’t have any previously established **Local** preferences.



Local—These preferences are “local” meaning that they can override the **Default Local** preferences of an individual Textbook Tracker client workstation.

Local preferences were created in response to the needs of a “local” environment, where each client workstation in a Textbook Tracker library system could be set up differently to reflect different needs. For example, your library might set up three Client Workstations, all with different permissions, sounds and color schemes.

Don’t worry about filling in every field in the **Local** preference windows; especially if you’ve already filled in most of the pertinent, static information in the Data Station’s **Default Local** preferences. Just supply information to the fields where you would like to elicit individual change. Textbook Tracker Client Workstations will automatically download any missing **Local** information from the Data Station’s pre-defined **Default Local** preferences.

Unless they’re the Data Station’s own **Local** preferences, **Local** preferences are not configured or stored on the Data Station. All **Local** preferences will be stored on the individual client machine and will not update any other client workstation connected to your Textbook Tracker Data Station.

Administration Preferences

Global Administration Preferences

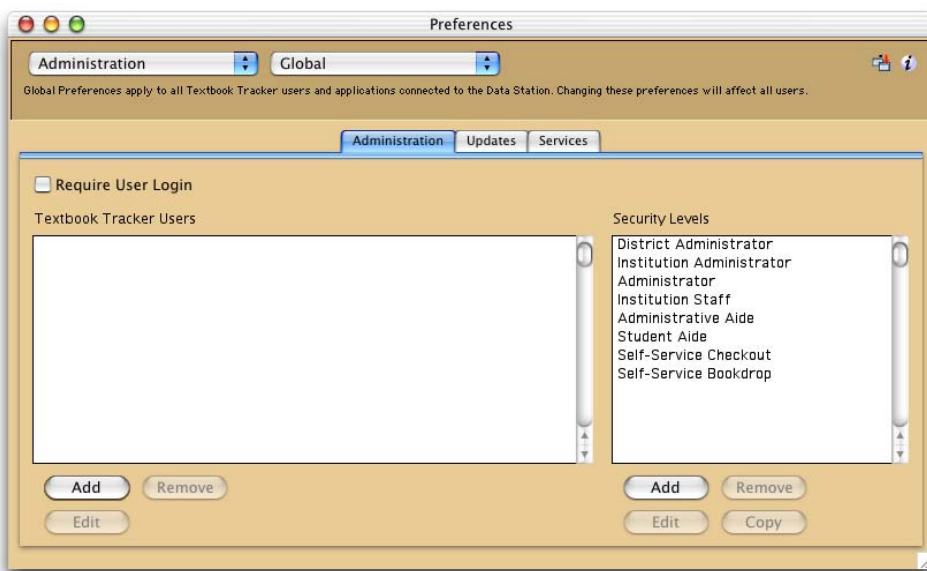
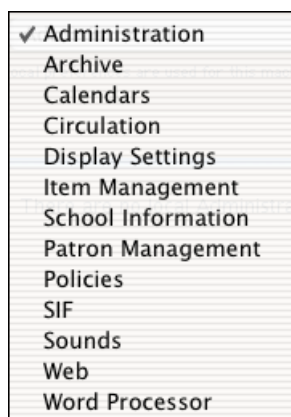
There are no **Local** or **Default Local Administration** preferences available.

Administration Tab

Use this preference to assign users their appropriate access level. A user's access level determines what Textbook Tracker operations the user is allowed to perform.

Many access levels, from **District Administrator** to **Student Aide** are available. **District Administrator** is the least restrictive and allows unlimited access to Textbook Tracker preferences and settings. **Self-Service Checkout/Bookdrop** is the most restrictive access level, only allowing users to check items in and out. Textbook Tracker also allows users to create their own custom security levels by choosing from a list of permissions (*see page 62 for more information*).

Until you set up an **Administrator** name, Textbook Tracker will launch with full administrative privileges. The **Administrator** is the only access level that lets you set up new Textbook Tracker users. Once you've established an **Administrator** name, if no other security level is selected, **Student Aide** access will be used upon launch.



If **Require User Login** is checked, you may select **Restart** or **Log Out** from the **File** menu to access Textbook Tracker with a different access level.

The **Add**, **Remove**, **Edit**, and **Copy** buttons create, remove, change, and duplicate Textbook Tracker users. To edit an existing user's information, double-click on a user's name from the **Textbook Tracker Users** field. You can create any number of Textbook Tracker users, each with their own unique (or identical) security level. While you may have users with duplicate security levels, you may not have duplicate user names.



Activating Security

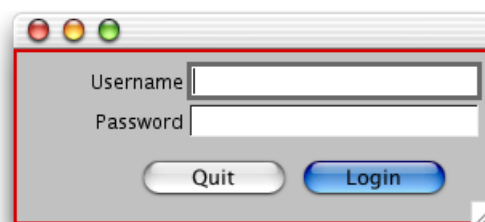
Check the **Require User Login** box on the **Administration** preference window to activate Textbook Tracker's **Log In** security window. The default setting for new institutions is OFF. When this box is checked and new users have been created, Textbook Tracker will require a username and optional password¹ when launching the program. To immediately activate (or when activating for the first time) Textbook Tracker's **Log In** security, you should select **Restart** from the **File** menu.

The username, entered during registration, is recorded to the **Transaction log**.

Accessing Textbook Tracker as a Different User

Sometimes you may need to access Textbook Tracker as a different user so that you have permission to perform certain tasks. For example, if you setup a **Client Workstation** for use by a **Student Aide**, you may need to log in as the **District/Institution Administrator** to do a task the **Student Aide** does not have authorization for.

To access Textbook Tracker with a different user name than the one you launched the program under, choose **Restart** or **Log Out** from the **File** menu. When the **Log In** window appears, enter the appropriate **Username** and optional **Password** and click **Log In** to access Textbook Tracker.

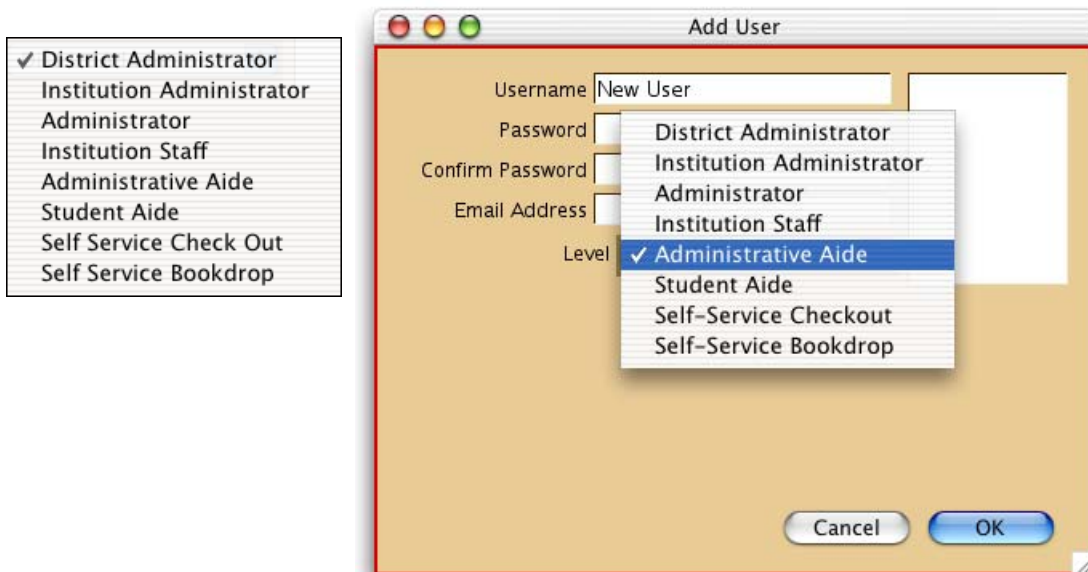


Make sure that the **Require User Login** checkbox is marked in the **Global Administration** preferences window (see the Activating Security section above).

¹ If a password was not specified when creating a new user in the **Add User** window (page 59), then this field will not be required.

Adding Users

Click the **Add** button (or <Cmd+N> Macintosh, <Ctrl+N> Windows) to add a new user to Textbook Tracker. The following window will appear, requesting specific new user information.

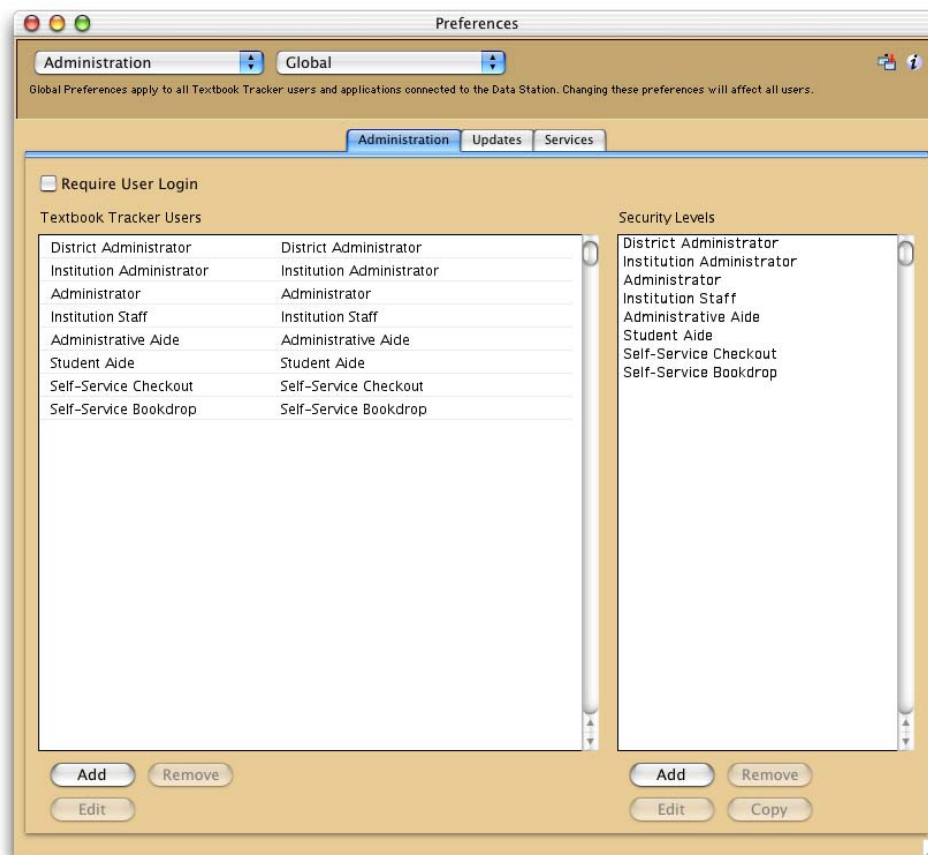


Enter the username, password¹, confirmation password, email address, and then select the **Level** for the new user. If you have not previously added any users, the **Level** drop-down menu will be set to **District/Institution Administrator** and you will not be able to change it. Once you add a **District/Institution Administrator**, you can add other new users with different access levels.

The **District Administrator** security level is only meaningful for multi-school collection licenses (WAN, etc.); for all other licenses, it behaves the same as the **Institution Administrator**.

1. Passwords are *not* case sensitive. Upper and lower case characters match. Although you may leave the Password field blank (meaning that a user requires no password upon **Log In**), it is *strongly* recommended that this is *not* done.

When you click the **OK** button, the new user name will appear in the **Textbook Tracker Users** field of the **Administration** preference window.



Removing Users

To remove a user from Textbook Tracker, select (highlight) a user from the **Textbook Tracker Users** field of the **Administration** preference window and click the **Remove** button.

Edit Users

You may edit the username, password, email address, and security level of any existing Textbook Tracker user. Clicking the **Edit** button opens a window similar to the **Add User** window (described on the previous page). Here, you may change any of the user fields. If your only existing user is a **District/Institution Administrator**, you will be unable to change their security access level until you have an additional **District/Institution Administrator**.

**NOTE:**

User names and passwords are NOT case sensitive.

✓ District Administrator
Institution Administrator
Administrator
Institution Staff
Administrative Aide
Student Aide
Self Service Check Out
Self Service Bookdrop

Access Levels

Below are the default security levels available within Textbook Tracker.

District Administrator—Full access to every control and setting within Textbook Tracker, including the ability to examine and change registered users. For multi-institution licenses, users at this level can edit district level preferences and have access to all (global) institution preferences. All other access levels can only modify (local) item/patron records from assigned Client Workstations.

Institution Administrator—Full access to every control and setting within Textbook Tracker, including the ability to examine and change registered users. For multi-institution licenses, users at this level can only edit (local) preferences for their assigned client workstation.

Administrator—Full access to every control and setting within Textbook Tracker except the ability to examine registered users.

Institution Staff—Access to all system functions and reports except **Preferences, Import** and **Utilities**.

Administrator Aide—Access to standard circulation commands and the authority to allow restricted actions. For example, if a patron has been issued too many textbooks, a warning message will appear during the next attempt to loan an item to the patron. With this access level, the administrator aide can override the message and allow the patron to be issued another textbook.

Student Aide—Access to standard circulation commands, but no authority to allow restricted actions. See the above description of **Administrator Aide** access for information about restricted actions.

Self-Service Checkout—This access level will only allow users to check out items using the **Data Station** or **Client Workstations**.

Self-Service Bookdrop—This access level will only allow users to check in items using the **Data Station** or **Client Workstations**.

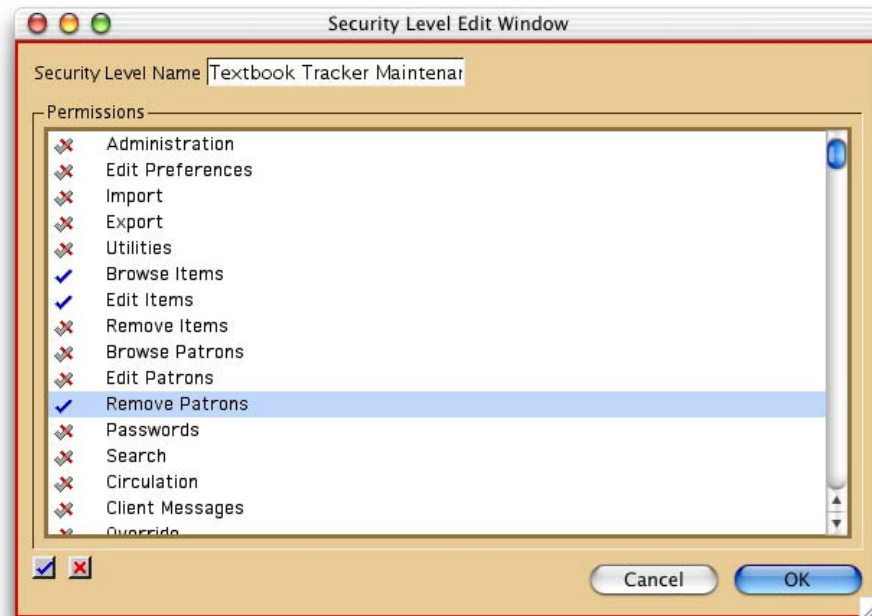
**NOTE:**

Only the **District Administrator** can add custom or edit existing security levels.

☒ District Administrator
☐ Institution Administrator
☐ Institution Staff
☐ Administrative Aide
☐ Student Aide
☐ Self Service Check Out
☐ Self Service Bookdrop

Adding, Editing, and Removing Custom Security Levels

Users with the appropriate authority can add or edit any of Textbook Tracker's security levels with the exception of the **District Administrator** security level, which has permissions for every feature within Textbook Tracker.



Add—This button opens the **Security Level Edit Window**. This window allows users to create their own custom security levels. Enter the name for the new security level in the **Security Level Name** field.

Clicking on any permission in the **Permissions** section of the **Security Level Edit Window** will enable or disable that option for the newly created security level. The **Enable All** (blue checkmark) icon located to the bottom left of the window activates all permissions. The **Disable All** (red X) icon located next to it will disable all permissions.

When you have finished creating your own custom security level, click **OK** to save the new security level or **Cancel** to discard it.

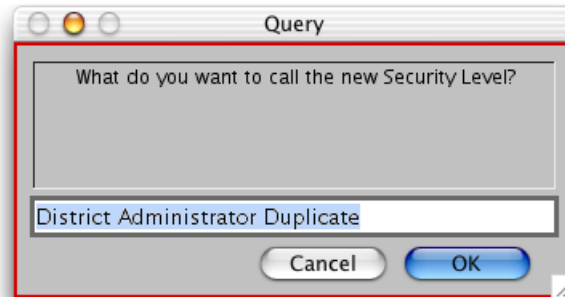
Remove—Users with the appropriate authority can remove a custom created security level by highlighting (selecting) the level from the **Security Level** portion of the **Global Administration** preference window's **Administration** tab and clicking the **Remove** button. Users will *not* be able to remove any of Textbook Tracker's nine default starting security levels.

Edit—This button opens the **Security Level Edit Window**. This window allows users to edit any existing security levels. Users are able to change the name of any existing security level, even those of Textbook Tracker's default starting nine.

Clicking on a permission in the **Permissions** section of the **Security Level Edit Window** will enable or disable that option for the existing security level. The **Enable All** (blue checkmark) icon located to the bottom left of the window activates all permissions. The **Disable All** (red X) icon located next to it will disable all permissions.

When you have finished editing your existing security level, click **OK** to save your changes or **Cancel** to discard them.

Copy—If you would like to duplicate an existing security level and it's list of enabled and disabled security options, select (highlight) the **Security Level** to be duplicated from the **Global Administration** preference window's **Administration** tab and click the **Copy** button. A **Query** window (like the one shown below) will appear asking what to name your newly duplicated **Security Level**. Be aware that you must enter a new, original name for your duplicate **Security Level**; they can't be duplicated without a name and they can't use an existing **Security Level** name.



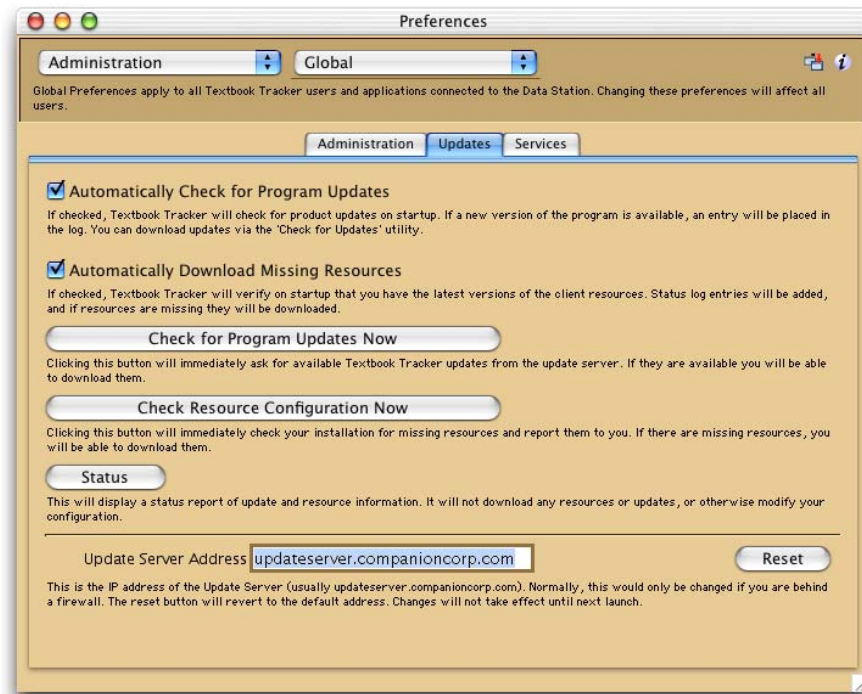
From this point on, you may treat the newly duplicated security level as you would any existing security level; it may be edited, it's name changed, or it may be completely removed from the system.

Global Administration Preferences

There are no available **Local** or **Default Local Updates** preferences.

Updates Tab

Textbook Tracker can be automatically updated over the world wide web. For convenience, larger organizations may license the use of a Textbook Tracker **Update Server**.



Automatically Check for Program Updates—If this box is checked, Textbook Tracker will automatically check for product updates on start-up. If a newer version of the program is available, an entry will be placed in the log. You can also download updates via the **Check for Updates** utility.

Automatically Download Missing Resources—If this box is checked, Textbook Tracker will automatically verify on start-up that you have the latest versions of the client resources. Status entries will be added to the log, and if any resources are missing, they will be automatically downloaded.

Check for Program Updates Now—Clicking this button will immediately ask for available Textbook Tracker updates from the update server. If they are available, you will be able to download them.

Check Resource Configuration Now—Clicking this button will immediately search your installation for any missing resources. If you are missing resources, you will be able to download them.

Status—This will display a status report of update and resource information. It will not download any resources or updates, or modify your configuration in any way.

Update Server Address—This is the IP address of the Textbook Tracker Update Server (usually `updateserver.companioncorp.com`). Normally, this will only be changed if you are behind a firewall. The **Reset** button will revert to the default update server address. Changes will not take effect until Textbook Tracker has been restarted.

Performing Textbook Tracker Software Updates

There are two ways you can perform software updates within Textbook Tracker. If you have an internet connection, you can check for Textbook Tracker updates from COMPanion's server. If you use **File, Utilities, Check For Updates**, and an update is available, a description of the update is shown under the **Get Read-Me** selection. From there, you can choose to update your Textbook Tracker Data Station or wait for a future date. If you are sure you want to update to the newest version on Textbook Tracker, an easier method is to use the **Updates** tab in the **Administration** preference window under **Edit, Preferences**. This utility is only available for the Data Station; Client Workstations do not offer this selection.

You can also download the newest COMPanion and Textbook Tracker software updates from the official website (www.textbooktracker.com). Just follow the **Products** and **Software Updates** hyperlinks. You must enter your Textbook Tracker registration name, email address, school/company and serial code in order to proceed with the download.

If you don't have an internet connection (or are unable to download the newest updates), you can contact COMPanion (via email or tech support) and request a Textbook Tracker Update CD-ROM be sent to your location.

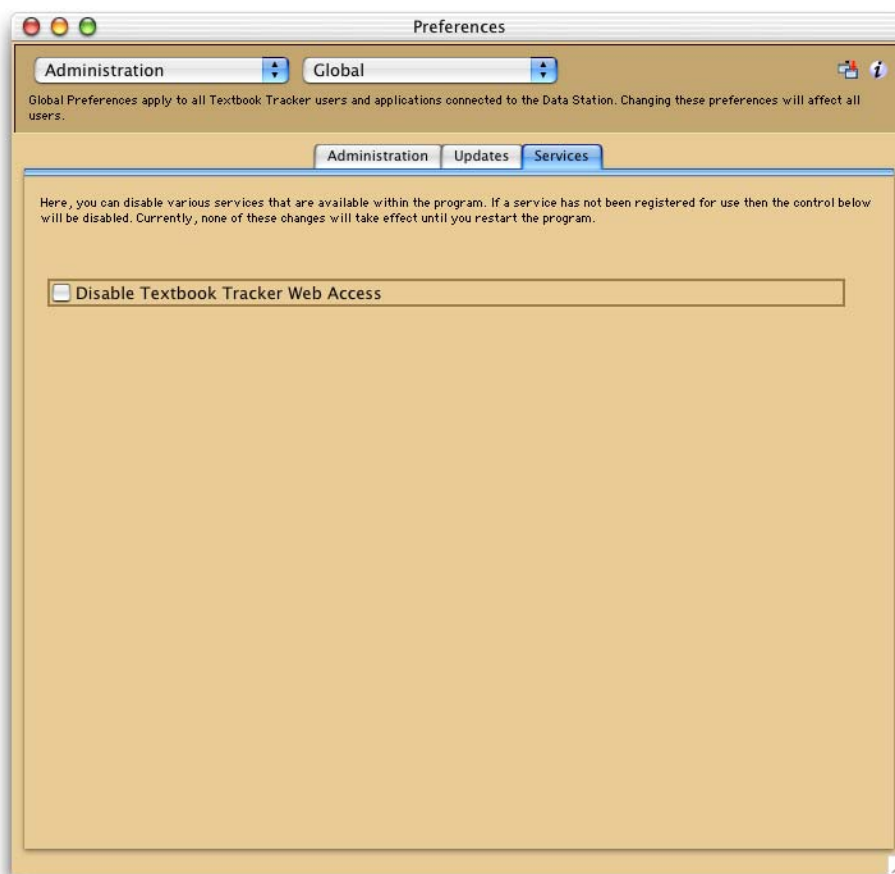
You may contact COMPanion's award winning technical support team via email (support@companioncorp.com) or by calling 1-(800)-347-4942.

Global Administration Preferences

There are no available **Local** or **Default Local Services** preferences.

Services Tab

This preference allows the **District** or **Institution Administrator** to disable licensed Textbook Tracker services.



Only the services that you've licensed can be enabled (or disabled). If they are not licensed, they will appear as grayed-out. Changes will not take effect until Textbook Tracker is restarted. Default is to enable all licensed services.

There are some services you may want to take special note of:

Disable Textbook Tracker Web Access—This will disable/enable Textbook Tracker's **Web** services.

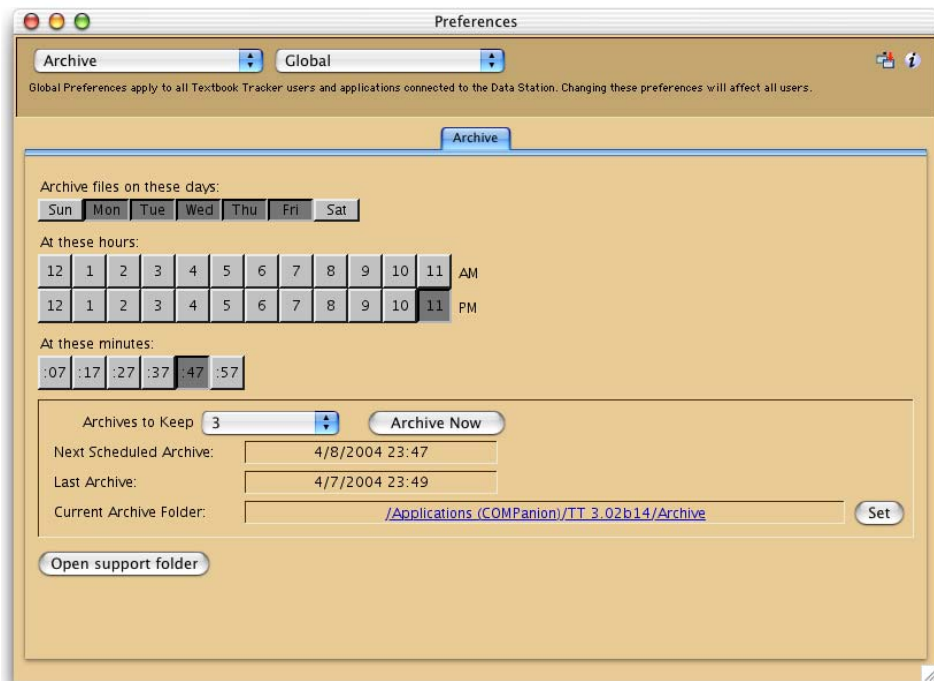
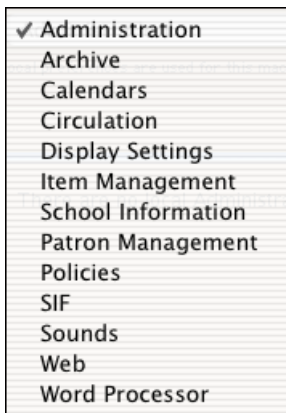
Archive Preferences

Global Archive Preferences

There are no available **Local** or **Default Local Archive** preferences.

Archive Tab

The **Archive** window allows you to schedule automatic backup copies of your valuable Textbook Tracker data. The default settings are **Mon, Tue, Wed, Thu & Fri** at **11PM** at **“:47”** minutes after the hour. This default keeps **three** backups inside the **Archive** folder, which is located in your **Textbook Tracker** shared system support folder. Clicking on the **Open Support Folder** button will open the application support directory where all your Textbook Tracker data is stored.



When it's time for an archive, all information in the **Data** folder is copied to a subdirectory in the **Archive** folder. During archiving, all school (or institution) services on the Data Station are disabled.

Although you can disable the automatic archiving function, this is *not* recommended. Your most recent archives (combined with your off-site backup) are invaluable in securing the safety of your very valuable data (see "Backing Up Your Data" on page 4).

- N O T E -

The Data Station must be turned on and running when you have the archive scheduled to take place. Thus, if the administrator doesn't want to leave their computers running overnight, they should change the default time(s) that the program is set to archive.

How Archiving Works

If the **Archives To Keep** drop-down menu is set to anything below four (including zero), the **Archive First** checkbox (page 318) and the **Archive Now** button (page 67) will keep five *manual* archives (as though the **Archives To Keep** preference was set to 5) and when a sixth *manual* archive is requested, Textbook Tracker will first create a new data archive before removing the oldest archive in the **Application Support Archive** folder.

In other words, every time you click the **Archive Now** button or have the **Archive First** checkbox marked during import, Textbook Tracker will perform a *manual* archive (even if your **Archives To Keep** is set to zero). However, if your **Archives To Keep** preference is set higher than 5, then the **Archive Now** and **Archive First** selections will no longer ignore the **Archives To Keep** preference; in other words, *manual* archives will now be restricted to the specified **Archives To Keep** value.

Textbook Tracker will perform an *automatic* archive based on the value specified in the **Archives To Keep** drop-down menu. Therefore, if your **Application Support Archive** folder contains more archives than the **Archives To Keep** preference states, Textbook Tracker will remove all of the surplus archives (oldest archives first) after it creates a new *automatic* archive.

For example, if you have the **Archives to Keep** preference set to 2 and Textbook Tracker has already created two *automatic* archives in the **Application Support Archive** folder, you will be able to add three additional *manual* archives to the folder, equalling five total archives.

If the **Archives to Keep** preference is set to 10 and Textbook Tracker has already created four *automatic* archives in the **Application Support Archive** folder, you will be able to add six additional *manual* archives to the folder.

During an *automatic* archive, if the **Archives to Keep** preference is set to 2 but you have *manually* created three additional archives, Textbook Tracker will create a new *automatic* archive before deleting the three oldest archives in the **Application Support Archive** folder. This way, the number of remaining archives will match the value specified in the **Archives to Keep** preference (in this instance, two).

Calendar Preferences

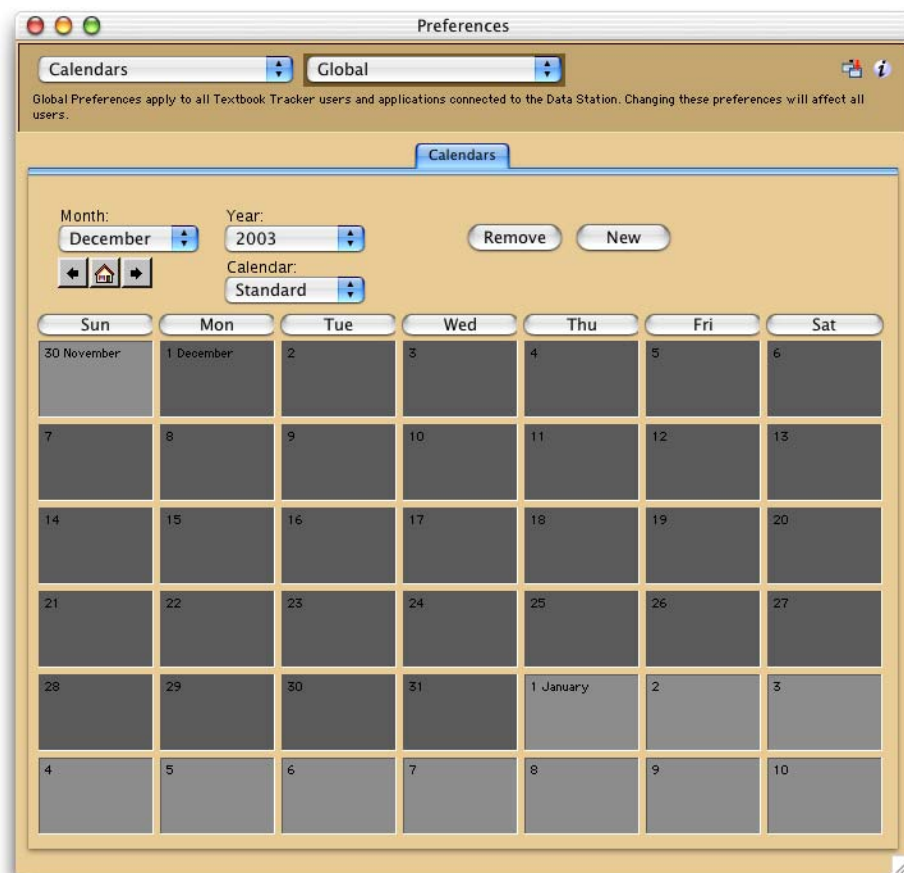
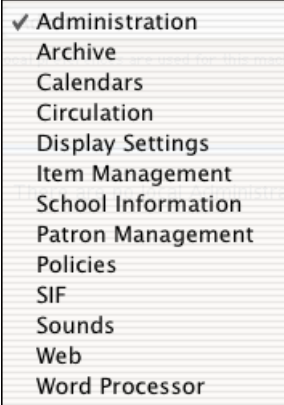
Global Calendar Preferences

There are no available **Local** or **Default Local Calendar** preferences.

Calendars Tab

Use this preference to create custom calendars for your school or institution.

You can assign a separate calendar to each patron policy or circulation policy. This lets you set up calendars for groups of patrons who may be operating on different institution levels and/or schedules.



The month and year of the current calendar are shown in the two fields near the upper left of the **Calendars** tab. To change the current month or year, use the corresponding drop-down menus. You may also use the **left** and **right arrow** buttons to cycle through the previous and next months. Click on the icon of the little **house** to return to your current month.

You can also use commands to change the month or year. Press <cmd-]> (Macintosh) or <ctrl-]> (Windows) to go forward a month and <cmd-[> (Macintosh) or <ctrl-[> (Windows) to go back a month. Textbook Tracker includes a calendar for the current year, previous year, and three years in the future.

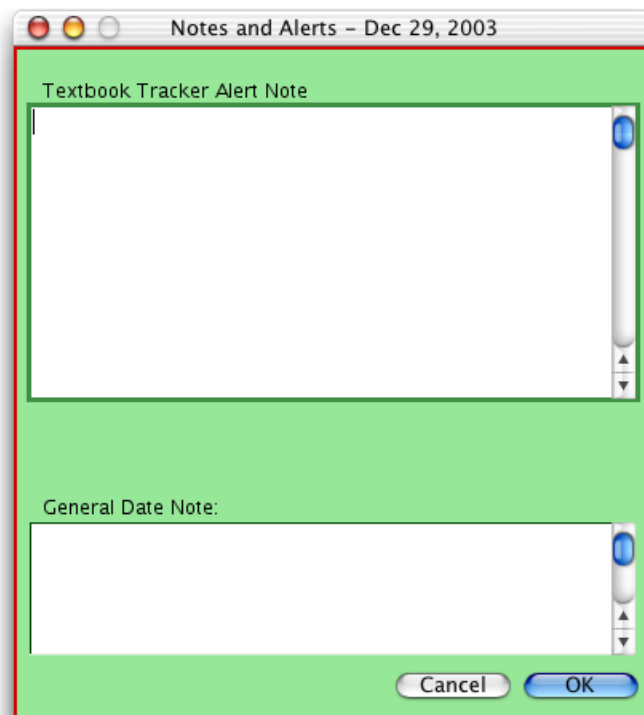
You can mark days on the calendar as **Period Due** dates and as **Closed** dates by clicking on the actual day. The choices cycle from **Open** (nothing displayed), **Closed**, **Period Due**, and then back to **Open**.

Period Due—A period due date is the day an item is due if you check your **Circulation Policy** to **Apply Period Due Dates**. For example, if you set a period due date of September 30, 2007, all books checked out before September 30th (that normally would have had a due date *after* the 30th), will be assigned a due date of September 30th.

Closed—These are dates on which the school/institution is closed. **Due** dates are computed so that they never fall on **Closed** dates (only on **Open** or **Period Due** dates). However, please note that there are some exceptions to **Closed** dates when using **Override Dates** (see “*Override Dates*” on page 184 for more information).

You can change the settings for the same day each week for the month by clicking on the day buttons (**Sun** through **Sat**) at the top of the calendar. You can change the setting for all days for the entire year by holding the <alt> (Windows) or <option> (Macintosh) key down and clicking on the days buttons at the top of the calendar.

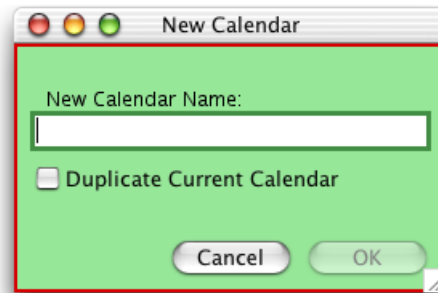
You may <shift-click> on a date to add a note. Notes can be used to display automatic reminders on the Data Station and Client Workstations, as well as provide private notes for the administrator and aides. Alert notes are only active for the **Standard** calendar and are ignored on other calendars. **General Notes** are available for all calendars.



**NOTE:**

Once you enter a calendar name in this window, you cannot change it.

Changes to the calendar are saved when you leave the **Calendar** preference window. You can also use the **Save** and **Revert** commands in the **File** menu to save or ignore changes. To create a new calendar, click the **New** button. Enter a name for the calendar that you want to add.



If you want to duplicate an existing calendar as a template for a new one, click the **Duplicate Current Calendar** checkbox.

To delete a calendar, make it the current calendar and click the **Remove** button. Any policies using the deleted calendar will be re-assigned to the standard calendar. You *cannot* delete the standard calendar.

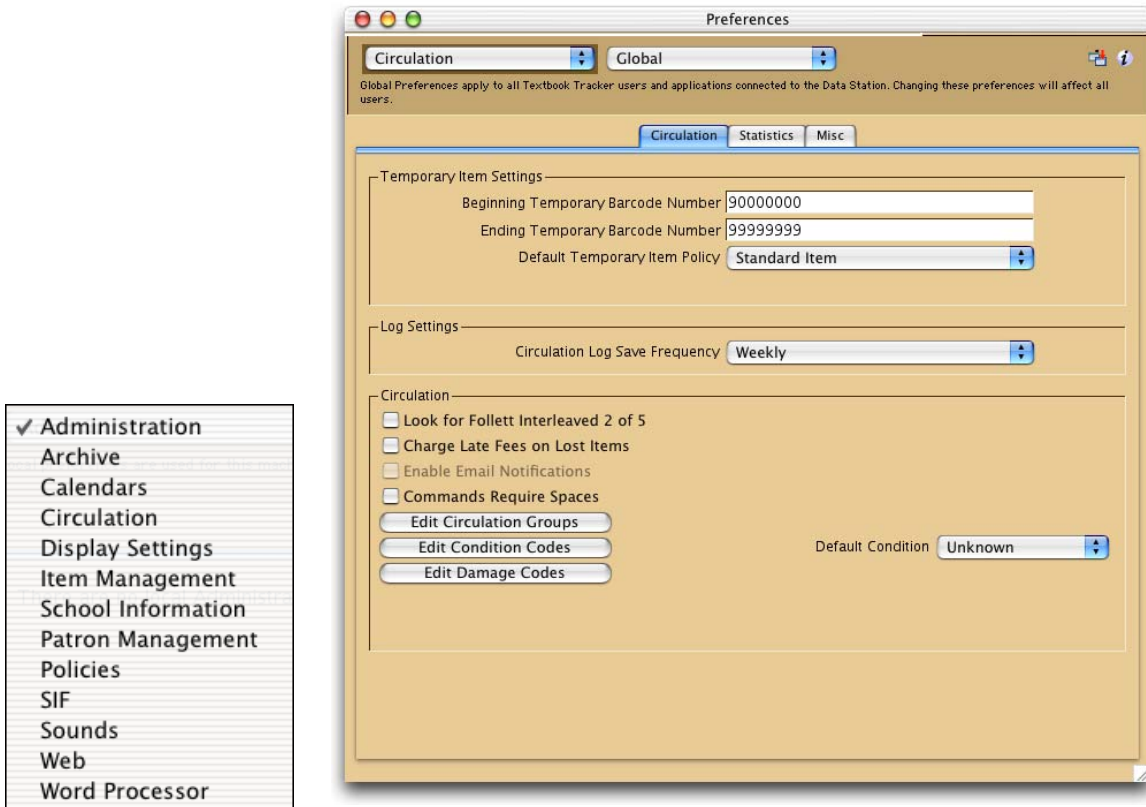
Circulation Preferences

Global Circulation Preferences

Circulation preferences contain both **Global** and **Default Local/Local** preferences.

Circulation Tab

Use this window to set all the preferences that relate to Textbook Tracker's circulation.



Temporary Item Settings

Beginning Temporary Barcode Number—Enter the first number of the barcode range that you want dedicated to temporary items. Textbook Tracker will treat any barcodes entered within this range as a temporary item (if it hasn't already been assigned to a patron or item). Default is 90000000.

Ending Temporary Barcode Number—Enter the last number of the barcode range you want dedicated to temporary items. Textbook Tracker will treat any barcodes entered within this range as a temporary item (if it hasn't already been assigned to a patron or item). Default is 99999999.

Default Temporary Item Policy—This drop-down menu lets you select the policy that will be applied for temporary circulation items. Default is **Standard Item**.

Daily
✓ Weekly
Monthly
Never

Log Settings

Circulation Log Save Frequency—Select **Daily**, **Weekly**, **Monthly** or **Never**. Archived logs are placed in the **Log** folder, which is located in Textbook Tracker’s shared application support folder (*see page 2 for more information*). Default is **Weekly**.

Every Client Workstation that connects to the main Data Station will also create a **Log** folder, where archived logs are saved. The circulation log will contain everything that is displayed in the **Circulation** window, and any additional special notes that may be useful. Every individual Textbook Tracker machine will keep a transaction log that contains a history of everything that has occurred on that workstation. It can be a valuable document if you want to examine any workstation’s history.

The following choices are available:

Daily—The circulation log is archived at the beginning of each day and is placed in the **Log** folder with a name such as **Circ Log for day 20020730** (yyyymmdd).

Weekly—The circulation log is archived every week (a week starts on Monday) and is placed in the **Log** folder with a name such as **Circ Log for week 20020729** (yyyymmdd).

Monthly—The circulation log is archived at the beginning of every month and is placed in the **Log** folder with a name such as **Cir Log for month 200207** (yyyymm).

Never—The circulation log is saved, but never archived. Under this option, the circulation log can grow to be very large.

Circulation

Look for Follett Interleaved 2 of 5—If you have any items with Follett interleaved 2-of-5 labels, check this box. This setting looks for all barcodes that are exactly 10 digits long and removes the last three digits that Follett uses as check digits. Default is OFF.

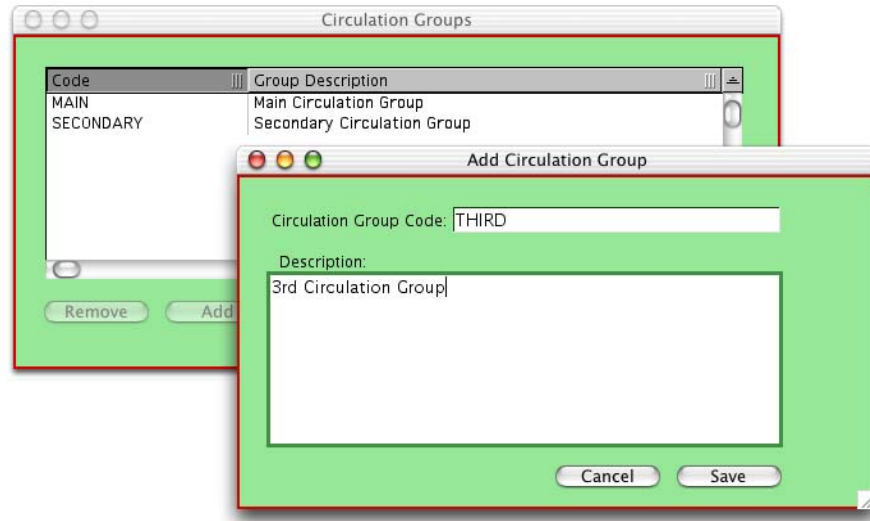
Charge Late Fees on Lost Items—If this option is ON, then late fees continue to accumulate on lost books up to the max fee limit. To stop charging fees on a particular item, **Remove** the copy or assign it as **Discarded**. Default is OFF.

Enable Email Notifications—Check this box if you want Textbook Tracker to automatically send email confirmations and notices to patrons. If selected, Textbook Tracker will send email to patrons that have valid email addresses when the following events occur: hold placed, hold expires, in-stock hold available, in-stock hold expires, item became overdue, and recall issued.

Commands Require Spaces—Checking this box will require that all Textbook Tracker **Circulation** window commands (or remote transaction import scripts) have spaces between the actual command and any additional command information. For example, if this box is checked, Textbook Tracker won't be able to recognize the command F4.50 (a charge of four dollars and fifty cents). However, if you enter F 4.50, with a space between the F and the 4, then Textbook Tracker will be able to process the command. This preference exists for schools who use barcodes that start with letters of the alphabet (alphanumeric); that in case they are imported, they are not misinterpreted as Textbook Tracker commands.

Circulation, Condition, and Damage Codes

Clicking on the **Edit Circulation Groups**, **Edit Condition Codes**, or **Edit Damage Codes** buttons will open a small window where you may **Remove**, **Add**, **Edit**, **Revert**, and **Save** new or existing condition codes.



Edit Circulation Groups—Removes, adds, edits, reverts, and saves **Circulation Group** codes and descriptions. **Circulation Groups** are used for collecting focused circulation statistics. **Circulation Group Codes** can be four characters long. **Circulation Groups** can be activated and cleared on the main **Circulation** window (see “What are Circulation Groups?” on page 187 for more information).

Edit Condition Codes—Removes, adds, edits, reverts, and saves textbook **Condition Codes**. These codes most often describe textbooks in best to worst condition. You can apply a **Condition Code** to a textbook under the **Copy Information** section of the **Item Management** window. **Condition Codes** can only be four characters long. The **Edit Condition** button that appears in this window allows users to apply condition codes to particular copies.

Edit Damage Codes—Removes, adds, edits, reverts, and saves default textbook **Damage Codes**. You can set the **Damage Code** (four characters long), **Description**, and **Fine**. **Damage Codes** can be applied from the main **Circulation** window if you have a current patron and item active by typing “DL” in the command line.

New Book
Used Book in Excellent Condition
Used Book in Satisfactory Condition
Used Book in Poor Condition
Replace this item, not usable
Scheduled to be discarded
✓ Unknown

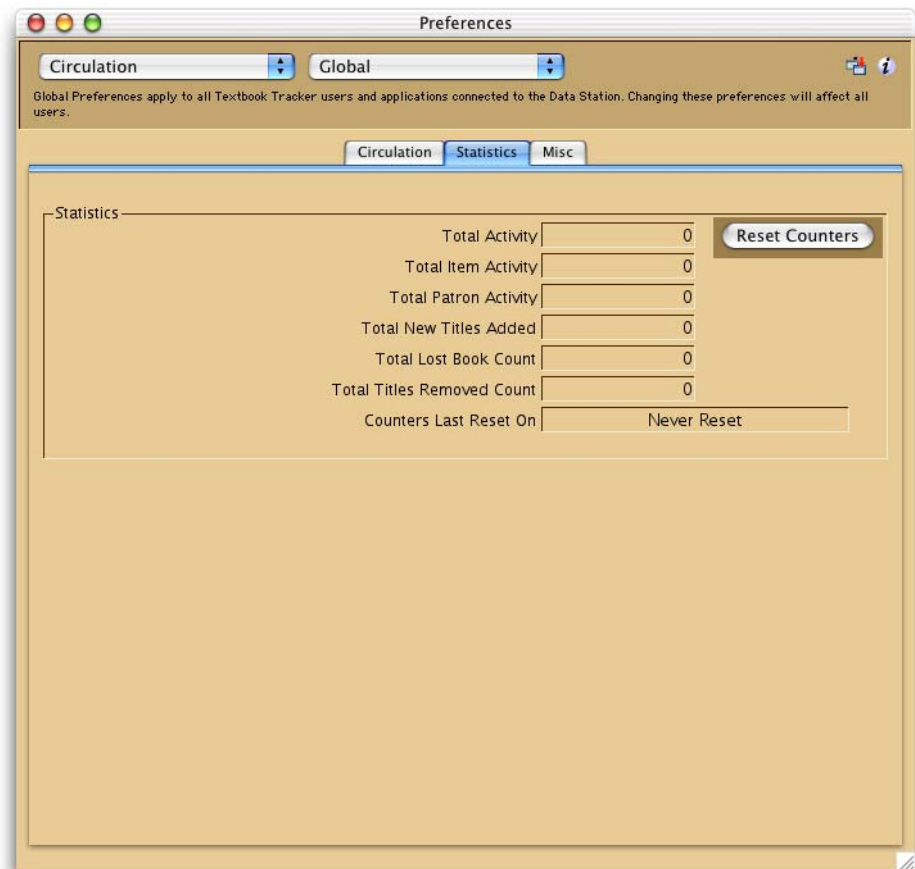
Default Condition—Allows the user to set default **Copy Condition Code(s)** and descriptions. Users may choose from these default conditions: **New Book**, **Used Book in Excellent Condition**, **Used Book in Satisfactory Condition**, **Used Book in Poor Condition**, **Replace this item-not usable**, **Scheduled to be discarded**, and **Unknown**. These default conditions, with the exception of the **Unknown** copy condition, can be removed or renamed. If a copy condition code that has been previously applied to an item is later deleted, those item’s condition codes will default to the **Unknown** condition. Those items whose condition code has been renamed will retain the same copy condition code information and accommodate the new name.

Global Circulation Preferences

Circulation preferences contain both **Global** and **Default Local/Local** preferences.

Statistics Tab

Textbook Tracker keeps a number of general statistics for your school. These counters can be reset at any time. Most schools will reset these on a yearly basis. Counters are incremented as follows.



Reset Counters—This button will clear all of the subsequent statistics.

Total Activity—Increments with every command (failed or successful) entered into the command line of the **Circulation** window.

Total Item Activity—Incremented every time a new item is made current on the **Circulation** window.

Total Patron Activity—Incremented every time a new patron is made current on the **Circulation** window.

Total New Titles Added—Incremented every time a new item (title, not copy) is added through the **Items** window or by import.

Total Lost Book Count—Incremented every time a copy is checked out to the **Lost Patron**.

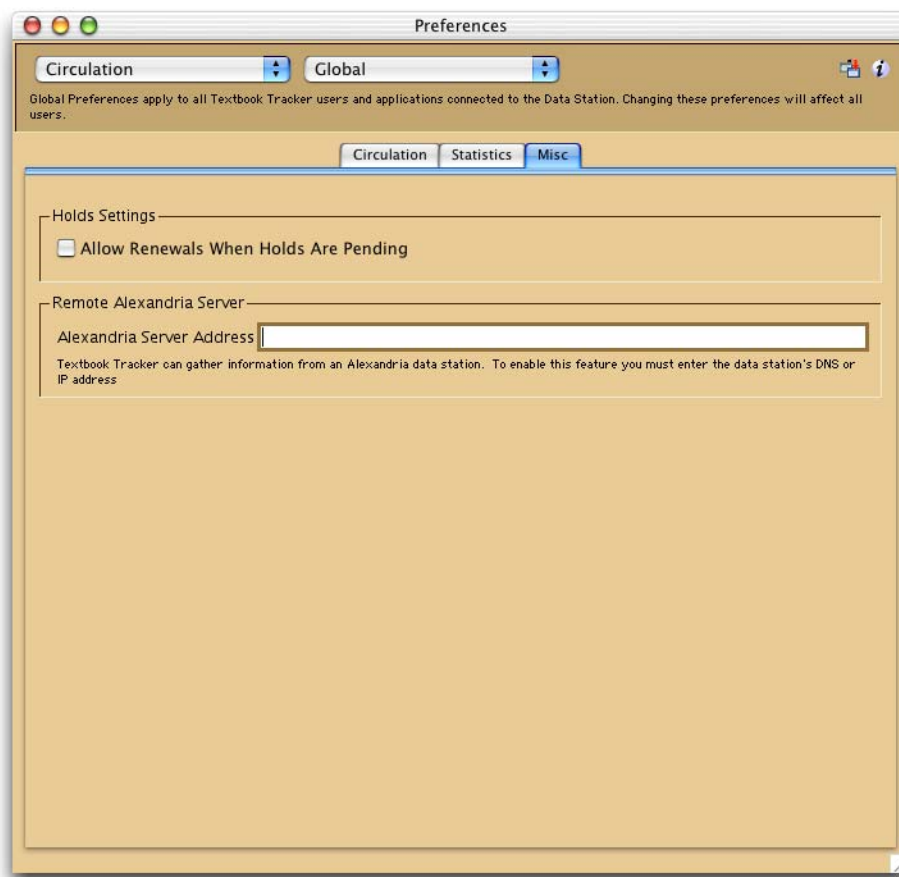
Total Titles Removed Count—Incremented every time an item (title, not copy) is removed from the database.

Counters Last Reset On—The date the counters were last reset to zero.

Global Circulation Preferences

Circulation preferences contain both **Global** and **Default Local/Local** preferences.

Miscellaneous Tab



Holds Settings

Allows Renewals When Holds Are Pending—Allows patrons the ability to renew items when other patrons have holds on those items.

Remote Alexandria Address

Alexandria Server Address—Textbook Tracker can gather information from an Alexandria Data Station. To enable this feature, you must enter the Data Station's DNS or IP address.

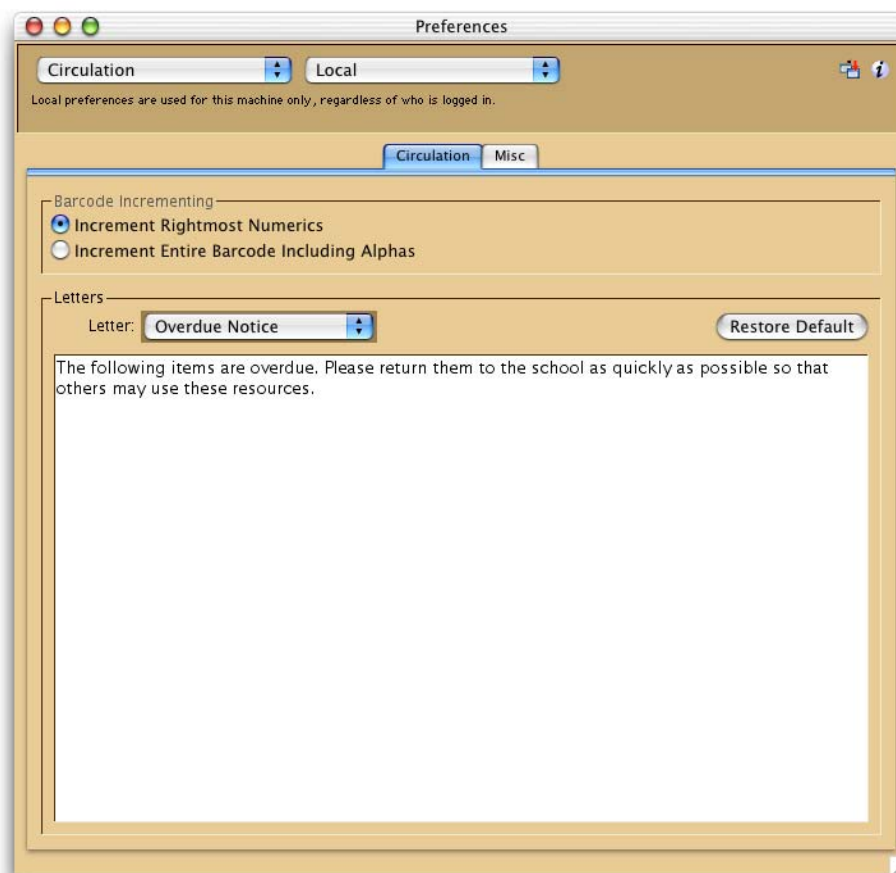
This feature is used specifically in conjunction with the "QA" command (see "View Patron Details" on page 199 for more information).

Local / Default Local Circulation Preferences

Circulation preferences contain both **Global** and **Default Local/Local** preferences.

Circulation Tab

Use this window to customize the body text of letters (patron notices) sent from the institution/school. To guarantee that your email notifications are being sent correctly, please check the list of requirements that are located under the **Enable Email Notifications** section on page 75.



Barcode Incrementing

Increment Rightmost Numerics—When this option is selected, new barcodes should only increment the rightmost numeric digits (even when using alphanumeric barcodes). In other words, when incrementing rightmost numerics, the barcode increments to the right and grows to the right. For example, the barcode following aaa999 should be aaa1000. This is the default setting.

Increment Entire Barcode Including Alphas—When this option is selected, new barcodes modify both alpha and numeric characters, increment to the right, and grow to the left. For example, the barcode following aaa999 would be aab000. The barcode zzz999 becomes 1aaa000, then 1aaa001, then 1aaa002, and so on and so forth; eventually becoming 1zzz999, which then turns to 2aaa000. Remember that, with this formula, (Z + 1 = 1A).

Letters

Use the **Restore Defaults** button to restore your text with the default text. Default text is as follows:

Overdue Notice—"The following items are overdue. Please return them to the school as quickly as possible so that others may use these resources."

In-Stock Hold—"An in-stock item is being held for you. Please pick it up by the specified date or it will be returned to general circulation."

Recall—"The following item is required at the school. Please return it as quickly as possible."

Reservation Notice—"Please note that you have a reservation on the following items. Reserved items should be picked up in the morning of the reservation start date and returned by the evening of the due date."

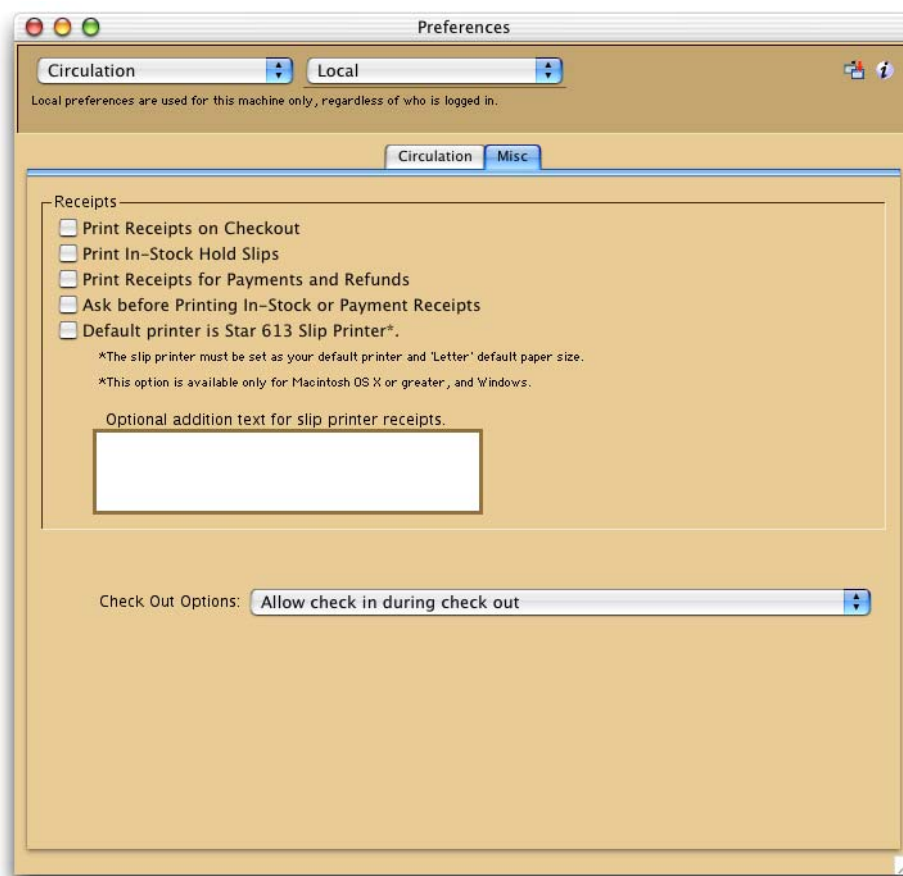
Refund Letter—This is the text that is used for the **Refund Letters** reports that are printed when a refund has been issued to a patron contained within your database. For more information on these refund reports, please see "Refund Letters" on page 227. Default text is: "You have been issued a refund with the following information."

Local Circulation Preferences

Circulation preferences contain both **Global** and **Default Local/Local** preferences.

Miscellaneous Tab

Additional circulation preferences.



Receipts

Print Receipts on Checkout—When this box is checked, Textbook Tracker users are allowed to print receipts for checked out items by using the “D” or “QP” command in the **Circulation** window at the end of the transaction. These checkout receipts contain information similar to that which is displayed when you click on the Current Item’s **Details** button. When this box is *not* checked, receipts will never be allowed to print, even when using the “D” or “QP” command.

Print In-Stock Hold Slips—When checked, Textbook Tracker will automatically print an in-stock hold receipt immediately after an in-stock hold has been filled for a patron.

Print Receipts for Payments and Refunds—When checked, Textbook Tracker will automatically print receipts for payments and refunds.

Ask Before Printing In-Stock or Payment Receipts—If this preference is checked, Textbook Tracker will ask permission before it automatically prints a payment receipt or an in-stock hold notice.

Default printer is Star 613 Slip Printer—Having this option checked indicates that this Data Station or Client Workstation is connected to a slip printer. The slip printer *must* be set as your operating system's default printer for every computer that you would like to print receipts from; your default paper size must be **US Letter Width x Long Receipt**.

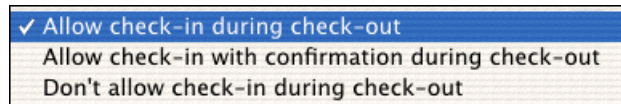
The slip printer will produce receipts for Textbook Tracker events in the same fashion that a normal printer would, depending on the print triggers you have selected above. The slip printer option is only available for Macintosh OS 10.3 (or higher) and all Windows operating systems.

Optional additional text for slip printer receipts—This is a user-defined text header that appears before the general header (or after the patron name on in-stock hold receipts). This header will be centered horizontally and can be as many lines as are required by the user. This field is most often used to house the name and address of your school or institution.

Check Out Options

This drop-down menu allows administrators to limit the capabilities of Textbook Tracker's **Check In/Out Circulation** mode.

The **Allow check in during check out** and the **Allow check in with confirmation during check out** options only apply if the item that is being checked in was checked out by the current patron. If it is not the same patron, then a warning window will appear, asking if you would like to check the item in before checking it out to the new patron (unless the **Don't allow check in during check out** option has been chosen). If the latter option is selected, then a message will appear in the transaction log that the item is currently checked out and will include the patron name.



Allow check in during check out—If Textbook Tracker is in check out mode, this option allows items to be checked into the **Circulation** window as well.

Allow check in with confirmation during check out—If you try to check in an item (or items) while the **Circulation** window is in **Check Out** mode, Textbook Tracker will require permission before checking-in any items.

Don't allow check in during check out—This selection will disallow items to be checked in using Textbook Tracker's **Circulation Check Out** window. For example, your library may require separate Data Stations, some that only allow items to be checked in and others that only allow items to be checked out

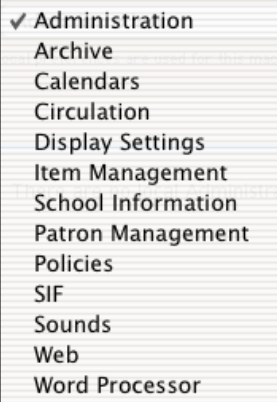
Display Preferences

Local & Default Local Display Settings Preferences

There are no available **Global Display Settings** preferences.

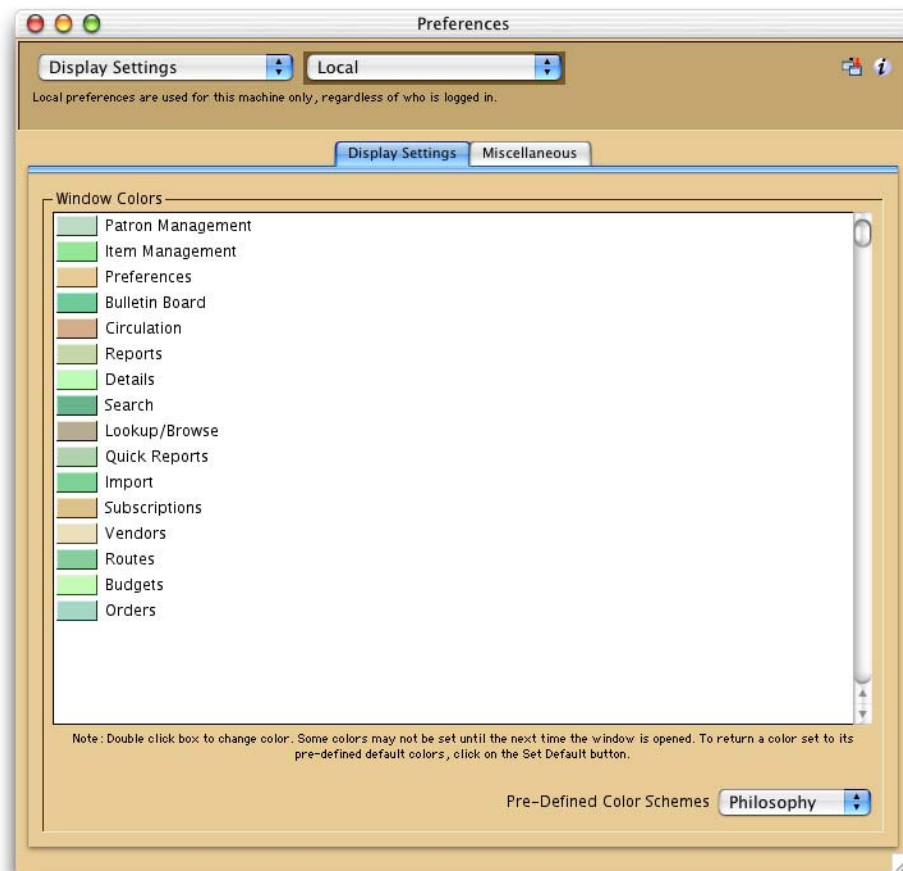
Display Settings Tab

To customize Textbook Tracker's color settings, double-click on the description of the Textbook Tracker window that you want to change. A standard operating system color change window will appear.



NOTE:

After you leave the **Display Settings** preference window, the color scheme you select will not be applied until Textbook Tracker is restarted.



Customize your Textbook Tracker colors as you see fit, then click **OK**.

Use the **Pre-Defined Color Scheme** drop-down menu to choose a default from a selection of pre-created color schemes. Once a color scheme has been selected, they can be further customized. The default color scheme is **Philosophy**.

Color schemes are local for each Client Workstation. When a Workstation is first launched, it will borrow the **Default Local** preferences from the Data Station. Any future changes to that workstation will be applied solely for that "local" workstation.

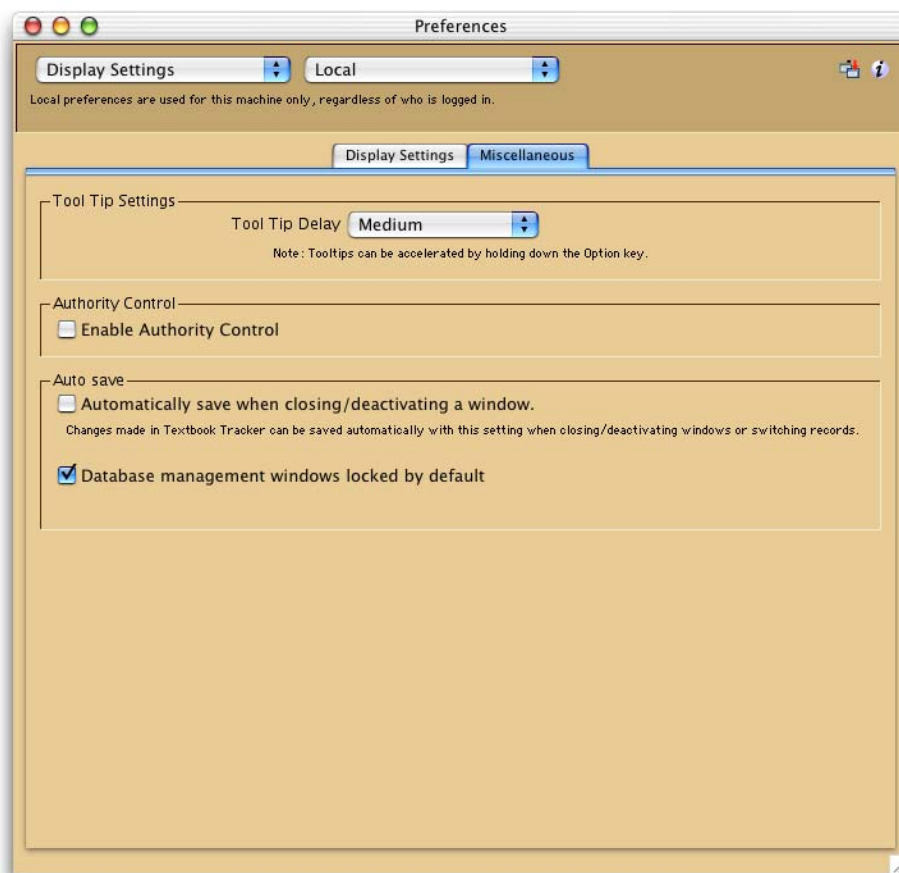
- ✓ Administration
- Archive
- Calendars
- Circulation
- Display Settings
- Item Management
- School Information
- Patron Management
- Policies
- SIF
- Sounds
- Web
- Word Processor

Local & Default Local Display Settings Preferences

There are no available **Global Display Settings** preferences.

Miscellaneous Tab

Use these controls to further customize the look of your Textbook Tracker Data Station or Workstation program.



Tool Tip Settings

Tool Tip Delay—Selects delay time for tool tips (those short pieces of descriptive text that appear when you move your mouse cursor over buttons and such). Tool tips can also be viewed instantaneously by holding down the <ctrl> (Windows) or <option> (Macintosh) key and moving over buttons and fields. Default is **Medium**.

Tool Tips can also be viewed instantaneously by holding down the <ctrl> (Windows) or <option> (Macintosh) key and moving over buttons and fields.

Authority Control

Enable Authority Control—When this checkbox is set, Textbook Tracker forces authority control when adding or editing item records (see “Authority Control” on page for more information).

Auto Save

Automatically Save When Closing/Deactivating A Window—When this box is checked, Textbook Tracker automatically performs the **Save** operation, rather than asking for user confirmation. Default is OFF.

Database management windows locked by default—When this box is checked, the user must unlock the current record in order to begin making changes. A locked record can *not* be modified. Default is ON.

Item Management Preferences

Global Item Management Preferences

Item Management preferences contain both **Global** and **Default Local/Local** preferences.

Items Tab

Use this preference to configure general information about your item barcode(s), default item policies, and other general catalogue settings.

- ✓ Administration
- Archive
- Calendars
- Circulation
- Display Settings
- Item Management
- School Information
- Patron Management
- Policies
- SIF
- Sounds
- Web
- Word Processor

Barcode Settings

Ignore Barcode Leader of—If you are using barcode numbers not designed for Textbook Tracker, you can specify that Textbook Tracker automatically ignore leading barcode characters. For example, your item barcodes may have the text “TBT” in front of each barcode, enter “TBT” in the **Ignore Barcode Leader of** field. Textbook Tracker will ignore the “TBT” at the beginning of the barcode label. If you have no need of this feature, leave the field blank.

Unused Barcodes—Creates a list of all the unused barcodes in a specified range. Barcode range cannot exceed “10,000.”

Catalog Defaults

These options tell Textbook Tracker which subject headings you want catalogued. Since cataloguing only occurs during an import or modification of records, your changes will only be reflected in new records unless you rebuild your database. If you do not understand these settings, please talk to a qualified MLS librarian or MARC expert.

Catalog LC Subject Headings—Default is **OFF**.

Catalog LC Juv Headings—Default is **OFF**.

Catalog National Library of Medicine Headings—Default is **OFF**.

Catalog National Agricultural Library Headings—Default is **OFF**.

Catalog Source Not Specified Headings—Default is **OFF**.

Catalog Canadian Subject Headings—Default is **OFF**.

Catalog French Subject Headings—Default is **OFF**.

Catalog Sears Headings—Default is **OFF**.

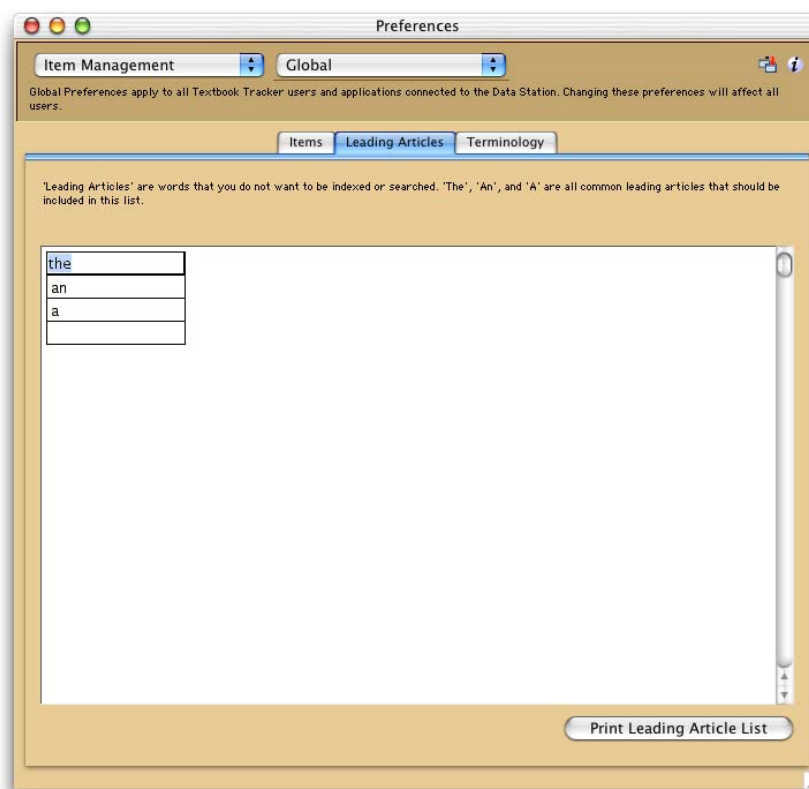
Index 700_t as a Title—Default is **OFF**.

Global Item Management Preferences

Item Management preferences contain both **Global** and **Default Local/Local** preferences.

Leading Articles Tab

This preference window allows users to specify which leading articles (e.g. the, an, a) should to be ignored during cataloguing and searching. Since leading articles vary from language to language, this preference gives the user total control over how they are defined.



Where is this preference used?

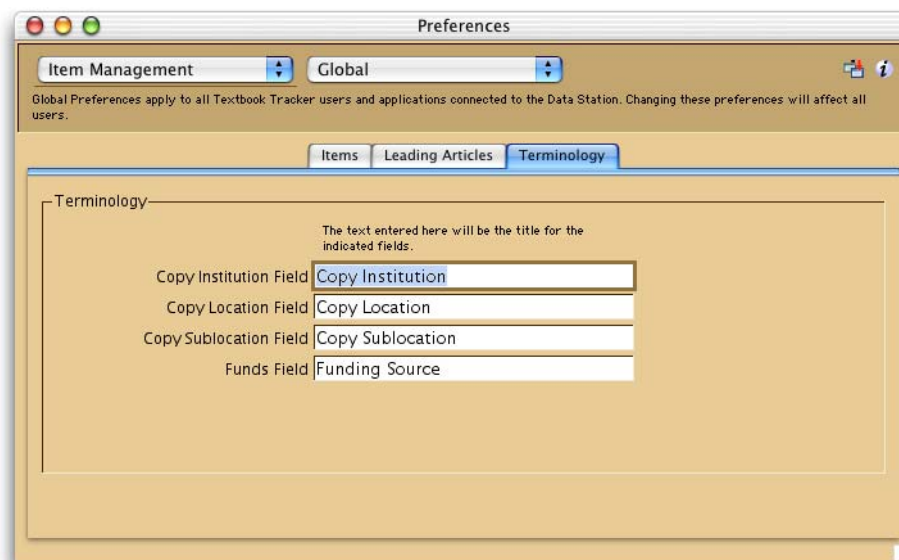
- Titles beginning with these leading articles will be sorted by the next available word. The second indicator of the **245** tag is automatically set to the correct MARC standard value for the skipped leading article.
- Series beginning with these leading articles are sorted by the next available word. The second indicator of the **440** tag is automatically set to the correct MARC standard value for the skipped leading article.
- When Textbook Tracker searches for titles, queries that begin with a specified leading article will be automatically skipped. Thus, the query for "The Cat in the Hat" will actually search for "Cat in the Hat."
- When Textbook Tracker searches for a series, queries that begin with a specified leading article will be automatically skipped. Thus, the query for "The Wizard of Oz" will actually search for "Wizard of Oz."

Global Item Management Preferences

Item Management preferences contain both **Global** and **Default Local/Local** preferences.

Terminology Tab

Use this window to set default terminology for your school or institution. You can set terminology for your **Institution**, **Location**, **Sublocation** and **Funds**.



Copy Institution Field—This field allows you to customize the “Institution” term that is used throughout Textbook Tracker. Because this term is customizable, this manual will use the generic term “**Institution**.” For example, if Textbook Tracker has been licensed for use at a “**School**” or a “**Central Distribution Center**,” then you may enter one of these terms into the field. Default is **Copy Institution**.

Copy Location Field—This field allows you to customize the “Location” term that is used throughout Textbook Tracker. Because this term is customizable, this manual will use the generic term “**Location**.” For example, if Textbook Tracker has been licensed for school use, then “**Homeroom**” is the most commonly used **Copy Location Field**. Default is **Copy Location**.

Copy Sublocation Field—This field allows you to customize the “Sublocation” term that is used throughout Textbook Tracker. Because this term is customizable, this manual will use the generic term “**Sublocation**.” For example, if Textbook Tracker has been licensed for school use, then “**Teacher**” is the most commonly used **Copy Sublocation Field**. Default is **Copy Sublocation**.

Funds Field—This field allows you to customize the term used for “Funds” in your school or institution. Because you can change the term, this manual will use the generic term “**Funds**.” Use this field terminology to help keep track of where funding for an item came from. For example, if you have to report the status of items purchased with government grants or special funds, enter the grant number or special fund name in this field. You can then generate reports using this field. Default setting is **Funding Source**.

Local & Default Local Item Management Preferences

Item Management preferences contain both **Global** and **Default Local/Local** preferences.

Items Tab

Use this preference to configure general information about your next barcode, default policy, and other catalog settings.

The screenshot shows the 'Preferences' window with the 'Items' tab selected. The window has a title bar with standard macOS window controls. Below the title bar, there are two dropdown menus: 'Item Management' (set to 'Local') and 'Local' (set to 'Local'). A note below these menus states: 'Local preferences are used for this machine only, regardless of who is logged in.' The main content area is divided into three sections: 'Barcode Settings', 'Policy and Medium', and 'Other Settings'. 'Barcode Settings' contains a 'Next Barcode' text field with the value '1300000'. 'Policy and Medium' contains two dropdown menus: 'Default Policy' (set to 'Standard Item') and 'Default Medium' (set to 'book'). 'Other Settings' contains a 'Local Call Number Tag' text field, a 'Copy History Size' text field with the value '6', and four checkboxes: 'Preserve Existing Call Numbers' (checked), 'Require Matching Copy Institution Code on Import' (checked), 'Prefer LC Call Numbers' (unchecked), and 'Show Statement of Responsibility in the Title Field of the Items Window' (unchecked). A note on the right side of the 'Other Settings' section states: '(Must match School ID Code set in the School Information tab)'.

Barcode Settings

Next Barcode—The next available item barcode number. When you enter a new copy record, Textbook Tracker automatically assigns the next available barcode (unless you assign a number manually). You should set this field when you first configure Textbook Tracker, so any copies that are added are assigned an item barcode number that agrees with your numbering strategy. Default is “1300000.”

Policy and Medium

Default Policy—Using this drop-down menu, you can set the default policy for newly added item records. The default is **Standard**. If you assign an item policy which is later removed, the **Default Policy** will return to **Standard**.

Default Medium—Using this drop-down menu, you can set the default medium for newly added item records. Default is **Book**.

Other Settings

Local Call Number Tag—If your call numbers are not in the customary location within the MARC record, use this preference to configure where Textbook Tracker should check first for a call number.

Copy History Size—Use this field to indicate the number of patrons to list in the copy history.

If you enter a valid “tag_subfield,” Textbook Tracker will scan that point in the MARC record to find the call number. If your call numbers are typically at 900_a, enter “900_a” in this field. The default setting is blank.

Preserve Existing Call Numbers—When this checkbox is set, existing call numbers are never modified during import or automatic SmartMARC updating. Default is **ON**.

Require Matching Copy Institution Code on Import—When this box is checked, only copy information with your institution/school code in 852_a is imported. All other institution/school codes are ignored. Default is **OFF**.

Prefer LC Call Numbers—When this checkbox is set, Textbook Tracker looks first for an LC Call Number when looking for call numbers in an imported MARC record. Default is **OFF**.

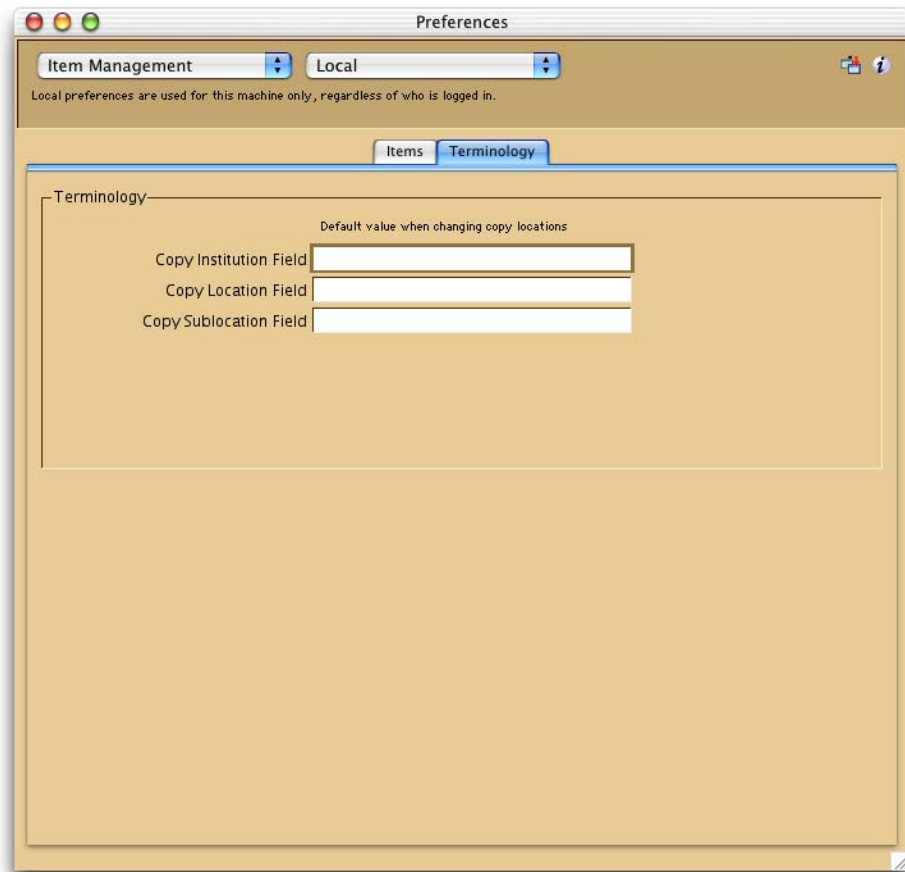
Show Statement of Responsibility in the Title Field of the Items Window—When this box is checked, Textbook Tracker shows the statement of responsibility (245_c) in the title field of the **Item Management** window. Default is **OFF**.

Local & Default Local Item Management Preferences

Item Management preferences contain both **Global** and **Default Local/Local** preferences.

Terminology Tab

Use this preference window to set the default values (terminology used when changing copy locations) that will appear in the fields of the **Change Location** window (*see “Change Location Window” on page 189 for more information*). You can set the default terminology for your **Institution**, **Location**, and **Sublocation**.



School Information Preferences

Global School Information Preferences

School Information preferences contain both **Global** and **Default Local/Local** preferences.

- N O T E -

The term used to identify the patron institution be customized by the administrator (see *"Terminology"* on page 98 for instructions). Although you can change this term, this manual will refer to it as **School**.

School Information Tab

The **School Information** preference window is the default window that appears every time you select Textbook Tracker's **Preferences** from the **Edit** menu or the shortcut keys <ctrl-; > (Windows) or <cmd-; > (Macintosh). Use this preference to personalize Textbook Tracker with information about your school or institution.

- ✓ Administration
- Archive
- Calendars
- Circulation
- Display Settings
- Item Management
- School Information
- Patron Management
- Policies
- SIF
- Sounds
- Web
- Word Processor

The screenshot shows the 'Preferences' window with the 'School Information' tab selected. At the top, there are two dropdown menus: 'School Information' and 'Global'. Below these, a note states: 'Global Preferences apply to all Textbook Tracker users and applications connected to the Data Station. Changing these preferences will affect all users.' The 'School Information' tab is active, showing fields for 'SMTP Server' (a text input field), 'Starting' (a dropdown menu set to 'Kindergarten'), 'Ending' (a dropdown menu set to '12th Grade'), and 'Last date of school is' (a text input field set to 'July 1 2004'). At the bottom, there is a checkbox labeled 'This is a school' which is checked.

SMTP Server—This is the TCP/IP or DNS address of your library's mail server. Typically, this will be "mail." followed by your domain name. You must enter a valid SMTP Server address to use email services. Default is blank.

School

Use this section to specify the type of school or institution that Textbook Tracker is being used for.

Starting—Use the drop-down menu to select the starting grade level of your school. Default is **Kindergarten**.

Ending—Use the drop-down menu to select the ending grade of your school. Default is **12th Grade**.

Last Date of School is—Identifies the last date of the current school year. On this date, all patrons graduate to the next grade level. Default is July 1st of the current year.

This is a School—When this box is checked, Textbook Tracker uses defaults and settings which assume that Textbook Tracker is being used for a school depository. Turning this option off either hides school elements or changes them into non-school related terms. Default is set based upon your activation codes. If your activation code contains “H1,” it will default to ON.

Local & Default Local School Information Preferences

School Information preferences contain both **Global** and **Default Local/Local** preferences.

School Information Tab

Use this preference to personalize Textbook Tracker with information about your school or institution.

The screenshot shows the 'Preferences' window with the 'School Information' tab selected. At the top, there are dropdown menus for 'School Information' and 'Local'. Below these, a note states: 'Local preferences are used for this machine only, regardless of who is logged in.' The main content area is divided into three sections: 'School Information Address', 'School Information Hours', and 'Information'. The 'School Information Address' section contains fields for 'Address', 'Address 2', 'City', 'State', 'Postal Code', 'Country', 'Telephone', and 'Fax'. The 'School Information Hours' section is currently empty. The 'Information' section contains fields for 'Administrator', 'Administrator Title', 'School Email Address', and 'School ID Code'. At the bottom, the 'Local Settings' section includes 'Money Format' (set to 'Use System S...') and 'Language' (set to 'English').

School Information Address

Enter the name of your school or institution. The default is your school or institution license name. You must enter your address, city, state, postal code, country, telephone and fax; this data is used for return addresses on patron notices and for information shown on **Textbook Tracker Web**.

This address information will also be used when creating a new patron if no city, state, postal code, or country information was specified or added to the new patron record (see *"Adding New Patrons"* on page 129).

School Information Hours

The text you enter in this field will get displayed in the **School Information** page of your Textbook Tracker Web. Describe your school hours (e.g. 7:00 a.m. - 5:00 p.m. Monday through Friday) with any combination of numbers and hours. If you decide to leave this field blank, the text **School Hours Not Specified** will appear on your Textbook Tracker **School Information** Web page.

Information

Administrator—This is the name that appears at the bottom of form letters. Enter the administrator's name here. Default is **Administrator**.

Administrator Title—The administrator's title. For example, Administrator, Textbook Director, or School Specialist, can also be included on form letters. Default is blank.

School Email Address—This is the school's email address, which is used as the return mail address for overdue notices and other email messages sent by Textbook Tracker. To guarantee that your email notifications are being sent, please check the list of requirements located under Enable Email Notifications on page 75. You must enter a valid email address to use most email services. Default is blank.

School ID Code—This is the school location identification code. This is a short code that is used for the **Copy Institution** field. Default is the first four characters of your school name. Changing this value will only apply the new **School ID Code** to future copy records; existing copy records that were created using the replaced **Institution ID Code** will *not* be automatically updated. If you would like to update your existing (and old) **Institution ID Codes** to the new value, run the **Copies Replace Information** utility (*see "Copies: Replace Information" on page 243 for more information*).

Local Settings

Money Format—Select the money format you want Textbook Tracker to use. Default is **Use System Setting**.

Language—Select a default language from the list of available languages. Default is **English** unless otherwise set by activation codes.

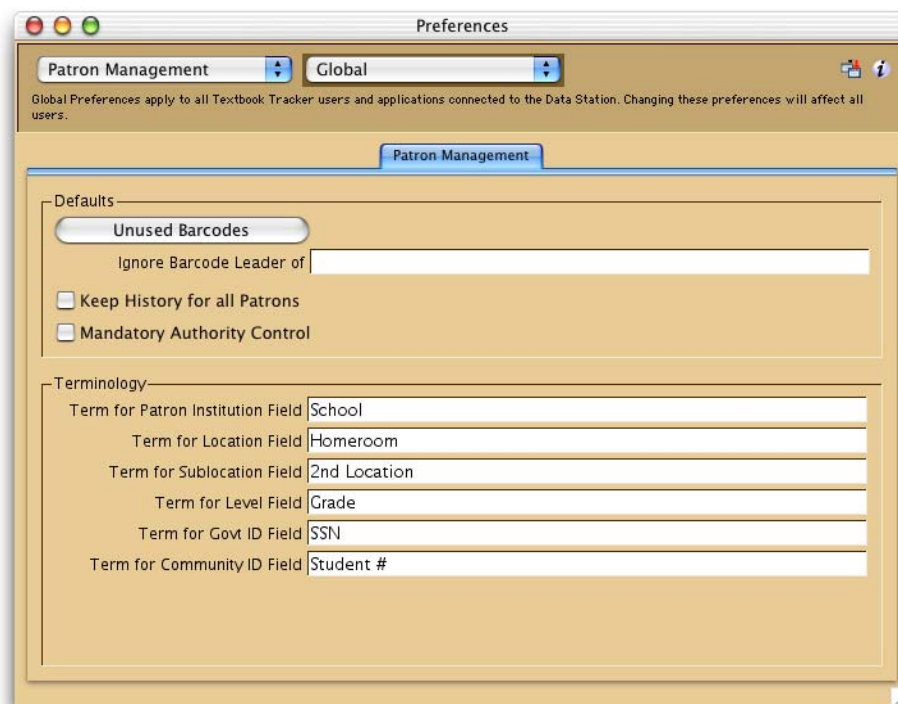
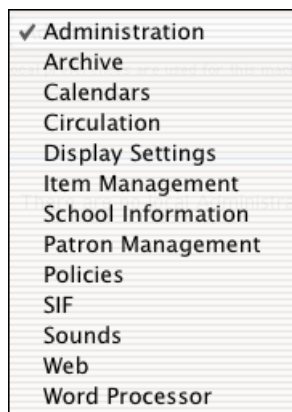
Patron Management Preferences

Global Patron Management Preferences

Patron Management preferences contain both **Global** and **Default Local/Local** preferences.

Patron Management Tab

Use the patron management preferences to configure next patron barcodes, default patron policies, terminology, and other general information about your patrons.



Defaults

Unused Barcodes—Creates a list of all unused patron barcodes within a specified range. The selected barcode range cannot exceed 10,000.

Ignore Barcode Leader of—If you are using barcode numbers not designed for Textbook Tracker, you can have Textbook Tracker automatically ignore leading characters automatically. For example, if your patron barcodes have the text “PAT” in front of each barcode, enter “PAT” in this field. Textbook Tracker will ignore the “PAT” at the beginning of each barcode label. If you don’t require use of this feature, leave the field blank.

Keep History for all Patrons—Check this box if you want Textbook Tracker to keep a transaction history for all the patrons who use your school/institution. Default is OFF.

Mandatory Authority Control—This makes **Authority Control** active and mandatory when you add new patrons or change fields that are authority controlled. **Location**, **Sublocation**, and **Grade** are all authority controlled.

Terminology

This preference lets you customize the terms for use in Textbook Tracker.

Term for Patron Institution Field—This preference lets you configure the term used for the **Institution** field. For example, “School” instead of “Institution”.

Although you can change this term, this manual will refer to it as “School.”

For schools, this defaults to “School”; for other institutions, this defaults to “Institution.”

Term for Location Field—This preference lets you configure the term used for the **Location** field. For example, you may want to use the term “Homeroom” rather than “Location.” The term you choose appears on the **Personal Info** tab in **Patron Management** and wherever else Textbook Tracker shows this information.

Although you can change this term, this manual will refer to it as “Location.”

For schools, this defaults to “Homeroom”; for other institutions, this defaults to “Location.”

If numeric ranges are going to be used in this field, they need to be padded with zeros in order to be sorted and selected correctly. For example, instead of a “1”, “2,” “402,” you’d insert “001,” “027,” “402.” Basically, all entries with a numeric range need to have the same number of characters.

Term for Sublocation Field—This preference lets you configure the term used for the **Sublocation** field.

You can use this field for whatever extra information you may need to enter. For example, you may want to use the term “Last Period” to identify an alternate location below the primary **Location** field. The term you choose appears wherever Textbook Tracker displays this information.

Although you can change this term, this manual will refer to it as the “Sublocation”. Default value is “2nd location.”

Term for Level Field—This preference lets you configure the term used for the **Level** field. For example, you may want to use the term “Grade” rather than “Level.” The term you choose appears under the **Personal Info** tab of the **Patron Management** window and wherever else Textbook Tracker shows this information.

Although you can change this term, this manual will refer to it as “Level.”

For schools, this defaults to “Grade.” For other institutions, this defaults to “Level.”

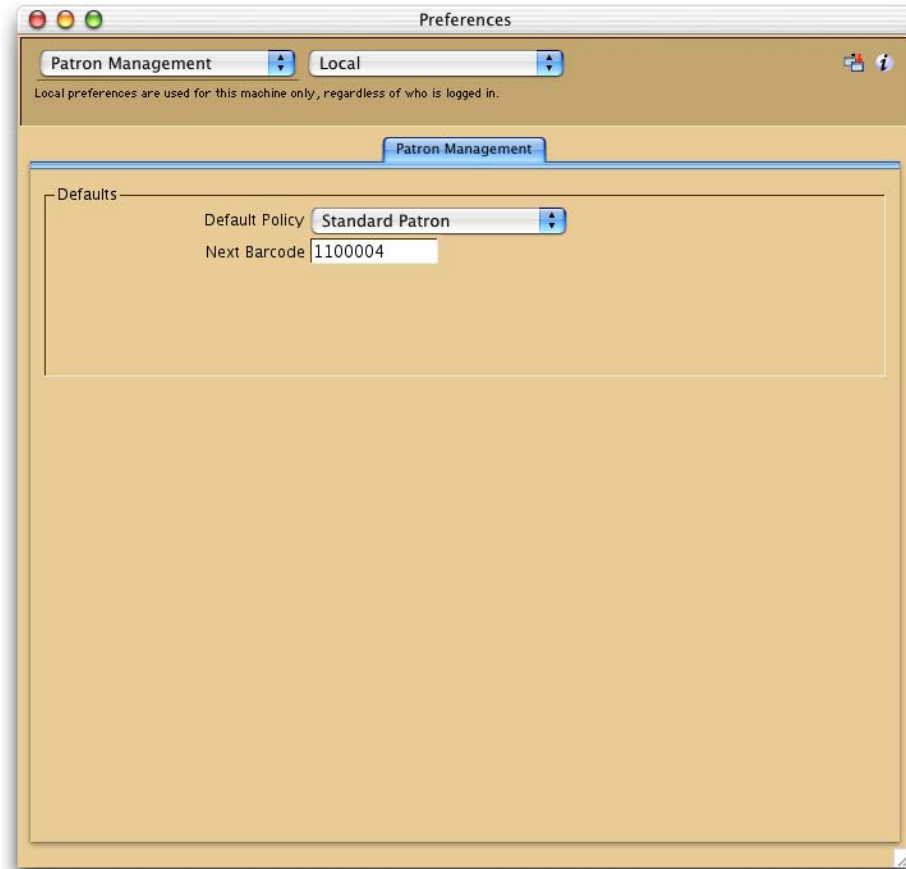
Term for Government ID Field—This field is used for national ID numbers. In the United States, this is typically the Social Security Number. Default value is “SSN.”

Term for Community ID Field—This field is used for community or local ID purposes. For schools, this defaults to “Student #”; for other institutions, this defaults to “ID #.”

Local Patron Management Preferences

Patron Management preferences contain both **Global** and **Default Local/Local** preferences.

Patron Management Tab



Default Policy—This drop-down menu displays what the default policy will be for newly added members. Use the drop-down menu to select a different default patron policy. If you later remove a patron policy, the **Default Policy** will revert to **Standard Patron**.

Next Barcode—The next available patron barcode number. When you create a new patron, Textbook Tracker will assign them the next available barcode (unless you assign a number manually). The default value is 11000000.

You should set this field when you first configure Textbook Tracker, so that any new patrons are assigned a patron barcode number that coincides with your numbering strategy.

Policy Preferences

Global Policies Preferences

There are no available **Local** or **Default Local Policies** preferences.

Patrons Tab

Textbook Tracker Policies help to establish rules on how patrons can use your school, how items circulate, and how circulation periods are computed. Policies are important for circulation purposes, reports, and statistics.

Use the **Policies** preferences to customize these rules for your school. The **Policies** preference window includes preferences for patrons, items, and circulation.

To choose policies for **Items** or **Circulation**, click on the appropriate tab across the top of the window. The preference window for that category will appear. The subsequent sections describe each category of preferences.

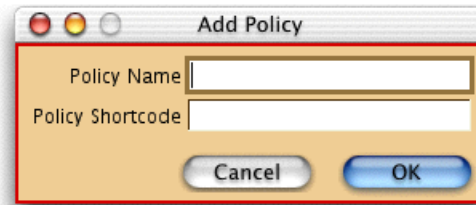
Patron Policies

Patron policies are the general rules that govern how patrons use your school. For example, front office workers can be given more privileges than teachers. Use the **Patron Policies** preference window to customize these rules for your school.

Textbook Tracker automatically creates two patron policies: a **System Patron** policy (SYS) and a **Standard Patron** policy (STD). These policies cannot be removed from the system. The system policy is for “special” patrons with barcodes under fifty. If you don’t assign a policy to a patron, Textbook Tracker uses the **Standard Patron** policy unless otherwise defined in the **Patron Management** preferences.

- ✓ Administration
- Archive
- Calendars
- Circulation
- Display Settings
- Item Management
- School Information
- Patron Management
- Policies
- SIF
- Sounds
- Web
- Word Processor

To add a policy, click on the **New** or **Duplicate** button. The following window appears asking you for information about the new policy.



Enter a **Policy Name** and a policy **Short Code** (between 1-4 characters) then click **OK** to create the new policy using these values. If you click on **Duplicate**, the currently selected policy rules are copied and a **Policy Shortcode** is automatically created. Otherwise, the **Standard Patron** rules are copied. You can then edit these values to customize the newly created policy to meet your needs. **Short Code(s)** and **Policy Name(s)** must be unique.

To remove a policy, click the **Remove** button. You can not remove a policy that is being used by existing patrons. The **Remove** and **Edit Name** buttons are hidden for the **Standard** and **System Patron** policies—as they cannot be removed or renamed.

To better explain how **Patron Policies** work, if a patron exceeds a value that you enter on the **Patrons Policy** window, a warning message appears. For example, if the patron tries to check out more books than the value that is provided in the **Maximum number of items checked out** field, a warning message will appear in the **Circulation** window.

When a warning message appears, some users will have the option to override the policy.

To change the settings for an existing policy, change the values in the fields on the **Patron Policies** preferences window. The following list explains the fields.

Policy—This drop-down menu shows the currently selected policy. Click in the drop-down menu to select other policies you've defined for your institution/school. You can edit this name by clicking on the **Edit Name** button, located right beside it.

Short Code—These are short names for policies. These are used in reports and other places where long names don't fit well. **Short Codes** must be between 2-4 characters and must be unique. Default is the first 4 characters of the **Policy Name**—adjusted to make it unique (in case two policies start with the same 4 letters).

Maximum number of items checked out—This is the maximum number of items that patrons (under this policy) can check out. Default is "5."

Maximum number of items overdue—This is the maximum number of items that patrons (under this policy) can have overdue and still be allowed to check out additional items. Default is "2."

Maximum number of items placed on hold—This is the maximum number of pending hold requests that patrons (under this policy) can have active at any one time. Default is "5."

Maximum fine for an overdue item—This value limits the maximum fine that can be charged for an overdue item. If you check the **Fines limited by item cost** box, the maximum fine will be either *this* value or the textbook cost (whichever is lower). Otherwise, this value alone is used. If you want to allow unlimited fines, enter a large value here. Default is “\$20.00.”

Number of days patron’s card is active—This value is used as the default card expiration date for newly added patrons. Default is “365” days.

Number of days to keep a hold request—Hold requests that exceed this given time limit are automatically removed from the system. Default is “28” days.

Number of days to keep an in-stock hold request—In-stock hold requests that expire are automatically removed at the beginning of each day. A notice is prepared so that items may be returned to the shelves, or held for another patron. Default is “5” days.

Total fines alert value—If the patron’s total fines exceed this value, an alert will appear when this patron becomes the current patron. If you want an alert for any patron with fines, set this value to “\$00.01”. If you want alerts for patrons with larger fines, determine that value here. Default is “\$20.00.”

Items are due on—Use this drop-down menu to select **Any Day** (meaning item due dates are based on the **Number of days these items can be loaned** option) or **Monday** through **Sunday**. If you select a day of the week from this menu, all loaned items are due back that same day each week. If the day of the week you select happens to fall on a **Closed** day, then Textbook Tracker will try the specified **due on** date again in a week. If the next week’s **due on** date also happens to be **Closed**, Textbook Tracker will make the item due on the next available **Open** date.

Use calendar—This field shows the calendar used under this policy. Use the drop-down menu to choose a different calendar for this policy. If you remove a calendar that is being used by a policy, the **Standard** calendar automatically replaces it. Default is **Standard**.

Apply period due dates—Choose whether to apply period due dates to patrons under this policy. If you decide to apply period due dates, due dates for items are automatically adjusted at check out. Default is **ON**.

Charge fines on closed dates—If this box is checked, patrons under this policy are charged fines on both open and closed dates. Otherwise, fines are only charged on dates that the school is open. Default is **OFF**.

Fines limited by item cost—Total fines for an item will be determined and limited by the hierarchy of certain values. These values are dollar amounts, contained in user-specified fields and examined in the order that is described below¹.

Here is the order in which these fields are examined: **Replacement Cost**, **Purchase Cost**, and **Default Replacement/Purchase Value**. If none of these fields contain a user-specified fee, a default of \$20.00 will be applied.

Policy notes—This field is used to enter a short note about the policy. This is for administrator use only, as Textbook Tracker doesn’t use this information. Default is blank.

1. Remember, these fields are hierarchal, meaning that the value provided in one field will get precedence over the value provided in another.

Global Policies Preferences

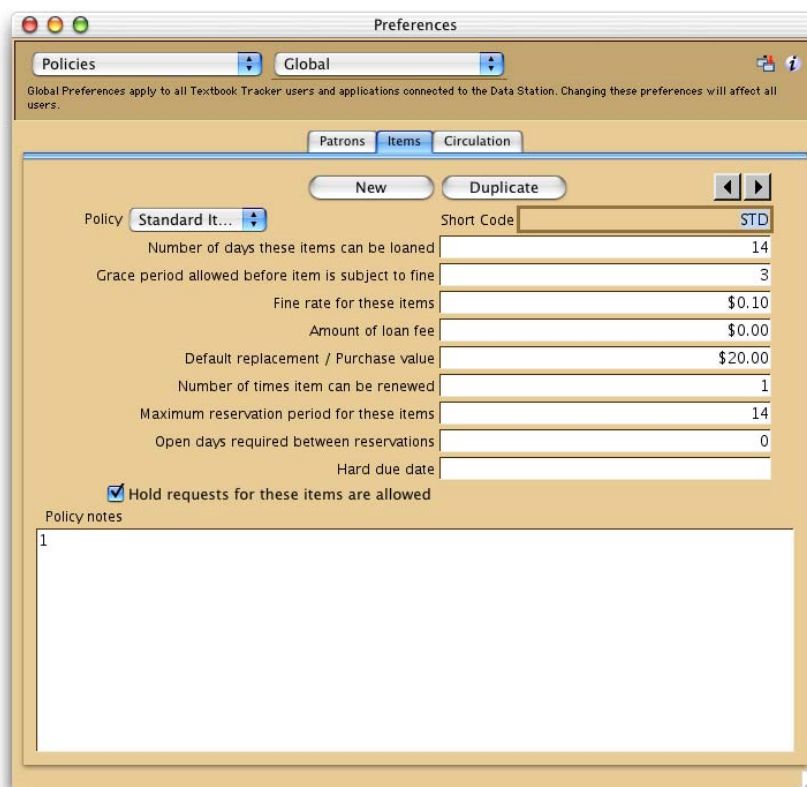
There are no available **Local** or **Default Local Policies** preferences.

Items Tab

Item policies are the general rules that govern how items are circulated in your school. For example, you can set policies to allow fiction works to be checked out longer than reference works. Use the **Item** policies preference to customize these rules.

Textbook Tracker automatically creates a **Standard Item** policy (STD) for items. The **Standard Item** policy is the default item policy. If you don't assign a policy to an item, it is assigned the **Standard Item** policy.

Click the **Item** tab on the **Policies** preference window to edit item policies.



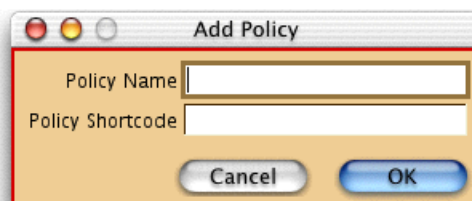
The screenshot shows the 'Preferences' window with the 'Items' tab selected. The window title is 'Preferences'. At the top, there are tabs for 'Policies' and 'Global'. Below these, a note states: 'Global Preferences apply to all Textbook Tracker users and applications connected to the Data Station. Changing these preferences will affect all users.' The 'Items' tab is active, showing a list of policies. The 'Standard It...' policy is selected. To the right of the policy name are 'New' and 'Duplicate' buttons. Below the policy name is a 'Short Code' field with the value 'STD'. The policy details are as follows:

Field	Value
Number of days these items can be loaned	14
Grace period allowed before item is subject to fine	3
Fine rate for these items	\$0.10
Amount of loan fee	\$0.00
Default replacement / Purchase value	\$20.00
Number of times item can be renewed	1
Maximum reservation period for these items	14
Open days required between reservations	0
Hard due date	

Below the table, there is a checkbox labeled 'Hold requests for these items are allowed' which is checked. At the bottom, there is a 'Policy notes' section with a text area containing the number '1'.

To add a policy, click on the **New** or **Duplicate** button. The following window appears, requiring information about your new policy.

Enter a **Policy Name** and **Short Code** (between 2-4 characters) then click **OK** to create a new policy using these values.



The screenshot shows the 'Add Policy' dialog box. It has two input fields: 'Policy Name' and 'Policy Shortcode'. Below the fields are 'Cancel' and 'OK' buttons. The dialog box is highlighted with a red border.

If you select **Duplicate**, the currently selected policy rules are copied. Otherwise, the **Standard Item** rules are copied. You can then edit the values to customize the newly duplicated policy to meet your needs. **Short Codes** and **Policy Names** must be unique.

To remove a policy, click the **Remove** button. You can not remove any policy that is currently being used by an existing item. Note that the **Remove** and **Edit Name** buttons are not selectable for the **Standard Item** policy.

To better explain how **Item Policies** work, if a patron exceeds any value that you have set in this window, a warning message will appear on the **Circulation** window. For example, if a patron tries to renew more times than the value you have entered in **Number of times item can be renewed**, a warning message will appear.

When a warning message appears, some users will have the option to override the policy.

To change settings for an existing policy, change values in the fields on the **Item Policy** preferences window. The following list explains the fields.

Policy—This drop-down menu displays the currently selected policy. Use the drop-down menu to choose from other policies that you've created for your school. You can edit these names by clicking on the **Edit Name** button.

Short Code—These are short names for policies and are used in reports and other places where long names don't fit well. **Short Codes** must be between 2-4 characters. Default is the first 4 characters of the policy name.

Number of days these items can be loaned—This field lets you specify the number of days (under this policy) that items can be loaned. Enter the number of days items of this policy can be loaned. For example, to set a loan period of three weeks, enter 21. Default is 14 days.

For items that you do not want checked out, set the loan period to 0 days.

Grace period allowed before an item is subject to fine—Use this field to set the grace period allowed for overdue items before fines begin to accrue. For example, if you set the grace period for two days, patrons are not charged fines until the third calendar day an item is overdue. At this point, they are charged fines for three overdue days. It doesn't matter if the school is open or closed on those days, the grace period is only computed on calendar days.

For easy checkin, set the grace period one day longer than your commonly closed periods. For example, if you are commonly closed on Saturday and Sunday, set the grace period for three days. Therefore, if the textbook is due on Friday, and it's turned in through the bookdrop on Saturday, when you check it in on Monday no fines will be charged.

The default grace period is three days.

Fine rate for these items—Set the fine rate for items with this policy. The fine rate is computed daily. If you don't charge fines, enter \$0.00. The default setting is "\$0.10."

Amount of loan fee—If you charge patrons a fee for checking out an item, this is the field where you set the fee amount for items using this policy. This fee is charged automatically when the item is checked out. The fee is recorded as "Loan Fee for {item title}." The default setting is "\$0.00."

Default replacement/Purchase value—Set the average replacement cost for items with this policy. This policy is used to assign replacement costs for items that don't have an individual replacement cost specified in the copy record. The default is "\$20.00."

Number of times item can be renewed—Enter a value to set the number of times items under this policy can be renewed. If you don't allow items to be renewed, set the number to 0. The default is 1.

If a patron tries to renew an item that has already been renewed the maximum number of times, a warning message will appear at the **Circulation** window indicating that the patron has exceeded the policy limit for renewals.

Open days required between reservations—If your school requires time to process an item that has been returned, this setting will enforce the processing time between reservations. For example, certain equipment may need to be calibrated after each use. If the calibration time takes two days, and you enter the value of "two days" in this preference, Textbook Tracker will make sure that reservations are separated by at least two days. Default is 0 days.

Hard due date—Using this policy, you can set a fixed due date for all items. If the due date entered here is *after* today's date, it is used as your due date. Otherwise, Textbook Tracker computes a due date according to other policy settings. Default is blank.

Hold requests for these items are allowed—Check this box to allow patrons to place hold requests on items. If you don't check this box, patrons cannot place hold requests on items under this policy. Default is ON.

Policy notes—Enter notes about this policy. Notes are only for the administrator's use, they are not used for any policy calculations. Default is blank.

Global Policies Preferences

There are no available **Local** or **Default Local Policies** preferences.

Circulation Tab

Circulation policies are the specific rules that are used when patron transactions are performed. Textbook Tracker creates a circulation policy for every combination of patrons and items, using the values that have been entered into individual **Patrons** and **Items** policy windows.

Use the **Circulation Policies** preference to customize these settings with your circulation exceptions. For example, you can configure a circulation policy to allow teachers to check out reference books, but not students.

Click the **Global Circulation** tab on the **Policies** preference window to change circulation policies.

Preferences

Policies Global

Global Preferences apply to all Textbook Tracker users and applications connected to the Data Station. Changing these preferences will affect all users.

Patrons Items Circulation

Only modify settings that are exceptions to the normal policy settings.

Patron Standard Patron Item Standard Item

Maximum number of items checked out	5	Number of days these items can be loaned	14
Maximum number of items overdue	2	Grace period allowed before item is subject to fine	3
Maximum number of items placed on hold	5	Fine rate for these items	\$0.10
Maximum fine for an overdue item	\$20.00	Amount of loan fee	\$0.00
Number of days patron's card is active	365	Average replacement cost for these items	\$20.00
Number of days to keep a hold request	28	Number of times item can be renewed	1
Number of days to keep an in-stock hold request	5	Maximum reservation period	14
Total fines alert value	\$20.00	Open days required between	0
		Hard due date	

Fines limited by book cost ☒

Apply period due dates ☒

Charge fines while the school is closed ☐

Hold requests for these items are allowed ☒

Use calendar Standard

Items are due on Any day

Policy notes

You can edit a **Circulation** policy by selecting a **Patron** and **Item** policy from the corresponding drop-down menus. For example, you can select **Standard Patron** and **Standard Item** to create a circulation policy for this combination. This policy will display the rules that are used when a standard patron performs a transaction on a standard item.

Each **Circulation** policy is a combination of one patron and one item policy. The original settings for a circulation policy come from combining these patron and item policies.

- If you change a patron or item policy, the default circulation policy (which is a combination of the policies), is changed to match *unless* you've entered an exception into the **Circulation** policy window. If you enter an exception, it will be used rather than the standard patron or item policy values.
- If you modify the settings in a **Circulation** policy, those values are used until you change them back to the default values. **Patron** and **Item** policies are not affected by the changes you make to the **Circulation** policy.

The following examples show how a policy change takes effect:

Example 1—A loan period is fourteen days under a particular **Item Policy** and you have *not* changed this value in the **Circulation** policies window. If you change the setting in the **Items** policy window from fourteen to twenty-one, all circulation policies using this item policy are updated.

Example 2—A loan period is fourteen days under a particular item policy but you *changed* this value in the **Circulation** policies window to a custom setting to allow teachers a loan period of thirty days. If you change the setting in the **Item** policy window from fourteen to twenty-one, the thirty-day setting remains in the customized **Circulation** policy; only those fields you *don't* customize will be changed.

Circulation Policies

Patron—Use this drop-down menu to modify circulation policies for these specific patron types. Users need only modify settings that are exceptions to the normal policy settings.

Maximum number of items checked out—The maximum number of items that the patron type (specified in the **Patron** drop-down menu above) can have out at one time. Default is 5.

Maximum number of items overdue—The maximum number of items that patrons can have overdue before new item checkout is disallowed. Default is 2.

Maximum number of items placed on hold—The total number of items that patrons can have placed on hold. Default is 5.

Maximum fine for an overdue item—This is the total amount that an overdue item can reach before it no longer accrues fees. Default is \$20.00.

Number of days a patron's card is active—How long (in days) that patron school/institution cards are valid. Usually, this is one year. Default is 365.

Number of days to keep a hold request—The number of days a patron's hold request will stay active. Default is 28.

Number of days to keep an in-stock hold request—The number of days a patron's in-stock hold will stay active. Default is 5.

Total fines alert value—The total amount of fines that a patron can accrue before an alert window will appear during checkout. Default is \$25.00.

Fines limited by item cost—When checked, fines for a particular item can not exceed it's total purchase cost. Default is checked.

Apply period due dates—Set up a **Period Due** date in the **Calendars Preference** window (by clicking twice on an empty calendar day). **Period Due** dates are fixed due dates that require items to be returned to the school, regardless of the loan period or any other circumstances. You may have as many **Period Due** dates as you require for your school/institution. Default is checked.

Charge fines while the school is closed—If checked, item fines will continue to accrue even on school/institution closed dates (e.g. weekends and holidays). Default is unchecked.

Policy Notes—Enter any general information or reminders for your set of combined policies.

Item—Use this drop-down menu to modify circulation policies for this particular item type. Users need only modify settings that are exceptions to the normal item policy settings.

Number of days these items can be loaned—This field lets you specify the number of days (under this policy) that items can be loaned. Enter the number of days items of this policy can be loaned. For example, to set a loan period of three weeks, enter 21. Default is 14 days.

For items that you do not want checked out, set the loan period to 0 days.

Grace period allowed before the item is subject to fine—Specify the number of days this item type can be borrowed past its loan period (see above) before fines begin to accrue. Default is 3.

Fine rates for these items—The fine amount that is charged to the patron for every day that the item is overdue. Default is \$0.10.

Amount of loan fee—If your school/institution charges a fee to check out items (i.e. renting), specify the price here. Default is \$0.00.

Default replacement / Purchase Value—Average cost for this specific item type. This is the amount charged to a patron when an item is lost, never returned, or irrecoverably damaged. This amount can be changed individually per item. Your **Items** preferences determine whether fees/fines are allowed to exceed this value. Default is \$20.00.

Number of times item can be renewed—Use this field to specify the number of times a patron can renew the same item. Default is 1.

Maximum reservation period for these items—Set the maximum number of days patrons can make reservations for these specific item types. Default is 14.

Open days required between reservations—Sets a buffer period of open days before a reservation so that items are processed and ready to distribute to the next patron in waiting. If a patron tries to check out a textbook whose reservation period coincides with their loan period, a warning message will appear and that patron's loan period will be cut short. Default is 1.

Hard due date—Date in which all items (i.e. *everything*) is required back to your school or institution. Generally, this date is set for the end of a school year, end of semester, or quarter changes.

When you enter any type of specially formatted information such as dates you can enter values in a wide range of formats. For example, you can enter the date December 1, 2004 as: "Dec 1, 2004" or "12/1/04"¹ or "12.1.04" or "12 1 04". If the year is 2004, you can just enter "12/1". If the current month is December, you can just enter "1". Default is blank.

Hold requests for these items are allowed—Hold requests for this item type will be allowed. Default is checked.

Use calendar—This is the calendar used for the options below. All changes made (closed dates, period due dates, etc.) will be generated by Textbook Tracker using this specific calendar. Default is **Standard**.

Items are due on—Use this drop-down menu to select **Any day** (meaning item due dates are based on the **Number of days these items can be loaned** option) or **Monday** through **Sunday**. If you select a day of the week from this menu, all loaned items are due back that same day each week. If the day of the week you select happens to fall on a **Closed** day, then Textbook Tracker will try the specified **due on** date again in a week. If next week's **due on** date also happens to be **Closed**, Textbook Tracker will make the item due on the next available **Open** date.

1. When you enter a two digit date, values between 0-30 are assumed to be 2000-2030 and values between 31-99 are assumed to be 2031-2099.

SIF Preferences

Global SIF Preferences

There are no available **Local/Default Local SIF** preferences.

- N O T E -

The **SIF** protocol is an optional feature of Textbook Tracker. You must have purchased a **SIF** license in order to use this feature.

- ✓ Administration
- Archive
- Calendars
- Circulation
- Display Settings
- Item Management
- School Information
- Patron Management
- Policies
- SIF
- Sounds
- Web
- Word Processor

What is SIF?

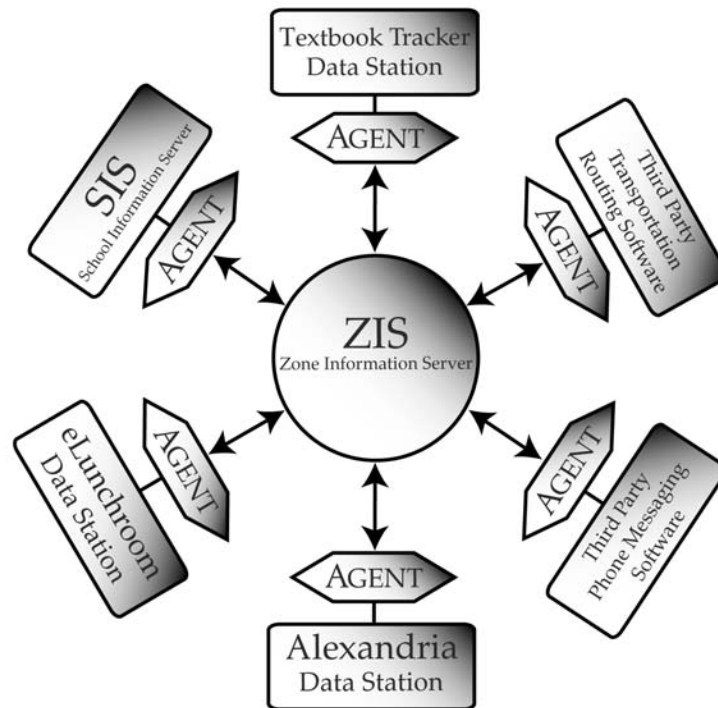
One of the biggest challenges facing the K-12 community is the lack of software interoperability (i.e. sharing of database information). In other words, most school districts have a series of software applications which all require the same data, but have no way to talk to each other. Educators and administrators consistently lament the fact that their financial management, administration, library automation, transportation routing, telephone messaging, and cafeteria software applications don't work together (i.e. communicate or share data formats). For example, a school district might need to create a report using data from multiple school software applications and deliver this report over the internet, confident that their information remains secure. SIF solves these problems by allowing different third party software applications to communicate, dramatically reducing the redundancy of data entry so that administrators can maximize staff and faculty time and are able to better focus on education.

The **Schools Interoperability Framework** (SIF) is *not* a product and will not be sold as such, rather, it's an industry-supported technical protocol that ensures that diverse primary and secondary (K-12) instructional and administrative software applications share information (data formats) and work together seamlessly, saving tremendous amounts of time and productivity. When different third party software applications can communicate with each other, access one another's databases, resources, and tools, a school district can more effectively serve the needs of its users¹.

1. Information on this page was sourced and adapted from the following internet resources: www.thejournal.com, www.microsoft.com, and www.sifinfo.org.

How does SIF work?

A critical component of SIF is the Zone Integration Server (ZIS) which serves as the data integration broker (or hub) between disparate software applications that support the SIF protocol. The ZIS is an invisible courier that reliably delivers information from one source to several destinations. The ZIS does not do this blindly, it is aware of the data formats that are of interest to these differing applications, aware of what they're privileged to send and receive, and aware of the security requirements for each and every application, delivering secure and reliable message broker services.

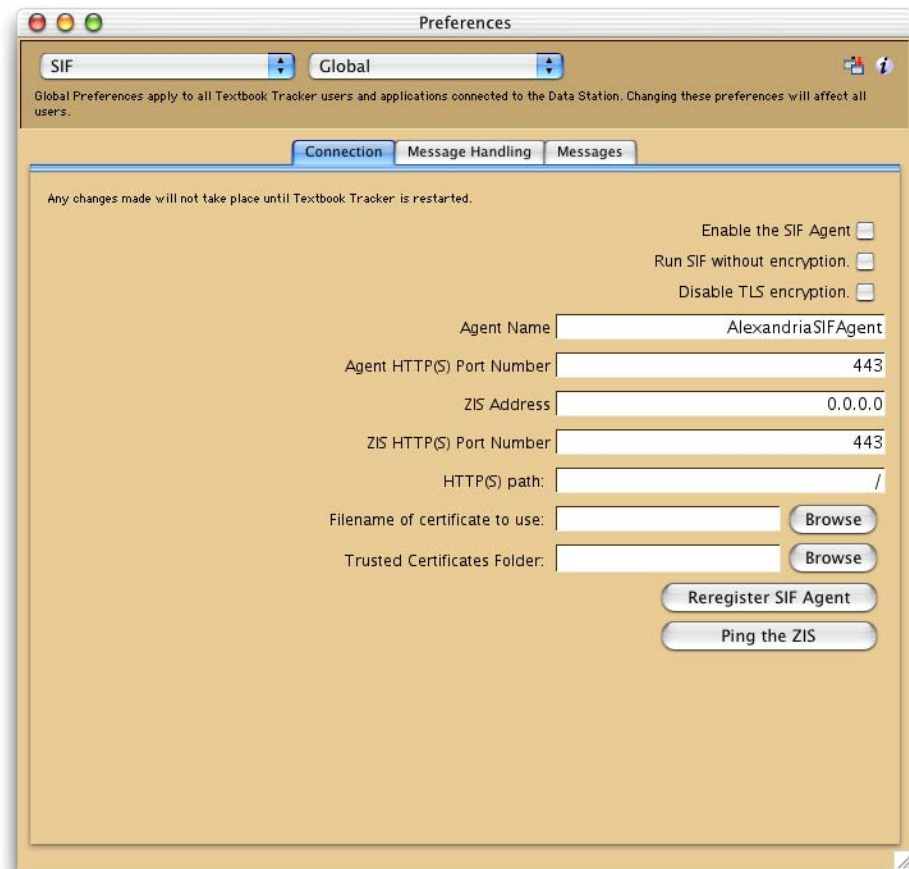


Third party vendors can connect their applications to one another via the ZIS by writing 'agents'. These agents perform the task of brokering communications between existing applications and the ZIS. These agents are the boundary where translation between the application's internal data format and SIF format occurs. SIF is not limited to a particular operating system or platform.¹

1. Information on this page was sourced and adapted from the following internet resources: www.thejournal.com, www.microsoft.com, and www.sifinfo.org.

Connection Tab

Any changes made to the **SIF Connection** tab fields will not take place until Textbook Tracker has been restarted.



Enable the SIF Agent—This will disable/enable Textbook Tracker’s **SIF** services. Without the SIF agent enabled, there won't be any communication with the ZIS system resources (e.g. the SIF agent port, RAM, CPU, etc).

Run SIF Without Encryption—SIF can run in two modes: *with* encryption or *without* encryption. However, since it can't run in both modes at the same time, use this checkbox to decide if you will disable/enable encryption. Unless necessary, running SIF without encryption is *not* recommended; whatever the ZIS is doing, Textbook Tracker should be doing as well.

Disable TLS Encryption—However unlikely, it is possible for there to be communication errors with TLS encryption. Unless the user experiences these types of errors, they should *always* keep TLS encryption enabled (obviously this preference is ignored if the **Run SIF Without Encryption** feature is disabled).

Agent Name—The name that the Textbook Tracker SIF Agent is known by to all other SIF agents and the Zone Integration Server (ZIS). For multiple libraries in the same zone, name should be unique; otherwise, there is no need to change it from the default.

Agent HTTP(S) Port Number—The TCP/IP port that Textbook Tracker listens with. This is the port that the ZIS will connect to. Under OSX, the default port requires that the user has administrative privileges on the computer (usually requires logging in as root).

ZIS Address—This is the internet address when the ZIS is located. This can be either an IP or resolvable address. The protocol header should be left out. Refer to your ZIS installation notes for this address.

ZIS HTTP(S) Port Number—The TCP/IP port that the ZIS listens on, and the one that you need to connect with. Refer to your ZIS installation notes for this number. If there is no mention of this port number, then the default will most likely work.

HTTP(S) path—This is useful if your ZIS is running underneath a web server. This path can be obtained by looking at the full address where the ZIS server is located. This path will be found after the address and port number (with all leading and trailing slashes).

Filename of certificate to use—This should point to a directory containing the certificate (in PEM format) that is trusted by the ZIS.

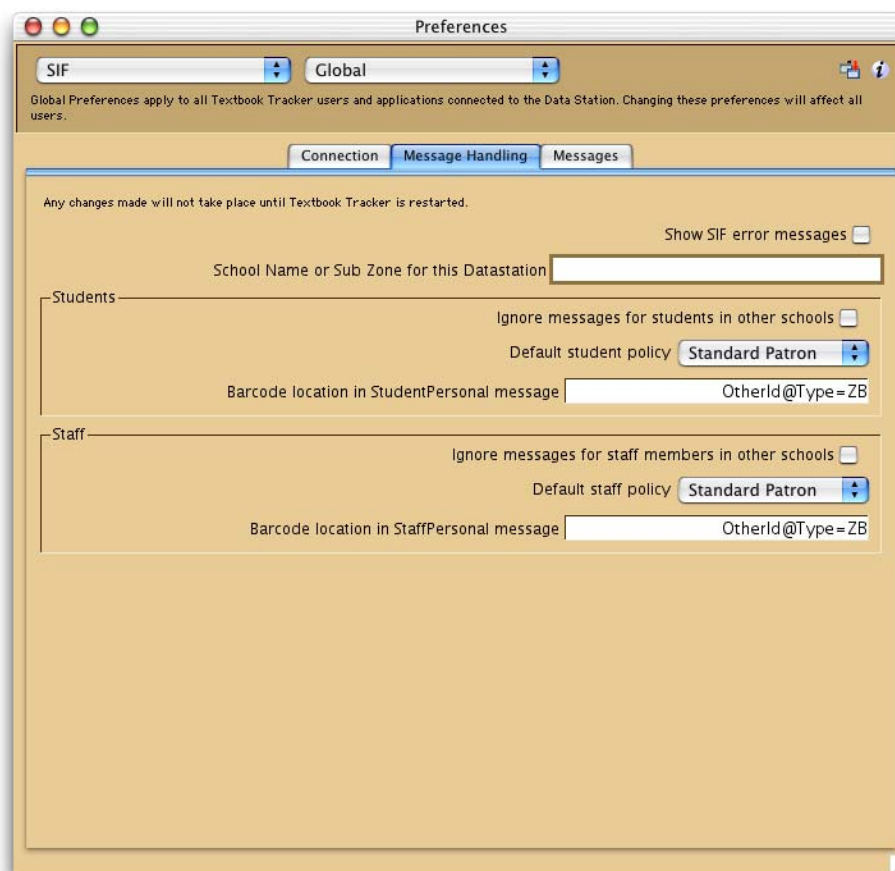
Trusted certificates folder—This should point to a directory containing the ZIS certificate and any other certificates in its certificate chain.

Reregister SIF Agent—Each agent sends a `SIF_Register` message to become part of the 'zone'. The ZIS then sends an acknowledgement (or `SIF_ACK`) message to confirm the registration.

Ping the ZIS—Sends a request to the ZIS and awaits an answer to make sure that it is on-line and available.

Message Handling Tab

Any changes made to the **SIF Connection** tab fields will not take place until Textbook Tracker has been restarted.



Show SIF error messages—This preference will display all the error messages that Alexandria receives from the ZIS in the **Circulation** window's **Transaction Log**. Even if this box remains unchecked, error messages will be saved to the transaction log file that is kept inside the Textbook Tracker **Logs** folder.

School Name or Sub Zone for this Data Station—To ignore students from other schools, indicate in this field the school name or subzone that will be embedded into the OtherID of type ZS in the StudentPersonal object.

Students

Ignore messages for students in other schools—Check this box if you have multiple Data Stations running within a zone (e.g. one Data Station per school in a school district). Using SIF, if a student is created, deleted, or changed, a message will go out to every SIF agent that is configured to receive student messages. However, if this box is checked, any student whose school (or subzone) doesn't match the **School Name or Sub Zone used in SIF** field (see below) will ignore the incoming message.

Default student policy—When a student is added via SIF, this is the policy that they will be assigned.

Barcode location in StudentPersonal message—Currently there are multiple ways for SIF implementers to put a student ID in the SIF message. Any one of these could be the barcode. This field allows the technical personnel who install the SIF zone to tell Textbook Tracker which is the correct one. If an **OtherID** of type **ZA** is in the **Sudent_Personal** objects, this is seen as the school for that student.¹

Staff

Ignore messages for staff members in other schools—Check this box if you have multiple Data Stations running within a zone (e.g. one Data Station per school in a school district). Using SIF, if a staff member is created, deleted, or changed, a message will go out to every SIF agent that is configured to receive staff member messages. However, if this box is checked, any staff member whose school (or subzone) doesn't match the **School Name or Sub Zone used in SIF** field (see below) will ignore the incoming message.

Default staff policy—When a staff member is added via SIF, this is the policy that they will be assigned.

Barcode location in StaffPersonal message—Currently there are multiple ways for SIF implementers to put a staff member ID in the SIF message. Any one of these could be the barcode. This field allows the technical personnel who install the SIF zone to tell Textbook Tracker which is the correct one. If an **OtherID** of type **ZA** is in the **Staff_Personal** objects, this is seen as the school for that staff member.²

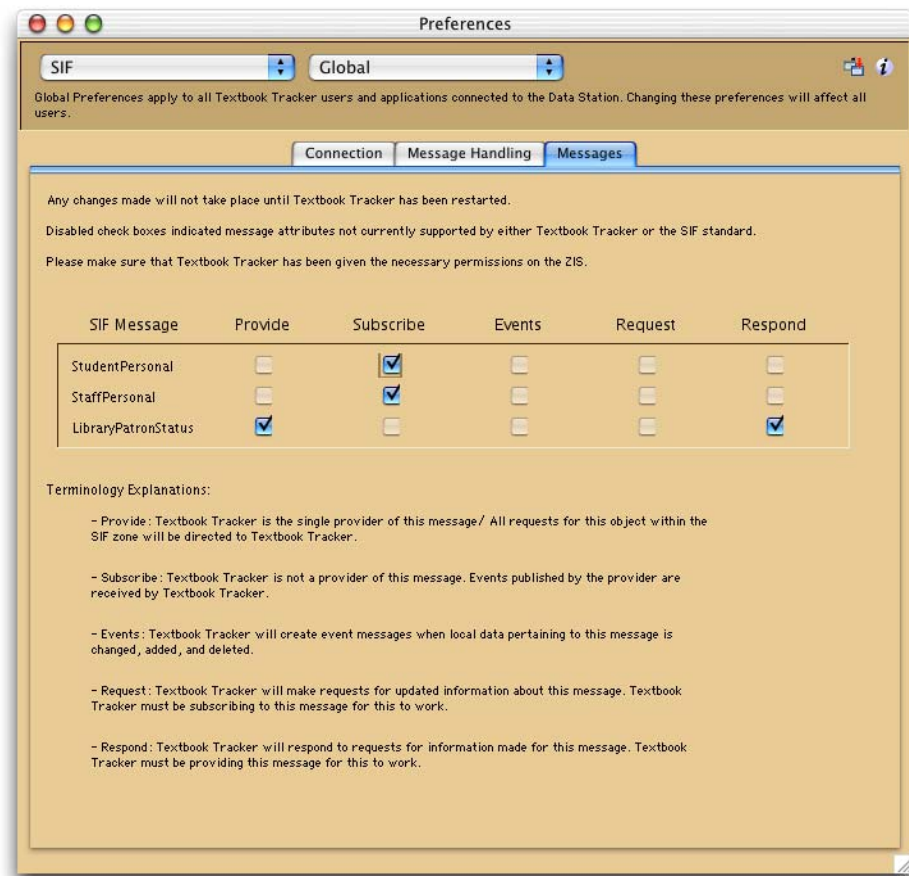
1. Format: **Element/subelement/sub-subelement@attribute=value**. Attribute is optional. The text of the matching element is used for the barcode. Default is **OtherID@type=ZB**.

2. Format: **Element/subelement/sub-subelement@attribute=value**. Attribute is optional. The text of the matching element is used for the barcode. Default is **OtherID@type=ZB**.

Messages Tab

Disabled (grayed out) checkboxes indicate that certain message attributes are not currently supported by either Textbook Tracker or the SIF standard.

Please make sure that Textbook Tracker has been given the necessary permissions on the ZIS.



Terminology Explanations¹

Provide—Textbook Tracker is the single provider of this message and all requests for this object within the SIF zone will be directed to Textbook Tracker. Checking this box indicates that Textbook Tracker wishes to serve as the provider of a data object and sends a **SIF_Provide** message to the ZIS. The ZIS enters this information into the **Access Control List** (ACL).

Subscribe—Checking this box means that Textbook Tracker wishes to subscribe to a certain data object and sends a **SIF_Subscribe** message to the ZIS. In other words, events published by the provider (usually the SIS) are received by Textbook Tracker.

Events—Textbook Tracker will create event messages when local data pertaining to this message is changed, added, and deleted. For an example, let's say that the SIS application is the new provider of the **Student_Personal** data object and the other applications are subscribers. When a new student is added to the SIS application, a **SIF_Event** is generated. The **SIF_Event** informs all of the subscribing applications about the addition, and each application in turn processes the new student into their database.

Request—Textbook Tracker will make requests for updated information about this message. Textbook Tracker must be subscribing to this message for this to work. For an example, let's say that the SIS application is the provider of the **Student_Personal** data object and the other applications are subscribers. Now let's suppose that Textbook Tracker has just been installed and needs to be populated with existing students in the SIS. Textbook Tracker, through its Agent, sends a request to obtain all student records.

Respond—Textbook Tracker will respond to request for information made for this message. Textbook Tracker must be providing this message for this to work. For example, upon receiving an **SIF_Request**, the SIS application Sends a **SIF_Response** to the ZIS containing all of the student record information. The ZIS forwards the request to the requester (Textbook Tracker, in this instance). Textbook Tracker is now synchronized with the SIS without the need for manual re-entry of all the student records.`

1. Information on this page was sourced and adapted from the following internet resources: www.thejournal.com, www.microsoft.com, and www.sifinfo.org.

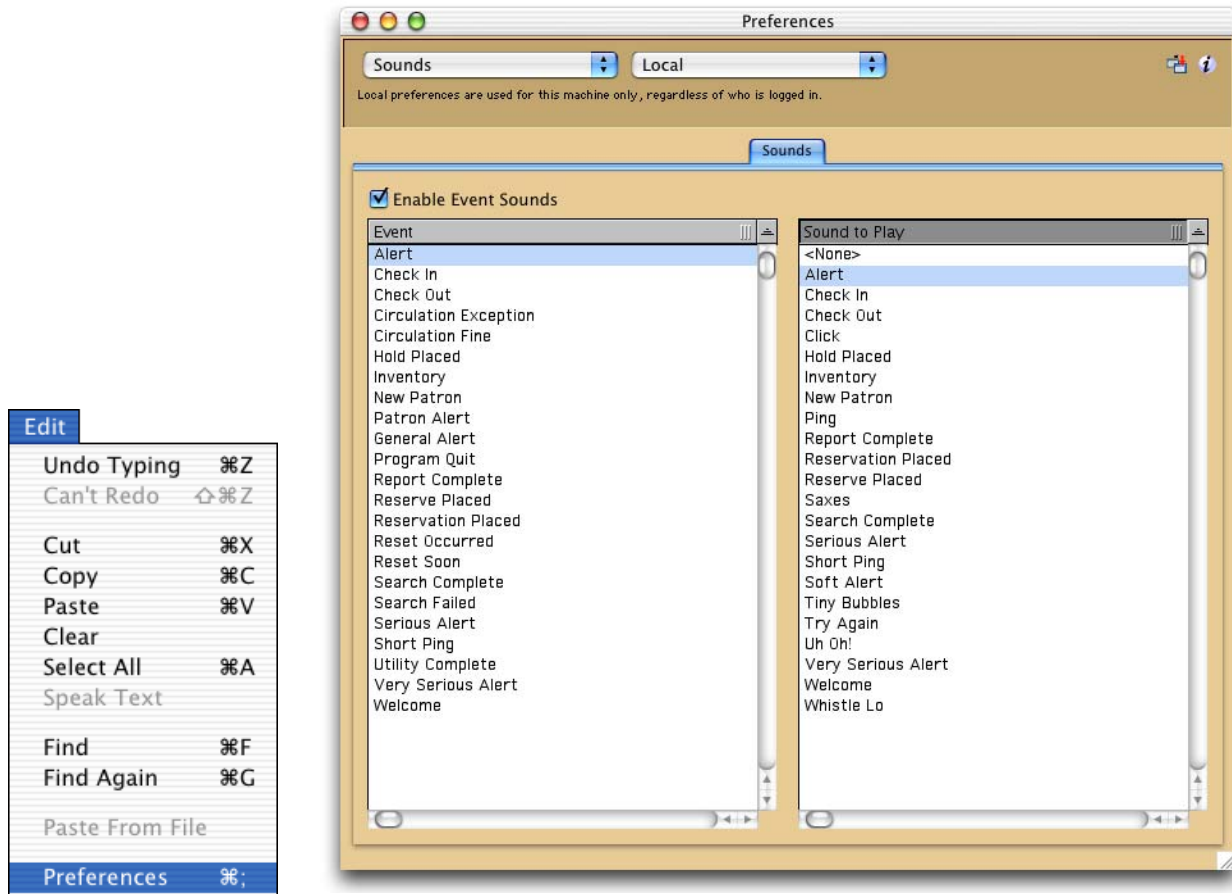
Sound Preferences

Local Sounds Preferences

There are no available **Global Sounds** preferences.

Sounds Tab

Use this preference to select what sounds play when certain events occur.



Click on an event to select (highlight) it, then click on the sound that you want to play when that event occurs. For example, if you want the sound of a saxophone to play when a book is checked in, choose **Check In** from the **Event** column and choose **Saxs** in the **Sound to Play** column.

- H I N T -

If you don't want Textbook Tracker to play sounds, remove the check from the **Enable Event Sounds** checkbox. Default is **ON**.

Use the **Restore Defaults** button to reset all sounds to their default values.

Web Preferences

Global Web Preferences

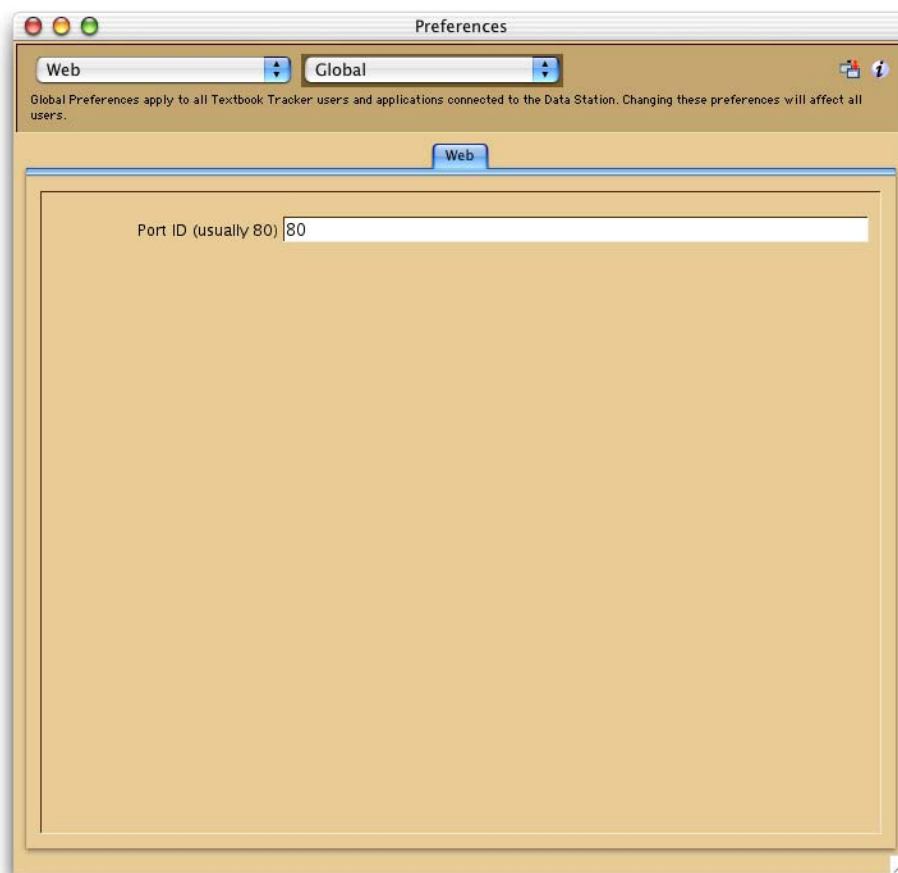
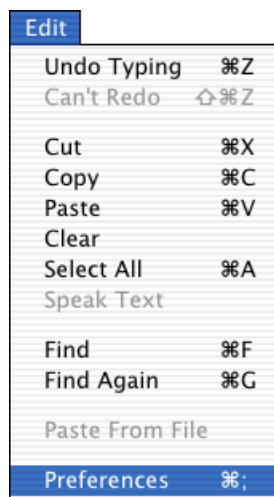
There are no available **Local** or **Default Local Web** preferences.

- N O T E -

Textbook Tracker Web is an optional feature of Textbook Tracker. You must have purchased a separate license to get full use from this feature.

Web Tab

If you have licensed **Textbook Tracker Web**, all of these preference options will become available to help customize your school/institution's web interface.



Port ID (usually 80)—Sets the port number used for web interface (this is usually 80). Default is **80**.

For more information on how to use **Web** features, please see the **Textbook Tracker Web** chapter, which begins on page 203.

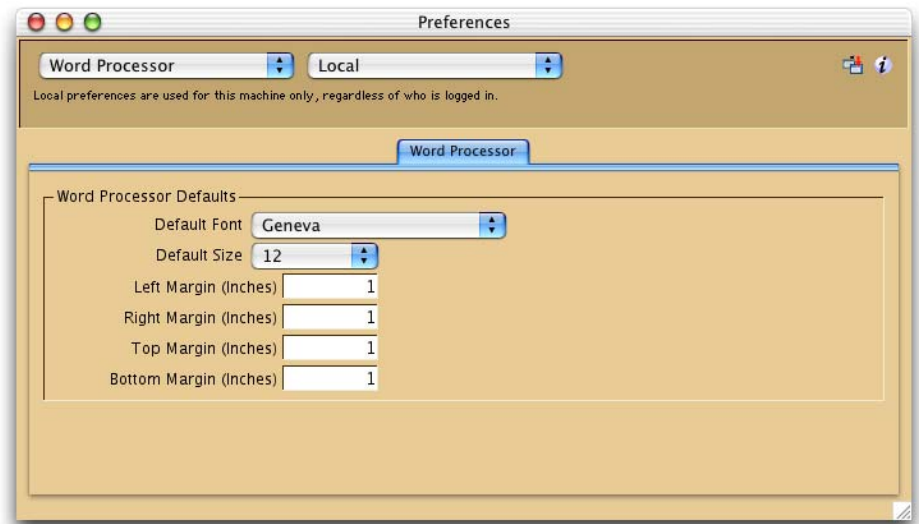
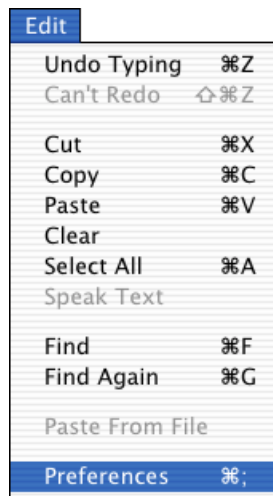
Word Preferences

Local Word Processor Preferences

There are no available **Global Word Processor** preferences.

Word Processor Tab

This preference window is used to set defaults when a new word processor document is opened.



Word Processor Defaults

Default Font—Selects the default font selection. Default is “Geneva.”

Default Size—Selects the default font size. Default is “12” point.

Left Margin—Sets the default left margin. Default is “1” inch.

Right Margin—Sets the default right margin. Default is “1” inch.

Top Margin—Sets the default top margin. Default is “1” inch.

Bottom Margin—Sets the default bottom margin. Default is “1” inch.

- N O T E -

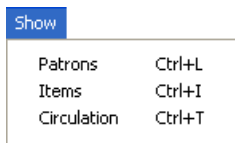
All the margins listed above come in from the edge of the paper. Since most printers can't print to the very edge of the paper (i.e. perform a full bleed), you should use a margin of *at least* “.25” inches.

Patron Management

This chapter includes a general description of managing patrons using the **Patrons** window and how to add, remove, modify, browse, find, and display patron information.

Patron Management Window

The **Patrons** window displays information about patrons in your institution/school. To display the **Patrons** window, select **Patrons** from the **Show** menu.



A screenshot of the 'Patrons' window. The window has a title bar with standard OS window controls. Below the title bar is a 'Browse By:' dropdown menu set to 'Last Name'. To the right of this is a small box containing the number '8'. Below the dropdown is a 'Barcode' field containing '1088'. Below that are three dropdown menus: 'Standard Patron', 'Active', and 'Unknown'. The main area of the window is divided into two sections. The top section contains a form for a patron named 'Sample' with address '1831 Fort Union Blvd.', 'Address 2', 'Salt Lake City', 'UT', and '84121', and 'USA'. The bottom section has four tabs: 'Personal Info', 'Notes', 'Statistics', and 'Attachments'. The 'Personal Info' tab is selected, showing a form with fields for 'SSN' (555-55-5555), 'Student #' (00050555), 'School' (COMPanion), 'Homeroom' (Kirschner), '2nd Location' (COMPanion Middle), 'Password' (*****), 'Email' (@companioncorp.com), 'Graduation Date' (Jul 1, 2006), 'Grade' (10), 'Card Exp Date' (Jan 28, 2005), 'Birthdate' (Apr 1, 1991), 'Parent/Guardian' (Mrs. Sample), 'Phone' (801-365-0169), and 'Fax' (801-943-7752).

The top portion of the window contains primary information about the Current Patron. This includes the patron barcode (**1088**), policy (**10th Grade**), status (**Active**), sex (**Unknown**), and patron sequence (**#8**) as well as name and address information and an optional picture of the patron.

More information about the patron is contained on the bottom-half of the window under individual tabs. Click on a tab to display more information.

The patron you are presently viewing is called the **Current Patron**. Selecting the **Circulation** window automatically reveals the Current Patron. Likewise, if you have a Current Patron displayed on the **Circulation** window and select the **Patrons** window, the same Current Patron is displayed.

Patrons	
First	Ctrl+Shift+[
Previous	Ctrl+[
Next	Ctrl+]
Last	Ctrl+Shift+]
Browse	Ctrl+B
Find	Ctrl+F
Lock Record	Ctrl+U
New Patron	Ctrl+N
Duplicate	Ctrl+D
Remove Patron	Ctrl+R
Paste Patron Picture	Ctrl+Y
Remove Patron Picture	
Show Details	Ctrl+Shift+D
Show History	

Using the Patrons Menu

You can view, modify, add and remove patron information using the **Patrons** window and the commands in the **Patrons** menu. When the **Patrons** window is the foremost window, a **Patrons** menu becomes available in the menu bar.

The **First**, **Previous**, **Next** and **Last** commands display the indicated record (first, previous, next or last) based on the order of the records shown in the **Browse By** field.

The arrows to the left of the **Browse By** field perform the same action as the **Next** and **Previous** commands.

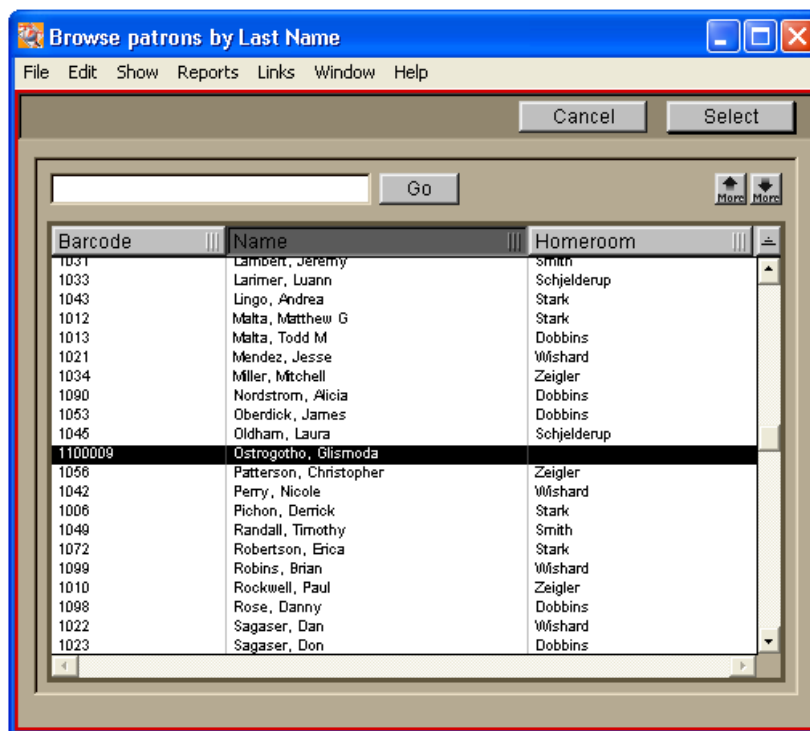
First—Displays the first record according to the **Browse By** order.

Previous—Displays the previous record according to the **Browse By** order.

Next—Displays the next record according to the **Browse By** order.

Last—Displays the last record according to the **Browse By** order.

Use the **Browse** command to view a quick list of patrons starting with the currently selected record.



Use the up and down arrow keys to move through the list. To display more patrons, click on the **More** buttons on the top right of the window or press the up or down arrow key to move upwards or downward at the ends of the list. To position the *browser* at another patron, enter information in the empty field to the left of **Go** and then click on the **Go** button.

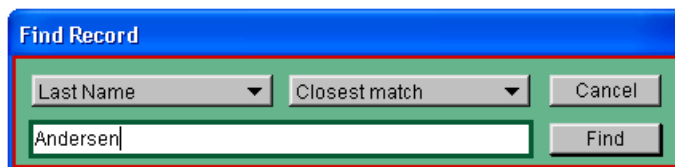
To select a patron in the list, either double-click on the patron or click the patron once and click **Select** or press the <enter>|<return> key on your keyboard.

When you select a record from the **Browse** window, the selected record is activated and displayed. To leave the **Browse** window without changing the current record, select **Cancel**.

Patrons	
First	Ctrl+Shift+[
Previous	Ctrl+[
Next	Ctrl+]
Last	Ctrl+Shift+]
Browse	Ctrl+B
Find	Ctrl+F
Lock Record	Ctrl+U
New Patron	Ctrl+N
Duplicate	Ctrl+D
Remove Patron	Ctrl+R
Paste Patron Picture	Ctrl+Y
Remove Patron Picture	
Show Details	Ctrl+Shift+D
Show History	

Finding Records

The **Find** command under the **Edit** or **Patrons** menus can be used to locate a specific record. For example, if you are looking for a patron with the last name “Andersen,” Textbook Tracker finds the first patron record with that name and selects it as the Current Patron in the **Patrons** window.



The **Find Record** dialog box has a blue title bar. It contains two dropdown menus: the first is labeled 'Last Name' and the second is labeled 'Closest match'. To the right of these is a 'Cancel' button. Below the dropdowns is a text input field containing the text 'Andersen'. To the right of the input field is a 'Find' button.

The first field menu allows you to select where to search for the data. The second field allows you to select **Closest Match** or **Exact Match**.

- ✓ Last Name
- First Name
- Barcode
- SSN
- Student #
- Homeroom
- 2nd Location
- Grade
- Policy
- Status
- Sequence #

Click on **Find** to locate the record, or click **Cancel** to stop the Find operation and return to the most recent patron record. If a **Find** is performed, the **Browse by** selection is automatically set to the same selection as the **Find** key.

Patrons	
First	Ctrl+Shift+[
Previous	Ctrl+[
Next	Ctrl+]
Last	Ctrl+Shift+]
Browse	Ctrl+B
Find	Ctrl+F
Lock Record	Ctrl+U
New Patron	Ctrl+N
Duplicate	Ctrl+D
Remove Patron	Ctrl+R
Paste Patron Picture	Ctrl+Y
Remove Patron Picture	
Show Details	Ctrl+Shift+D
Show History	

Modifying Patron Information

You can edit information directly in the **Patrons** window or in any of the tabs on the window. You can edit information in these windows the same as you would in other application. For example, you can place the cursor in a field with existing value and type additional values or you can highlight a value in a field and type over it. Before records can be changed, they must be unlocked by using the **Unlock** command (see *"Changing Records" on page 48*).

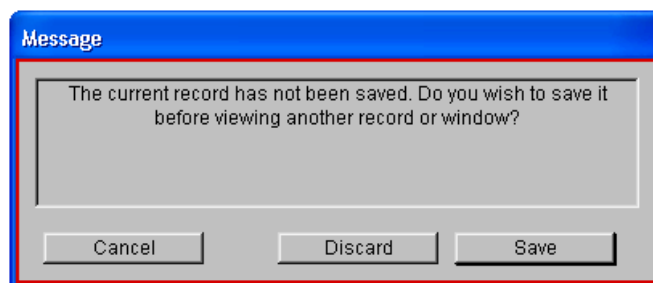
- N O T E -

If your preferences are set to lock records, you'll have to unlock the record first by clicking on the lock icon or selecting **Unlock** from the **Display Settings Preferences** menu before you can make changes to the record.

To move to the next data entry field, press the <tab> key. To move to the previous data entry field, press <shift-tab>. To select a data entry field to edit, click in the same field. To select from a drop-down menu, <tab> until the drop-down menu you desire is highlighted and use the <up> and <down> arrow keys to make your selection.

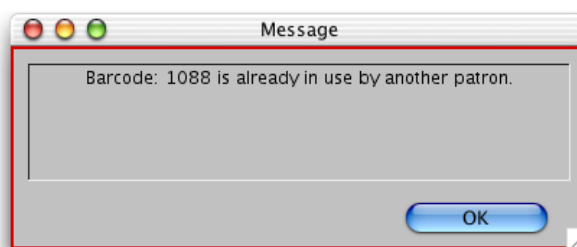
When you have modified all the information you want in the record, click the **Save** button in the upper right of the window. The record is saved. If you want to ignore the information you have entered, click the **Revert** button to restore the previous record and discard your changes.

If you try to select another record or leave the window without saving your input, the following warning message appears.



Click the **Cancel** button to return to the window with your input still displayed. Click the **Discard** button if you want to ignore the data you entered. Click the **Save** button or <enter> key to save your changes.

If you try to save a record with a barcode that is already in use (i.e. **1001**), the following window appears. You will have to change the barcode to a unique barcode or discard all changes.



If you want to modify the information for a group of patrons, use the appropriate utility (see *"Copy Utility Types" on page 242*).

Patrons	
First	Ctrl+Shift+[
Previous	Ctrl+[
Next	Ctrl+]
Last	Ctrl+Shift+]
Browse	Ctrl+B
Find	Ctrl+F
Lock Record	Ctrl+U
New Patron	Ctrl+N
Duplicate	Ctrl+D
Remove Patron	Ctrl+R
Paste Patron Picture	Ctrl+Y
Remove Patron Picture	
Show Details	Ctrl+Shift+D
Show History	

Adding New Patrons

Use the **New Patron** command to add a new patron to your database. When you select the **New Patron** command, the **Patrons** window will appear with fields where you need to add information.

Fill in all the data fields in the window (such as First and Last Name, Address, and so forth) to add a new record. Textbook Tracker automatically copies the **City, State, Postal Code** and **Country** from your institution/school address (see “*School Information Address*” on page 95) for the new patron.

To move to the next data entry field, press the <tab> key. To move to the previous data entry field, press <shift - tab>. To select a data entry field to edit, click in the field. To select from a drop-down menu, <tab> until the drop-down menu you desire is highlighted and use the <up> and <down> arrow keys to make your selection.

The **Barcode** and **Last Name** fields are required to add a new patron. Textbook Tracker automatically displays a barcode number based on the value you entered in the **Next Barcode** field in the **Patron Management Preference** window (documented on page 97). You may type over this value to change it.

When you have added all the information you need for this patron, click the **Save** button in the upper right corner of the window. If you want to ignore the information you have entered, click the **Revert** button. The previous patron will be displayed.

You can add many patrons quickly if you have their data in electronic format (see “*Data Import*” on page 317 for complete instructions).

Patrons	
First	Ctrl+Shift+[
Previous	Ctrl+[
Next	Ctrl+]
Last	Ctrl+Shift+]
Browse	Ctrl+B
Find	Ctrl+F
Lock Record	Ctrl+U
New Patron	Ctrl+N
Duplicate	Ctrl+D
Remove Patron	Ctrl+R
Paste Patron Picture	Ctrl+Y
Remove Patron Picture	
Show Details	Ctrl+Shift+D
Show History	

Duplicating a Patron

Use the **Duplicate** command to make a copy of an existing patron. You can then modify the information to create a new patron. This will save the data entry time when you add patrons who have similar information such as location, graduation date, policy and status.

When you select the **Duplicate** command, the **Patrons** window appears with a copied version of the Current Patron information. This window will automatically select the next available barcode for patrons rather than copying the barcode from the duplicate record. Type over the information on the window with the appropriate information for the new patron.

Removing a Patron

At times you need to remove a patron from your system. Removing patrons who no longer use your institution/school helps ensure the accuracy of your reports.

W A R N I N G !

Before you remove a patron, backup your data files. Removing patrons is permanent and cannot be undone! If you erroneously remove a patron, you will have to re-enter all their information or recover the information from a backup copy of your data.

Use the **Remove** command to permanently remove the Current Patron.

When a record is removed, all associated information is also removed. For example, removing a patron also removes any holds or reservations that the patron has pending. A patron with items checked out *cannot* be removed until all items have been returned to the institution/school or recorded as lost.

Paste Patron Picture

If you have a picture on your computer clipboard, this command will paste it into the patron picture field (*see the "Glossary" starting on page 355 if you don't understand what your computer clipboard is*). If you would like to import patron pictures en masse (i.e. in large numbers), you can use the **Import Patron Pictures Utility** (*see "Patrons: Import Patron Pictures" on page 256*).

Remove Patron Picture

Clears the current patron picture.

Show Details

Shows details for the current patron. Displays the same report as the **Details** button on the **Circulation** window.

Show History

Shows the history of patron transactions (if any have been kept). When **Keep Patron History** (*page 137*) is turned OFF, this menu option will appear as grayed out and only payment and fine history will be maintained and displayed.

Special Patrons

When you start Textbook Tracker, it creates several special patrons using barcodes 1 through 6. These patrons are used to track items with a special status such as lost, archived, on order or out for repair. Barcodes numbered 1-20 are reserved for Textbook Tracker usage. If you attempt to add barcodes in these ranges, they will automatically be reassigned by the system. You can not Add, Remove or Modify records in this range.

Special patrons are generally not shown in browse lists, reports or other areas of the program. In order to view them, they must be selected via barcode number in either the Circulation window, or Patron Find window.

Barcode numbers 21-49 are reserved for the administrator's special usage, and (similar to 1-19 barcodes) are not generally shown to the user unless specifically requested. However, the administrator can add, remove or modify these records.

For example, when you send an item out to be repaired, you can check the item out to **On Repair** (Barcode 4). This leaves the item inventoried but prohibits another from checking it out when it's not available. When the item is returned, you simply check it back into your institution/school and it's available for circulation again.

If you accidentally assign some of your patrons with system barcodes, all you need to do is go back and change their barcodes to fit your specified barcode range.

The following is a summary list of special patrons Textbook Tracker creates. You can also create your own special patrons for tracking particular items.

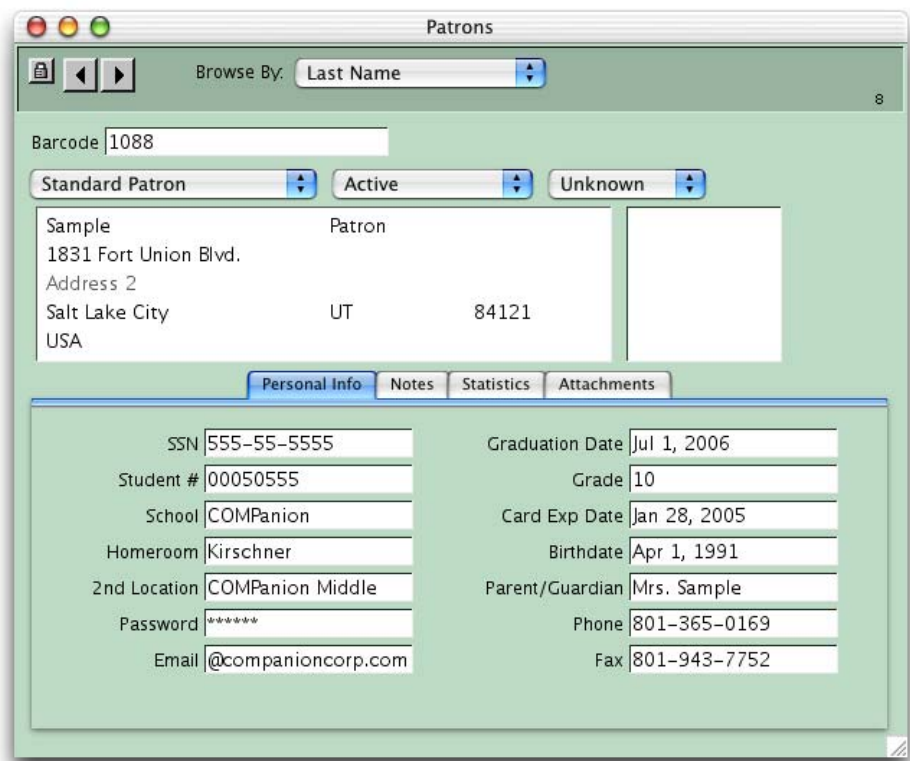
- **Lost Items** (Barcode 1) to identify items you cannot find in your collection.
- **Discarded Items** (Barcode 2) to identify items you no longer want used in your institution/school.
- **For School/Institution Use** (Barcode 3) to assign items for use within the institution/school.
- **On Repair** (Barcode 4) to track items you have sent out of the institution/school for repair.
- **On Order** (Barcode 5) to track items you have on order but have not yet been received or shelved.
- **Archived Items** (Barcode 6) to identify items kept in the institution/school and generally not checked out.

Patrons	
First	Ctrl+Shift+[
Previous	Ctrl+[
Next	Ctrl+]
Last	Ctrl+Shift+]
Browse	Ctrl+B
Find	Ctrl+F
Lock Record	Ctrl+U
New Patron	Ctrl+N
Duplicate	Ctrl+D
Remove Patron	Ctrl+R
Paste Patron Picture	Ctrl+Y
Remove Patron Picture	
Show Details	Ctrl+Shift+D
Show History	

Patron Information Fields

The following section describes the data fields in the **Patrons** window on each tab. When a field has an obvious meaning or use (such as city or phone), it will not be included in the explanation unless there are special notes about how it is used.

Primary Patron Information



The top portion of the **Patrons** window contains information about the patron. This includes the patron barcode, policy, status and sex, as well as name and address information, and a picture of the patron.

These are fields that cross the top of the **Patrons** window:

Patron Barcode—Each patron will have a unique barcode number that is either assigned by the system or entered manually. This barcode can contain up to 15 digits and must be unique. It may contain numbers or letters, but no punctuation characters or spaces.

Patron Policy—The policy you assign to a patron determines the institution/school rules that this patron must follow. To select a policy for a patron, click the arrow at the end of the **Policy** drop-down menu and choose a value. The default policy for new patrons is automatically assigned based upon the **Patron Management Preferences** (see “Patron Management Preferences” on page 97 for more information).

Initial set up and creation of patron policies can be performed using **Patron Policies Preferences** window (covered on page 101).

☒ Active
☐ Card Lost
☐ Suspended
☐ Transferred
☐ Inactive
☐ Other

Patron Status—The second field across the top of the **Patrons** window is the patron status field. A patron's status identifies active patrons and those with special circumstances such as a lost card, suspended or transferred.

To select a status for a patron click on the arrows at the end of the patron status drop-down menu. The following values are available:

- **Active**—A patron whose status is active can borrow (check in and check out) textbooks according to the rules of the assigned patron policy.
- **Card Lost** or **Suspended**—This status causes a message to display at the Administrator Workstation when the student ID/barcode is entered. The message recognizes a patron's status and asks the administrator to verify that it's okay to continue with this patron.
- **Transferred, Inactive, Other**—These status options are for generating patron reports for patrons with specific statuses. For example, you could generate a list of all patrons that have transferred or are inactive. These statuses cause a message alert at the Administrator Workstation when the student ID/barcode is entered.

☐ Female
☐ Male
☒ Unknown

Sex—Click on the arrow at the end of this drop-down menu to select the patron's sex. The default is **Unknown** until the patron's sex is identified.

First—Enter the patron's first name or the first name and middle initial.

Last—Enter the patron's last name. This field is required, you *can not* save a patron record without a last name.

Address, City, State, Postal Code, Country—Enter the patron's mailing address. Notices and letters are sent to this address.

Patron Picture—You can add a patron picture to the patron record. The picture will appear in the box under the gender menu in the Patron window and in the Current Patron section of the **Circulation** window. There are several ways to add a picture to the **Patrons** window:

- **Drag and drop**—Drag the graphic file from the Desktop or program onto the **Patrons** window in Textbook Tracker. As you drag the picture file, a box outline shows where the picture is to be placed to help you align it properly.
- **Copy and paste**—Open the picture of the patron in the application where it was created. Select the graphic and copy it to the clipboard (this is usually done with commands such as **Select All** and **Copy** and **Cut** under the **Edit** menu in the program). Go back to your Textbook Tracker **Patrons** window and choose **Paste Patron Picture** from the **Patrons** drop-down menu at the top of the window. The picture appears in the area under the **Sex** button.
- **Import Patron Pictures Utility**—This utility will import patron pictures en masse (i.e. in large numbers). This **Utility** can be run under **File > Utilities > Patrons > Import Patron Pictures** (see "Import Patron Pictures Select By Options" on page 256).

Patrons	
First	Ctrl+Shift+[
Previous	Ctrl+[
Next	Ctrl+]
Last	Ctrl+Shift+]
Browse	Ctrl+B
Find	Ctrl+F
Lock Record	Ctrl+U
New Patron	Ctrl+N
Duplicate	Ctrl+D
Remove Patron	Ctrl+R
Paste Patron Picture	Ctrl+Y
Remove Patron Picture	
Show Details	Ctrl+Shift+D
Show History	

Personal Info

Here is a brief description of the fields located on the **Personal Info** tab:

The screenshot shows the 'Patrons' window with the 'Personal Info' tab selected. The window title is 'Patrons'. At the top, there is a 'Browse By:' dropdown menu set to 'Last Name'. Below this is a 'Barcode' field containing '1088'. There are three status buttons: 'Standard Patron', 'Active', and 'Unknown'. The main form area displays the following information:

Sample	Patron
1831 Fort Union Blvd.	
Address 2	
Salt Lake City	UT 84121
USA	

Below the main form area are four tabs: 'Personal Info' (selected), 'Notes', 'Statistics', and 'Attachments'. The 'Personal Info' tab contains the following fields:

SSN	555-55-5555	Graduation Date	Jul 1, 2006
Student #	00050555	Grade	10
School	COMPanion	Card Exp Date	Jan 28, 2005
Homeroom	Kirschner	Birthdate	Apr 1, 1991
2nd Location	COMPanion Middle	Parent/Guardian	Mrs. Sample
Password	*****	Phone	801-365-0169
Email	@companioncorp.com	Fax	801-943-7752

Government ID¹—(shown as SSN# in the sample window) This is an alternate, unique ID code that you may want to use with Textbook Tracker. If you plan on updating patron information automatically from a central administration system (or you want to locate patrons by alternative codes, enter data in these fields). In the United States, the Government ID is typically the Social Security Number (**SSN**); other countries may use other formats. Duplicate values are not allowed; if a duplicate code is entered, Textbook Tracker will bring up an alert message and highlight the number so that it can be modified.

Community ID—(shown as Student# in the sample window) This is an alternate, unique ID code that you may want to use with Textbook Tracker. If you plan on updating patron information automatically from a central administration system (or you want to locate patrons by alternative codes, enter data in these fields). Community ID is designed to be used for your local ID. This could be a student code, phone number, parcel number or any other unique identification code. Duplicate values are not allowed; if a duplicate code is entered, Textbook Tracker will bring up an alert message and highlight the number so that it can be modified.

1. This term can be customized by the administrator (see "Patron Management Preferences" on page 97 for instructions).

Location—(shown as Homeroom in the sample window) The location of a patron in a school is typically the student's homeroom or first period class. You can change the name of this field in the **Terminology** section of the **Patron Management** preference window. To ensure the accuracy of reports, be *consistent* when entering information in this field. Reports can be generated and sorted by this field. For example, you may print an overdue list of all students in a homeroom with overdue items.

Phone and **Fax**—Enter the phone number and fax number that should be used to notify the patron of overdue items, in-stock holds, and other official institution/school business.

Email—Enter the Email address for the patron if you plan to use email for notification purposes such as overdue notices. If you choose email as the type of report when printing overdue notices, the notice is sent to the specified email addresses. If you don't enter a valid address or leave the field blank, email messages will not be sent to patrons.

Password—An optional password can be entered for the patron. For security reasons, passwords are shown as "*" characters and are used by the patron to identify themselves when performing remote transactions. The password will default to the patron's **Last Name** without spaces or punctuation.

Graduation Date—Enter the date the patron will graduate. This field is used to compute the patron's current grade. Patrons automatically graduate to the next grade level on the date you enter as the last day of school on the **School Information** preference window. Graduated patrons are given grade level "graduated".

Level¹—This field identifies the patron's level in school. If the school institution/school and graduation date has been entered, Textbook Tracker will assign the level based on your preferences. If you enter a level and a school institution/school, Textbook Tracker will calculate the graduation date for you. Textbook Tracker will advance patrons one level after the last day of school if the level is set to either "JK" (junior/kindergarten), "PS" (pre-school), "K" (kindergarten), or "1-12".

Sublocation²—(shown as **Grade** in the previous sample window) Use this field to group patrons by a second location or to track any other useful data. You can enter letters, numbers, as well as spaces in this field.

Reports can be generated and sorted by this field. Therefore, to ensure the accuracy of reports, be *consistent* when entering information in this field. You could, for example, use this field to classify the ethnicity of patrons for government or internal reports.

Card Exp. Date—Enter the date the patron's institution/school card expires. If you leave this field blank, Textbook Tracker will calculate the expiration date based on the patron's policy when the patron record is first added to the system. For example, if a **Patron Policy** in **Preferences** is set for 365 days, the card will expire 365 days from the date the patron was entered.

Birth Date—Enter the patron's birth date. This information is used solely for reference.

Parent/Guardian—Enter the patron's parent or guardian. This information is used solely for reference.

1. This term can be customized by the administrator (see "Patron Management Preferences" on page 97 for instructions).

2. Authority Control is available for Location and SubLocation by pressing <option-tab> on Macintosh or <ctrl-tab> on Windows.

Patrons

First	Ctrl+Shift+[
Previous	Ctrl+[
Next	Ctrl+]
Last	Ctrl+Shift+]
Browse	Ctrl+B
Find	Ctrl+F
Lock Record	Ctrl+U
New Patron	Ctrl+N
Duplicate	Ctrl+D
Remove Patron	Ctrl+R
Paste Patron Picture	Ctrl+Y
Remove Patron Picture	
Show Details	Ctrl+Shift+D
Show History	

Notes

The **Notes** tab includes information about the patron's emergency contacts as well as groups the patron belongs to and general notes about the patron.

The screenshot shows the 'Patrons' window with the 'Notes' tab selected. The patron's name is Marissa Dasada, and her address is 1831 Fort Union Blvd., Salt Lake City, UT 84122, United States of America. The 'Notes' tab contains four sections: 'Contact Notes' (Marissa's mother can be contacted at 555-7789), 'Alert Notes' (Alert notes appear in circulation every time this patron borrows or returns a book), 'Categories' (User-defined patron categories), and 'General Notes' (General notes are accessible in circulation and show when the Notes button in the current patron window in circulation is clicked).



NOTE:

If any notes exist for a patron, a plus sign (+) appears next to the patron's name on the **Circulation** window. You can enter a plus sign <+> on the command line in the **Circulation** window to display the note when the patron is the Current Patron.

Contact Notes—Identifies the parent or guardian you need to contact in case of emergency. Enter the contact name, address and phone number if it is different from the patron's address and phone number. You may enter more than one name and address.

Categories—Enter information about groups the patron belongs to. Such as, special reading programs, at-risk students, special education students, or any other group you find useful. The categories can be used to select patron records for reports.

Alert Notes—This field is used to make the administrator aware of special circumstances regarding a patron. For example, you can enter an alert message to pass on to the patron next time the patron is in the institution/school. The alert message automatically appears on the **Circulation** window when you enter the patron's barcode number.

General Notes—This field is used for additional comments about a patron. These comments can be viewed only from the Administrator Workstation. When any notes exist for a patron, a **Notes** button appears under the patron's picture on the **Circulation** window when he/she is the Current Patron. Click the **Notes** button to view the notes entered for this patron.

Patrons	
First	Ctrl+Shift+[
Previous	Ctrl+[
Next	Ctrl+]
Last	Ctrl+Shift+]
Browse	Ctrl+B
Find	Ctrl+F
Lock Record	Ctrl+U
New Patron	Ctrl+N
Duplicate	Ctrl+D
Remove Patron	Ctrl+R
Paste Patron Picture	Ctrl+Y
Remove Patron Picture	
Show Details	Ctrl+Shift+D
Show History	

Statistics

The **Statistics** tab includes statistics about the patron's use of the institution/school. Textbook Tracker automatically generates this information and you cannot modify it.

The screenshot shows the 'Patrons' window with the 'Statistics' tab selected. The window title is 'Patrons'. At the top, there's a 'Browse By:' dropdown set to 'Last Name'. Below that is a 'Barcode' field containing '1088'. There are three dropdown menus: 'Standard Patron', 'Active', and 'Unknown'. The main area displays the patron's information: 'Sample' (Patron), '1831 Fort Union Blvd.', 'Address 2', 'Salt Lake City', 'UT', '84121', and 'USA'. Below this is a tabbed interface with 'Personal Info', 'Notes', 'Statistics' (selected), and 'Attachments'. Under the 'Statistics' tab, there's a checkbox 'Keep Patron History' which is checked, and a 'Show History' button. Below the checkbox is a table of statistics for 'Patron, Sample (1088)'. The table has two columns of data.

Patron, Sample (1088)	
Items Out.....0	Lifetime Usage.....0
Items Overdue.....0	Lifetime Overdues.....0
Pending Holds.....0	Reservations.....0
In-Stock Holds.....0	Reserves.....0
Fines.....\$0.00	Last Use.....May 5, 2004
Payments.....\$0.00	Last Validation.....May 7, 2004
Balance Due.....\$0.00	Next Validation Due.....May 7, 2004
	Accession Date.....May 5, 2004
Current/Previous Policy : STD/STD	
Usage	

Keep Patron History—When this box is checked, Textbook Tracker keeps a history of this patron's transactions. You can view the transaction history data by using the **Show History** menu selection in the **Patrons** menu or the **Show History** button that appears (show above) to the left of this checkbox when this option is checked (activated).

Patrons	
First	Ctrl+Shift+[
Previous	Ctrl+[
Next	Ctrl+]
Last	Ctrl+Shift+]
Browse	Ctrl+B
Find	Ctrl+F
Lock Record	Ctrl+U
New Patron	Ctrl+N
Duplicate	Ctrl+D
Remove Patron	Ctrl+R
Paste Patron Picture	Ctrl+Y
Remove Patron Picture	
Show Details	Ctrl+Shift+D
Show History	

Attachments

The screenshot shows the 'Patrons' window with the 'Attachments' tab selected. The window title is 'Patrons'. At the top, there are navigation buttons (back, forward) and a 'Browse By:' dropdown set to 'Last Name'. To the right are 'Revert' and 'Save' buttons. Below this is a 'Barcode' field containing '1088'. There are three dropdown menus: 'Standard Patron', 'Active', and 'Unknown'. The main area displays patron information: 'Sample' (Patron), '1831 Fort Union Blvd.' (Address 1), 'Address 2', 'Salt Lake City' (City), 'UT' (State), and '84121' (Zip). Below this is a tabbed interface with 'Personal Info', 'Notes', 'Statistics', and 'Attachments' (selected). The 'Attachments' tab shows a list of files: 'Lunchroom Export.txt - File' and 'Statistics.pict - File'. To the right of the list are icons for 'Add File', 'Add URL', 'Add Sound', 'Add Movie', 'Modify', 'Execute', and 'Remove'.

You can associate web pages, multimedia and other documents to a patron using the Attachments tab. To add attachments, use the icons on the right of the window, or drag and drop documents into the attachment list. To edit an attachment, double-click on its name in the list. To activate the attachment, hold down the <option> button followed with a double-click on the name in the list.

Attachments are shown in the **Patron Details** window.

Item Management

This chapter explains how to manage information for the titles/copies in your school.

- N O T E -

If you are using a multi-collection license for Textbook Tracker, all schools share title information, thus, all other schools can view the changes you make.

The Textbook Tracker Workstation allows you to view and edit titles from every collection in your district, but only *your* title statistics and copy information may be modified from your workstation.

The Central Administrator Workstation allows viewing and editing of all database title/copy information across all collections.

About MARC records

All Textbook Tracker title/copy data is saved in MARC¹ (MAchine-Readable Cataloging) record format, the standard for bibliographic data around the world.

Although it's hidden from you, Textbook Tracker saves additional information in the MARC record for performing its school automation duties. This information is Textbook Tracker-specific and is *not* included in the MARC editor. However, if you export data to transfer into another Textbook Tracker system, the export function will include this Textbook Tracker-specific information.

The MARC standard is complex and ever-changing. Thus, there may be information in your MARC records which is valid MARC data, but is unused by Textbook Tracker. It may be that newer versions of Textbook Tracker will use this data, so it's carefully saved with the rest of your MARC data. If you have MARC information that you'd like Textbook Tracker to process, send a written request to:

Textbook Tracker MARC Suggestion
COMPAnion Corporation
1831 Fort Union Blvd.
SLC, UT 84121

You may also send an email to: "v5comments@companioncorp.com"
or to "idea@companioncorp.com"

Your request will be examined and you'll receive a response.

1. To learn more about MARC tags and subfields, visit the Library of Congress' website at "<http://www.loc.gov/MARC/>"

Show	
Patrons	⌘L
Items	⌘I
Circulation	⌘T

Item Management Window

The **Items** window displays information about the titles/copies in your database. All items that circulate (books, magazines, av media) are accessible through the **Items** window.

The term “item” can also mean “title” or “copy” depending on the context. An item can be a textbook, video, filmstrip, newspaper, or any other form of media in your collection. Each title can have multiple copies. **Title Information** consists of data that is identical for all copies of a particular title, including author, publication, and notes. **Copy Information** consists of data that is specific to a given copy.

Under the **Show** menu, select **Items**.

The top portion of the window contains primary information about the current item. This includes the call number, title policy, medium, title, author, and other publishing information. **Title/Copy Information** is maintained on the bottom half of the window on separate tabs. Click on the corresponding tabs to show title and copy information. Click on a tab to view the information it contains.

Items	
First	⇧⌘[
Previous	⌘[
Next	⌘]
Last	⇧⌘]
Browse	⌘B
First Copy	⇧⇧⌘[
Previous Copy	⇧⌘[
Next Copy	⇧⌘]
Last Copy	⇧⇧⌘]
Browse Copies	⇧⌘B
Find	⌘F
Unlock Record	⌘U
New Title	⌘N
Remove Title	⌘R
Add Copy	⌘Y
Remove Copy	
Duplicate Title	
Duplicate Copy	⌘D
Transfer Copies From	
Show Details	⇧⌘D
Show Title Editor	⇧⌘T
Show Author Editor	⇧⌘A

Using the Items Menu

You can view, modify, add and remove item information using the commands located under the **Items** menu. When the **Items** window has focus (the foremost window), an **Items** menu is available in the menu bar.

The **First**, **Previous**, **Next** and **Last** commands will shuffle through records based on the order of the records selected from the **Browse By** drop-down menu (first, previous, next or last).

The arrows to the left of the **Browse By** field perform the same function as the **Next** and **Previous** commands.

First—Displays the first record according to the **Browse By** order.

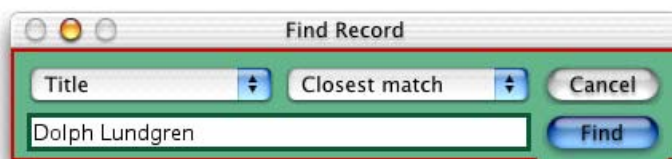
Previous—Displays the previous record according to the **Browse By** order.

Next—Displays the next record according to the **Browse By** order.

Last—Displays the last record according to the **Browse By** order.

Finding Records

The **Find** command under the **Edit** menu can be used to locate specific data. For example, if you are searching for an item titled “Calculus for High Scholars,” Textbook Tracker will find the first item record that most closely matches that title and selects it as the Current Item shown in the **Items** window.



The first drop-down menu allows you to specify the type of data you are searching for. The second drop-down menu allows you to select **Closest match** or **Exact match**.

Click the **Find** button to locate the record, or click the **Cancel** button to stop. The **Find** window is automatically set to the same selection as the **Browse By** menu. If a **Find** is performed, the **Browse By** selection is automatically set to whatever options you selected from the **Find Record** fields.

The **Browse By** commands (**First**, **Previous**, **Next**, and **Last**) and the **Find** command change depending on the information being viewed. With titles, browsing and finding options appear in the drop-down menu when the **Title Information** tab is active. Copy-specific options are available when the **Copy Information** tab is active. With copies, browsing and finding is limited to the **Title** displayed in the primary information portion of the **Items** window. When the **Copy Information** tab is active, you can use the **Browse** command to move between titles.

Items	
First	⇧⌘[
Previous	⌘[
Next	⌘]
Last	⇧⌘]
Browse	⌘B
First Copy	⇧⇧⌘[
Previous Copy	⇧⌘[
Next Copy	⇧⌘]
Last Copy	⇧⇧⌘]
Browse Copies	⇧⌘B
Find	⌘F
Unlock Record	⌘U
New Title	⌘N
Remove Title	⌘R
Add Copy	⌘Y
Remove Copy	
Duplicate Title	
Duplicate Copy	⌘D
Transfer Copies From	
Show Details	⇧⌘D
Show Title Editor	⇧⌘T
Show Author Editor	⇧⌘A

Browsing Records

Use the **Browse** command from the **Items** menu to view a list of items starting with the currently selected item record.



Use the up and down arrow keys on your keyboard to move the selection bar through the list. To display a new page of items, click on the **More** buttons on the top right of the window or use the up and down arrow keys at the ends of the list. To position the browser at another item, enter text that approximates the item or copy you would like to view in the empty field to the left of the **Go** button and then click **Go**.

To select an item from the list, either double-click on the item or highlight (select) the item and click **Select** (or press <enter> or <return> on your keyboard).

When you select a record from the **Browse** window, the selected record is displayed. To exit the **Browse** window without changing the current record, use the OS specific close box or click the **Cancel** button.

The records displayed in the **Browse** window are sorted by the value selected from the **Browse By** drop-down menu at the top of the **Item** window. To change the order in which the items are displayed choose a different value from the **Browse By** drop-down menu.

Items	
First	⇧⌘[
Previous	⌘[
Next	⌘]
Last	⇧⌘]
Browse	⌘B
First Copy	⇧⇧⌘[
Previous Copy	⇧⌘[
Next Copy	⇧⌘]
Last Copy	⇧⇧⌘]
Browse Copies	⇧⌘B
Find	⌘F
Unlock Record	⌘U
New Title	⌘N
Remove Title	⌘R
Add Copy	⌘Y
Remove Copy	
Duplicate Title	
Duplicate Copy	⌘D
Transfer Copies From	
Show Details	⇧⌘D
Show Title Editor	⇧⌘T
Show Author Editor	⇧⌘A

**NOTE:**

Title changes must be saved before you can view or modify copy information.

Changing Item Information

You can edit information directly on the **Items** window or in any of the tabs within the window. For example, you can place the cursor in an existing value and type additional information. You can also highlight the entire value and type over it. Before records can be changed, they must be unlocked using the **Unlock** command (see “Changing Records” on page 48).

- N O T E -

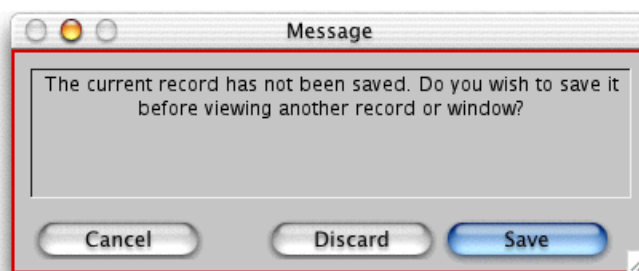
If your **Display Settings** preferences are set to automatically lock records, you’ll have to unlock the record by manually clicking on the lock icon from the upper left-hand side of the window or selecting **Unlock Record** from the **Items** menu before you can make changes to the record.

To move to the next data entry field, press the <tab> key. To move to the previous data entry field, press <shift-tab>. To select a data entry field to edit, click in the same data field. To select from a drop-down menu, <tab> until the drop-down menu you desire is highlighted and use the <up> and <down> arrow keys to make your selection..

To modify copy information, click on the **Copy Information** tab and **Browse** or **Find** the copy to modify. When you have modified the copy information you want to change, click **Save**.

When you have modified all the title/record information you want, click the **Save** button in the upper right of the window. The record is now saved. If you want to ignore the information you have entered, click **Revert** to discard your changes.

If you try to select another record or leave the window without saving your input¹, the following warning message appears.



Click the **Cancel** button to return to the window with your changes still intact. Click the **Discard** button if you want to ignore the data you’ve entered. Click the **Save** button or <enter> to save your changes.

1. You can set a preference to automatically save changes (see “Automatically Save” on page 85).

Items	
First	⇧⌘[
Previous	⌘[
Next	⌘]
Last	⇧⌘]
Browse	⌘B
First Copy	⇧⇧⌘[
Previous Copy	⇧⌘[
Next Copy	⇧⌘]
Last Copy	⇧⇧⌘]
Browse Copies	⇧⌘B
Find	⌘F
Unlock Record	⌘U
New Title	⌘N
Remove Title	⌘R
Add Copy	⌘Y
Remove Copy	
Duplicate Title	
Duplicate Copy	⌘D
Transfer Copies From	
Show Details	⇧⌘D
Show Title Editor	⇧⌘T
Show Author Editor	⇧⌘A

Authority Control

Authority Control is available for the following item fields: **Title, Authors, Publisher, Series, Subject Terms, Categories (Bibliography, Curriculum, Interest), Copy Collection** and **Copy Location** (see “Display Preferences” on page 83).

When **Authority Control** is enabled, every time the user tabs out of an **Authority Control** field, Textbook Tracker checks to see if the current data has been defined before. If it has, the cursor moves to the next field. If it has not, an **Authority Control** selection list appears. The user can choose to add the current entry, or select a previous entry by double-clicking on the selection.

When **Authority Control** is not enabled, the user can still check their entry by exiting the field with an <option-tab> on Macintosh or <ctrl-tab> on Windows. If the term is not set, the **Authority Control** selection list appears. If the term *is* set, the cursor moves to the next field.

The **Series Authority Control** window gives a list of terms close to the one in the current entry field. The user can select an item in the list by double-clicking on it or by clicking the **Select** button. If the new term isn’t in the system (but is valid) the user can add it by clicking **Add to List**.

Items	
First	⇧⌘[
Previous	⌘[
Next	⌘]
Last	⇧⌘]
Browse	⌘B
First Copy	⇧⇧⌘[
Previous Copy	⇧⌘[
Next Copy	⇧⌘]
Last Copy	⇧⇧⌘]
Browse Copies	⇧⌘B
Find	⌘F
Unlock Record	⌘U
New Title	⌘N
Remove Title	⌘R
Add Copy	⌘Y
Remove Copy	
Duplicate Title	
Duplicate Copy	⌘D
Transfer Copies From	
Show Details	⇧⌘D
Show Title Editor	⇧⌘T
Show Author Editor	⇧⌘A

Adding New Titles or Copies

Use the **New Title** command to add a new title to your database. When you select the **New Title** command, the **Items** window appears with blank fields for you to add information.

Input information into the window (such as call number, title, and so forth) to add a new record.

A **title** is required to add a new item. Titles may be added with or without copies.

To move to the next data field, press the <tab> key. To move to the previous data entry field, press <shift-tab>. To select which data entry field to edit, click inside the data field. To select from a drop-down menu, <tab> until the drop-down menu you desire is highlighted and use the <up> and <down> arrow keys to make your selection.

Use the **Add Copy** command to add new copies to this title. Remember that copies are part of the title record and cannot be added until the title is saved.

When you have added all the necessary information for this title/copy, click the **Save** button in the upper right of the window. Add any copies you desire and then click the **Save** button. If you want to discard the information you have entered, click the **Revert** button.

Removing a Title or Copy

Items that have been discarded, discontinued, sold, or permanently lost must be removed from the system to keep reports and searches from becoming cluttered with obsolete information. However, be certain that the items you are removing from the system have been permanently expunged from your collection.

For example, a lost item may eventually be found or returned. In this case, it is better to record those items as **Lost**, **Discarded**, **On Repair**, **On Order**, or **Archived**. These special item categories allow you to keep track of items that may eventually return to your school (see “*Special Patrons*” on page 179). Only remove those items that will *never* return to your collection.

Use the **Remove Title** command to permanently remove the current title and all its copies.

Remove Copy is only available when the **Copy Information** tab is selected and will remove the current active copy whether it is lost or available.

When a title is removed, all associated information is also removed. A copy that has a copy issued to a patron can *not* be removed, and a title with copies checked out to a patron can *not* be removed. However, copies that are checked out to the **Lost**, **Discarded**, **On Repair**, **On Order** or **Archived** patrons can be removed. The **Remove Copy** command only removes the selected copy record.

W A R N I N G !

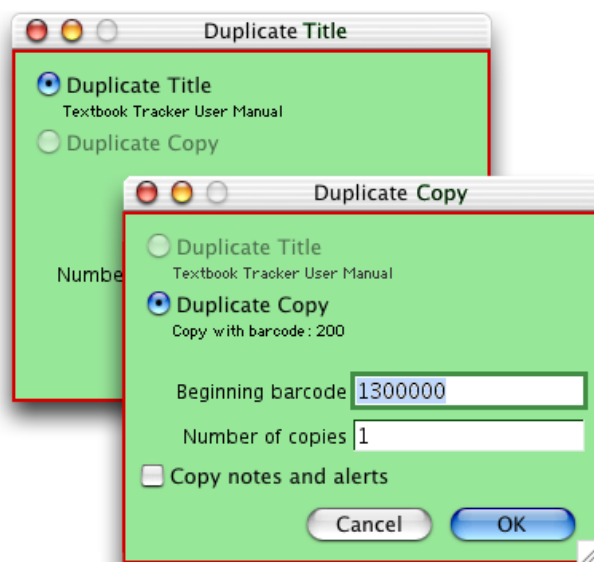
Removing items is permanent and *cannot* be undone. If you remove an item in error, you will have to re-enter the information or recover it from a backup copy of your data. If you need to report on items that are lost or discarded for the year, you should check those items out to the corresponding “special” patron. Run all necessary reports (such as **Super Summary** or **Special Item** lists) before removing these items. Once they are removed, they are unavailable for any other reports.

Items	
First	⇧⌘[
Previous	⌘[
Next	⌘]
Last	⇧⌘]
Browse	⌘B
First Copy	⇧⌘⇧[
Previous Copy	⇧⌘[
Next Copy	⇧⌘]
Last Copy	⇧⌘⇧]
Browse Copies	⇧⌘B
Find	⌘F
Unlock Record	⌘U
New Title	⌘N
Remove Title	⌘R
Add Copy	⌘Y
Remove Copy	
Duplicate Title	
Duplicate Copy	⌘D
Transfer Copies From	
Show Details	⇧⌘D
Show Title Editor	⇧⌘T
Show Author Editor	⇧⌘A

Duplicating Titles/Copies

Use the **Duplicate Title** or **Duplicate Copy** commands to make copies of existing titles/copies. You can then modify this information for the newly created item or copy record. This saves precious data entry time when you are adding titles that have similar information (such as author, publisher, and series) or copies that have similar information (such as funds, price, and vendor).

When you select the **Duplicate Title** or **Duplicate Copy** commands, the **Duplicate Title/Copy** window appears.



When the **Title Information** tab is current, **Duplicate Title** will create new item records with the same title information and a new volume number.

Type over the value in the **Number of volumes** field if the title you are duplicating has more than one volume. Each new title will be assigned a new volume number which will display on the screen. Type over the values that differ to create your new title.

After you enter the number of titles/copies you would like to duplicate, click **OK**. A progress window appears showing the new title being duplicated.

When the **Copy Information** tab is current, **Duplicate Copy** will create new copies with the same copy information as the current copy with new barcodes.

Textbook Tracker automatically displays a **Beginning barcode** number based on the value you entered into the **Next Barcode** field of the **Title/Copy Management** preference window (see “Item Management Preferences” on page 87). Enter the additional **Number of copies** you need for this title. After you enter the information on this window, click **OK**. A progress window appears to show the record is duplicated. The last new copy added will display. Type over any values on this window that need to change.

Be sure you edit all the fields that reflect the [correct] information for the new title/copy. If you forget to change a particular field, that new item field will have the same information as the item which was duplicated.

Items	
First	⇧⌘[
Previous	⌘[
Next	⌘]
Last	⇧⌘]
Browse	⌘B
First Copy	⇧⇧⌘[
Previous Copy	⇧⌘[
Next Copy	⇧⌘]
Last Copy	⇧⇧⌘]
Browse Copies	⇧⌘B
Find	⌘F
Unlock Record	⌘U
New Title	⌘N
Remove Title	⌘R
Add Copy	⌘Y
Remove Copy	
Duplicate Title	
Duplicate Copy	⌘D
Transfer Copies From	
Show Details	⇧⌘D
Show Title Editor	⇧⌘T
Show Author Editor	⇧⌘A

Transfer Copies From

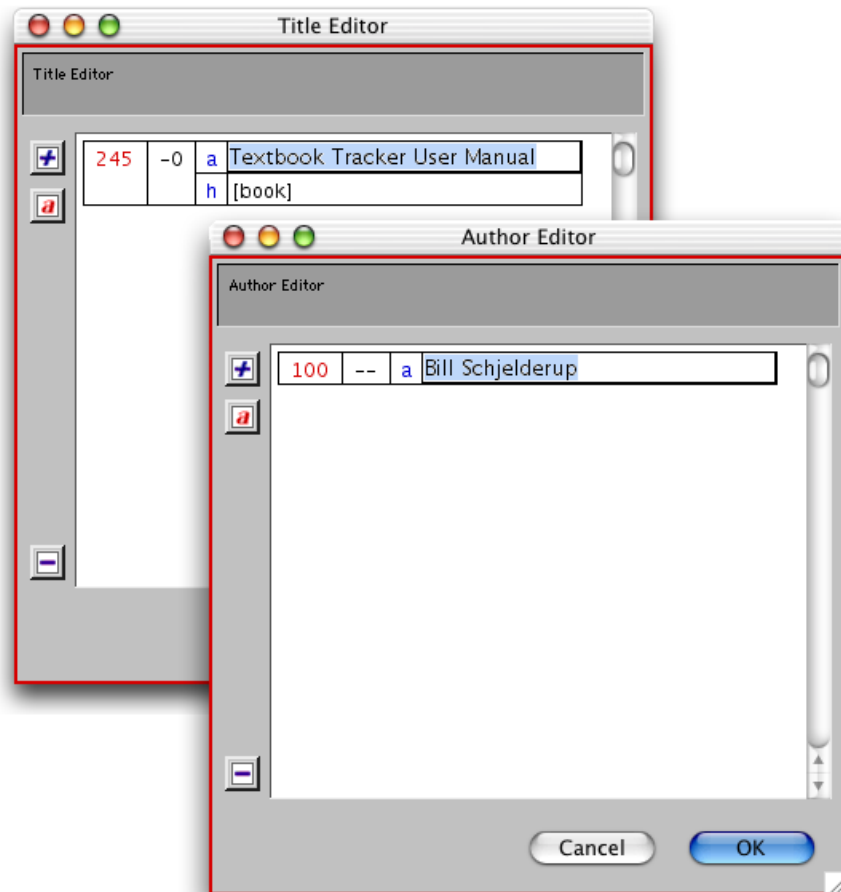
Transfer Copies From allows the user to move copies from one title to another.

Show Item Details

The **Show Details** selection for the **Items** menu brings up the same window as the **Details** button on the **Circulation** window.

Show Title / Author Editor

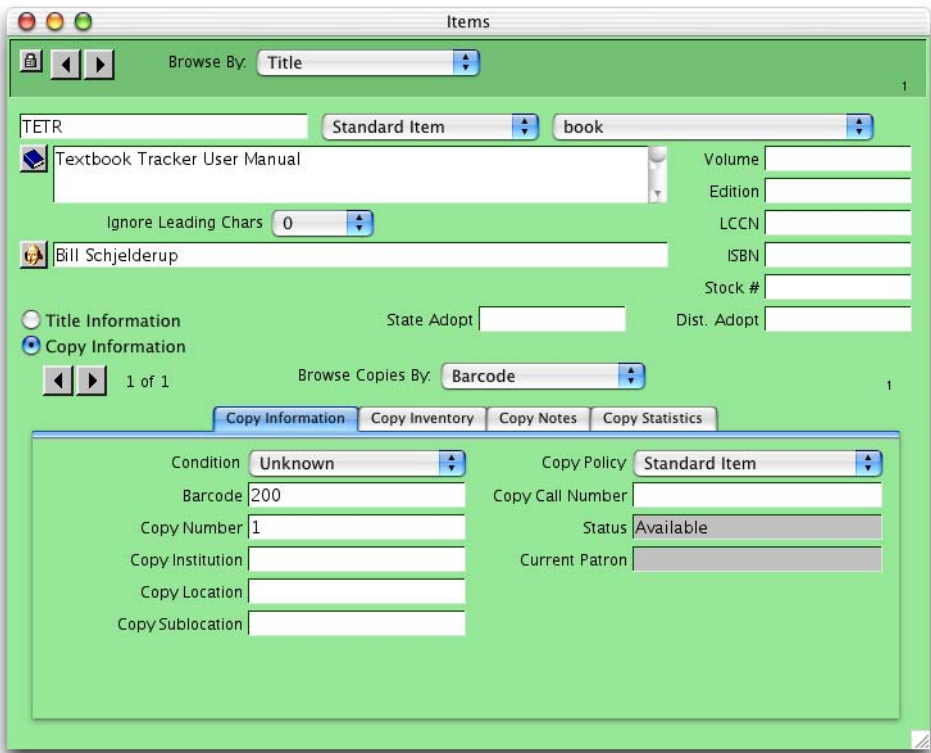
For detailed instructions on how to use the **Author/Title Editor** windows, please review page 152. of this chapter.



Items	
First	⌘⌘[
Previous	⌘[
Next	⌘]
Last	⌘⌘]
Browse	⌘B
First Copy	⌘⌘⌘[
Previous Copy	⌘⌘[
Next Copy	⌘⌘]
Last Copy	⌘⌘⌘]
Browse Copies	⌘⌘B
Find	⌘F
Unlock Record	⌘U
New Title	⌘N
Remove Title	⌘R
Add Copy	⌘Y
Remove Copy	
Duplicate Title	
Duplicate Copy	⌘D
Transfer Copies From	
Show Details	⌘⌘D
Show Title Editor	⌘⌘T
Show Author Editor	⌘⌘A

Item Information Fields

The **Items** window includes three major parts: the primary item information, the title information and the copy information. Both **Title** and **Copy Information** contain additional tabs of related information.



- N O T E -

Textbook Tracker updates MARC records with the information you enter on the **Items** window.

Primary Item Information—The top portion of the window shows primary item information such as call number, title policy, medium, title, and author. This portion of the **Items** window is visible regardless of the tab you have selected on the bottom of the patron window.

Title Information—This portion of the window shows information about each item in your collection. Below this are tabs that you click on to display more information about this title.

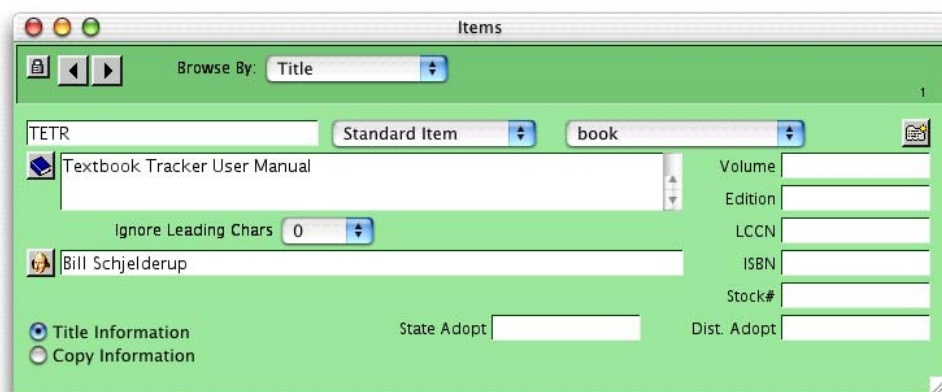
Copy Information—This portion of the window shows information about each copy of the title. Below this are tabs that you click on to display more information about this copy.

The following sections describe fields contained within the **Title Information** area of the **Items** window. When a field has an obvious meaning (such as city or phone) it is not documented unless there are special notes about how it is used.

Items	
First	⇧⌘[
Previous	⌘[
Next	⌘]
Last	⇧⌘]
Browse	⌘B
First Copy	⇧⇧⌘[
Previous Copy	⇧⌘[
Next Copy	⇧⌘]
Last Copy	⇧⇧⌘]
Browse Copies	⇧⌘B
Find	⌘F
Unlock Record	⌘U
New Title	⌘N
Remove Title	⌘R
Add Copy	⌘Y
Remove Copy	
Duplicate Title	
Duplicate Copy	⌘D
Transfer Copies From	
Show Details	⇧⌘D
Show Title Editor	⇧⌘T
Show Author Editor	⇧⌘A

Primary Title Information

The top portion of the **Items** window contains primary information about the item. This includes the call number, policy and medium type, as well as title, author, volume, edition, LCCN and ISBN, and ISBN/stock.



The fields in the top portion of the **Items** window are as follows.

Title Call Number—Each title is assigned a call number. The call number designates the location of an item in the school. Because call numbers are site-specific rather than universal (such as LCCN and ISBN), you must enter call numbers specific to your school. The title call number is saved in MARC field 900_a.

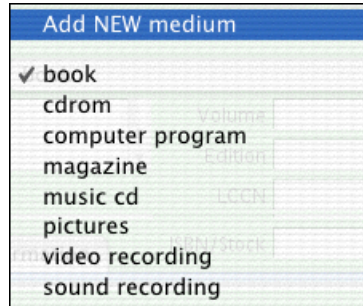
Depending on their source, imported MARC records may or may not include a call number for your item. Textbook Tracker formats call numbers to remove control characters and double spaces, thus correcting incorrectly formatted numbers.

Copies “inherit” title call number unless a specific copy call number is specified or changed.

Item Policy—The policy determines the circulation rules for a particular group of items. Every title is given a policy. In addition to specifying circulation rules, an item policy is used to group items for statistical analyses and reporting purposes.

Copies “inherit” a title policy unless a specific policy is assigned.

Medium—The **Medium** identifies the “media type” or physical format of the item. This drop-down menu lets you choose from existing mediums that have been used so far in your data. The default is **Book**. The medium is saved in MARC field 245_h. You can create a new medium by selecting **Add NEW medium** in the **Medium** drop-down menu.



Volume—The **Volume** field distinguishes multiple-volume works such as encyclopedias, certain periodicals, and books. Only volume designations are valid in this field (the word **Volume** automatically appears when volume is referenced on a Textbook Tracker window).

If the item isn’t part of a multiple-volume work, leave the field blank. The volume is saved at MARC tag 092_v or 440_v.

Edition—Enter edition information as you want it to appear in reports. For example, “2nd Ed.” or “2nd rev. Ed.” Edition information is saved in MARC field 250_a.

LCCN—Enter the item’s Library of Congress Control Number. The LCCN is a unique 8-digit identifier assigned to an item’s bibliographic record. You may enter the LCCN with or without punctuation, however, only numeric digits are saved. LCCN is saved at MARC field 010_a.

ISBN—Enter the item’s International Standard Book Number. The ISBN is a unique identifier. A title may have more than one ISBN (i.e. the ISBN for the hardback edition differs from the paperback edition). Textbook Tracker only displays the first ISBN found in the MARC record. Saved at MARC field 020_a.

You can enter an ISSN rather than an ISBN. If the number you enter is 8 digits, Textbook Tracker assumes the number is an ISSN and saves it at MARC tag 022_a. If it has 10 digits, Textbook Tracker assumes it is an ISBN.

Stock#—An optional, free-alphanumeric identification field. In Textbook Tracker v2, this field was called **ISBN/Stock**. If you are importing data from Textbook Tracker v2, the information contained within the **ISBN/Stock** number field will be placed under **Stock#**. This field can be used for stock, vendor, or order numbers.

District Adoption—Date this textbook was acquired by the school district.

State Adoption—Date this textbook was acquired by the state.

Items	
First	⇧⌘[
Previous	⌘[
Next	⌘]
Last	⇧⌘]
Browse	⌘B
First Copy	⇧⇧⌘[
Previous Copy	⇧⌘[
Next Copy	⇧⌘]
Last Copy	⇧⇧⌘]
Browse Copies	⇧⌘B
Find	⌘F
Unlock Record	⌘U
New Title	⌘N
Remove Title	⌘R
Add Copy	⌘Y
Remove Copy	
Duplicate Title	
Duplicate Copy	⌘D
Transfer Copies From	
Show Details	⇧⌘D
Show Title Editor	⇧⌘T
Show Author Editor	⇧⌘A

Show	
Patrons	⌘L
Items	⌘I
Circulation	⌘T

Adding Audiovisual Equipment

Your school might prefer to circulate audiovisual carts that include specific items as one *group* and one barcode. Then again, you might require patrons to check out individual items (i.e. VCR's and televisions) separately. Regardless of how your school functions, there are several ways you can add or check out audiovisual equipment using Textbook Tracker¹.

To add audiovisual equipment to your database, go to **Show, Items**, then **Items, New Title**. It is recommended that you enter default **Call Numbers** (i.e. AV, AVS, EQ, EQU) to distinguish these items from your textbooks on various reports. You must also enter a default **Policy** (Audio Visual), **Medium**, and **Title**.

The screenshot shows the 'Items' window in Textbook Tracker. The 'Browse By' dropdown is set to 'Title'. The form is for a new title named 'AVEQ Cart'. The 'Standard Item' dropdown is set to 'Standard Item', and the 'Category' dropdown is set to 'audio visual'. The 'Volume' field is empty. The 'Edition' field is empty. The 'LCN' field is empty. The 'ISBN' field is empty. The 'Stock#' field is empty. The 'Dist. Adopt' field is empty. The 'State Adopt' field is empty. The 'Ignore Leading Chars' field is set to '0'. The 'Techie' field is empty. The 'Title Information' radio button is selected, and the 'Copy Information' radio button is unselected. The '1 copies' label is visible. The 'Content Notes' field contains the text: 'Sony 42" XBR, High Definition, Televisions', 'Hitachi 4-Head, S-Video VCR', and '2 Remote Controls'. The 'General Note' field contains the text: 'TV Includes Closed Captioning' and 'VCR has Commercial Advance'. The 'Attachments' tab is selected, showing a list of attachments: 'Publication', 'Subjects', 'Categories', 'Notes', 'Summary', 'Statistics', and 'Attachments'.

If you are creating an AV Cart (or group), then you can detail what's included with the AV Cart in the **Content Notes** field and specify any distinctive functionality of the equipment in the **General Note** window. When you print this AV Cart's barcode, you may want to print several to place on each item contained within.

If you have several AV Carts with similar equipment, you can **Add Copies** just as you would with books. However, be sure to detail any differences in the item's **Copy Notes**. For example, you might have five AV Carts with exactly the same television and two more with completely different brands/makes/models. Make sure to list any relevant **Alert Notes** for items that a patron/ teacher might forget (i.e return the remote controls).

If you are adding all AV equipment as separate components, you need to create a **New Title** for every television, VCR, slide projector, or compact disc player you have in your inventory so that they each have their own unique barcode. Even if you are using the AV Cart method, it is still a good idea to barcode each component individually for inventory purposes.

1. Remember to be consistent in how you circulate audio visual equipment using Textbook Tracker. There is no *one* set way to do this, it's essentially up to you.

Items	
First	⇧⌘[
Previous	⌘[
Next	⌘]
Last	⇧⌘]
Browse	⌘B
First Copy	⇧⇧⌘[
Previous Copy	⇧⌘[
Next Copy	⇧⌘]
Last Copy	⇧⇧⌘]
Browse Copies	⇧⌘B
Find	⌘F
Unlock Record	⌘U
New Title	⌘N
Remove Title	⌘R
Add Copy	⌘Y
Remove Copy	
Duplicate Title	
Duplicate Copy	⌘D
Transfer Copies From	
Show Details	⇧⌘D
Show Title Editor	⇧⌘T
Show Author Editor	⇧⌘A

Title and Author Editor

Textbook Tracker includes a **Title** and **Author Editor** under the **Items** window. This feature allows MARC savvy users to easily select what tags and subfields they would like to use to enter information (without having to use an actual MARC editor). The subsequent sections first explain how to enter MARC record information in the **Title** and **Author** fields, and is then followed with a description on how to use the **Title** and **Author Editor**.

Title—A title is required; the record will not be saved unless a value is entered in the **Title** field. The title is saved under MARC field **245_a**.

In the **Title** field, if you enter a title that is longer than the field, the text wraps to the next line. To enter a subtitle, press <return> on the keyboard and enter a colon (":") followed by the subtitle. When you save the record, it is displayed with the colon and subtitle on the second line. This is saved under MARC field **245_b**. You can also use the equals sign ("=") in the **245_b** tag to designate a subtitle. However, the ("=") is mainly for multilingual titles.

For example:

Pretice Hall Literature
: Timeless voices, Timeless Themes

If you want to continue manually entering or editing MARC information from the **Title** field, you can enter a statement of responsibility and general material designation. Begin a statement of responsibility (**245_c**) with a front slash ("/") and enclose the medium in brackets ("[]"). All subfield information must begin on a new line in the **Title** field.

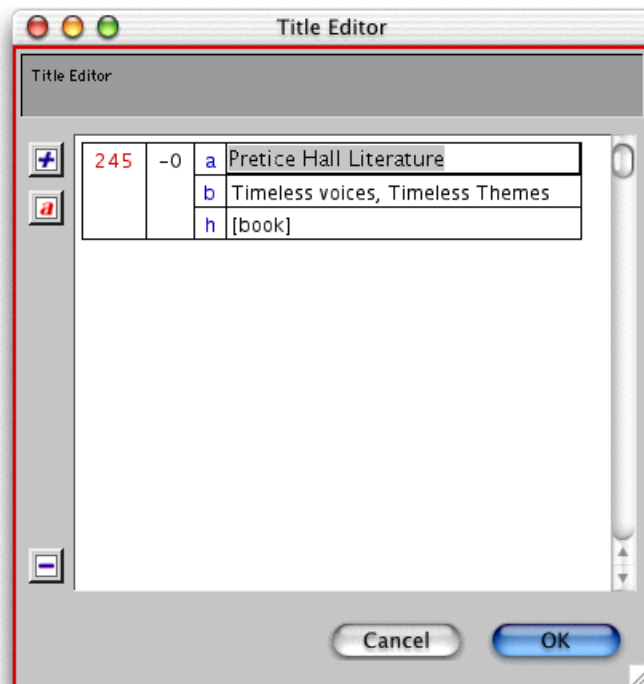
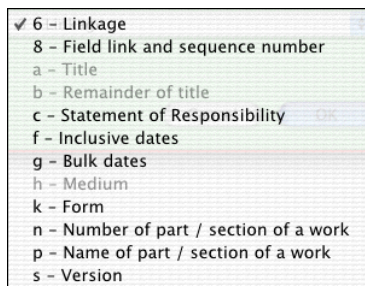
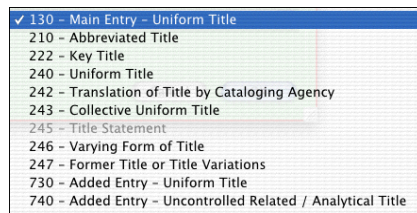
If you enter a medium, it will be saved (but not shown in the title field) only in the medium drop-down menu.

If you enter a statement of responsibility, and preferences are set to not show this, it will be saved, but not displayed.

If you enter title information and then <option-tab> (Macintosh) or <ctrl-tab> (Windows) out of the **Title** field (or if you have **Enable Authority Control** checked in the **Miscellaneous, Display Settings** preference window), an **Authority Control Title Search** window will appear, allowing you to see if this title is already in your collection. If it is, the **Authority Control** window will not display.

Underneath the **Title** field is the **# of Non-Filing Characters** drop-down menu with the digits 0-9. Use this drop down menu to specify the number of characters in the title to ignore when indexing the title. Thus, the title *The Wizard of Oz* should have a "4" selected so the book is sorted (indexed) as "Wizard of Oz". The final character to ignore must be either a space or punctuation character. If this indicator is set incorrectly, Textbook Tracker will revert the **# of Non-Filing Characters** setting to zero rather than ignore a partial word.

If you want a quicker, easier method of editing Title/MARC fields, click the **Title Editor** icon (shown below) to the left of the **Title** field. The following window will appear.



Title Editor



Add Tag



Add Subfield



Delete Tag

Using the **tag** terminology learned from the previous page, enter or edit your MARC record information. The **Title Editor** allows you to easily enter multiple detailed subfields and add new **tags** to any item title. This method of entering information is far superior to that of the **Title** field. Click on the icons to the left of the **tag** field to **Delete** or **Add Tag** and **Subfield**.

The order you have for **Subfield** within a tag is saved as displayed. Tags will be saved in numerical order.

Any empty subfield will be removed when saved.

Author—Enter “Last name, First name” in the author field. This is the primary author saved in MARC tag **100_a**. To add/edit additional authors, illustrators, editors, or composers, use the **Author** or **MARC Editor** and add them as repeating **700_a** or other appropriate tags.

If you <option-tab> (Macintosh) or <ctrl-tab> (Windows) out of this field (or if you have **Enable Authority Control** checked in the **Miscellaneous, Display Settings** preference window), an **Authority Control Author Search** window will appear, allowing you to see if this author is already in your collection. If it is, the **Authority Control** search window will not appear.

Author Editor

When you have more than one author (or person responsible for the publication), click on the **Show Author Editor** option under the **Items** menu or click the **Author Editor** icon (shown below). Use this editor to add, modify or remove authors. Please note, the first author is stored at MARC tag **100**, additional Authors are usually stored as MARC tag **700**.

When you click on the **Author Editor**, the following window will appear:

100 - Main Entry - Personal Name
110 - Main Entry - Corporate Name
111 - Main Entry - Meeting Name
✓ 700 - Added Entry - Personal Name
710 - Added Entry - Corporate Name
711 - Added Entry - Meeting Name

✓ 4 - Relator code
6 - Linkage
8 - Field link and sequence number
a - Personal Name
b - Numeration
c - Titles and other words associated with a name
d - Dates associated with a name
e - Relator term
f - Date of a work
g - Miscellaneous information
j - Attribution qualifier
k - Form subheading
l - Language of a work
n - Number of part / section of a work
p - Name of part / section of a work
q - Fuller form of name
t - Title of a work
u - Affiliation

Author Editor

100

a	Personal Name
q	Fuller form of name
c	Titles and other words associated
d	Dates associated with a name

Cancel

OK

Author Editor

Add Tag

Add Subfield

Delete Tag

The **Author Editor** allows you to easily enter multiple detailed subfields and add new **tags** to any item title. Click on the icons to the left of the **tag** field to **Delete** or **Add Tag** and **Subfield**.

Title Information (tab)

The bottom-half of the **Items** window shows **Title Information** for each item you have in your collection.

When **Title Information** is selected, title-related tabs show across the bottom of the window. You cannot view or edit copy information until the title information is saved.

Publication

The data fields in the **Publication** tab contain title publication information.

The screenshot shows the 'Publication' tab selected in the Textbook Tracker application. The form contains the following fields:

- Publisher:** A text input field.
- Place:** A text input field.
- Year:** A text input field.
- Replacement Cost:** A text input field with a default value of '\$0.00'.
- Series:** A text input field.
- Extent:** A text input field.

Publisher—Enter the name of the publisher. Saved at MARC field 260_b.¹

Place—Enter the place of publication. Saved in MARC field 260_a.

Year—Enter the year of publication. Omit ending punctuation. Estimated dates are enclosed in brackets. Saved in MARC field 260_c.

Replacement Cost—In many instances, patrons are charged a replacement cost for a lost item rather than the school's purchase cost. The replacement cost defaults to the purchase price, but can be later modified by the administrator as replacement costs change.

When the "value" of a title is required, Textbook Tracker first checks to see if a Replacement Price is available. If the **Replacement Price** is \$0.00, then Textbook Tracker checks to see if a **Purchase Cost** is available, if that's also \$0.00 then Textbook Tracker tries to use the **Average Replacement Cost** from the copies policy. If that value is also \$0.00, then a value of \$20.00 is used.

Series—If the item is part of a series, enter the series name here. Otherwise, leave this field blank. Saved in MARC field 440_a.¹

1. If you <option-tab> (Macintosh) or <ctrl-tab> (Windows) out of this field (or if you have **Enable Authority Control** checked in the **Miscellaneous, Display Settings** preference window), an **Authority Control Series Search** window will appear, allowing you to see if this series is already in your collection. If it is, the **Authority Control** window will not appear.

Extent—Enter physical information about the item (i.e. number of pages, total playing time, number of slides, illustration information). You can specify which subfield the extent data is saved in by following AACR2R rules of punctuation.

300_a (Extent), has no proceeding punctuation.

300_b (Other Physical Details, such as illustration info), preceded by a colon.

300_c (dimensions), preceded by a semicolon.

300_e (Accompanying Material), preceded by a plus sign.

For example: `300_aFilmstrip_bColor_c35mm_eSound cassette.`

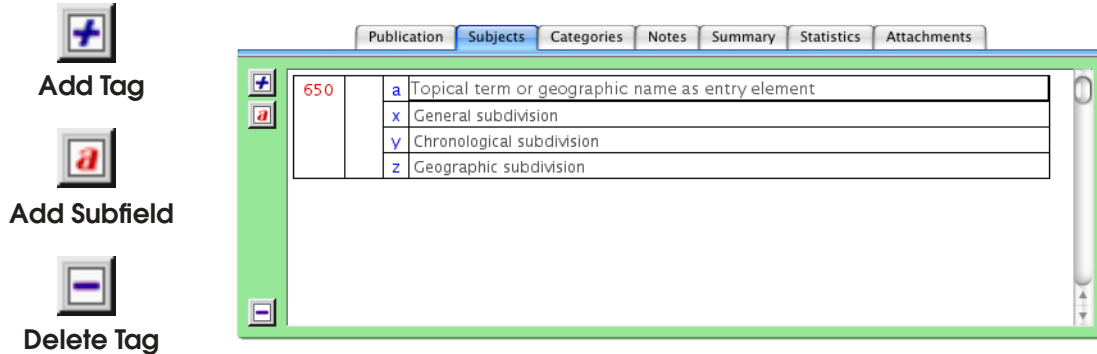
is shown as: "Filmstrip: Color; 35mm +Sound cassette."

Another example: `300_a161 pp._c22 cm._e161 pages with illls.`

is shown as: "161 pp.; 22 cm.+161 pages with illls."

Subjects

This tab leads to the **Subject Editor** and defines the title subject entries.



The **Subjects** tab allows the user to catalog these subjects:

600	- Personal Name
610	- Corporate Name
611	- Meeting Name
630	- Uniform Title
✓ 650	- Topical Term
651	- Geographic Name
655	- Index Term (Genre/Form)

Each new subject you add will default to the **650_a_x_y_z**. You can change the tag only to those listed above. Any others can only be added from the MARC view. You can also change any tag or subfield as desired. Tags will always sort in numerical order when the title is saved. Subfields save in the order they are displayed or entered. There is no sorting for subfields.

✓ 2	- Source of heading or term
3	- Materials specified
6	- Linkage
8	- Field link and sequence number
a	- Topical term or geographic name as entry element
b	- Topical term following geographic name as entry element
c	- Location of event
d	- Active dates
e	- Relator term
v	- Form subdivision
x	- General subdivision
y	- Chronological subdivision
z	- Geographic subdivision

Information that you enter in this window is used for reports. For example, if you add items with "Mythology" in the **650_a** column, users can report on the collection for "Mythology" and this item will be included in the results.

The subjects you enter must have at least two characters and can be a single word or phrase.

To remove a subject, highlight it and press the <delete> key on your keyboard or use the **Delete Tag** icon to the left side of the **Tag#** field.

The **Subjects** tab allows the administrator to edit and create any **tag**. For each **tag** you add, a separate line is created with default subfields. General **650** subjects will default with the topical data at **_a**, the general data at **_x**, chronological data at **_y** and geographic data at **_z**.

General Topic (_a)

Geographic (_x)

Chronological (_y)

Geographic (_z)

- N O T E -

Every term in MARC subject fields are cataloged and can be used for reports.

Categories

This tab provides a way to group titles into custom categories specific to your location. Category groupings make it easier to access related items in your collection.

When you add text to the categories in this window, users can utilize the text and report on items in your collection. For example, you can create groups in the **Curriculum** column for a particular teacher's class. You can then catalog the books for that class with that **Curriculum** value. You can then create a report for curriculum groups that display all the books required for that teacher's class.

Bibliography—Used to create bibliographies of interest to users. An item may belong to several different bibliographic categories.

Curriculum—Contains curricula information for a title. For example, items that Ms. Andres is using in her Geography 212 class can include Curriculum categories such as "Geography 212" and "Ms. Andres". Users can search for the items by the teacher or course name. Reports can be sorted by Curriculum.

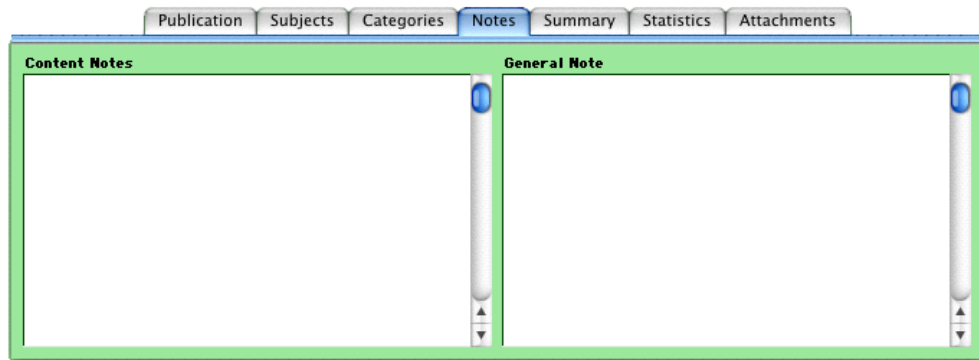
Interest Code—Contains information regarding the item's intended audience. Be consistent in how you enter the values in this field and be sure you know what values to search for (i.e. if you enter "8th grade" as an interest category, be sure you know to enter "8th grade" rather than "Eighth Grade").¹ Interest Level data is saved in MARC tag 521_a.²

1. The interest code is not always so specific. Another example would be 7-10 (meaning age) or Junior High School to College Students.

2. Depending on the MARC indicator, it can be more specific. 521 00_a could be reading level [3.4]. 521 10_a could be interest age level [7-10]. 521 20_a could be interest grade level [K-3].

Notes

This tab contains content and summary notes. If you provide any **Contact** or **General Notes** in these fields, a **Notes** button will appear in the **Current Item** section of the **Circulation** window.



The screenshot shows a software window with a tabbed interface. The tabs are labeled: Publication, Subjects, Categories, Notes (which is the active tab), Summary, Statistics, and Attachments. The main area of the window is divided into two vertical panels. The left panel is titled 'Content Notes' and the right panel is titled 'General Note'. Both panels are currently empty, showing only a vertical scrollbar on the right side of each panel.

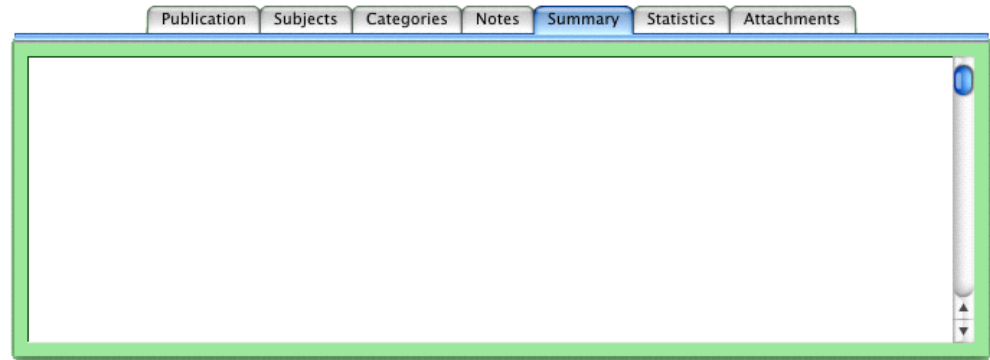
Content Notes—Contains notes about the title's content. For example, **Content Notes** for an anthology may list the works included within the anthology.

Separate contents by pressing the <return> key. Only the first 505_a content note in the MARC record is displayed in this window.

General Notes—Contains the first **General Note** for this title. Only the first 500_a note in the MARC record is displayed in this window.

Summary

Contains a summary of the title.

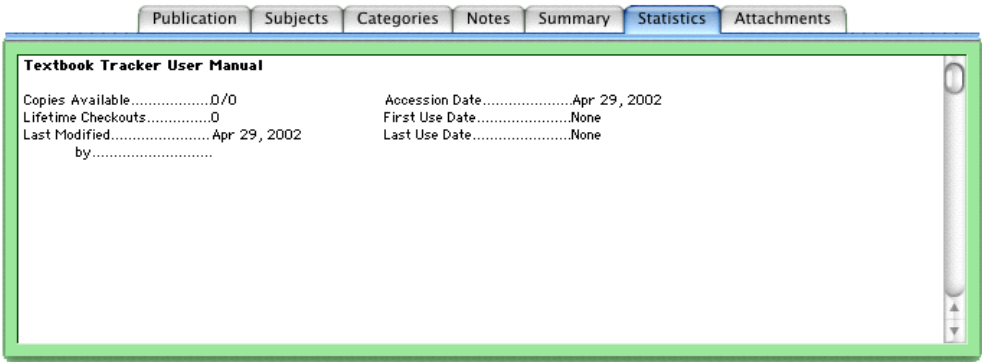


The summary appears in the **Title Detail** window and can be viewed for easy reference. If a user knows what a book is about but not the title or author, they can search for the item by words in the summary.

Only the first **520_a** summary note in the MARC record is displayed in this window.

Statistics

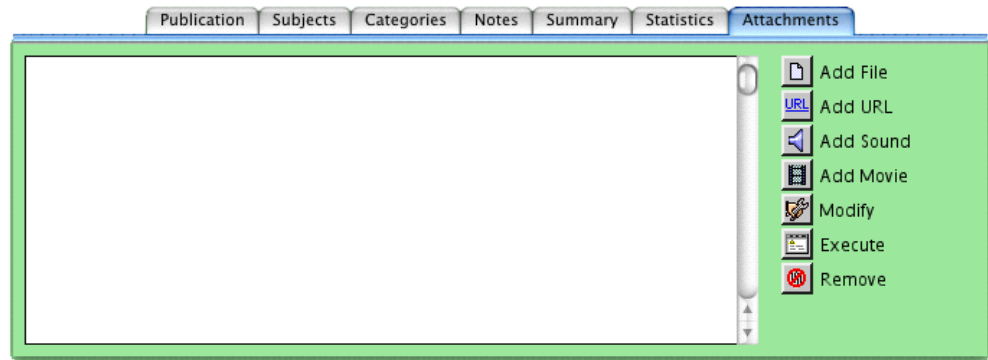
The **Statistics** tab shows information that is collected automatically during circulation. This information helps assess school and item usage. It can be used for ordering additional copies of items in high demand or weeding out infrequently used items. The information displayed is a summary for all copies, and *cannot* be modified.



If you have a multi-collection Textbook Tracker License and are using the Central Administrator Client, an additional window will be visible showing all the collections available in your database. Each collection has its own **Statistics** information.

Attachments

The **Attachments** tab shows documents, videos, URLs and other items that are attached to the title record. Attachments also appear on the **Details** window when an item is found through a search. Users can click an attachment to view or launch it from the **Details** window.



You may attach URLs, files, sounds or movies by dragging their icons to the attachment list or clicking on the associated icon and selecting the file. To add an URL, click on the icon and enter the full URL.

Double-click on any item in the list to edit the attachment specifications. <Option>-double-click (Macintosh) or <alt>-double-click on any item in the list to view the original document or URL.

When you have added attachments, click **Save** at the top of the **Items** window to save the attachments. To remove an attachment, select the attachment in the list and click **Remove** or press the <delete> key.

- N O T E -

Make sure that the applications required to open particular attachments are installed on your machine. For example, Quick Time is required for ".avi" movies, some image formats require the proper image manager, ".pdf" documents need Adobe Reader, and so on. Be certain to have the appropriate programs installed.

Copy Information (tab)

The right tab on the bottom-half of the **Items** window shows (when selected) **Copy Information** for each copy of the current title you have in your collection. To view detailed information about a copy, browse or find the copy you wish to view. Only one copy can be viewed at a time.

The screenshot shows the 'Items' window with the 'Copy Information' tab selected. The window is divided into several sections:

- Top Section:** Includes a 'Browse By' dropdown set to 'Title', a search bar containing 'TETR', and a 'Standard Item' dropdown set to 'book'.
- Title Information:** Displays 'Textbook Tracker User Manual' as the title, 'Bill Schjelderup' as the author, and 'Ignore Leading Chars' set to 0.
- Metadata Fields:** Fields for Volume, Edition, LCCN, ISBN, Stock #, and Dist. Adopt are visible on the right.
- Copy Selection:** A 'Browse Copies By' dropdown is set to 'Barcode', and '1 of 1' copies are listed.
- Copy Information Tab:** This tab is active and shows:
 - Condition:** A dropdown menu set to 'Unknown'.
 - Barcode:** A text field containing '200'.
 - Copy Number:** A text field containing '1'.
 - Copy Institution:** An empty text field.
 - Copy Location:** An empty text field.
 - Copy Sublocation:** An empty text field.
 - Copy Policy:** A dropdown menu set to 'Standard Item'.
 - Copy Call Number:** An empty text field.
 - Status:** A dropdown menu set to 'Available'.
 - Current Patron:** An empty text field.

This window includes tabs with various kinds of copy information. Click on a tab to view information in the tab window.

The following sections describe the information on each tab window.

Copy Information

Condition—Allows the administrator to describe the condition of the copy. You can create a report to track copies by their condition.

Barcode—Each copy has a unique barcode number. A barcode number is required for every copy. Barcodes can be up to 15 digits. Textbook Tracker assigns these numbers based on the value you enter in the **Title/Copy Management** preference window. You can highlight and type over numbers in the field to change them.

Copy Number—Textbook Tracker assigns each copy a number when it is added. You can type over the copy number to change it. Duplicate copy numbers are allowed. The copy number is simply an alternative identification number for the school's use. Textbook Tracker uses the barcode number to uniquely identify copies. If you import items, the copy number will not change, even if the number is already used by another copy in the system.

Copy Institution—Enter the copy school institution short code in this field. This code is taken from. Remember that the term **Copy Institution** is dynamic and can be changed in the **Global Item Management** preferences (see “Terminology Tab” on page 92).

Copy Location—When your items are stored in various physical locations, use the **Location** field to further define where the items can be found if the call number is not specific enough. Remember that the term **Copy Location** is dynamic and can be changed in the **Global Item Management** preferences (see “Terminology Tab” on page 92).

Copy Sublocation—This is the sublocation for your items. Use this field to further define where the items can be found if the **Location** is not enough. Remember that the term **Copy Sublocation** is dynamic and can be changed in the **Global Item Management** preferences (see “Terminology Tab” on page 92).

Copy Policy—Use this drop-down menu to select your copy policy. By default, new copies will inherit the item title policy. You may create new title/copy policies in the **Policies** preferences window (see “Policy Preferences” on page 101).

Copy Call Number—The call number for a copy is “inherited” from the **Title Call Number** unless it’s replaced with a copy-specific call number.

Copy Policy—The **Copy Policy** is “inherited” from the **Title Policy** unless it’s changed by the administrator.

Status—This non-editable field displays the status of the copy (i.e. whether the copy is available for circulation or not).

Current Patron—If the copy **Status** (see above) is **Checked out**, this non-editable field displays the barcode number of the patron who has borrowed the copy.

Copy Inventory

	Copy Information	Copy Inventory	Copy Notes	Copy Statistics
Inventory	May 5, 2004			
Purchase Cost	\$20.00			
Accession Date	May 5, 2004			
Funding Source				
Vendor				

Inventory—This is the date the copy was last inventoried, circulated, or marked used in the system. Textbook Tracker automatically inventories items when they are circulated. You can print a report of all items that haven't been circulated (inventoried) since you last inventoried your collection, then inventory only those items. The inventory date is automatically set to the date the copy was imported and added to the collection.

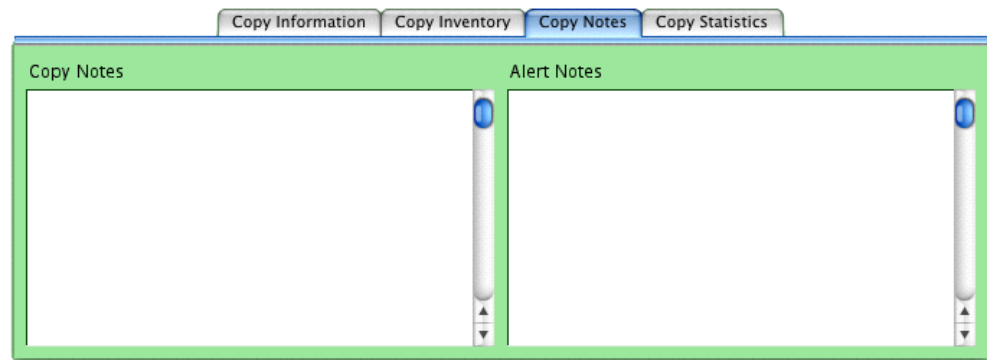
Purchase Cost—Used for logging purchase costs of the copy. If you do not enter a price, Textbook Tracker uses the item policy default average for determining the cost of an item. Copy price is shown at 852_9 in MARC records.

Accession Date—This is the date the copy was entered into Textbook Tracker. The default for this field is the current date. You can generate reports and search based on this accession date.

Funding Source—This identifies the funding source for the copy. It can be used when you generate reports, including reports that list all items purchased from a specific funding source.

Vendor—Vendor from which the items were purchased.

Copy Notes

The image shows a software window titled "Copy Notes" with a green border. At the top, there are four tabs: "Copy Information", "Copy Inventory", "Copy Notes" (which is selected and highlighted in blue), and "Copy Statistics". Below the tabs, the window is divided into two main sections. The left section is labeled "Copy Notes" and contains a large, empty white text area with a vertical scrollbar on its right side. The right section is labeled "Alert Notes" and also contains a large, empty white text area with a vertical scrollbar on its right side.

Copy Notes—Enter general comments about this copy. When a copy has notes, a **Notes** button appears in the **Current Item** section of the **Circulation** window. For example, if a copy is damaged, you can document the damage in this field. Click the **Notes** button to view the **Copy Notes**. **Copy Notes** are shown at 852_z in MARC records.

Alert Notes—This field is used to make the user aware of special circumstances regarding a specific copy. When a copy circulates with multiple parts, **Alert Notes** can remind you (on check out and check in) that it includes multiple parts (if that information is entered). When the copy is accessed from the **Circulation** window, an **Alert Note** window appears. **Alert Notes** are shown at 852_x in MARC records.

If a copy has *any* notes at all, two plus signs ("++") appear next to the item name in the **Current Item** section of the **Circulation** window. Enter the "++" command on the command line to view notes for that item.

Copy Statistics

Copy Information	Copy Inventory	Copy Notes	Copy Statistics
Barcode.....200 Copy Number.....1 Checkout Count.....0 Days in circulation.....0 Date of last use.....None Current Status.....Available Copy policy.....STD Last Modified.....Apr 29, 2002			

The **Copy Statistics** tab includes statistics about the copy's use. Textbook Tracker automatically generates this information and you *cannot* modify it. This screen also includes copy history, the names and barcodes of the patrons who borrowed this copy, and the last user who modified it (requires security to be activated; see "Administration Preferences" on page 57).

Circulation

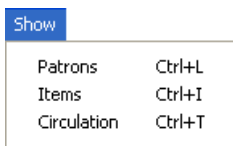
This chapter describes how to use the **Circulation** window to complete daily activities within your institution/school.

The Circulation Window

The **Circulation** window is the main window of the Administrator Workstation. Use this window to enter transactions. You can also issue textbooks, place hold requests and reservations, process fees, fines, payments, and renew books. You can also complete special functions such as inventory, cataloging, record updating and viewing.

Use any of the following methods to activate the **Circulation** window.

- Select **Circulation** from the **Show** menu.
- Press <cmd - t> (Macintosh) or <ctrl - t> (Windows) on the keyboard.
- Select **Circulation** from the **Window** menu.



Modes, Commands and Help

The top portion of the **Circulation** window shows the active mode, the command line, and the **Help** button.

- A **mode** is simply a function for which you may want to process many patrons or items. For example, **Bookdrop**, **Check In/Out**, **Hold**, and **Renew** are all modes.
- The **Command Line** is where you enter a barcode for a patron or item, or you may enter a command. If you enter only a barcode, the mode (shown to the left of the command line) determines the action that is performed.
- Click the **Command Help** button to display a list of available commands and an explanation of how to use each one.

Current Patron and Current Item Information

The middle portion of the **Circulation** window displays general information about the Current Patron and Current Item.

- N O T E -

Many Textbook Tracker functions depend on the Current Patron or Item. For example, you must have a Current Patron to check out, hold, or reserve an item.

- Click the **Details** button in the patron or item section to view more detailed information about the Current Patron/Item.
- Click the **Notes** button in the patron or item section to view notes entered for that particular patron / item. You enter the notes for a patron in the **Notes** tab in the **Patrons** window. You enter notes for an item in the **Copy Notes** tab of the **Items** window.

You can also select **Show Patron Details** or **Show Item Details** from the **Circulation** menu to view the same information as the **Details** button.

Circulation Log

The bottom portion of the **Circulation** window contains the Circulation Log. This log records information for each transaction you complete and all operations you perform.

Select **Print** from the **File** menu or type “+++” into the command line and press enter to print the Circulation Log. The Circulation Log is automatically saved by Textbook Tracker according to the preferences you’ve selected (*see “Circulation Preferences” on page 73*). Logs are saved inside the Textbook Tracker **Log** folder.

Using the Circulation Window

This section describes how to use commands, **Command Help**, and the **Circulation** menu to complete transactions in your institution/school.

Using the Command Line

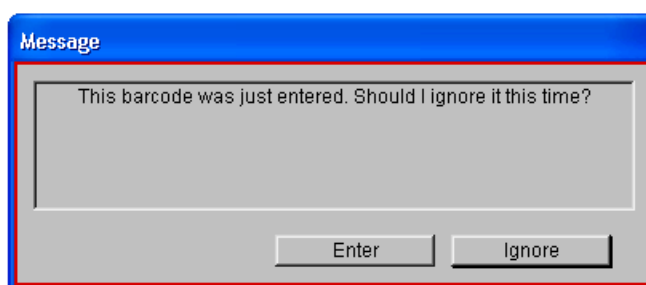
There are several ways to use the command line.

- **Enter a barcode.**

You can enter a barcode manually by typing the number and then pressing <enter>, or scan a barcode using a barcode reader.

If you only enter a barcode, the action that takes place depends on the current mode (displayed to the left of the command line). For example, if your current mode is **Check In/Out** and you enter barcode "13456," item 13456 will be issued to the Current Patron.

If you enter the same barcode number twice in a row, this warning message appears:



- N O T E -

When you enter barcodes via portable readers, Textbook Tracker will ignore duplicate entries that appear side by side.

- **Enter a command and a barcode.**

For actions other than those displayed in the mode field, enter a command followed by the barcode and press <enter>. Doing so will apply that action to the individual barcode you enter. It does not change the mode. Therefore, if you're in **Check In/Out** mode, entering the command of "B 13456" will perform a bookdrop for item 13456.

- **Enter a command without a barcode.**

If you enter a command without a barcode, the current mode will change. For example, if you enter "H" and press <enter>, the mode is set to **Hold**. You can then enter (or scan) a barcode for each item you want placed on hold for the Current Patron.

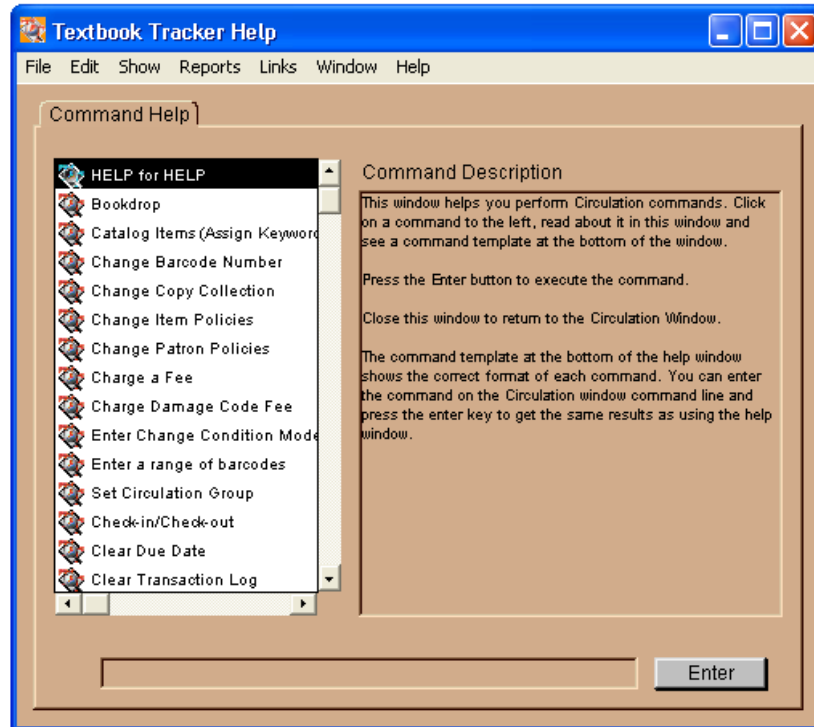
- S H O R T C U T -

An equal sign "=" is used as a shortcut for the **Current Item** barcode. Thus "H=" places a hold on the current item.

Using Help for Commands

Click the **Command Help** button to the right of the command line on the **Circulation** window to access information about commands and how to use them.

If you select a command from the list in the **Help** window, it displays information about that command. It also contains the command letter and a blank field where you may enter the barcode and any additional information for that command.



Type or scan a barcode; this executes a command for the barcode you enter. The **Circulation** window then appears.

If you select a command and click **Enter** without entering a barcode, the action taken depends on the command you selected. For example:

- If the command you select is a mode, Textbook Tracker changes the current mode and displays the **Circulation** window under this mode.
- If you select the locate command (see *“Locating Patrons and Items”* on page 198), a **Lookup** browse window will appear. You may then make a selection from the browse window.
- If the command you select performs a Circulation function, then that function is performed, the **Circulation** window will appear, and the Circulation Log records the results. For example, if you select the **Hold Request** command and enter a barcode, Textbook Tracker puts a hold on the item and the **Circulation** window will appear, appropriately logging the entry.

Circulation	
Start Bookdrop	Ctrl+1
Make Charges/Payments	Ctrl+2
Show Patron Details	Ctrl+3
Remove Patron Holds	Ctrl+4
Show Item Details	Ctrl+6
Adjust Item Holds	Ctrl+7
Renew Patron Items	Ctrl+R
Broadcast message to clients	
Display all connected clients	

Using the Circulation Menu

Additional circulation commands are available from the **Circulation** menu. This menu appears at the top right of the menu bar across the **Circulation** window. You can either select a command directly from this menu or use the hot-keys (shown on the right hand side of the menu) to execute commands.

Some of the commands in this menu require a Current Patron or Current Item. For example, you must have a Current Patron to select **Show Patron Status**.

The **Circulation** menu shows available commands in bold text. For example, if the Current Patron does not have any holds or reservations, the **Remove Patron Holds** and **Remove Patron Reservations** selections are grayed out in the menu and therefore, non-selectable.

The following commands are available from the **Circulation** menu.

Start Bookdrop—Sets the current mode to **Bookdrop**. In **Bookdrop** mode, you enter barcodes for items you want to check in. This option will toggle between **Start Bookdrop** and **Start Check In/Out** modes.

Start Check In/Out—Sets the current mode to **Check In/Out**. This option will toggle between **Start Bookdrop** and **Start Check In/Out** modes.

Make Charges-Payments—Add or remove fines, accept payments for fines incurred, and issue refunds for payments made. You must have a Current Patron to select this option.

Show Patron Details—Shows the complete details for the Current Patron; including all transactions, fines, requests, and so forth. You must have a Current Patron to select this option. Performs the same function as the **Details** button.

Remove Patron Holds—Shows the items the Current Patron has on hold. To remove a **Hold**, click on the request you want removed and click **Remove Hold**. You must have a Current Patron with hold requests to select this item. To remove an in-stock hold, let it expire or bookdrop it. The next patron in the hold queue will be assigned the item.

Show Item Details—Shows the complete details of the Current Item, including the status for all copies of that title. You must have a Current Item to select this command/option. Performs the same function as the **Details** button.

Adjust Item Holds—Shows all patrons who have hold requests for the Current Item. You can remove a request from the queue (or change its order). You must have a Current Item with hold requests displayed to select this option.

Renew Patron Items—Shows everything currently checked out to the Current Patron. Either click on the **Renew All** button to renew all items or highlight certain items to renew and click the **Renew** button. The Current Patron must have items checked out.

Broadcast Message to Clients—A **Query** window will appear with a text box for entering and sending messages to other clients connected to the Data Station. This message will only appear to currently connected clients.

Display All Connected Clients—Lists, in the Circulation Log, all clients that are currently connected to the Data Station. The type of application and the machines' IP address are visible in the log.

Checking Items In and Out

Textbook Tracker makes it easy to issue items. Textbook Tracker automatically determines whether a barcode you enter belongs to a patron or an item and whether that item is already issued. Because of this, Textbook Tracker can usually determine the appropriate course of action.

In addition, while you are performing transactions, Textbook Tracker automatically computes due dates, adjusts for closed dates, verifies policies, and collects statistics.

The subsequent sections provide the steps for issuing textbooks. Other sections in this chapter will describe special kinds of checkouts; such as: temporary items, renewing, reserving, and making reservations. They also cover “special status” items such as lost, archived, and on order.

- N O T E -

You can use the **equal sign** (“=”) instead of the barcode for the Current Item in *any* command. For example, if the Current Item is 3000, then “H=” is the same command as H3000.

Checking Items Out

Use the following steps to check an item out:

- Step 1. Type or scan the barcode of the patron who is checking-out the item. This makes the patron the Current Patron.

If you don’t know the patron’s barcode, use the locate command (see “*Locating Patrons and Items*” on page 198) to find the patron and their barcode.

- Step 2. Textbook Tracker uses the item due date established in your **Circulation Policies**. To enter a different due date, use the **Set Override Date** command (detailed on page 184).

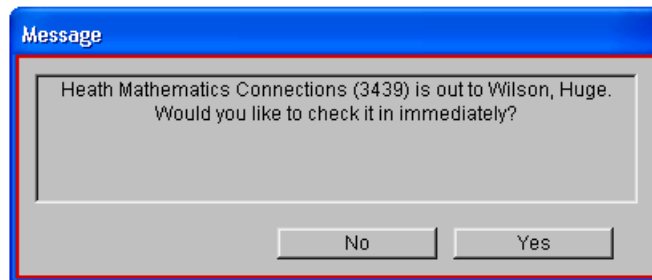
As you check items out, item details appear on the **Circulation** window. A line is also added to the Circulation Log to show what items have been issued.

- Step 3. Type or scan the barcode of the item you want to issued to the Current Patron.

Special Conditions When Checking Out Items

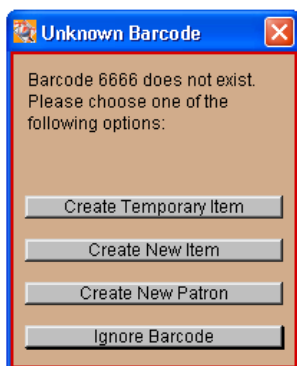
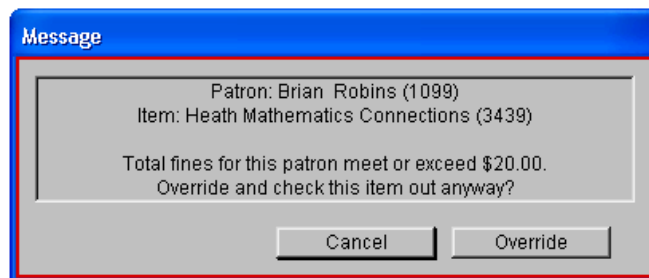
When you are issuing items, Textbook Tracker will alert you to special conditions that may affect check out.

- If you enter a barcode for a book that is already issued, a warning message will appear.



You can choose to check this book in, or cancel the request to check it out.

- If issuing an item to a patron violates a set policy, Textbook Tracker will alert you. For example, if a patron exceeds the number of items they can check out or exceeds the overdue limit, a warning message will appear. If more than one policy setting is violated, the messages will all appear in a single window.



If you have the authority to override policies, the window will include the “**Override and check this item out anyway?**” option. You can allow the patron to check the item out (even though it exceeds the specified limit) or cancel their request to check it out. If you don’t have the authority to override policies, a warning message will appear without the ability to override and check out the item to the patron.

If the item barcode you enter is not assigned to an existing item (and is not in the temporary barcode range defined in your preferences), the **Unknown Barcode** window appears.

You can choose **Ignore Barcode** if you entered it incorrectly, or you can select one of the other options.

If a copy is designated as an in-stock hold for another patron, an error message will appear. If you have the authority, **Cancel** / **Override** buttons will appear at the bottom of the screen. Clicking **Override** will issue the copy to the Current Patron with the in-stock hold shoved back to the top of the hold queue. If you don’t have any authority, no override options will be available and item check out will be denied.

Checking Items In

Use the following steps to check in items:

- Step 1. Type or scan the barcode of the patron who has the item checked out. This makes that patron the Current Patron.
If you don't know the patron's barcode, use the locate command (see *"Locating Patrons and Items"* on page 198) to find the patron's barcode.
- Step 2. Type or scan the barcode of the item you are checking-in.

If you are checking-in a number of items, use the **Bookdrop** mode described on the next page.

If the item you check in is overdue and has a fine, a window will appear with information about the fine.

Overdue Fine

Darla Anderson

3567 Romeo and Juliet

The item being returned is past due.
You can enter a payment, change the fine balance, or
cancel the fine.

Fine Amount \$6.00

Forgiven Amount \$0.00

Additional Charge \$0.00

Balance Due \$6.00

Payment \$0.00

Forgive Fine Charge Fine

From this window, you can enter a payment, forgive the fine, forgive a portion of the fine, or record the fine to the patron's permanent record to be processed later. If you want to forgive part of the fine, enter a value in the **Forgiven Amount** field. If you want to charge an additional amount, enter the value in the **Additional Charge** field. To record a payment, enter it into the **Payment** field. To forgive the entire fine, click on the **Forgive Fine** button. To charge the fine, click on the **Charge Fine** button (see *"Fee Charges and Payments"* on page 192).

Temporary Items

You can use Textbook Tracker's temporary item checkout function to keep track of items in your school/institution that are borrowed, but you don't want entered as part of your permanent inventory. For example, you may want to keep track of when newspapers, brochures, magazines, and other items are borrowed and returned, but not inventory them because of their limited shelf life.

A temporary item is logged at check out and check in the same as any other item. Temporary items may be renewed and have fines charged against them. However, once the item is checked in, the transaction record and temporary item information is removed from Textbook Tracker without a trace.

While they are checked out, temporary items show on loaned items reports, overdue lists, fine lists, and lost item lists. Because they are not inventoried, they do not show on inventory reports or shelf list reports. A temporary item cannot be searched using the catalog. If these items circulate frequently, it may be better to catalog them in Item Management; otherwise they will need to be re-entered each time they circulate.

Setting Up Temporary Check Out Items

See "Circulation Preferences" on page 73 for information on setting up default temporary barcodes.

Checking Out Using Temporary Items

There are a number of ways to check out temporary items.

You can prepare several temporary check out cards with temporary barcode numbers established in your preferences. When a temporary item is going to be checked out, attach one of these cards. When the item is returned, remove the card and return it to a stack of temporary check out cards to be reused again for other temporary items.

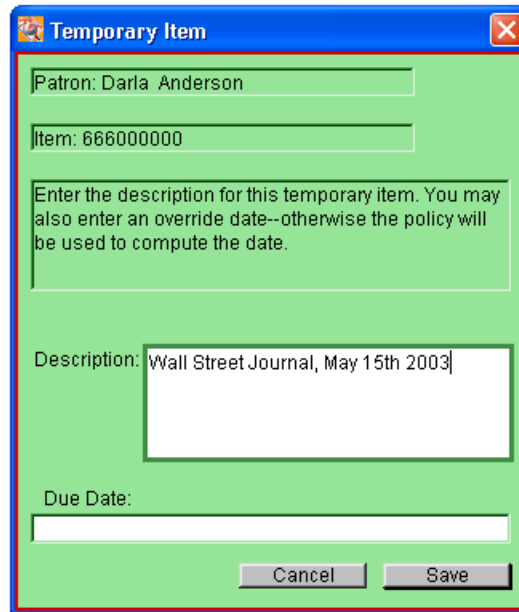
Another way to use temporary check out is to place a temporary barcode (within the range specified in your preferences) on all temporary items that might be checked out. The barcode is then used only for that item, but never permanently entered into Textbook Tracker. For example, as newspapers are received, you put temporary barcode numbers on the newspapers.

- N O T E -

You can print temporary barcode labels using Textbook Tracker. Choose **Special Reports** from the **Reports** menu, then select **Custom Barcode Labels**.

When you enter a temporary barcode number in the command line, Textbook Tracker checks the following:

- Textbook Tracker checks to see if the number is being used by an existing item.
- If it is not being used, Textbook Tracker checks to see if the number is being used by an existing patron.
- If it is not being used by an existing patron, Textbook Tracker checks to see if the number is within the range determined for temporary items in **Circulation** preferences (*on page 73*). If the number is within range, the following window appears:



Temporary Item

Patron: Darla Anderson

Item: 666000000

Enter the description for this temporary item. You may also enter an override date--otherwise the policy will be used to compute the date.

Description: Wall Street Journal, May 15th 2003

Due Date:

Cancel Save

Follow these steps to check out temporary items.

- Step 1. Enter a description of the item in the **Description** box.
- Step 2. If you want to specify a due date, enter it in the **Due Date** field. If you do not enter a due date, Textbook Tracker computes a due date based on the policies you have assigned for temporary items.
- Step 3. Click **Save**.

Special Patrons

There are several “special patrons” that Textbook Tracker creates. You can use these patrons to track items with a special status of lost, archived, or out-for-repair. For example, to track items that have been lost, you check them out to the **Lost Patron** (barcode #1).

Special patrons use the **System** policy, which has no restrictions on numbers of items checked out.

Here are Textbook Tracker’s “special” patrons:

Lost Items (barcode 1)—To keep track of items that have been lost, issue them to this patron. Unlike other items, an item issued to the **Lost Item** patron does not have its inventory date renewed. If the item is ever found, simply check it in and it’s available for check out again.

If the item is already checked out to real patron, when you issue it to the **Lost Item** patron, a window appears so you can charge a fine to the patron who has lost the item. The lost item will appear on the patron’s status report.

Although you may permanently remove an item from the Textbook Tracker system when it’s lost, items are quite often found again later. Checking an item out to the **Lost Item** patron makes it easier to return it to the system because you simply check the item back in when it’s found.

Using the **Lost Item** patron also makes it easy to keep track of which items have been lost so you can order new copies.

There are **Utilities** available to remove lost items according to your policies and the criteria you select.

Discarded Items (barcode 2)—To track items that are not to be used, but have not yet been permanently removed, issue them to this patron. To return a discarded item back to “in-stock,” simply check it in.

To permanently remove discarded items, use the corresponding **Item Utility**.

For School Use (barcode 3)—To keep items available for use *only* within the school, check items out to this patron. For example, you may want to keep textbooks for classroom use only and not allow them to be checked out. Check these items out or place a reserve on them using the **For School Use** patron.

On Repair (barcode 4)—To keep track of items sent for repair and not available to patrons, check them out to this patron. When the item has returned and repaired, check them in to make them available again.

On Order (barcode 5)—To keep track of items on order, permanently add the items to your collection when you order them and issue them to this patron. Enter an override date that matches the scheduled delivery date for these items. When you receive these items, check them in to make them available.

Archived Items (barcode 6)—To archive certain items and not make them available to patrons, check them out to this patron. For example, issue items to this patron if they are kept in a special room and not generally available for Circulation.

Unknown Patron (barcode 8)—Used for items whose status you do not know (i.e. special circumstances such as: items on display, temporarily misplaced items that you know aren’t permanently missing).

Reasons For Creating Your Own Special Patrons

You can create and remove your own “special” patrons to track items with unique status as needed for your school. Use barcodes 50 or under for special patrons. These patrons are assigned the **System** policy, which does not restrict the number of items they can be issued.

The following are examples of uses for special patrons you create:

- Instead of using the **School Patron** for classroom sets which are not to leave the school, create a **Classroom Patron** and issue reference books to this patron.
- Instead of using the **On Repair Patron**, create a special patron for each vendor that repairs your items. When you send an item to that vendor, check it out to them for the period of time they will have the item.
- Instead of using the **On Order Patron**, create a special patron for each vendor from whom you order items. When you order items from that vendor, check them out to that vendor and enter an override date that matches the scheduled delivery date.

Show Patron Notes

Command: +

Show Patron Notes—You can enter **General Notes** for a patron under the **Notes** tab in the **Patron Management** window. When **General Notes** have been entered, a **Notes** button will appear in the Current Patron area of the **Circulation** window. To view these patron notes, click on the **Notes** button or enter a “+” in the command line.

Append Patron Note

Command: + {text}

Append a Patron Note—You can add more **General Notes** to the Current Patron from the **Circulation** command line rather than having to go into the **Patron Management** window.

Replace Patron Note

Command: +# {text}

Replace Patron Notes—Use this command to completely replace the Current Patron’s **General Notes** with the text you enter. Entering the “+#” command without any following text will clear the Current Patron’s **General Notes**.

Show Item Copy Notes

Command: ++

Show Item Copy Notes—You can enter notes for a title copy under the **Copy Notes** tab. This tab will appear on the **Item Copy Data** window when you select **Add Copy** on the **Items** window.

When notes have been entered for a copy, a **Notes** button will appear in the Current Item area of the **Circulation** window.

Enter two plus signs “++” in the command line or click the **Notes** button to view notes for the current item copy.

Append Item Copy Note

Command: ++ {text}

Append Item Copy Note—You can add more **Copy Notes** to the Current Item from the **Circulation** command line rather than having to go into the **Item Management** window.

Replace Item Copy Note

Command: ++# {text}

Replace Item Copy Note—Use this command to completely replace the Current Item **Copy Notes** with the text you enter. Entering the “++#” command without any subsequent text will clear the Current Item’s **Copy Notes**.

Print Circulation Log

Command: +++

Print Circulation Log—The Circulation Log is a list of each action you have completed. This log appears at the bottom of the Circulation window. Use the “+++” command to print the Circulation Log. You can also select **Print** from the **File** menu to print the Circulation Log.

Put Comment in Circulation Log

Command: # {comment}

Put Comment in Circulation Log—Use this command to put a note in the Circulation Log. Notes can be *very* useful for making a permanent record of special events that happen in the institution/school. For example, enter “# Lights flickered, battery backup saved our machine!” when the power goes down. You then have a permanent record of when this event occurred. Or “# Out to lunch.” When you return, it’s clear if there has been any activity while you were gone!

Import Script / File

Command: *

Import Script / File—In addition to entering transactions by typing or scanning them into the command line, Textbook Tracker allows users to process commands saved in text files. These text files can be created by COMPanion’s portable laser scanners or by any program that creates text files.

Use this command to select the file to read. When the file is imported, Textbook Tracker processes the commands contained within it as if the user had entered them one at a time.

- N O T E -

While processing commands via a transaction file, Textbook Tracker does not alert you to unusual circumstances. Instead, Textbook Tracker takes whatever action it determines the most appropriate. After reading a transaction file, be sure to check the Circulation Log for any possible complication alerts.

Since this function is typically used for inventory scans, Textbook Tracker defaults all transaction files to begin with the **Inventory** command. If you are using a transaction file for purposes other than inventory, you *must* use the appropriate command in the header file.

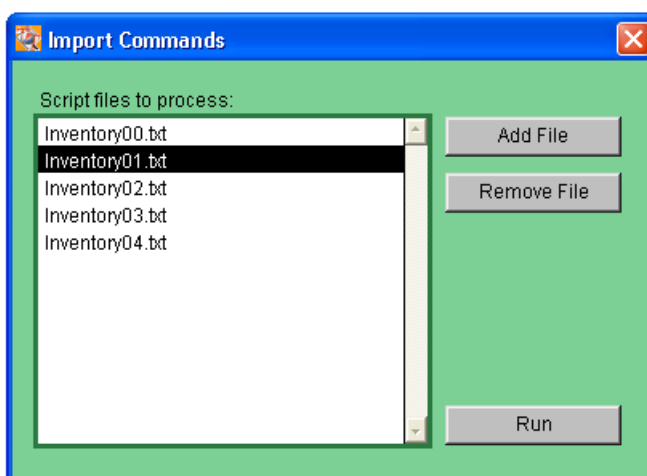
You can also drag and drop these files onto the **Transaction** window or use the **Import** command if they have the proper transaction file header¹. Textbook Tracker will recognize them as transaction files and process them automatically.

1. Textbook Tracker headers begin with “####” for example, SmartScan files begin with “#### SmartScan...”

Importing Portable Laser Scanner Inventory Files

If you're using a portable laser scanner for inventory purposes and have HotSynced (downloaded) inventory data to your hard drive, use the following steps to import that data into Textbook Tracker (*refer to your SmartScan User's Manual for more details*).

- Step 1. Make sure to backup your *current* Textbook Tracker data.
- Step 2. Use the "*" command followed by <enter> in the Transaction window to open the **Import Commands** window.
- Step 3. Use the **Add File** button to add inventory files to the **Script files to process** field. If you have downloaded several inventory files before importing them (see the example below), make sure you are renaming the files or moving them to different directories so that they do not have the same file name and do not get replaced.¹
- Step 4. Once the inventory file you want imported from the **Script files to process** field is highlighted, click the **Run** button to begin import.



- Step 5. Your data is now imported into the Textbook Tracker database.

1. SmartScan will rename the files according to when they were downloaded, but there may be issues with some of the older portable scanners.

Clear Override Date

Command: .

Clear Override Date Mode—Use this command to clear the **Override Date** and reset the **Circulation** window to **Check In/Out**.

Set Override Date

Command: .{date}

Set Override Date—Typically, due dates are computed based on the policies you define in **Preferences**. You can use this command to set different due dates for items you are issuing, book-dropping, reserving, or performing inventory on. For example, to set the due date to June 3, 2005, type “. Jun 3 05” (including the period) and press <enter>.

Until you clear or reset the due date using either “.” or “x”, the changes below will be performed:

- Textbooks you check out will be due on June 3, 2005.
- When you bookdrop, the system will record the book as having been checked in on June 3, 2005.
- When you perform **Inventory**, the inventory date used will be June 3, 2005.
- When you are in **Statistics** mode, this date will be used.
- The **Override Date** you set is shown on the bottom-right corner under the Transaction Log of the **Circulation** window. A Circulation Log entry will also show that this date was manually set.



The **Override Date** you set is in effect until you clear it. To clear the **Override Date**, type a period into the command line without a date. The “.” command will also clear any special modes (such as **Bookdrop** or **Inventory**) that were in effect. The period command “.” without a date is a quick way to prepare the **Circulation** window for **Check In/Out**.

Issuing items under an **Override Date** forces them to be due on that day, regardless if that date is **Closed** in your **Calendar Preference** (see “*Calendar Preferences*” on page 69).

Clear Circulation Mode

Command: . .

Reset Mode—Use this command to clear any special modes in effect and reset the **Circulation** window to **Check In/Out**. This does the same thing as the period command, except that it clears the Current Patron/Item and *doesn't* clear the **Override Date** setting.

Transfer Mode

Command: .X

Transfer—Use this mode to transfer a currently checked out item (or items) from one patron to another without changing the due date. For example, books can be issued for an entire year, but if a teacher changes halfway through a semester, you can use this command to transfer the items to the new teacher and still retain the stationary due date. This command also makes it easier on users, as they are no longer required to perform a manual override when items are already checked out to another user.

To use this command, enter “.X” into the command line and press <enter>. Next, in the command line, type the patron barcode number to whom you would like to transfer the item(s). Lastly, in the command line, enter the item barcode number of the item(s) you are transferring. The item(s) will be transferred to the new patron, and a note will be made to the transaction log.

Change Barcode Number

Command: / {old barcode} = {new barcode}

Change Barcode Number—Use this command to change barcode numbers for patrons or items while performing tasks within Textbook Tracker. For example, if you are issuing items, you can change their barcode numbers as you check them out. If you are performing inventory, you can change the barcodes as you inventory the items.

This command changes the old barcode number and then enters the new barcode number you specified from the command line. This means you can change barcode numbers and continue with the activities you were performing.

For example, suppose you are checking in items and come across one with barcode number 3009, but the barcode label is damaged. You may want to place a new barcode label on the item with the barcode number of 9000. To do this, while still in **Check In/Out** mode, type “/3009=9000” in the command line. Textbook Tracker changes barcode 3009 to 9000 and enters 9000 into the command line, which will check the book in.

You can use this command to change patron barcodes as well as item barcodes.

Set Self-Service Check-Out Mode

Command: AS

Set Self Service Check-Out Mode—This command logs out the user (you) and sets the mode to **Self Service Check Out**. To exit this mode and security level, select **Restart** from the **File** menu and log in under the correct security level. This mode can not be exited using the “.” command—it’s a shortcut to change user levels.

Set Self Service Bookdrop Mode

Command: ASB

Set Self Service Bookdrop Mode—This command logs out the user (you) and sets the mode to **Self Service Bookdrop**. To exit this mode and security level, select **Restart** from the **File** menu and log in under the correct security level. This mode can not be exited using the “.” command—it’s a shortcut to change user levels.

Bookdrop Mode

Command: B {optional barcode}

Using Bookdrop Mode—Use the Bookdrop command to check in items for one or for many patrons. In **Bookdrop** mode, all the item barcodes you scan (or enter) are checked in. This provides a quick way to check in a large numbers of books without worrying about the patrons. For example, this mode provides a quick way to check in the large number of books returned at the end of the year.

- To check in a single item, type “B” followed by that item’s barcode number and press <enter>.
- To check in many items, type “B” and then press <enter>. This activates **Bookdrop** mode. You can also start **Bookdrop** mode by selecting **Start Bookdrop** from the **Circulation** menu.

While in **Bookdrop** mode, Textbook Tracker assumes you are only checking items in. If you type or scan a barcode for an item that is not checked out, a message will appear in the Circulation Log. If you enter a patron barcode, Textbook Tracker switches to **Check In/Out** mode and makes this patron the Current Patron.

Change Copy Condition Mode

Command: CL

Change Copy Condition Mode—This command will open the **Condition Codes** window, allowing users to select from a list of user-defined condition codes. These condition codes can be created using Textbook Tracker’s **Global Circulation** preferences (see “Circulation, Condition, and Damage Codes” on page 76). After a condition code has been selected, the **Circulation** window will enter the **Set Condition** mode. When you are in this mode, every item barcode you input into the command line will have the selected condition code applied. You may also use this command in conjunction with the “RR” command.

What are Circulation Groups?

Circulation Groups are an extremely flexible, easy way to track statistics and allow users to meaningfully bunch together groups of transactions under a single, user-designated code.

For example, **Circulation Groups** can be applied to items that have been checked out to specific teachers or groups of students; **Circulation Groups** can be the class periods, course numbers, or departments where the item is being utilized.

It is in this way that **Circulation Groups** allow for nearly infinite customization and make it easy for users to keep track of the items which have been loaned to teachers, courses, classes, or departments and all the subsequent statistics that result.

Circulation Groups should only be applied to items as they are checked out¹. A **Circulation Group** that has been assigned to an item will be removed when the item is checked in.

If the **Circulation Group** information that has been applied to an item needs to be kept for future reference (even after the item has been checked in), then users will be required to manually place special **Notes** on the copy records (see “Notes” on page 160) or on the patron record (see “Notes” on page 136).

In a high school situation, a **Circulation Group** that uses the teacher, period, or class course will be the most practical. In an elementary school scenario, it might be more functional to use the teacher or subject. For instance, in elementary schools, Math and Reading students are often organized by ability and therefore sent to different teachers accordingly. Therefore, a **Circulation Group** could be created for Grant (teacher name) or Math and Grant (subject and teacher) or Reading (subject).

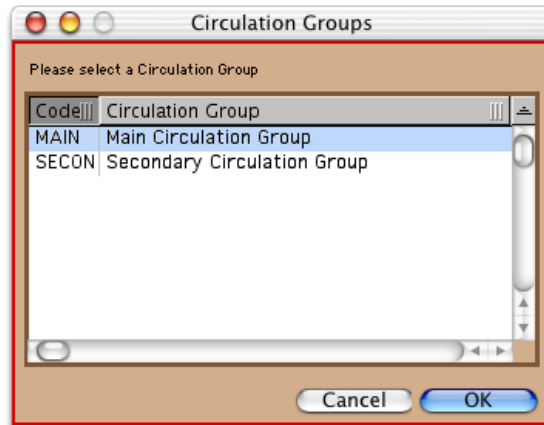
By means of the **Institution**, **Location** and **Sublocation** fields, users may be able to execute some of the same tracking abilities as **Circulation Groups**. However, in a high school or Central Union situation, the limitations of these fields might not be enough.

Circulation Groups can be easily created in Textbook Tracker without the usual lengthy set up time (especially since Textbook Tracker supports tab-delimited imports). For example, users can acquire a tab-delimited export file from the Administrator’s office that contains all of the teachers, classes, courses and import them into the database very quickly.

1. There is an exception to this rule. Users can use the “CN” command after an item has already been checked out to apply a **Circulation Group** (see “Change Circulation Group” on page 188).

You may set up new **Circulation Group** codes using **Global Circulation** preferences (please see “Circulation” on page 75 for more information). Once you have set up a new **Circulation Group**, it will appear in the **Circulation Groups** window, which is accessed by entering “CG” or “CN” into the command line of the **Circulation** window.

If you do not specify a **Circulation Group** code from the **Circulation Groups** window, clicking **OK** will automatically select the first code in the window (based alphabetically). Default **Circulation Group** code is MAIN.



Apply Circulation Group

Command: CG

Apply Circulation Group—Use the “CG” command to check items out to patrons under a designated **Circulation Group** code. The “CG” mode requires that you have a Current Patron and Item. A small, white box with the words “**Group: (Circulation Group Code)**” will appear below the **Circulation** window’s current mode indicator and command line.

The only way to clear this particular mode is to re-enter “CG” into the command line and press enter.

Change Circulation Group

Command: CN

Change Circulation Group—Use the “CN” command to apply **Circulation Groups** to items that have already been checked out. Entering “CN” in the command line puts Textbook Tracker into the **Change Circulation Group** mode. Enter the barcode number of the item whose **Circulation Group** you would like to change. The item will be immediately updated with the new **Circulation Group** code.

Entering a patron barcode number to switching to another mode will terminate the **Change Circulation Group** mode. You may also terminate this mod using the “X” or the “. .” commands.

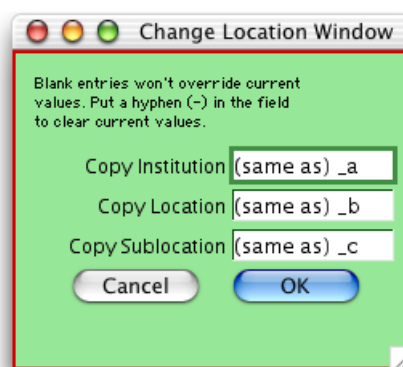
Change Location Window

Command: CH

Change Institution Command—Using this command, which opens the **Change Location Window**, is the same as using the individual (“CH_a”, “CH_b”, and “CH_c”) or the combined (“CH_a_b_c”) change location commands which are described below. The only difference is that the **Change Location Window** (accessed by the “CH” command) makes things easier for the user because it provides an intuitive graphical user interface.

Enter a new name for each field that you would like to change. When you are satisfied with your entries, click **Ok** to proceed with your changes or **Cancel** to exit. Whatever you input into the blank **Copy Institution** field is like performing the “CH_a” command. Similarly, whatever is input into the **Copy Location** field is like performing the “CH_b” command; whatever is input into the **Copy Sublocation** field is like performing the “CH_c” command.

Please keep in mind that blank entries won’t override an item’s current location values, as location defaults have been set in the **Item Management** preferences **Local / Default Local Terminology** tab (see “Terminology Tab” on page 92). If you would like to override these default values with a blank one, enter a hyphen (“-”) in each of these fields.



The terms for **Copy Institution**, **Copy Location**, and **Copy Sublocation** can be changed by using **Item Management** preference’s **Global Terminology** window (see “Terminology Tab” on page 89).

Change Institution Command

Command: CH_a{institution}

Change Institution Command—Use this command to change the institution code for a selected number of copies.

For example, to change a specific copy institution code to WestMont, you would type “CH_aWestMont” into the command line and press <enter>. Doing so will change the **Circulation** window to run under the **Change Locations** mode. When Textbook Tracker is running under this mode, you may enter any barcode whose institution code you want changed into the command line.

An entry will be made to the **Circulation Log**, containing information on the copies whose institution code you’ve changed.

When you’ve entered all the item barcode numbers whose institution code you wanted changed, use the “.” command to exit the **Change Locations** mode.

Change Location Command

Command: CH_b{location}

Change Institution Command—Use this command to change the location code for a selected number of copies.

For example, to change a specific copy location code to ScienceLab, you would type "CH_aScienceLab" into the command line and press <enter>. Doing so will change the **Circulation** window to run under the **Change Locations** mode. When Textbook Tracker is running under this mode, you may enter any barcode whose location code you want changed into the command line.

An entry will be made to the **Circulation Log**, containing information on the copies whose location code you've changed.

When you've entered all the item barcode numbers whose location code you wanted changed, use the "." command to exit the **Change Locations** mode.

Change Sublocation Command

Command: CH_c{sublocation}

Change Institution Command—Use this command to change the sublocation code for a selected number of copies.

For example, to change a specific copy sublocation code to WestMont, you would type "CH_aWestMont" into the command line and press <enter>. Doing so will change the **Circulation** window to run under the **Change Locations** mode. When Textbook Tracker is running under this mode, you may enter any barcode whose sublocation code you want changed into the command line.

An entry will be made to the **Circulation Log**, containing information on the copies whose sublocation code you've changed.

When you've entered all the item barcode numbers whose sublocation code you wanted to change, use the "." command to exit the **Change Locations** mode.

Change Damage Condition

Command: DL

Change Damage Condition—This command will open the **Damage Codes** window, allowing users to select from a list of user-defined damage codes. These damage codes can be created using Textbook Tracker's **Global Circulation** preferences (see *"Circulation, Condition, and Damage Codes" on page 76*). Once you have selected a specific damage code from the list, it will be immediately applied to the Current Item.

During checkout, if you notice that an item copy has undocumented damage and you would like to register the damage without charging a fine to the Current Patron (because, obviously, the damage was not done by the patron checking out the book), you can use the "++" command to apply an item copy note to the copy record. This is the best and easiest way of noting damage without charging a fine to an undeserving patron.

Circulation	
Start Bookdrop	Ctrl+1
Make Charges/Payments	Ctrl+2
Show Patron Details	Ctrl+3
Remove Patron Holds	Ctrl+4
Show Item Details	Ctrl+6
Adjust Item Holds	Ctrl+7
Renew Patron Items	Ctrl+R
Broadcast message to clients	
Display all connected clients	

Handling Charges and Payments

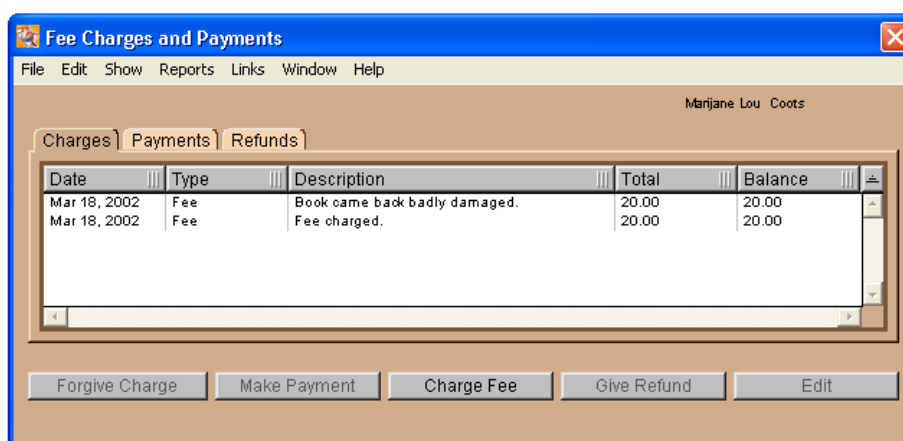
Use the **Fee Charges and Payments** function to view charges assigned to a patron for overdue items or fees assigned for special circumstances (such as lost items or loan fees). Textbook Tracker calculates amounts for overdue charges and fees based on your circulation policies.

You can also use the **Fee Charges and Payments** function to charge miscellaneous fees to a patron, record the payments a patron makes, or amounts you have forgiven.

Fee Charges and Payments

Command: F or FF

Fee Charges and Payments—To view charges and payments for the Current Patron, type “F” and press <enter>, or choose **Make Charges-Payments** from the **Circulation** menu.



NOTE:

To charge a patron for a damaged book after it has been checked in, use the “F {book amount} {description}” command in **Circulation** window with a Current Patron. For example, if Patron 1621 bookdropped a damaged item, the administrator can later enter Patron 1621 into the Circulation window and assess them a fee by typing “F 20.00 Charles scribbled in index” in the command line to charge them a \$20.00 fee.

This window includes three tabs: **Charges**, **Payments**, and **Refunds**.

The **Charges** tab shows the charges currently assessed against the patron. Textbook Tracker uses the following charge types.

- **Overdue**—Charges for overdue books that are still checked out. These charges are updated daily because the charge amount increases each additional day the book is overdue. You can enter a payment against this kind of charge without checking the book in.
- **Fee**—Charges for overdue books that have been returned, loan fees specified in your circulation policies, or any additional charge such as damage to textbooks, etc.
- **Lost**—Charges for losing a textbook.

The **Payments** tab shows the total payments received from this patron.

The **Refunds** tab shows the total refunds received by this patron.

Forgiving a Charge

To forgive an entire charge, highlight (select) the line and click the **Forgive Charge** button and click on **Process**.

If you only want to forgive a portion of a charge, use the **Forgive Charge** button and enter the amount to forgive, then click on **Process**.

Recording a Payment

Use the following steps to process a payment or pay a portion of the charge.

- Step 1. Select (highlight) a line and click the **Make Payment** button. The **Payment** window appears.

- Step 2. In the **Payment Notes** field, enter any notes concerning the payment. Perhaps if you reduced the charge (by modifying the **Total Charges** value), you would want to explain why.
- Step 3. Enter the amount the patron is paying in the **Payment Amount** field.
- Step 4. Click **Process** to record the payment or **Cancel** to stop.

Charging a Fee

Command: F {charge amount} {comment}

Charging a Fee—Use the “F” command with an amount and optional comment to issue a charge against the Current Patron. For example, to assign a \$4.20 charge for a damaged textbook, type “F4.20 Damaged Textbook” and press <enter>.

Once you enter a charge, you can change it if you made a mistake. In the **Make Charge Payments** window, select the **Charge** to edit and click the **Edit** button. You can modify either the **Fee Comment** or the amount (except on overdue fees that are still accruing).

You may also charge the Current Patron a fee by clicking on the **Charge Fee** button from the **Fee Charges and Payments** window.

Hold Requests

When an item is not available, a patron can place a **Hold Request** for that item. When the item is returned to the school, a message appears at the Administrator Workstation asking to hold that item for the requesting patron. An item waiting to be claimed is shown in the hold list as an In-Stock item¹.

If more than one patron requests a hold for the same item, Textbook Tracker keeps a list of the patrons in the order that they requested the item.

Your circulation policies determine how long a **Hold Request** can stay active. The expiration date for a hold is shown in the Circulation Log when you place the hold.

Textbook Tracker updates hold queues each day. If a held item is not claimed within the circulation policy limit, it is assigned to the next patron in the request queue. If no other patrons are waiting for the item, it is released for general circulation. This activity is recorded in the Circulation Log.

You can print a list of In-Stock Holds using **Circulation Reports** from the **Reports** menu (see “Circulation Reports” on page 251).

Placing a Hold Request

Command: H {item barcode}

Placing a Hold Request—Use the “H” command to place a hold on an item for the Current Patron or to begin **Hold** mode.

- To hold an item for the Current Patron, type “H” then scan (or type) the barcode number for the item which the Current Patron wants to hold and press <enter>.

If you do not know the item barcode, use one of the **Find** commands (see “Locating Patrons and Items” on page 198) to find the item’s barcode.

- To start **Hold** mode, type “H” and press <enter>. A hold request is placed on each item whose barcode you type or scan while in this mode. To exit **Hold** mode, type a patron barcode number or use the “X” or “.” command. A Current Patron is required.

- S H O R T C U T -

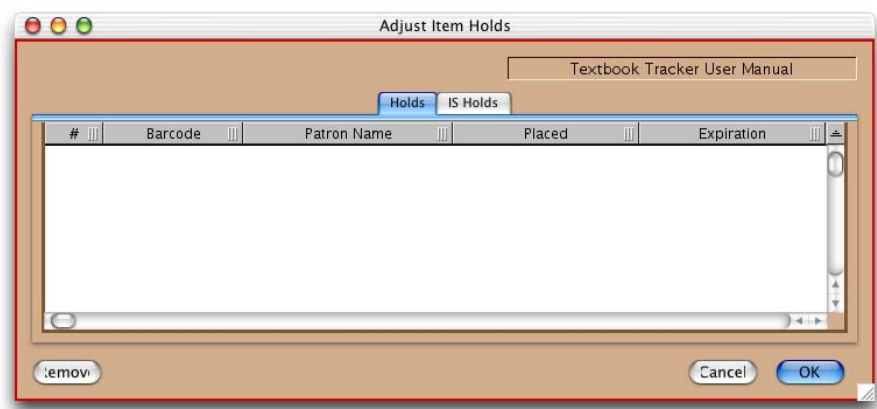
You can enter an equal sign “=” as a shortcut for the current item barcode. Thus, “H=” places a hold on the current item.

1. An in-stock “hold” is actually a special type of check out for the requesting patron. To remove the in-stock hold, either check out the item to the requesting patron, or bookdrop the item. When performing a bookdrop, if other hold requests are pending, an in-stock hold is created for the next patron in the hold queue.

Circulation	
Start Bookdrop	Ctrl+1
Make Charges/Payments	Ctrl+2
Show Patron Details	Ctrl+3
Remove Patron Holds	Ctrl+4
Show Item Details	Ctrl+6
Adjust Item Holds	Ctrl+7
Renew Patron Items	Ctrl+R
Broadcast message to clients	
Display all connected clients	

Removing Patron Holds

Use **Remove Patron Holds** from the **Circulation** menu to remove hold requests for the Current Patron.



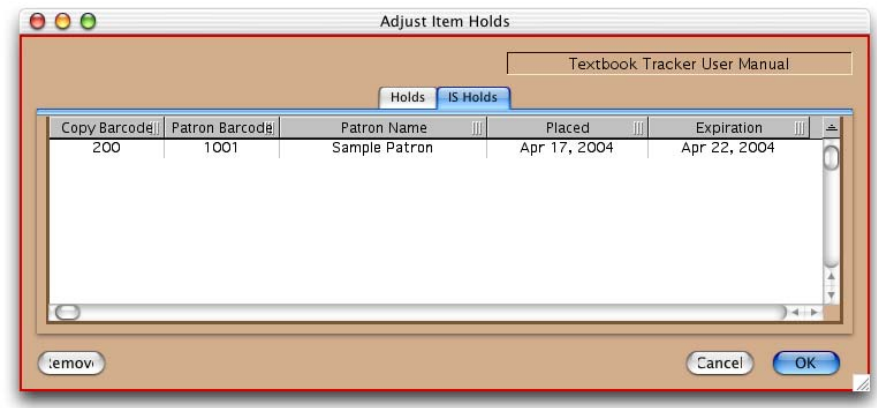
To remove a hold request, select the line you want to remove and click the **Remove Hold** button. To save the results, click the **Save** button. To ignore any changes, click the **Cancel** button.

W A R N I N G !

When you remove a hold request on this window, you cannot undo the remove. The only way to restore the hold is to place a new hold for the patron whose request was incorrectly removed.

Adjusting or Removing Item Holds

Use **Adjust Item Holds** from the **Circulation** menu to adjust or remove hold requests for the Current Item. The **Holds** tab shows items that are checked out, but have a hold placed on them by other patrons.



To remove a hold, select the item and click the **Remove Hold** button.

To change the order of the hold requests, click on a hold request and drag the line up or down. To save the results, click the **Save** button. To ignore any changes, click the **Cancel** button.

Inventory Control

Use the function in Textbook Tracker to keep track of your collection. An inventory identifies what items are contained in your school collection, which have been lost and which have been found.

Every item in your collection with a barcode number has an associated inventory date. This is the date on which you last noted that the item was located in your school.

Textbook Tracker automatically updates the inventory date for an item when it is checked out or checked in.

The “I” command inventories but does not check in. Good to use when items are on long-term check out (i.e., where they may not be returned for years, but must still be inventoried and accounted for).

The “IB” command bookdrops all lost, borrowed, discarded, and other status textbooks as they are encountered.

Taking Inventory

Command: I{B} {inventory date}

Inventory—Use the “I” command to update the inventory date on items. You can use the current date or you can enter a different date.

- To update items with today’s date, type “I” then <enter>. To inventory items, scan (or type) the barcode for the item and press <enter>. Each item whose barcode you scan (or type) is updated with today’s date.
- To update items with a date other than the current date, type “I” and the date you want to use for the inventory, followed by the <enter> key. For example, to update items with an inventory date of September 1, 2001, enter “I 9/1/01”. Each item barcode you type or scan is updated with the date you specified. You may not set an inventory date beyond today’s date (i.e. for any future date) or for more than ten years in the past.
- To perform an automatic bookdrop on all issued items scanned during inventory, use the optional “B” parameter. Thus, “IB” performs inventory using today’s date. If an issued book is inventoried, it’s automatically bookdropped.

As you enter barcode numbers during **Inventory** mode, the Circulation Log records the item and call number. If a call number is out of call number order, the Circulation Log marks those items with an “Inv ?? ->” before the call number.

To exit **Inventory** mode, use the “.” command (type a period and press <enter>).

Notes about Inventory

- You can inventory portions of the school over a course of days. When you run inventory reports, specify the date range which you took inventory. All items inventoried during this date range will be included.

For example, if you take inventory over Spring break (April 21st through 25th), specify this date range when you run an inventory report. All items inventoried between April 21 and 25 will be included in the report. If you don't specify a date range, the reports will return all items regardless of when they were inventoried.

- You do not have to close the institution/school to take inventory. Because the inventory date for an item is updated when the item is checked out, items issued while you are taking inventory will have dates within the inventory date range. This is also true for items checked in during inventory.
- Items returned after you have completed inventory will automatically have their inventory date adjusted to the check in date, which will be after the inventory date. If you prepare an inventory report for all items with dates on or after the date you took inventory, these items will be included.
- To identify items missing from your collection, prepare an inventory report of non-inventoried items with the dates when you performed inventory.
- If you are not using a portable reader when taking inventory and you enter an item barcode that Textbook Tracker does not recognize, a window appears to let you add the new item.

Enter the title and any other desired fields and click **Save**. This provides a quick way to add the new item and continue with your inventory. You can add additional information for this item later using the **Items** window.

Inventory Reports

You can prepare inventory reports based on the inventory date and other criteria (*see page 237 for a list of Inventory reports*). For example, you can generate an inventory report showing:

- Items inventoried or not inventoried within a specified date range.
- Lost items inventoried (which means the item is actually in the institution/school even though it is marked as lost).
- Items within a specific section of your institution/school.
- Items with a specific funding source.

Locating Patrons and Items

Use the commands in this section to locate patrons and items for which you don't know the barcode number. For example, if you want to issue a textbook to a patron, but you don't have that patron's barcode, you can use the locate commands to find the patron by name.

When you enter a locate command, the **Browse** window appears starting with the patron name or item that is the closest match to the name you specified or the value you entered. When you select a patron or item from the list, they become the Current Patron or Item and appear on the **Circulation** window.

Use the up and down arrow keys on the keyboard to scroll through the list.

Double-click a name in the list or highlight (select) it and press the <enter> key. When you select a name from this window, it becomes the Current Patron and appears in the **Circulation** window.

You can enter new names in the **Browse From** field at the top of the window and press <enter> to search anew.

If your search results have more patrons than can be viewed on one window, use the **More** buttons (located at the upper right-hand side of the screen) to examine additional patrons.

Locate An Item By Call Number

Command: C {call number}

Locate an Item by Call Number—Use this command to locate a copy, searching by the copy's call number. For example, to locate a title with call number 150, type "C 150" and press <enter>. The **Item Lookup** browse by window appears, starting with the item in the collection that most closely matches the call number you specified.

Locate a Patron by Name

Command: L {patron name}

Locate a Patron by Name—Use this command to locate a patron by name and make them the Current Patron. For example, to find a patron with the last name Smith, enter "L Smith".

Locate an Item by Title

Command: T {title}

Locate an Item by Title—Use this command to search for an item copy by title or a portion of the title. For example, to locate an item beginning with *Foundation*, type "T foundation" and press <enter>. The **Browse** window appears starting with the item in your collection that most closely matches the title you specified.

Recall Immediately With Email Notification

Command: KM {item barcode}

Recall Immediately With Email Notification—This command issues a recall request for a specified item copy and automatically sends an email notification to the patron. If the patron in possession of the item copy does not have an email address, the recall will be processed, however, an error message will appear, notifying you that the recall notice could not be sent via email. If the item copy isn't checked out, a recall request can not be processed.

For example, the command "KM 3000" will immediately recall copy 3000 and automatically send email notification to the borrowing patron.

Change Patron Homeroom

Command: NP {new patron homeroom code}

Change Patron Homeroom—Use this command to change the homeroom code for several patrons.

For example, to change a group of patrons to homeroom code Brown, type "NP Brown" and press <enter>. This activates **Change Patron Homeroom** mode. You can now enter all the patron barcodes whose homeroom code you want to change.

The transaction log will record the patrons whose homeroom code you've changed.

When you have entered all the patrons homeroom code you wanted to change, use the "." command to exit **Change Patron Homeroom** mode.

Make a Patron Current

Command: P {patron barcode}

Make a Patron Current—Use this command to make a specific patron the Current Patron. For example, to make patron 100 the Current Patron, enter "P100". This command is useful if you have an overlap of patron and item barcode numbers. Textbook Tracker will check the item barcodes before the patron barcodes. Therefore, if you enter the patron barcode on the command line or use the "X {barcode}" command, Textbook Tracker will find the item rather than the patron.

Checking Patron and Item Status

Command: Q {barcode}

Checking Patron and Item Status—Patron status includes information such as loaned items, due dates, reserved items, and reservations. **Item** status includes **Circulation** status, holds queue, and reservations queue for all copies of a specified title. This makes it very easy to find the status of a particular copy or the total status of the title.

Use the “Q” command to display the status of a patron or item.

- To view the status of a patron, type “Q” followed by the barcode number of the patron (typed or scanned) and press <enter>. If you do not enter a barcode, the status of the Current Patron will be displayed.
- If you don’t know a patron’s barcode, use the locate command (see “*Locating Patrons and Items*” on page 198) to find the patron and their barcode.
- To view item details, type “Q” followed by the barcode number (typed or scanned) for the item and press <enter>.

If you do not know an item barcode, use one of the find commands (see “*Locating Patrons and Items*” on page 198) to locate an item and its barcode.

There are two other ways to view the status of the Current Patron or Item:

- Select the **Show Patron Details** and **Show Item Details** commands from the **Circulation** menu.
- Click the **Details** button in the Current Patron or Current Item areas of the **Circulation** window.

View Patron Details

Command: QA

View Patron Details—This command opens the **Patron Details** window when you have a Current Patron displayed on the **Circulation** window. This command performs the same action as clicking on the **Details** button (contained in the Current Patron section of the **Circulation** window when you have patron selected).

Renew Query

Command: QE

Renewing an Item—Opens the **Patron Renewals** window, which displays a list of all textbooks issued to the Current Patron, allowing you to choose which ones to renew (this is also a menu option).

Renewing an Item

Command: R {item barcode}

Renewing an Item—Use this command to renew an item or activate **Renew** mode. You can specify the number of times an item can be renewed in your **Circulation Policies** (*documented on page 152*).

- To renew an item, type “R” and scan (or type) the barcode number for the item and press <enter>. If your Circulation policies allow, this item is renewed to the patron who has it checked out. That patron also becomes the Current Patron.

If you don’t know the item barcode, use one of the locate commands (*see “Locating Patrons and Items” on page 198*) to find the item’s barcode.

- To start **Renew** mode, type “R” and press <enter>. All item barcodes you type or scan while in this mode are renewed. To exit **Renew** mode, enter a patron barcode number or use the “X” or “.” command.

If renewal is not allowed, a message will appear to inform you. A renewal is not allowed when the **Circulation Policy** is set to disallow renewals or when renewing an item would take it into a reserved date range.

Renew All Items

Command: RA

Renew All Items—When you have a Current Patron, this command renews all items for that patron.

Clicking on the **Renew All** button in the **Patron Renewals** window (activated by the QE command described above) will automatically override the **Number of times item can be renewed** policy preference (page 106) or any other set preference that restricts how many renewals a patron can have on an item. If a user wants to force their policy functionality, they may select (highlight) one or all of the items listed in the **Patron Renewals** window and click on the **Renew** button. Unlike the **Renew All** button, the **Renew** button will force the policy preference on every item (if the preference has been activated). In this instance, a **Message** window will appear asking for the user to **Cancel** or **Override** the renewal.

Process a Barcode Range

Command: RR

Process a Barcode Range—Use this command when you want to process a range of barcodes within a particular mode. For example, if you would like to change the condition or damage codes for an entire range of books, type this command after you have activated the **Change Condition Codes (“CL”)** or **Change Damage Codes (“DL”) Mode**. Doing so will open the **Barcode Range** window. By providing a **Starting** and **Ending Barcode** in this window, your **Mode** will only process barcodes between the ranges you provided. If you enter only a **Starting With** selection, Textbook Tracker will select all records that begin with the barcode information you provided. If you only enter an **Ending With** value, Textbook Tracker will select all barcodes before and up to the selected barcode.

Change Item Policies

Command: UI {new policy code}

Change Item Policies—Use this command to quickly change policy codes for a number of copies. For example, suppose you want to mark a number of copies for overnight check out exclusively during the next two weeks. You can quickly create a policy for overnight check out and then use this command to change the policy for those copies.

Textbook Tracker saves the old policy so you can restore it later using the **Restore Previous Policy** command. Therefore, in the above example, at the end of the two weeks, you can restore the original policy.

Change Patron Policies

Command: UP {new policy code}

Change Patron Policies—Use this command to quickly change the policy codes for a number of patrons. This command works for patron policies exactly like the “UI” command (explained above) works for copy policies.

Restore Previous Policy

Command: UR

Restore Previous Policy—Use this command to quickly change patrons or copies back to their previous policy.

Start Classification Mode

Command: V {type} {keyword}

Start Classification Modes—Use this command to quickly add searchable terms to the items you scan.

Let’s say you want to create a reading list on Olympic skiing. You would enter the command “V B Olympic Skiing” in the command line and press <enter>. Textbook Tracker would display **B*Olympic Skiing** above the command line. Any item you enter in this mode would have the bibliographic keyword “Olympic Skiing” assigned to it. To end the **Classification** mode, enter the “.” command in the command line.

You can further examine and manipulate keywords you’ve added using the **Utilities** command under the **File** menu.

Valid types include:

S — Subject	R — Study Program
C — Curriculum	P — Point Count
I — Interest/reading level	T — Test Number
B — Bibliography	H — Holding Code

Make Item/Patron Current

Command: X {barcode}

Make a Patron or Item Current—Use this command to make an item or patron barcode the Current Item or Current Patron. For example, “X100” makes patron 100 the Current Patron and “X110034” makes item 110034 the Current Item. If you enter an “X” without a barcode, Current Items and Patrons are cleared and the window is restored to

Check In/Out mode.

Clear Current Patron/Item Mode

Command: X

Clear Current Patron/Item Mode—Use this command to clear the Current Patron, Current Item *and* **Override Date**.

Clear Circulation Log

Command: Z

Clear Circulation Log—This command removes all entries in the visible Circulation Log. However, the log entries saved to disk are not affected by this command.

Textbook Tracker Web

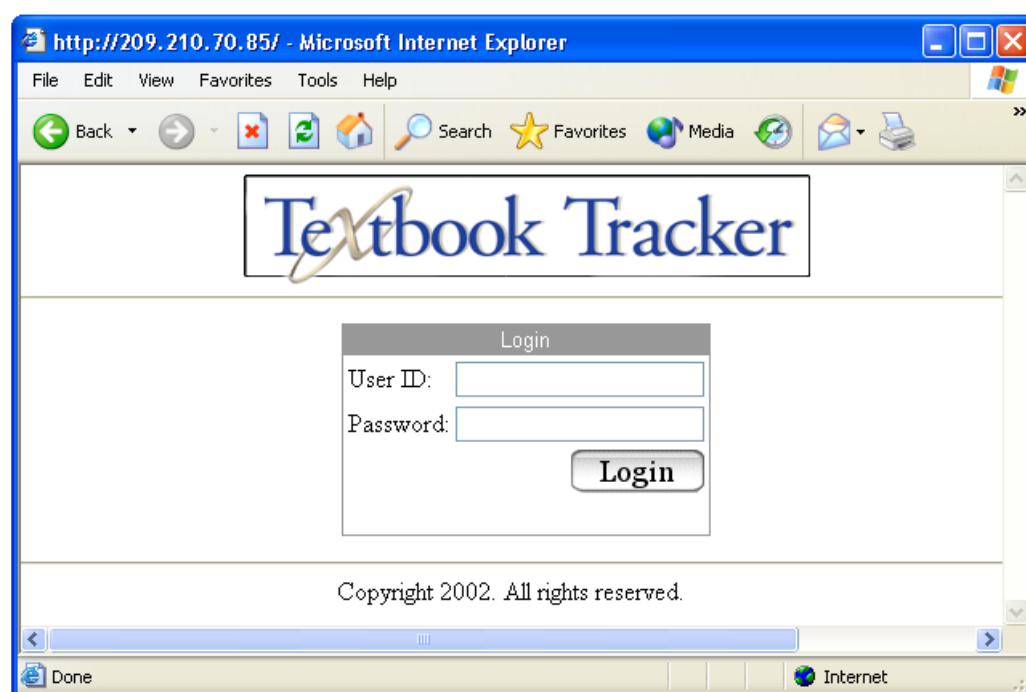
Connecting to Textbook Tracker Web

With Textbook Tracker WEB, you can perform functions using standard World Wide Web browsers such as Netscape Navigator or Microsoft Internet Explorer.

Use the following instructions to use Textbook Tracker WEB.

- Step 1. To connect to the Textbook Tracker WEB interface, enter the IP address of the machine running the Textbook Tracker Data Station (or click on a link which contains this address).

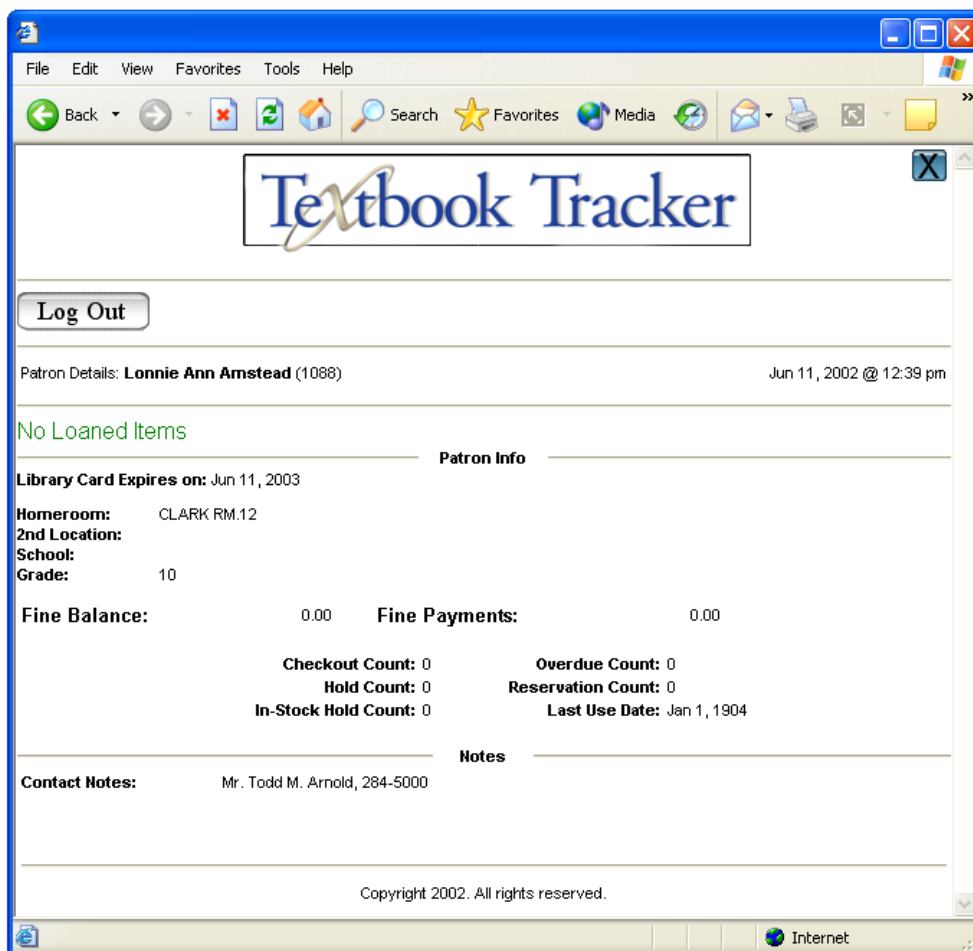
Edit	
Undo Cut	Ctrl+Z
Can't Redo	Ctrl+Shift+Z
Cut	Ctrl+X
Copy	Ctrl+C
Paste	Ctrl+V
Clear	
Select All	Ctrl+A
Find	Ctrl+F
Find Again	Ctrl+G
Paste From File	
Preferences	Ctrl+;



- Step 2. Follow the instructions on the web page. Enter a **Patron Barcode** and **Password** to access their account information.
- You can even change the Textbook Tracker WEB interface to display in a different language.

Textbook Tracker WEB sample window

Here is a sample window from the Textbook Tracker WEB interface.



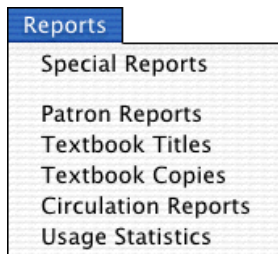
Introduction to Reports

Textbook Tracker provides a simple-to-use interface to generate hundreds of reports for nearly all the data saved within the program.

This chapter provides an overview of the report preparation process and instructions on how to create and use **Quick Reports**. For information on a specific report type, please refer to the corresponding report chapter.

How to Create a Report

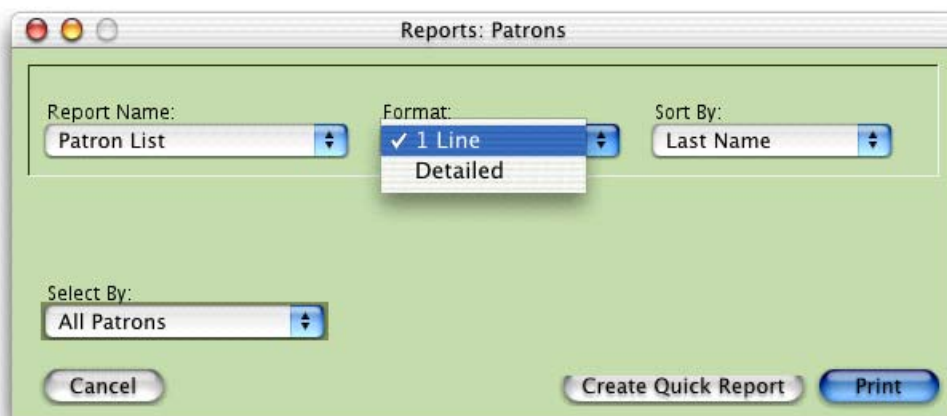
To generate a customized report in Textbook Tracker, choose the report type you want from the **Reports** menu. In the example below, **Patron Reports** was selected from the **Reports** menu. This sample shows a generalized version of the report window for all types of reports. The specific fields and drop-down menus on every report window may vary depending on the report and format you have selected.



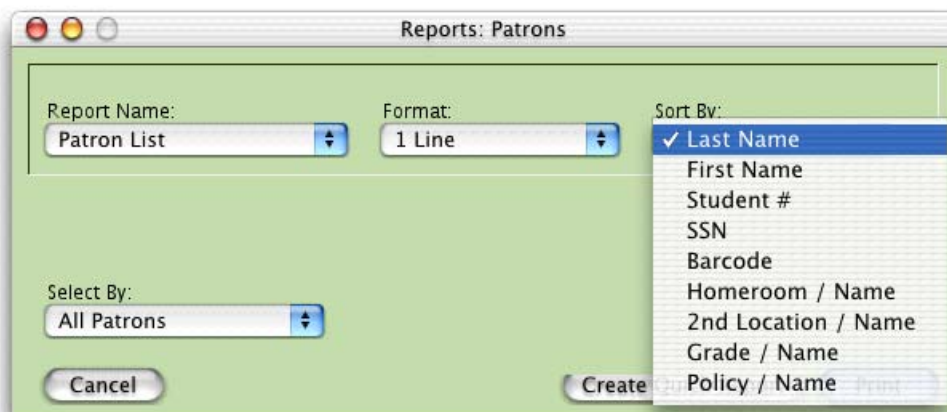
Use the following general steps to prepare a report.

- Step 1. Select a specific report type from the **Reports** menu.
- Step 2. Once the window has opened, select a specific report type from the **Report Name** drop-down menu.

- Step 3. If the report you have selected has more than one format, a **Format** drop-down menu will appear (e.g. most reports have a **1-Line** and **Detailed** format). Make a selection from the **Format** drop-down menu.



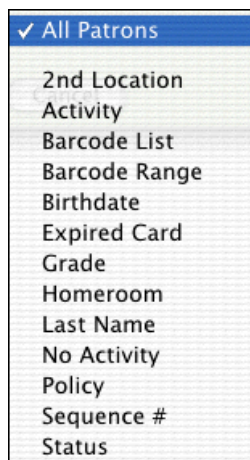
- Step 4. Select a sort order from the **Sort By**¹ field. The **Sort By** order determines how records are ordered in the report (e.g. **Patron Reports** can be sorted by name, barcode, policy, and other values). Some **Sort By** selections sort by two values (e.g. **Patron Lists** can be sorted by **Grade/Name**, resulting in patrons being sorted by grade and then by name).



- Step 5. Use the **Select By** drop-down menus to select which records are to be included in the report. You can make up to seven selections using **AND**, **OR**, and **AND NOT** (Boolean logic) for your report. You are limited to seven selection ranges and may need a large monitor to accommodate them as the window grows with every choice. In addition, the order the selections are processed is from the top down and will affect the results if you are using both **And** and **Or** operators at the same time.

When you choose values in the selection drop-down menus, other fields may appear and prompt you for required information (e.g. if you select

1. Since Textbook Tracker allows you to customize the terms for **Patrons** and **Items**, the term names you use may not be reflected in this manual. For purposes of illustration, the sample we've used in this manual is a school and thus Community ID = Student #, Location = Homeroom, Level = Grade and so forth.

**NOTE:**

The settings for the report window are initially set as “locked” so you can’t accidentally modify the report.

Activity in the **Select By** drop-down menu, **Date Range**¹ fields will appear, allowing you to enter a starting and ending date value).

If you enter only a **Starting With** selection, Textbook Tracker will select all records where the **Grade** begins with the entered text. For example, entering “GR1” would select “GR100”, “GR10” and “GR1B37”.

To do an exact match for a text field range, enter an **Ending With** value that matches the **Starting With** value followed by a space and exclamation point. For example, **Starting With** “GR1” and **Ending With** “GR1 !” (unless you really have data named “GR1 !”)

Step 6. Click the **Print** button. As Textbook Tracker creates your report, the status of the report appears at the top of the **Report Results** window.

Step 7. As the report is processing, you can perform other tasks, receive items or even prepare other reports within Textbook Tracker. If necessary, click the **Cancel** button to stop the report from processing.

If your **Report** window becomes hidden behind other windows, find it again under the Textbook Tracker **Windows** menu.

When the report is complete, it appears in Textbook Tracker’s standard Virtual Word Processing window. Since the report is a word processing document, you can:

- View and edit the report on the screen using Textbook Tracker’s Virtual Word Processing commands.
- Choose **Save** from the **File** menu to save the report.
- Highlight text in the window and copy it to other programs or onto your desktop.
- Select **Print** from the **File** menu to print the report. Due to operating system limitations, you may only print one report at a time.

1. For more information on **Adaptive Dates** possibilities, see page 208.

Adaptive Dates

An adaptive date can be substituted for an actual date anywhere within the Textbook Tracker application. However, adaptive dates are especially helpful when creating and running **Quick Reports**.

In the past, a **Quick Report** that required a **Date Range** selection would use the dates that had originally been entered every time the report was performed. Now, you can supply an adaptive date in any **Date Range** selection field so that the next time the **Quick Report** is performed, it will correctly use the proper date, whether it be today, tomorrow, yesterday, etc.

Here are the terms you can substitute for an actual date in the Textbook Tracker **Date Range** selection fields:

%today or **%td** — Entering these commands into a date field is the same as entering today's date. For example, if today's date is April 7th, 2010, then entering %td or %today is the same as entering 4/7/2010.

%yesterday or **%yd** — Entering these commands into a date field is the same as entering yesterday's date. For example, if yesterday's date was April 6th, 2010, then entering %yd or %yesterday is the same as entering 4/6/2010.

%tomorrow or **%tm** — Entering these commands into a date field is the same as entering tomorrow's date. For example, if tomorrow's date is April 8th, 2010, then entering %tm or %tomorrow is the same as entering 4/8/2010.

%lastweek or **%lw** — Entering the %lw or %lastweek command will subtract seven days from today's date. For example, if the current date is April 7th, 2010, then entering %lw or %lastweek is the same as entering 3/31/2010 (March 31st, 2010).

%nextweek or **%nw** — Entering the %nw or %nextweek command will add seven days from today's date. For example, if the current date is April 7th, 2010, then entering %nw or %nextweek is the same as entering 4/14/2010 (April 14th, 2010).

%lastmonth or **%lm** — Entering the %lm or %lastmonth command will subtract thirty days from today's date. For example, if the current date is April 7th, 2010, then entering %lm or %lastmonth is the same as entering 3/8/2010 (March 8th, 2010).

%nextmonth or **%nm** — Entering the %nm or %nextmonth command will add thirty days from today's date. For example, if the current date is March 8th, 2010, then entering %nm or %nextmonth is the same as entering 4/7/2010 (April 7th, 2010).

%lastyear or **%ly** — Entering these commands into a date field is the same as entering today's date, but last year. For example, if today's date is April 7th, 2010, then entering %td or %today is the same as entering 4/7/2009.

%nextyear or **%ny** — Entering these commands into a date field is the same as entering today's date, but next year. For example, if today's date is April 7th, 2010, then entering %td or %today is the same as entering 4/7/2011.

Also, you are allowed to add or subtract a number of days from each adaptive date selection. For example, %td - 5 will take today's date and subtract five days. Further, %tm + 20 will take tomorrow's date and add twenty days.

Reports

Special Reports

Patron Reports

Textbook Titles

Textbook Copies

Circulation Reports

Usage Statistics

Quick Reports

Creating Quick Reports

Textbook Tracker includes the **Quick Report** ability, making it very easy to save the most frequently-used reports. Please note that **Quick Reports** only save the specifications that were used to create the report and do not save the results of a generated report. However, since all reports are standard word processing documents, you can save the actual report like any other virtual word processor document.

Use the following steps to create a **Quick Report**.

Step 1. Select a report from the **Reports** menu.

Step 2. Select all the options you want for this saved report template.

**NOTE:**

You can not change the name of a Quick Report although you can remove the one with the “bad” name and create another.

Step 3. Click on the **Create Quick Report** button. When the following window appears, name the Quick Report you just created.

Step 4. Click on **OK** to save the Quick Report you just created, otherwise click **Cancel**.

Step 5. To view your saved report formats/templates, select **Quick Reports** from the **Reports** menu.

Reports**Special Reports**

Patron Reports

Textbook Titles

Textbook Copies

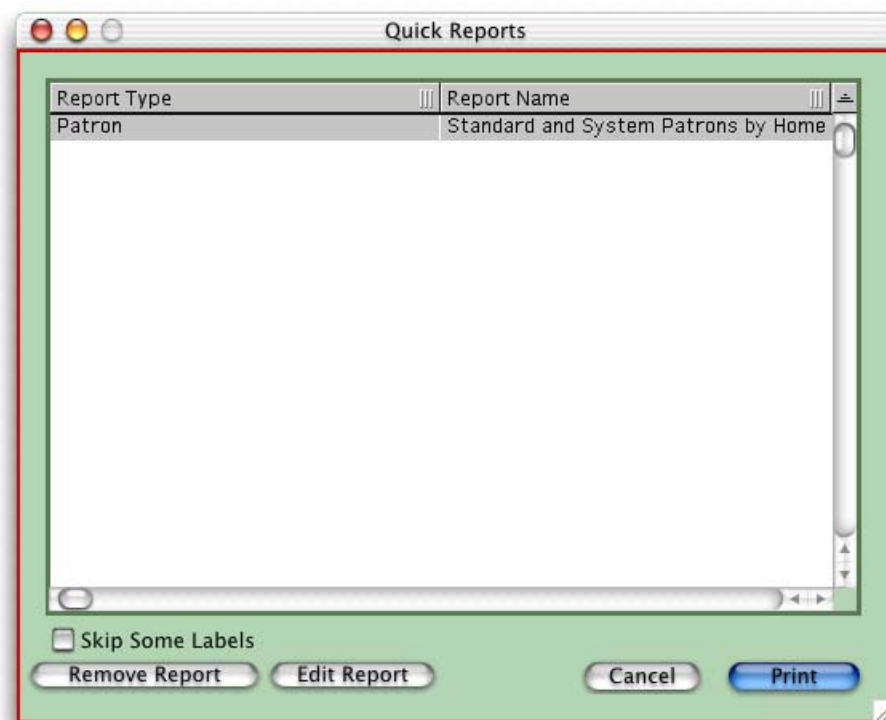
Circulation Reports

Usage Statistics

Using Quick Reports

Use the following steps to use the Quick Reports you've saved.

Step 1. Select **Quick Reports** from the **Reports** menu.



Step 2. Double-click on one of the report names or select a report and click **Print** or select **Print** from the **File** menu to prepare the saved report. To remove a Quick Report, select it and click the **Remove Report** button.

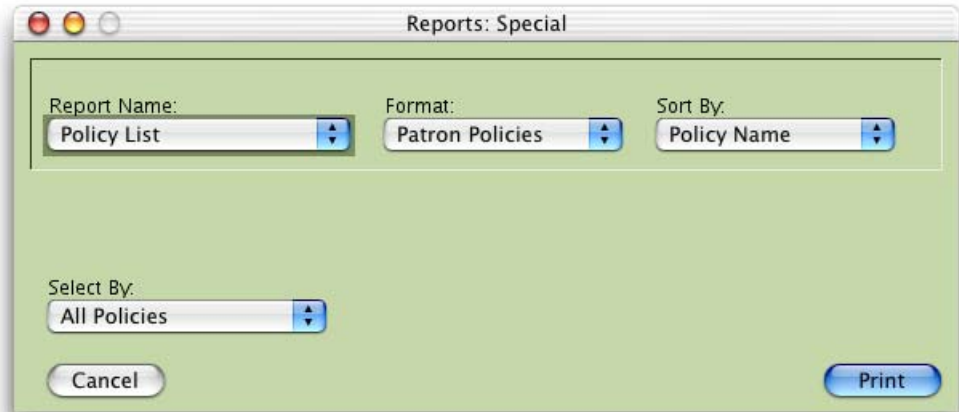
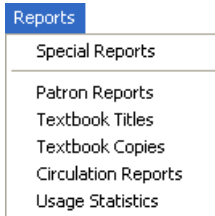
Step 3. To edit a Quick Report, select it and click the **Edit Report** button. Make the necessary changes and click **Save**.

Step 4. For label reports, you can check **Skip Some Labels** if you don't want the labels to print starting on the upper left corner or if you don't want them to print consecutively. A window will appear, displaying the label sheet layout; click on the labels that you want to skip.

Special Reports

These reports are special because they don't seem to fit into any other categories. They are used for displaying and printing barcode labels, calendars and information about your policies.

Preparing Special Reports

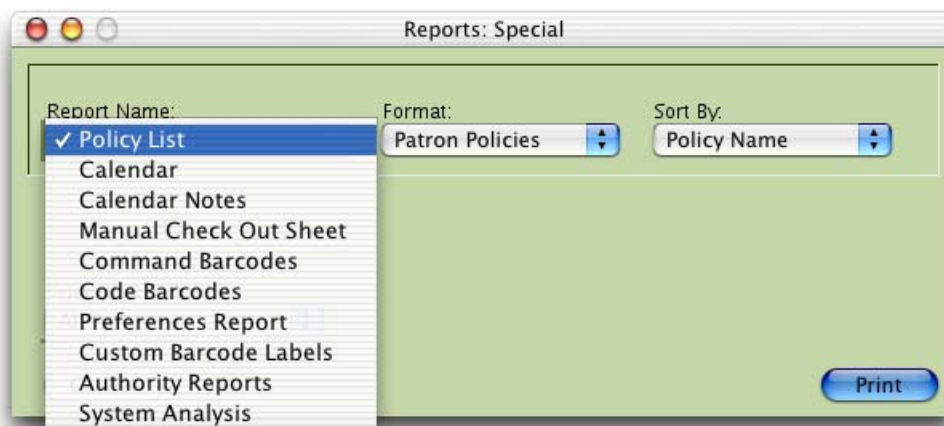


- Step 1. Choose **Special Reports** from the **Reports** drop-down menu.
- Step 2. Choose the type of report you want from the **Report Name** drop-down menu.
- Step 3. Choose how you want your report **Format** displayed.
- Step 4. Select the **Sort By** option for your report.
- Step 5. Use the **Select By** drop-down menu to set options for the report.
- Step 6. Click the **Print** button to prepare the report.
- Step 7. Make any changes to the formatting.
- Step 8. Choose **Print** from the **File** menu.

- ✓ Policy List
- Calendar
- Calendar Notes
- Manual Check Out Sheet
- Command Barcodes
- Code Barcodes
- Preferences Report
- Custom Barcode Labels
- Authority Reports
- System Analysis

Policy List

Use this report to document all the policies you've created.



- ✓ Patron Policies
- Item Policies
- Circulation Policies

Policy List Report Formats

Patron Policies—Generates a report which includes all patron policies sorted by full policy name.

Item Policies—Prepares a report which includes all item policies sorted by full policy name.

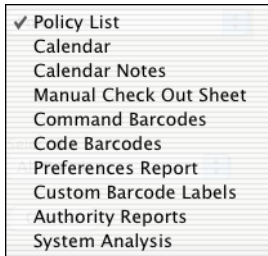
Circulation Policies—Generates a report which includes all circulation policies sorted by full policy name.

Policy List Sort By Options

Policy Name—This option arranges all patron policies by policy name.

Policy Select By Options

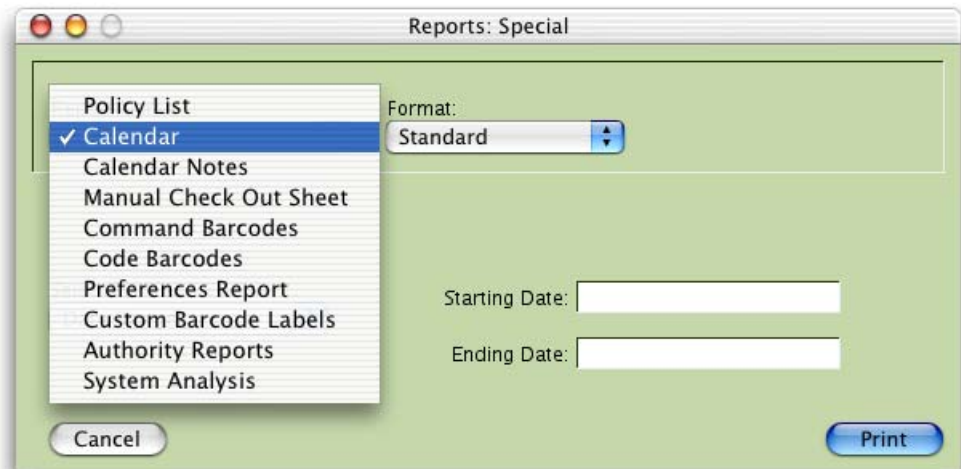
All Policies—This prepares a list of all patron policies.



Calendar

This report prints calendars in a month-per-page format over a specified date range. Only the month of the **Starting** or **Ending Date** is used, although the program requires you enter a full date.

You can use this report to print a post for any calendars in your system.



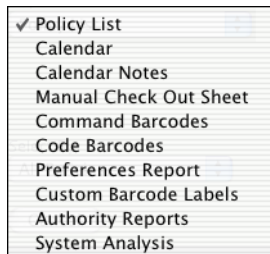
Calendar Report Formats

Standard—This **Format** generates reports for the **Standard** calendar. When you create your own calendars, more selections will appear under this **Format** drop-down menu (see “*Calendar Preferences*” on page 69).

Calendar Select By Options

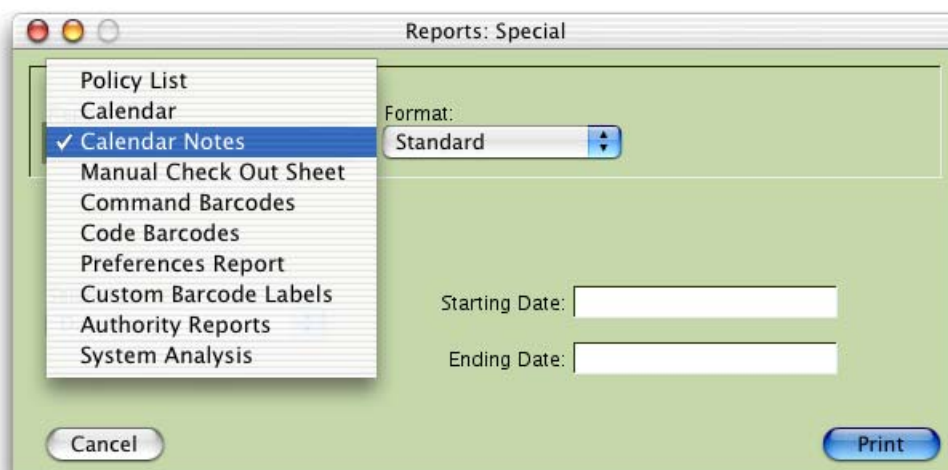
Date Range—Enter a **Starting** and **Ending Date** range. If you enter ONLY a **Starting Date**, the ending date is assumed to be in the “far future.” If you enter ONLY an **Ending Date**, the **Starting Date** is assumed to be in the “far past.” If you don’t enter any date, the **Starting Date** is set as today’s date. For example, you can enter the date December 1, 2003 as: “Dec 1, 2003” or “12/01/03”¹ or “12.1.03” or “12 1 03”. If the year is 2003, you can just enter “12/1.” If the current month is December, you can just enter “1.”

1. When you enter a two digit date, values between 0-30 are assumed to be 2000-2030 and values between 31-99 are assumed to be 1931-1999.



Calendar Notes

This report prints selected calendar notes throughout a specified date range.



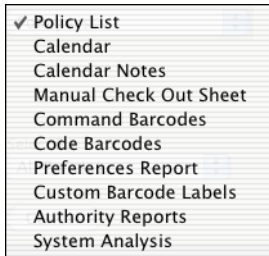
Calendar Notes Report Formats

Standard—This **Format** generates reports for the **Standard** calendar. When you create your own calendars, more selections will appear under this **Format** drop-down menu (see “Calendar Preferences” on page 69).

Calendar Notes Select By Options

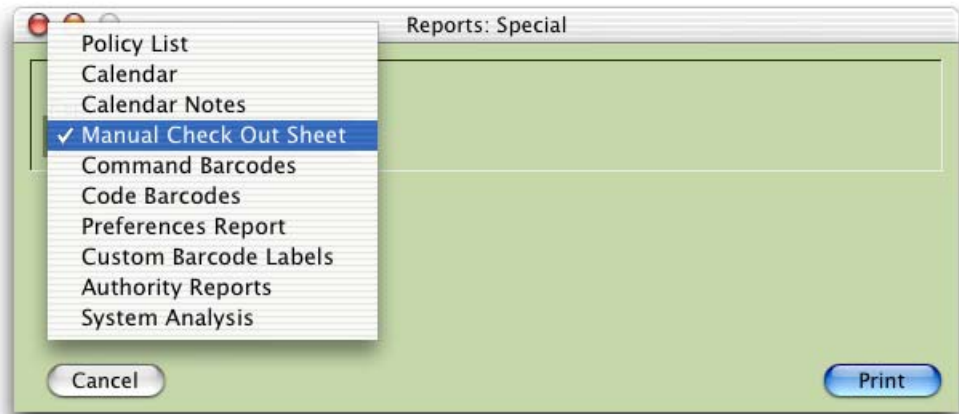
Date Range—Enter a **Starting** and **Ending Date** range. If you enter ONLY a **Starting Date**, the ending date is assumed to be in the “far future.” If you enter ONLY an **Ending Date**, the **Starting Date** is assumed to be in the “far past.” If you don’t enter any date, the **Starting Date** is set as today’s date. For example, you can enter the date December 1, 2003 as: “Dec 1, 2003” or “12/01/03”¹ or “12.1.03” or “12 1 03”. If the year is 2003, you can just enter “12/1.” If the current month is December, you can just enter “1.”

1. When you enter a two digit date, values between 0-30 are assumed to be 2000-2030 and values between 31-99 are assumed to be 1931-1999.



Manual Checkout Sheet

Print manual checkout sheets. It's a simple form that can be used to record transactions that can later be entered into Textbook Tracker. You can also use one of COMPanion's portable laser scanners to perform transactions when the computer system isn't available.



There are no **Format**, **Sort By**, or **Select By** drop-down menu options for this report selection.

- ✓ Policy List
- Calendar
- Calendar Notes
- Manual Check Out Sheet
- Command Barcodes
- Code Barcodes
- Preferences Report
- Custom Barcode Labels
- Authority Reports
- System Analysis



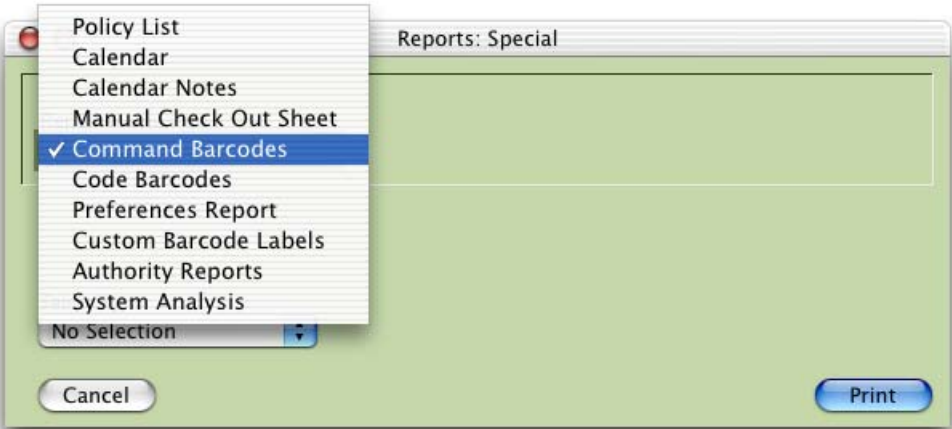
NOTE:

These command labels can be used with the portable reader to enter Circulation commands into the reader.

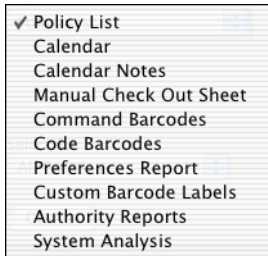
Command Barcodes

Prepares a sheet of barcodes used to scan commands into the **Circulation** window.

To perform a specified command in the **Circulation** window, just scan the command with your scanner. Print this sheet and attach it to your desk for quick-entry of **Circulation** commands.

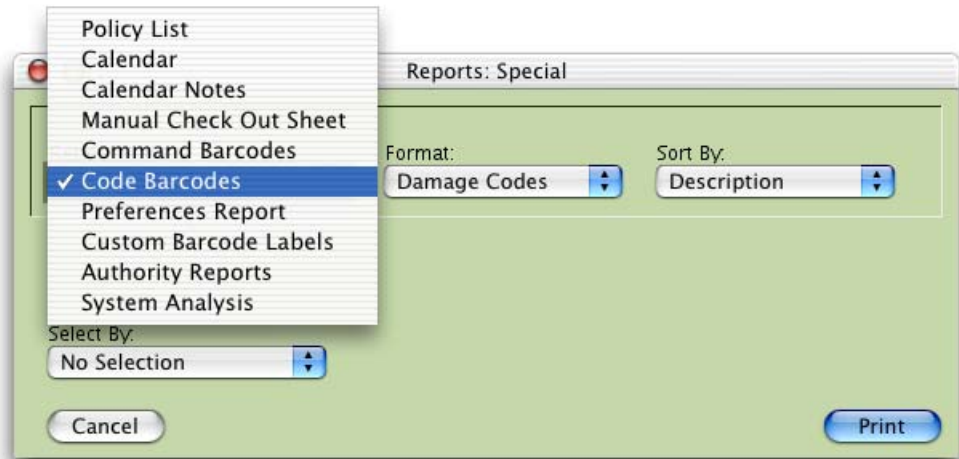


There are no **Format**, **Sort By**, or **Select By** drop-down menu options for this report selection.

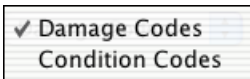


Code Barcodes

This report will output damage and condition codes as scannable barcodes. These codes can be found by accessing your **Global Circulation** preferences (*see page 75 for more information*).



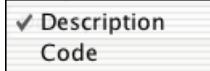
There are no **Select By Options** for **Code Barcodes**.



Code Barcodes Report Formats

Damage Codes—This **Format** includes the **Damage Code** (*see page 75*) description, a scannable barcode, and the command line equivalent.

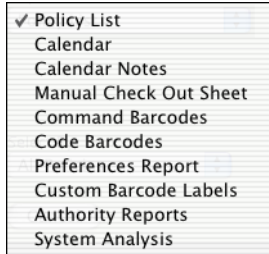
Condition Codes—This **Format** includes the **Condition Code** (*see page 75*) description, a scannable barcode, and the command line equivalent.



Code Barcodes Sort By Options

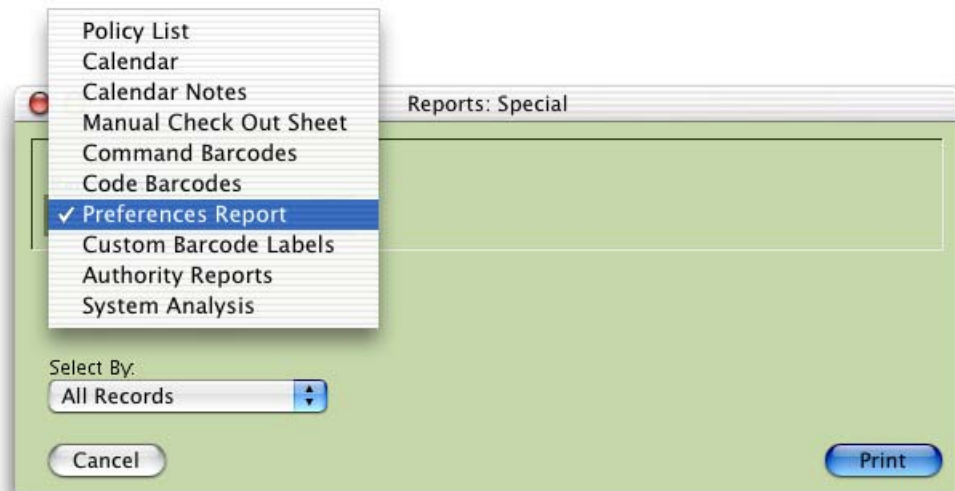
Description—This **Sort By** option will print the code barcodes by description.

Code—This **Sort By** option will print the code barcodes by code.

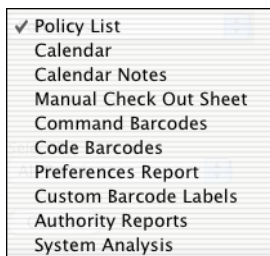


Preferences Report

A report of all preferences *not* available through other reports.

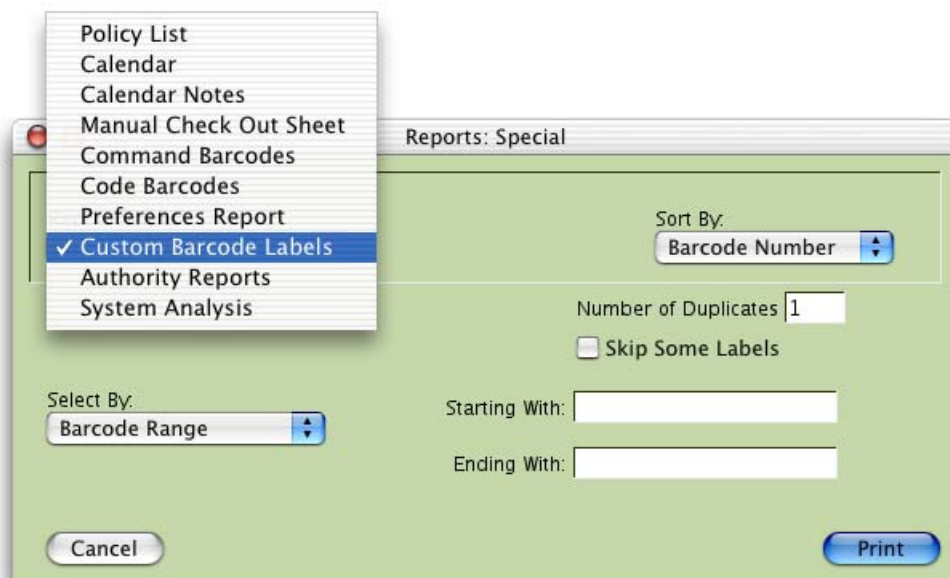


There are no **Format**, **Sort By**, or **Select By** drop-down menu options for this report selection.



Custom Barcode Labels

This report prints barcode labels, sorted by number, over a specified range. This report will only work with sheet feed printers. It will print Code 3 of 9 labels (30 per page) on special laser-printer paper available from COMPanion. Enter a **Starting** and **Ending** With barcode number.



When you click **Print**, you'll see the following window:



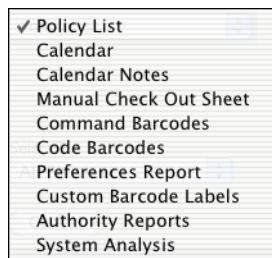
This window will allow you to enter the text to be printed on the top and bottom of the labels.

For label reports, you can check **Skip Some Labels** if you don't want the labels to print starting on the upper-left corner or if you don't want them to print consecutively. A window will appear, displaying the label sheet layout; click on the labels that you want to skip.

You can use these labels for any purpose. Typically, you'll use them for printing temporary barcode labels and creating new item and patron barcode labels; however, the advantage of printing labels from other barcode printing reports is that patron labels will have the patron's name on them and item labels will have the title and call number printed on them.

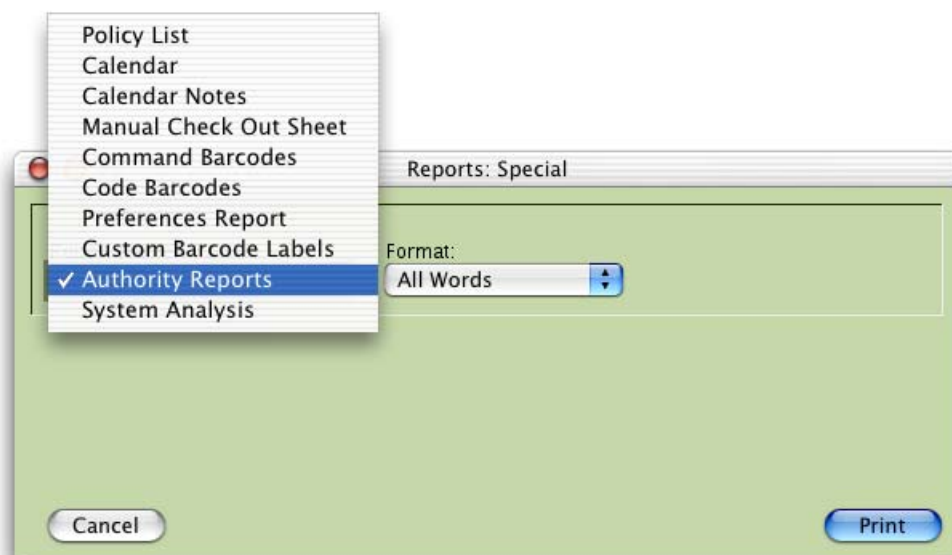
- N O T E -

If you are planning on using label protectors, test your scanners before placing labels protectors over your labels. Some combinations of protectors/scanners don't work well together and you don't want to be forced to replace your scanners or labels if there is a conflict.



Authority Reports

This report provides information on the terms created in your catalog. This report includes the full term and how many entries contain that term.



Authority Report Formats

Title—Only title entries are included.

Author—Only author entries are included.

Subject—Only subject entries are included. Please note that subject entries are for subject subfields only, not for full subject phrases.

Bibliographic Code—Only Textbook Tracker bibliographic codes are included.

Curriculum Code—Only Textbook Tracker curriculum codes are included.

Interest Code—Only interest codes entries are included.

Publisher—Only publisher name entries are included.

Series—Only series entries are included.

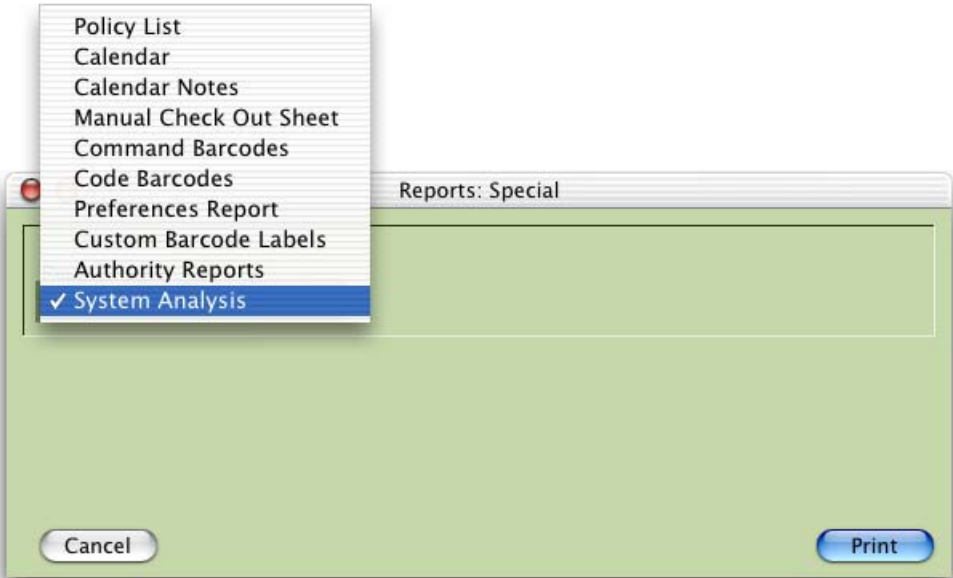
Publication Year—Only publication year entries are included.

There are no **Sort** or **Select By** drop-down menu options for this report selection.

- ✓ Policy List
- Calendar
- Calendar Notes
- Manual Check Out Sheet
- Command Barcodes
- Code Barcodes
- Preferences Report
- Custom Barcode Labels
- Authority Reports
- System Analysis

System Analysis

This report shows information about your computer system and Textbook Tracker **Data** files.

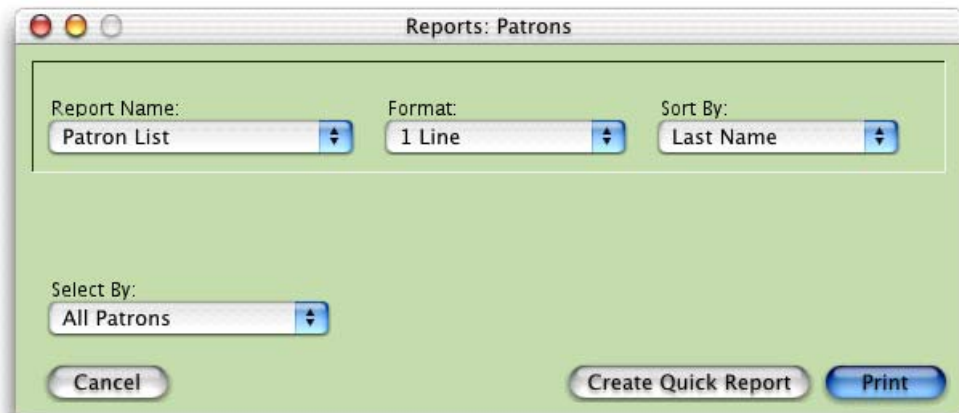


There are no **Format**, **Sort By**, or **Select By** drop-down menu options for this report selection.

Patron Reports

Preparing Patron Reports

Patron reports give you immediate access to information about the patrons who use your textbooks. Patron reports can create lists, notices, cards and labels. To prepare a **Patron Report**, follow these steps:



Reports

Special Reports

- Patron Reports
- Textbook Titles
- Textbook Copies
- Circulation Reports
- Usage Statistics

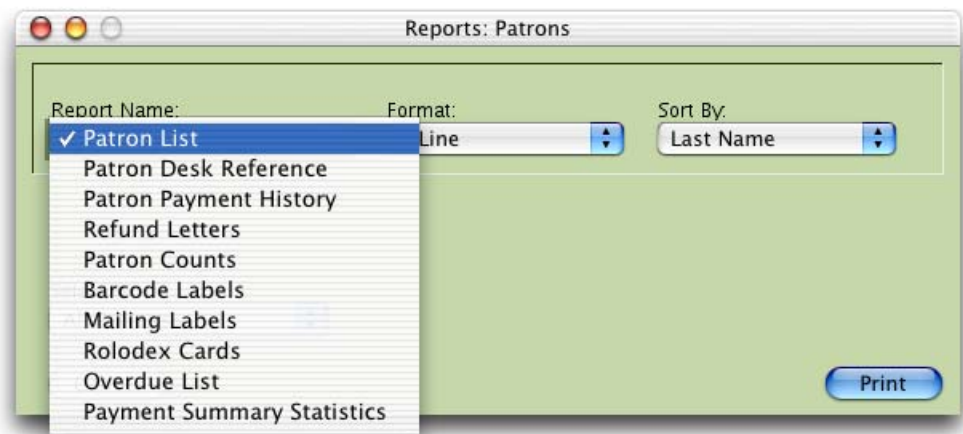
- Step 1. Choose **Patron Reports** from the **Reports** menu.
- Step 2. Choose the type of report you want from the **Report Name** drop-down menu.
- Step 3. Choose whether you want to have your report **Detailed**, **1-Line**, or any other format that's available from the **Format** drop-down menu.
- Step 4. Choose how you want this report sorted under the **Sort By** drop-down menu.
- Step 5. Use the **Select By** drop-down menu to select what patron record information to include in this report.
- Step 6. Click on the **Print** button to prepare the report.
- Step 7. Make any desired changes using the Virtual Word Processor tools.
- Step 8. To send to the printer, either click on the printer icon or choose **Print** under the **File** menu.

The following sections describe Textbook Tracker's **Patron Report Names**, **Formats**, **Sort By**, and **Select By** options.

- ✓ Patron List
- Patron Desk Reference
- Patron Payment History
- Refund Letters
- Patron Counts
- Barcode Labels
- Mailing Labels
- Rolodex Cards
- Overdue List
- Payment Summary Statistics

Patron List

This report prepares a wide range of information about the patrons using your institution.



- ✓ 1 Line
- Detailed

Patron List Report Formats

There are two available formats for the patron list.

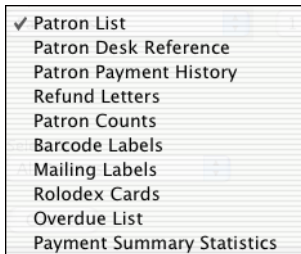
- 1 Line**—This format provides minimal information for each patron you select, including only the patron’s name, level, barcode, community ID and location.
- Detailed**—This format includes all available information for the patrons that you select. This includes name, address, phone number, status, card expiration date, date of last use, policy, patron ID, birth, sex, location, level, sublocation, graduation year, contact, contact’s phone number, email address and patron picture (if the **Include Patron Pictures** checkbox is marked).

Patron List Sort By Options

See page 234 for the complete Patron List **Sort By** options.

Patron List Select By Options

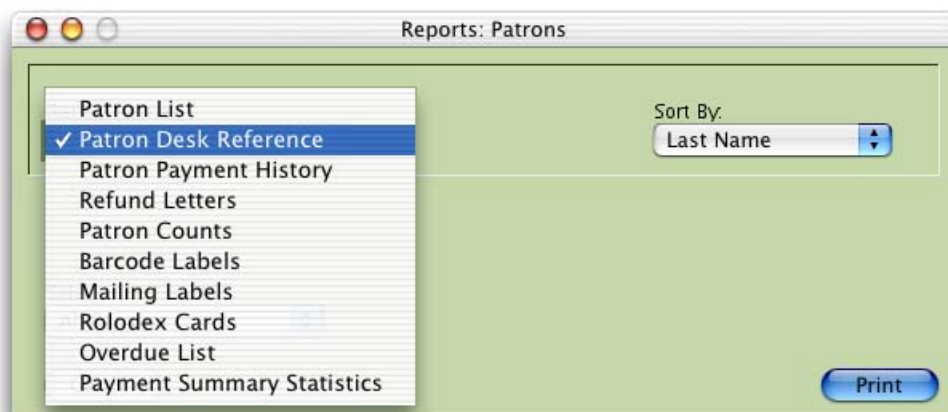
See page 235 for the complete Patron List **Select By** options.



Patron Desk Reference Reports

This report acts as a desk reference. It contains printed barcode and patron information about each selected patron. This report includes name, gender, location, and phone number. The printed barcode on the desk reference can be scanned to make the patron current.

You can use the **Sort By** options on this report to make it more useful. For instance, if patrons are assigned textbooks by location (i.e. Homeroom), you can sort the desk reference by location, you can quickly locate the students on the desk reference under their location and scan the barcode label.



There are no **Format** options available for this report.

Patron Desk Reference Sort By Options

See page 234 for the complete Patron Desk Reference **Sort By** options.

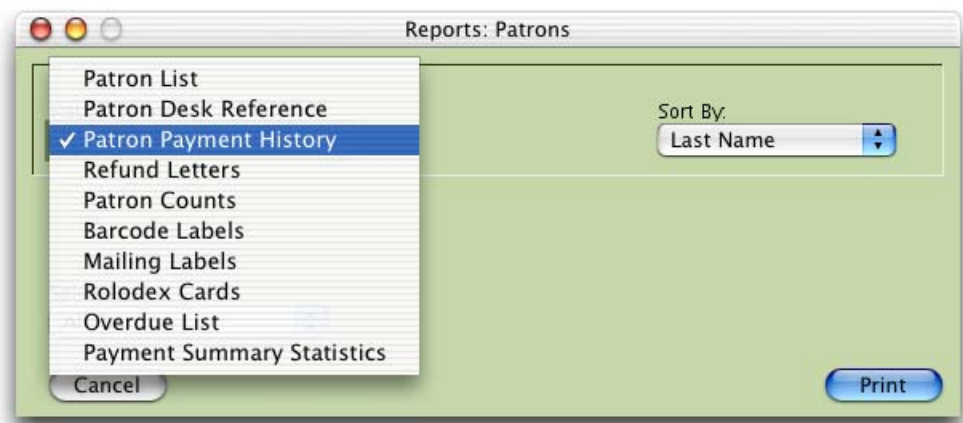
Patron Desk Reference Select By Options

See page 235 for the complete Patron Desk Reference **Select By** options.

- ✓ Patron List
- Patron Desk Reference
- Patron Payment History
- Refund Letters
- Patron Counts
- Barcode Labels
- Mailing Labels
- Rolodex Cards
- Overdue List
- Payment Summary Statistics

Patron Payment History

This report is a detailed list of all payments made by patrons. It includes the patron's name, barcode number, and information regarding each payment date, type of payment, amount of payment, and the barcode number of the item against which the payment was made.



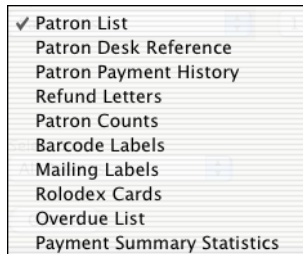
There are no **Format** options available for this report.

Patron Payment Sort By Options

See page 234 for the complete Patron Payment History **Sort By** options.

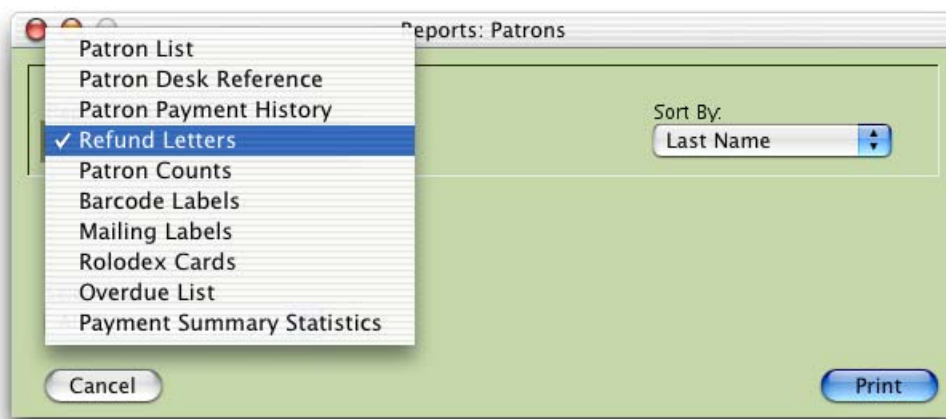
Patron Payment Select By Options

See page 235 for the complete Patron Payment History **Select By** options.



Refund Letters

This report searches a selected patron history range for any existent refunds and then prints a letter addressed to the patron's parent/guardian containing all of their existing refunds. This report includes the institution address, today's date, patron address, refund letter text (see *"Refund Letters" on page 80*), refund date, refund description, and refund amount.



There are no **Select By** or **Format** options available for this report.

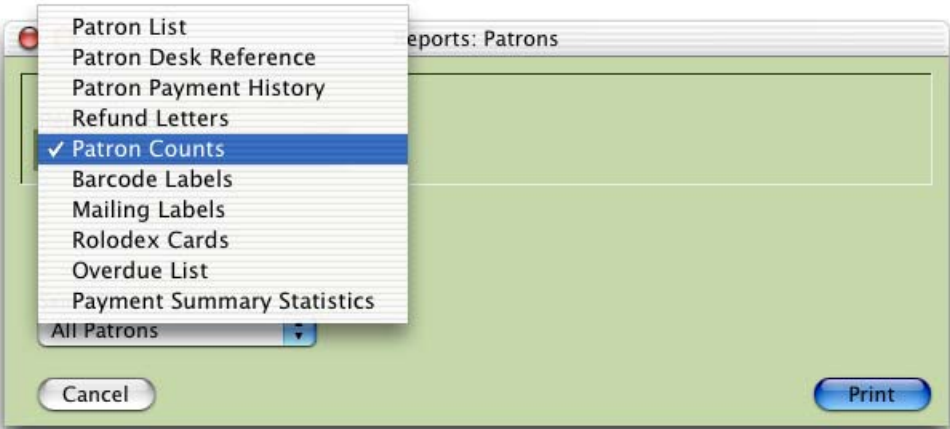
Refund Letters Sort By Options

See page 234 for the complete Refund Letters **Sort By** options.

- ✓ Patron List
- Patron Desk Reference
- Patron Payment History
- Refund Letters
- Patron Counts
- Barcode Labels
- Mailing Labels
- Rolodex Cards
- Overdue List
- Payment Summary Statistics

Patron Counts

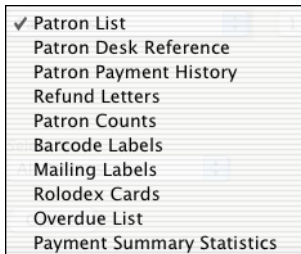
This report provides an exact number of patrons who have a suspended status, how many patrons have expired cards, or how many patrons fall under a particular policy. The only information this report provides is the total number of patrons meeting the selected range criteria.



There are no **Format** or **Sort By** options available for this report.

Patron Counts Select By Options

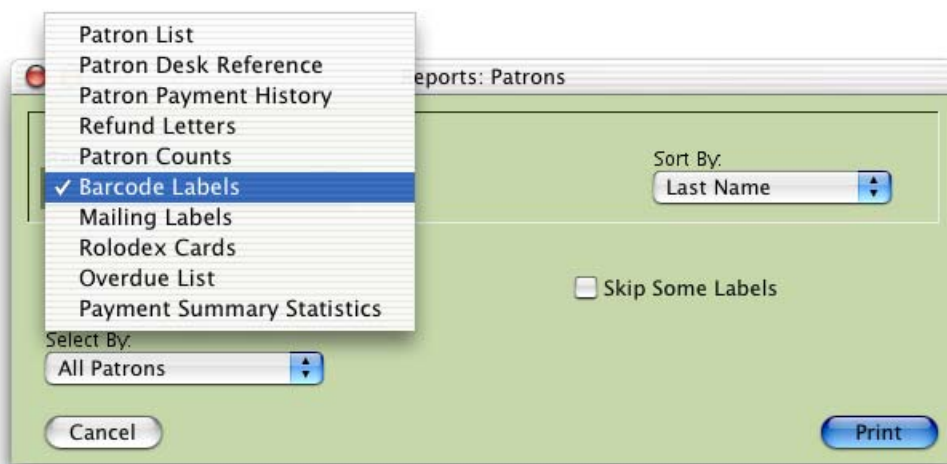
See page 235 for the complete Patron Counts **Select By** options.



Barcode Labels

This report prints a barcode label for each selected patron. The label includes the patron's name, barcode number, and barcode.

For label reports, you can check **Skip Some Labels** if you don't want the labels to print starting on the upper-left corner or if you don't want them to print consecutively. A window will appear, displaying the label sheet layout; click on the labels that you want to skip.



There are no **Format** options available for this report.

Barcode Labels Sort By Options

See page 234 for the complete Barcode Labels **Sort By** options.

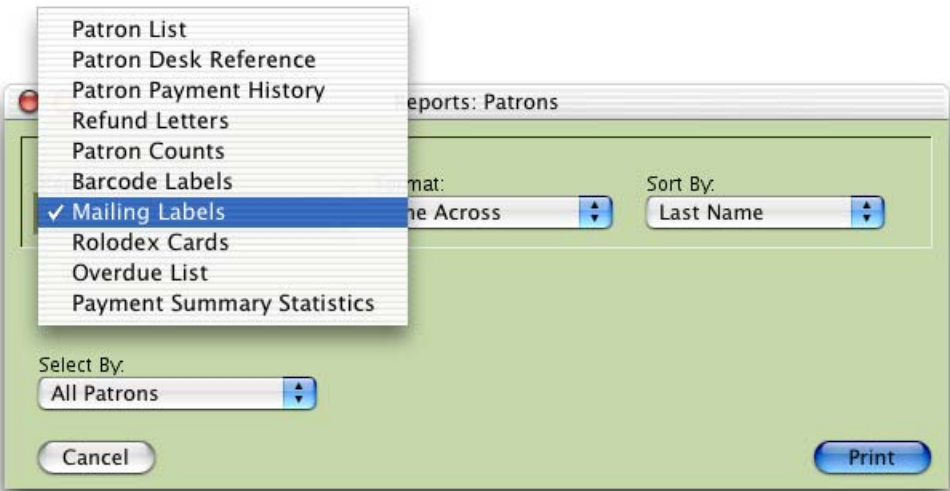
Barcode Labels Select By Options

See page 235 for the complete Barcode Labels **Select By** options.

- ✓ Patron List
- Patron Desk Reference
- Patron Payment History
- Refund Letters
- Patron Counts
- Barcode Labels
- Mailing Labels
- Rolodex Cards
- Overdue List
- Payment Summary Statistics

Mailing Labels

This report prints a mailing label for each selected patron. This **Mailing Labels** form is designed for page printers with three labels across and down.



- ✓ One Across
- Three Across

Mailing Labels Report Formats

One Across—This format prints patron mailing labels on a page with labels printed in one column at a time and down.

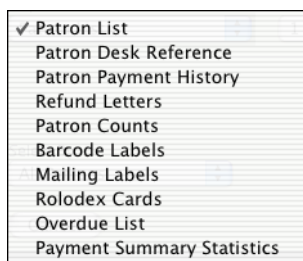
Three Across—This format prints patron mailing labels on a page with three labels across and down. For **Three Across** label reports, you can check **Skip Some Labels** if you don't want the labels to print starting on the upper-left corner or if you don't want them to print consecutively. A window will appear, displaying the label sheet layout; click on the labels that you want to skip.

Mailing Labels Sort By Options

See page 234 for the complete Mailing Labels **Sort By** options.

Mailing Labels Select By Options

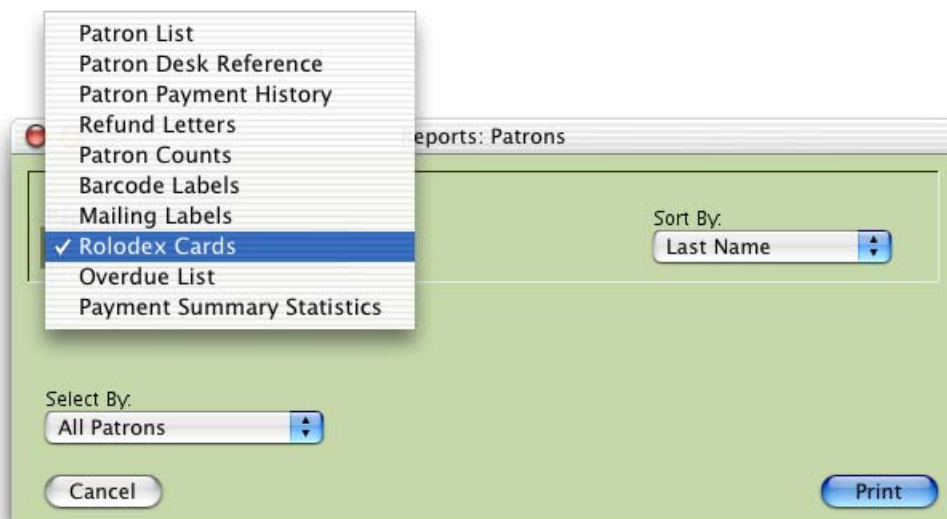
See page 235 for the complete Mailing Labels **Select By** options.



Rolodex Cards

This report prints a rolodex card (eight per page) for each selected patron. The rolodex cards show the patron's name, barcode, barcode number, level, location, phone number, and address.

Contact COMPAnion for paper pricing and stock.



There are no **Format** options available for this report.

Rolodex Cards Sort By Options

See page 234 for the complete Rolodex Cards **Sort By** options.

Rolodex Cards Select By Options

See page 235 for the complete Rolodex Cards **Select By** options.

- ✓ Patron List
- Patron Desk Reference
- Patron Payment History
- Refund Letters
- Patron Counts
- Barcode Labels
- Mailing Labels
- Rolodex Cards
- Overdue List
- Payment Summary Statistics

Overdue List

This report will prepare a list of all the items that are overdue in your school/ institution. This report will include call number, barcode, title, due date, and fine amount (if any).

When the **Include Charges, Fees, Fines** box is checked, notices or entries will print for overdue fine for returned items, miscellaneous fees, and lost or damaged charges.

The screenshot shows a software window titled "Reports: Patrons". A dropdown menu is open from the top-left, listing various report options: Patron List, Patron Desk Reference, Patron Payment History, Refund Letters, Patron Counts, Barcode Labels, Mailing Labels, Rolodex Cards, Overdue List (which is highlighted with a blue bar and a checkmark), and Payment Summary Statistics. Inside the main window, there is a "Sort By:" dropdown menu set to "Last Name". Below that is an unchecked checkbox labeled "Include Charges, Fees, Fines". At the bottom left, there is a "Select By:" dropdown menu set to "All Patrons". At the bottom right, there are two buttons: "Cancel" and "Print".

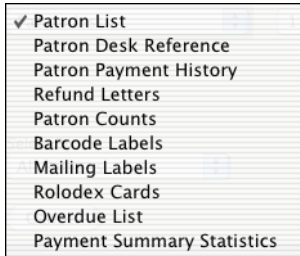
There are no **Format** options available for this report.

Overdue List Sort By Options

See page 234 for the complete Overdue List **Sort By** options.

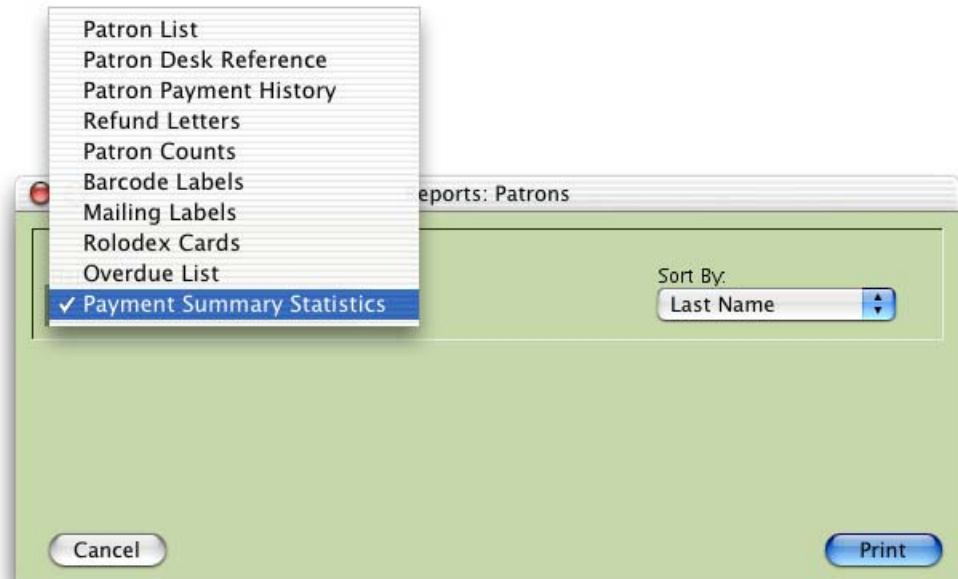
Overdue List Select By Options

See page 235 for the complete Overdue List **Select By** options



Payment Summary Statistics

This report will print a detailed list of all the payments that were made by patrons. This report includes the patron's name, barcode number, and information regarding each payment date, type of payment, amount of payment, item barcode, item title, and the description of the fee against which the payment was made.



When you perform the **Payment Summary Statistic** report, please note:

- Item barcodes will only appear for items that have been designated as **Lost**.
- Items that have an associated fee or fine will also have their **Notes** and **Details** included in the report.
- **Lost** will appear in the **Type** column only after an item has been checked out to the **Lost** patron.
- **Fee/Overdue** will appear in the **Type** column on items that have been manually charged a fine/fee.
- The **Amount** field indicates what a patron has paid on the fee/fine.

There are no **Select By** or **Format** options available for this report.

Payment Summary Statistics Sort By Options

See page 234 for the complete Payment Summary Statistics **Sort By** options.

✓ Last Name

First Name

Student #

SSN

Barcode

School / Name

Homeroom / Name

2nd Location / Name

Grade / Name

Policy / Name

Patron Report Sort By Options

Use the **Sort By** drop-down menu to select the order in which you want the patrons included in your report. For example, you can sort the report by name or by barcode number.

The following is a list of **Sort By** values for patron reports.

Last Name—The report is sorted by the patron’s full name in “Last Name, First Name” format.

First Name—The report is sorted by the patron’s full name in “First Name, Last Name” format.

Student #—The report is sorted by the patron’s institution ID field.

SSN—The report is sorted by the patron’s government ID.

Barcode—The report is sorted by the patron’s barcode number.

Institution/Patron Name¹—The report is sorted by the patron’s institution (typically **School** for schools), and within each institution, by the patron’s name.

Homeroom/Patron Name²—The report is sorted by the patron’s location (typically **Homeroom** for schools), and within each location, by the patron’s name.

2nd Location/Patron Name³—The report is sorted by the patron’s sublocation, and within each sublocation by the patron’s name.

Grade/Patron Name⁴—The report is sorted by the patron’s level, (typically **Grade** in school- based systems), and within each level, by the patron’s name.

Policy/Patron Name—The report is sorted by the patron’s policy name, and within each policy name by the patron’s name.

1. Textbook Tracker will use your customized name for Institution. In this example it’s School.
2. Textbook Tracker will use your customized name for Location. In this example it’s Homeroom.
3. Textbook Tracker will use your customized name for Sublocation. In this example it’s 2nd Location.
4. Textbook Tracker will use your customized name for Level. In this example it’s Grade.

☒ All Patrons
☐ 2nd Location
☐ Activity
☐ Barcode List
☐ Barcode Range
☐ Birthdate
☐ Expired Card
☐ Grade
☐ Homeroom
☐ Last Name
☐ No Activity
☐ Policy
☐ School
☐ Sequence #
☐ Status

Patron Report Select By Options

Use the **Select By** drop-down menu to select which patrons you want included in the report. You can enter as many values for selection criteria as you need using **And**, **Or**, and **And Not** (Boolean Logic). When you choose values in the selection drop-down menus, other fields appear, prompting you for **Starting With** and **Ending With** values.

The following is a list of selectable values for patron reports.

All Patrons—This report includes all the patrons for whom you have records including special patrons those who have barcode numbers under 50 and a **Status** of **Active**.

2nd Location—This report includes patrons with a sublocation between the **Starting With** and **Ending With** ranges. If you enter *only* a **Starting With** (or **Ending With**) selection, Textbook Tracker will select all records where the sublocation data begins with the entered text. If you enter no text, the selection is ignored. The default name for **Sublocation** is **2nd Location**.

Activity—This report includes patrons who have used textbooks within specified dates. If you enter **ONLY** a **Starting Date**, the ending date is assumed to be in the “far future.” If you enter **ONLY** an **Ending Date**, the **Starting Date** is assumed to be in the “far past.” If you don’t enter any date, the **Starting Date** is set for one year in the past.

Barcode List—This selection allows users to enter or scan non-sequential barcodes to appear on the report. Duplicate entries will only print once. This list can be selected with the **Select All** command under the **Edit** menu and copied to use in selecting for other reports.

Barcode Range—This report includes patrons with barcodes between the selectable **Starting With** and **Ending With** ranges. If you only want information on one patron, enter the patron’s Barcode number as the **Starting With** value. Also, if you don’t specify otherwise, only Barcodes greater than the number 50 are included in the report.

Birthdate—This selection includes all patrons with birthdays in the specified range. If you enter only an **Ending Date**, it will sort every birthday **ON** or **BEFORE** that date.

Expired Card—This report includes patrons whose cards will expire as of the specified date. If you do not enter a date, the beginning of the next month is used as the selected date. Thus, your report would include all patrons whose cards will expire at the end of the current month.

Grade¹—This report includes patrons with **Grades** between the **Starting With** and **Ending With** ranges. If you enter only a **Starting With** (or **Ending With**) selection, Textbook Tracker will select all records where the data begins with the entered text if you only enter an **Ending With** level, Textbook Tracker will select all levels before and up to the selected level. If you enter no text, the selection is ignored. The default name for **Level** in a school is typically **Grade**.

1. This is the default term for your **Level Field**. This can be changed in your (see “Patron Management Tab” on page 99).

Homeroom¹—This report includes patrons with **Locations** between the **Starting With** and **Ending With** ranges. If you enter only a **Starting With** (or **Ending With**) selection, Textbook Tracker will select all records where the location begins with the entered text. For example, entering “HR1” would select “HR100”, “HR10” and “HR1B37”. If you enter no text, the selection is ignored. The default name for **Location** in a school is typically **Homeroom**.

School²—This report includes patrons with a **School/Institution** between the **Starting With** and **Ending With** ranges. If you enter only a **Starting With** (or **Ending With**) selection, Textbook Tracker will select all records where the institution or school begins with the entered text. For example, entering “COM” would select “COMPanion”, “COMP001” and “COMPAB1”. If you enter no text, the selection is ignored. The default name for **Institution** in a school situation is typically **School**.

Last Name—This report includes patrons with **Names** (in last name, first name order) between the **Starting With** and **Ending With** ranges. Use this to compile reports for all patrons within a particular family, or to print lists selected from any alphabetical range of names. If you enter only a **Starting With** (or **Ending With**) selection, Textbook Tracker will select all records where the data begins with the entered text. If you enter no text, the selection is ignored.

No Activity—This report includes patrons who have not used textbooks within the specified date range. If you enter only a **Starting Date**, the ending date is assumed to be in the “far future.” If you enter only an **Ending Date**, the **Starting Date** is assumed to be in the “far past.” If you don’t enter any date, the **Starting Date** is set one year in the past.

Policy—This report includes patrons with policies between the **Starting With** and **Ending With** ranges. For example, if you only want to select patrons under Textbook Tracker’s default patron policy (Standard Patron), select the report by policy and choose **Standard Patron** as the **Starting With** (and **Ending With**) value.

Sequence #—This report includes patrons with **Sequence #**’s between the **Starting With** and **Ending With** range. This option is helpful in identifying new patrons or patrons added to the system in a particular order. If you enter only a **Starting With** (or **Ending With**) selection, Textbook Tracker will select all records where the data exactly matches the entered text. If you enter no text, the selection will be ignored.

Status—This report includes only patrons with the status you specify. Select **All** to choose **All Status** codes. If you don’t specify a particular status, only **Active** patrons are included on the report.

- N O T E -

Unless you *specifically* select them, patrons with barcodes under the number fifty are NOT included in the reports. If you specifically want to include patron’s with barcodes less than fifty, use the barcode selection option. In addition, only patrons with an **Active** status are included. If you want to specifically include patrons with all statuses, choose **All** from the **Status** drop-down menu or choose the exact status you’d like.

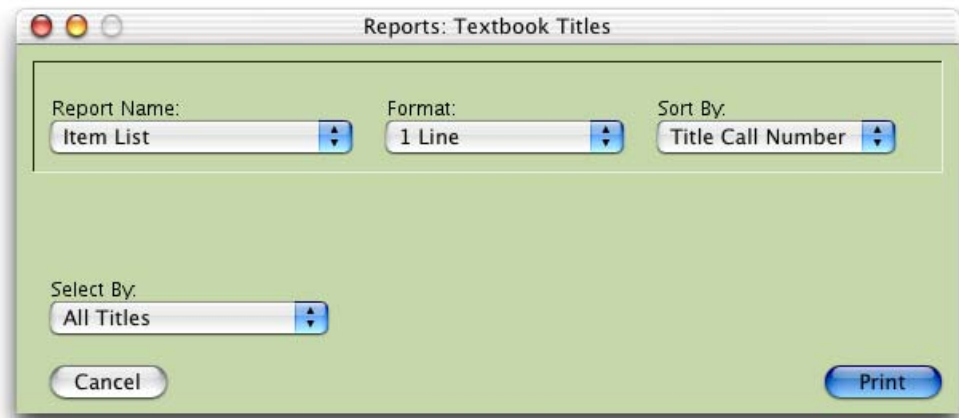
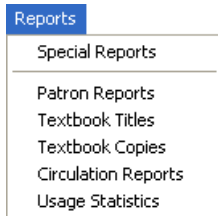
1. This is the default term for your **Location Field**. This can be changed in your (see “Patron Management Tab” on page 99)

2. This is the default term for your **Institution Field**. This can be changed in your (see “Patron Management Tab” on page 99)

Textbook Titles Reports

Preparing Textbook Title Reports

Textbook Title Reports give you immediate access to information about the title in your collection. To prepare a Textbook Title Report, follow these steps:



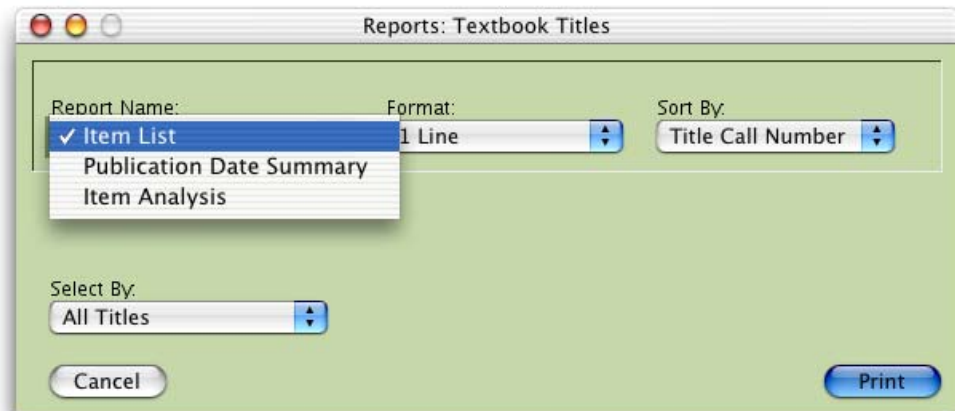
- Step 1. Choose **Textbook Titles** from the **Reports** menu.
- Step 2. Choose the type of report you want from the **Report Name** drop-down menu.
- Step 3. Choose whether you want to have your report simple or detailed by selecting from the **Format** drop-down menu.
- Step 4. Choose the order by which you want this report sorted under the **Sort By** drop-down menu.
- Step 5. Use the **Select By** drop-down menu to select what title record information to include in this report.
- Step 6. Click on the **Print** button to prepare the report.

The following sections describe each of Textbook Tracker's title **Report Names**, **Formats**, and **Sort By** and **Select By** options.

- ✓ Item List
- Publication Date Summary
- Item Analysis

Item List

These reports are used to view title information for the records in your collection.



- ✓ 1 Line
- Summary
- Detailed
- MARC

Item List Report Formats

1 Line—The report contains basic information about each selected title. Use this report when minimal information is required.

Summary—A simple report compiled in a compact format with one or two titles per line. The report contains everything found in the 1-line report, but the information is easier to read. Use this report when minimal information is required.

Detailed—A report with full title information, including each item's call number, title, author, place of publication, publisher, date of publication, sequence number, LCCN, ISBN, and policy. Two or three item records can fit on each page. Use this report to verify data entry or as a substitute to your card catalog.

MARC—A report showing each title's MARC record in MicroLIF format.

Item List Report Sort By Options

See page 241 for complete and detailed descriptions of Item List **Sort By** options.

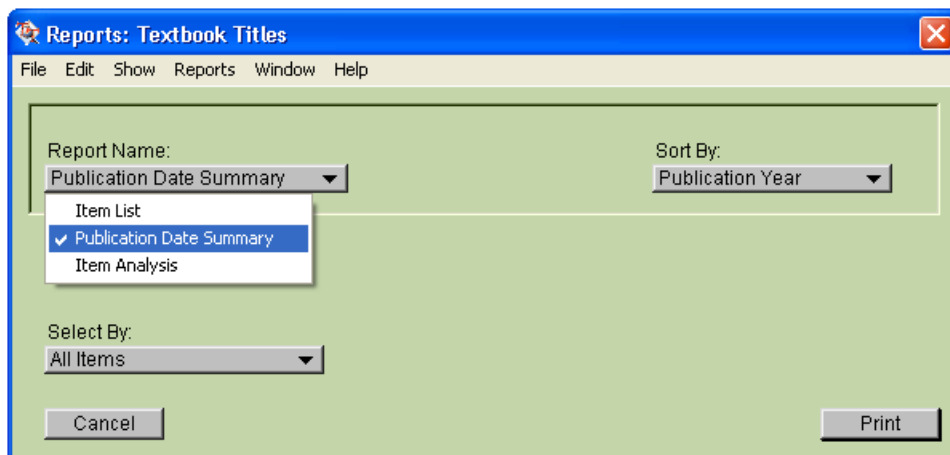
Item List Report Select By Options

See page 242 for complete and detailed descriptions of Item List **Select By** options.

✓ Item List
Publication Date Summary
Item Analysis

Publication Date Summary

A report that includes the number of items published each selected year, and the number of times these items have been borrowed during the current year and life-to-date. Use this report to determine the age of the items in your collection.



There are no **Format** options available for this report.

Publication Date Summary Report Sort By Options

See page 241 for complete and detailed descriptions of Publication Date Summary **Sort By** options.

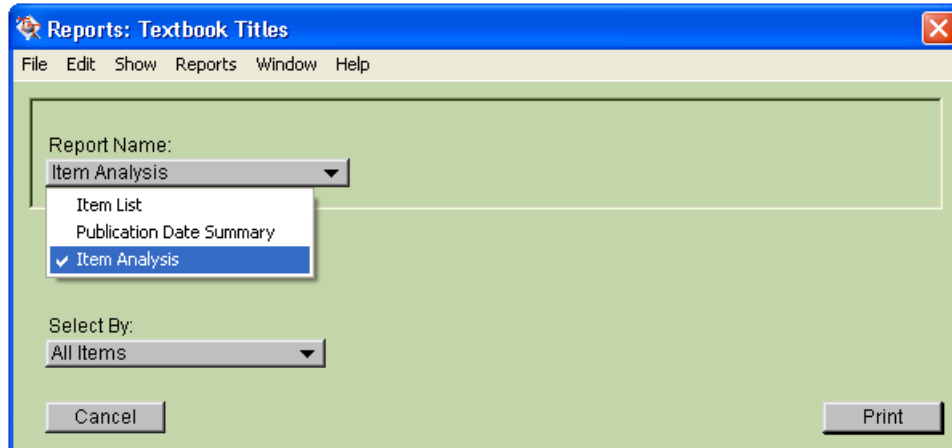
Publication Date Summary Report Select By Options

See page 242 for complete and detailed descriptions of Publication Date Summary **Select By** options.

✓ Item List
Publication Date Summary
Item Analysis

Item Analysis

Counts the titles and copies within the selected range; also includes the replacement cost for all titles. Use this report to determine how many titles/copies you have within selected areas of your collection. It helps you answer questions like “How many horticulture books do we have?” or “How many eight grade history books do we have?”



There are no **Sort By** or **Format** options available for this report.

Item Analysis Report Select By Options

See page 242 for complete and detailed descriptions of Item Analysis **Select By** options.

☒ Title Call Number
☐ Title Policy / Title Call Number
☐ Title
☐ Author
☐ Publication Year
☐ Subject
☐ Curriculum Code
☐ Bibliographic Code
☐ Interest Code
☐ Series
☐ Publisher

Textbook Title Report Sort By Options

Use the **Sort By** drop-down menu to select the order in which you want the items included in your report. For example, if you want an alphabetic list, sort by title.

The following is a list of **Sort By** values for Textbook Title Reports.

Author—This report is sorted alphabetically. To ensure that the author names sort correctly, make sure all author names are entered using the same format: “Last Name, First Name.” If a title has more than one author, it will appear under each author’s listing.

Curriculum Code—Sort by curriculum code and then by call number.

Bibliographic Code—Sort by bibliographic code and then by call number.

Interest Code—Sort by interest code and then by call number.

Publisher—This report is sorted by the publisher. This is useful if you want to compile a list of items a particular publisher has put in print.

Publication Year—This report is sorted numerically by the publication year field on the title record. This is useful if you want to compile a list of when items in the collection were published.

Series—Sorts by book series (i.e. Little House on the Prairie).

Subject—Sort by subject and then by call number.

Title—This report is sorted alphabetically by title. Articles such as ‘A’, ‘An’ or ‘The’ are ignored when specified as such in the MARC record. For example, *The Wizard of Oz* will be sorted under W.

Title Call Number—This selection sorts by call number, then primary author, then title. Call number sorts from left to right, so a call number of 100 is sorted before 20. To ensure numerical sorting works for you, all numbers must have leading zeros. For example, a call number of 020 is sorted before 100.

Title Policy/Title Call Number—This report is sorted alphabetically by policy name, and within each policy by call number. Each policy begins on a new page.

✓ All Titles
Author
Bibliographic Code
Curriculum Code
Interest Code
Medium
Publication Year
Publisher
Series
Subject
Title
Title Call Number
Title Policy
Title Sequence #

Textbook Title Reports Select By Options

Use the selection drop-down menus to select which items you want to include in the report. For example, you can select items in a certain barcode or call number range.

You can enter up to six values for selection criteria using **And**, **Or**, and **And Not** (Boolean Logic). When you choose values in the selection drop-down menus, other selections appear and prompt you for **Starting With** and **Ending With** values.

The following is a list of selectable values for Textbook Title Reports:

All Titles—The report includes all items.

Author—This report includes items with authors in the alphabetic range you specify.

Bibliographic Code—This report includes items classified under the bibliographic copy codes you specify.

Curriculum Code—This report includes items classified with the curriculum keywords you specify.

Interest Code—This report includes items classified with the interest level or reading level you specify.

Medium—This report includes items classified with the medium code you specify.

Publication Year—Selects items with publication years between any given range. Publication years must be specified by a four digit number such as "1979" or "2002."

Publisher—Selects items with publishers in the given range.

Series—Selects items with series in the given range.

Subject—This report includes items classified with the subjects you specify.

Title—This report includes titles within an alphabetical title range you specify.

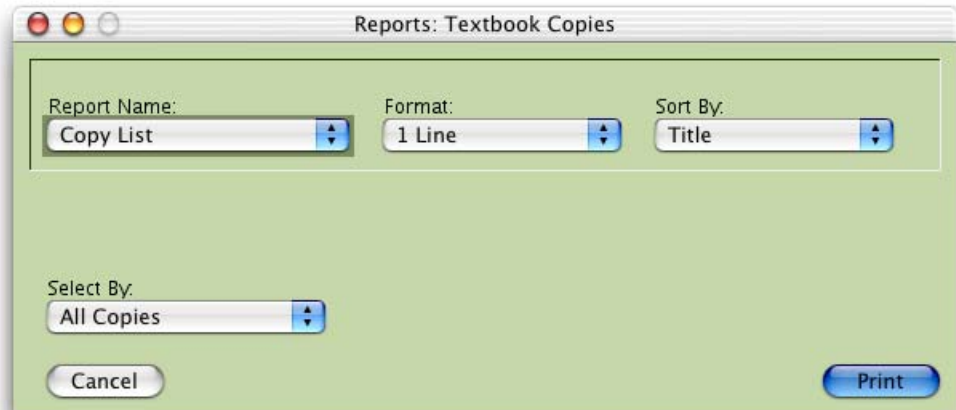
Title Call Number—This report includes items with the item call number you specify.

Title Policy—This report includes items within the policy code range you specify.

Title Sequence #—This report includes items with sequence numbers between the range you specify. Titles are assigned a sequence number in the order they are entered into your system.

Textbook Copies Reports

This report gives you immediate access to your copy information. To prepare a Textbook Copy report, follow these steps.



Reports

Special Reports

Patron Reports

Textbook Titles

Textbook Copies

Circulation Reports

Usage Statistics

Preparing Copy Reports

To prepare a Textbook Copies Report, follow these steps:

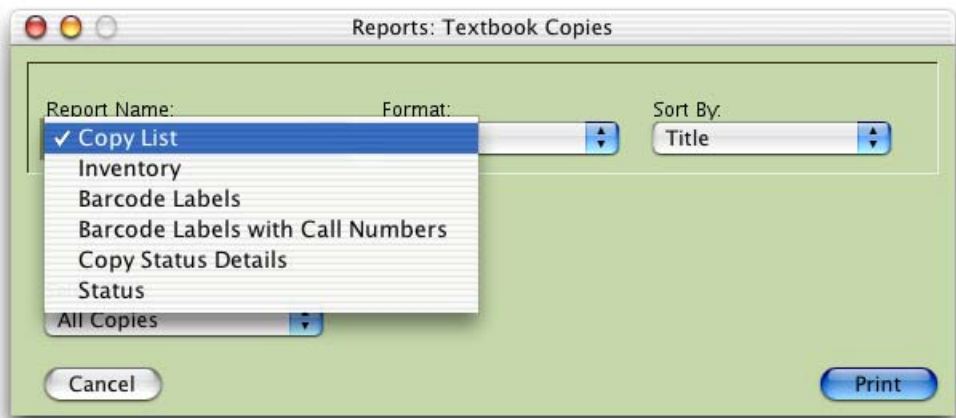
- Step 1. Choose **Textbook Copies** from the **Reports** menu.
- Step 2. Choose the type of report you want from the **Report Name** drop-down menu.
- Step 3. Choose how you want your report **Format** displayed.
- Step 4. Choose the order by which you want this report sorted using the **Sort By** drop-down menu.
- Step 5. Use the **Select By** drop-down menu to select what item record information to include in this report.
- Step 6. Click on the **Print** button to prepare the report.

The following sections describe each of Textbook Tracker's copy **Report Names**, **Formats**, **Sort By**, and **Select By** options.

- ✓ Copy List
- Inventory
- Barcode Labels
- Barcode Labels with Call Numbers
- Copy Status Details
- Status

Copy List

These reports are used to display copy-specific information.



- ✓ 1 Line
- Simple, with Barcodes with Summary
- Detailed
- Copy List Summary

Copy List Report Formats

1 Line—A simple report with one line of information for each selected copy. The report includes each copy’s call number, title, copy number, barcode number, life-to-date use, and date of last use.

Simple, with Barcodes—A two-column report that includes each copy’s title and call number in the first column, and author and barcode number in the second.

with Summary—A simple report that includes each copy’s call number, title, copy number, and barcode number. Under each title, this report also shows the item summary.

Detailed—A detailed report that includes the following information for each selected copy: call number, title, author, copy number, barcode number, vendor, cost, purchase & replacement, collection, funding, location, and accession date. This report is similar to the detailed item list, but includes information for each copy of a title.

Copy List Summary—A simple report that tells you how many copies there are of a title, how many are available, how many have been lost, and how many are out.

Copy List Sort By Options

See page 249 for complete and detailed descriptions of **Copy List Sort By** options.

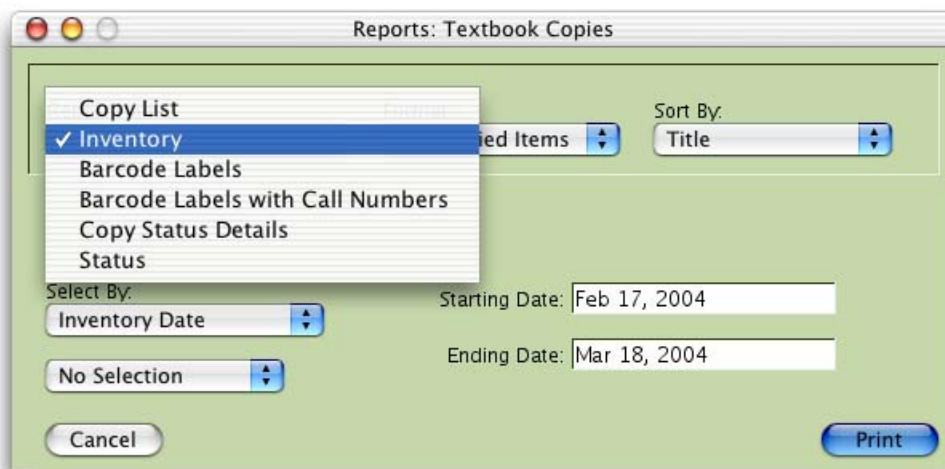
Copy List Select By Options

See page 250 for complete and detailed descriptions of **Copy List Select By** options.

✓ Copy List	Print
Inventory	
Barcode Labels	
Barcode Labels with Call Numbers	
Copy Status Details	
Status	

Inventory

These reports are used for inventory purposes. An inventory date range is generally required to run these reports. Items with an inventory date in the past month are considered “inventoried.”



Inventory Report Formats

✓ Inventoried Items	Print
Not Inventoried Items	
Lost Items Inventoried	
Inventory Statistics Summary	

Inventoried Items—A report listing all items whose inventory date falls between a specified date range. The report includes each item’s call number, title, barcode number, inventory date, transaction status, and funds.

Not Inventoried Items—A report of items that have not been inventoried within a specified date range. Every copy has an inventory date that specifies when it was last physically known to have been in your collection. Performing inventory and checking in (or out) renews this date. For best results, be sure to enter today’s date as the **Ending Date**. You *can* generate reports for any given date range, but keep in mind that items have only one (most recent) inventory date. Therefore, if an item that was missing three months ago has recently been found, it will not appear as missing in any reports you generate for that time period. This report includes each item’s call number, title, barcode number, inventory date, transaction status, and funds.

Lost Items Inventoried—A report listing all items within a specified inventory date range (that is, checked out to Patron #1).

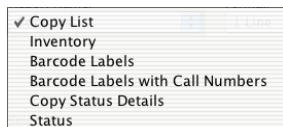
Inventory Statistics Summary—All items within the selected range are counted, and a single page report specifies how many items have been inventoried, how many have not, and how many lost items have been located. Use this report to determine your current inventory status.

Inventory Sort By Options

See page 249 for complete and detailed descriptions of **Inventory Sort By** options.

Inventory Select By Options

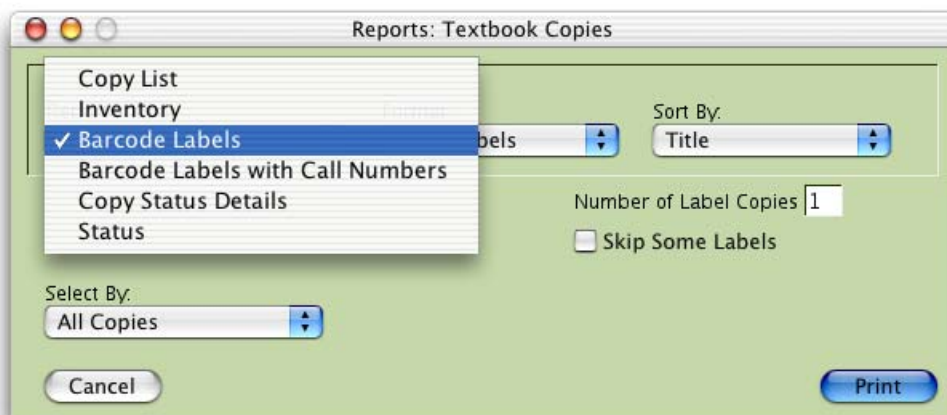
See page 250 for complete and detailed descriptions of **Inventory Select By** options.



Barcode Labels

This prints a barcode label for each selected item. You can only print barcode labels for items already in your collection. To print barcode labels for temporary items, select **Custom Barcode Labels** from **Special Reports** under the **Reports** menu (*see page 219*). Other information on the label includes the item's title, custom text, barcode number, and call number. This report is designed for sheet feed Printers. Use **COMPanion's Laser Labels** for perfect results. If you want to print more than one barcode label at a time, enter the number you want in the **Number of Label Copies** field.

If you want the labels to start printing at locations other than the top left of the sheet, check **Skip Some Labels**.



Barcode Labels Report Formats

Laser Labels—This format will print barcode labels on a three across format (starting from 0 unless otherwise specified).

Include Call Numbers—This format will print the item call numbers above the customizable text of the barcode labels.

Barcode Labels Sort By Options

See page 249 for complete and detailed descriptions of **Barcode Labels Sort By** options.

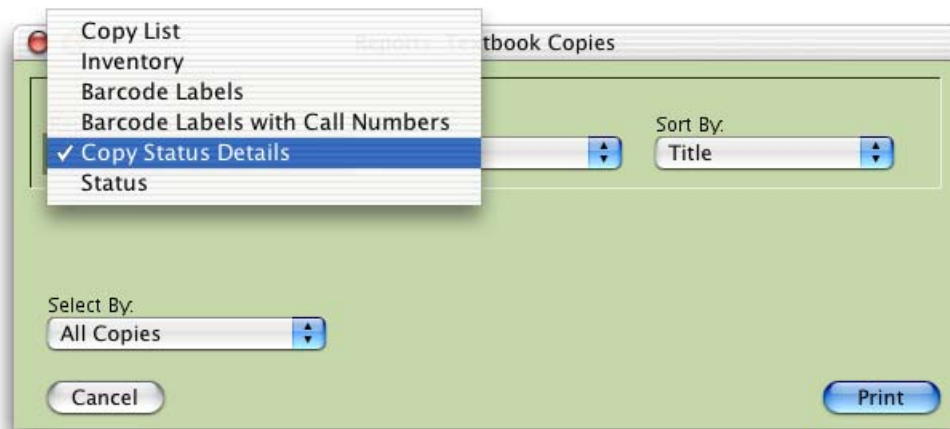
Barcode Labels Select By Options

See page 250 for complete and detailed descriptions of **Barcode Labels Select By** options.

✓ Copy List
Inventory
Barcode Labels
Barcode Labels with Call Numbers
Copy Status Details
Status

Copy Status Details

This report prepares a list of all the copies in your database, including their status details. Items loaned to special or inactive patrons (barcode numbers between 1 and 50) are not included in this report. Temporary items are also *not* shown on this report.



Copy Status Details Report Formats

1 Line—Includes primary transaction information for each item. The report includes each patron's name and barcode, and each item's title, call number, barcode and due date. An asterix indicates overdue items.

Copy Status Details Sort By Options

See page 249 for complete and detailed descriptions of **Copy Status Details Sort By** options.

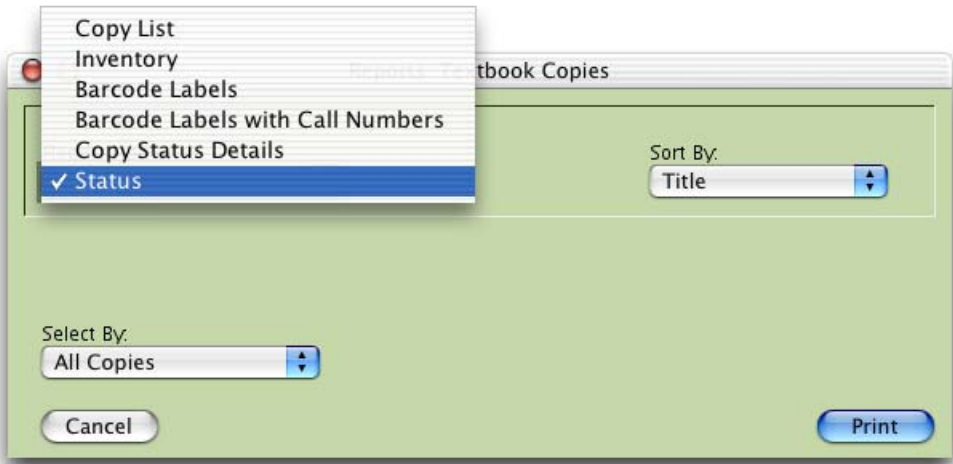
Copy Status Details Select By Options

See page 249 for complete and detailed descriptions of **Copy Status Details Select By** options.

- ✓ Copy List
- Inventory
- Barcode Labels
- Barcode Labels with Call Numbers
- Copy Status Details
- Status

Status

This report displays the status of selected title copies, determining how many copies are available, how many are checked out, and whom they are checked out to.



There are no **Formats** available for this report.

Status Sort By Options

See page 249 for complete and detailed descriptions of **Status Sort By** options.

Status Select By Options

See page 249 for complete and detailed descriptions of **Status Select By** options.



Textbook Copies Sort By Options

Use the **Sort By** drop-down menu to select the order in which you want the items included in your report. For example, if you want an alphabetic list, sort by title.

The following is a list of **Sort By** values for item reports.

Accession Date—Sort by accession date and then by call number.

Barcode—This report is sorted numerically by barcode.

Condition—This report tracks copies by their condition.

Copy Institution—This report is sorted by institution code.

Copy Institution/Copy Location—This report is sorted by institution and then by copy location code.

Copy Location—This report is sorted by location.

Copy Sublocation—Sort by copy sublocation code and then by call number. When this option is selected, a **Page Breaks Between Sort Fields** checkbox will appear in the report window. When this box is checked, each copy sublocation code starts on a new page.

Date Purchased—Sort by date which the copy was purchased.

Funding Source—Sort by copy fund code and then by call number. Each copy fund code begins on a new page.

Funding Source / Copy Institution—This report is sorted by a copy's fund code and then by institution code.

Funding Source / Copy Location—This report is sorted by a copy's fund code and then by location code.

Funding Source / Copy Sublocation—This report is sorted by a copy's fund code and then by sublocation code.

Inventory Date—Sort by inventory date and then by call number.

Policy—This report is sorted by policy, followed by barcode and transaction status.

Title—This report is sorted alphabetically by title. Articles such as 'A', 'An' or 'The' are ignored when specified as such in the MARC record. For example, *The Wizard of Oz* will be sorted under W.

Vendor—This report is sorted by vendor, followed by barcode and transaction status.

☒ All Copies

Accession Date
 Barcode List
 Barcode Range
 Copy Call Number
 Copy Condition
 Copy Institution
 Copy Last Used Date
 Copy Location
 Copy Policy
 Copy Sequence #
 Copy Status
 Copy Sublocation
 Copy Vendor
 Funding Source
 Inventory Date
 No Last Used Date
 Not Inventoried Date
 Title

Textbook Copies Select By Options

Use the selection drop-down menus to select which items you want to include in the report. For example, you can select items in a certain barcode or call number range.

You can enter up to six values for selection criteria using **And**, **Or**, and **And Not** (Boolean Logic). When you choose values in the selection drop-down menus, other selections appear and prompt you for **Starting With** and **Ending With** values.

All Copies—The report includes all copies.

Accession Date—This report includes copies added to your system in the date range you specify.

Barcode List—This report includes all items matching the barcode you enter or scan. You can select all the barcodes in it later with another report.

Barcode Range—This report includes all copies within a particular barcode range.

Copy Call Number—This report includes all copies within a particular copy call number range.

Copy Condition—This **Select By** option allows you to list all copies within a specified condition.

Copy Institution—This report lists all copy institutions between a specified range.

Copy Last Used Date—This option selects copies which have been used over the specified date range.

Copy Location—This report includes copies classified with the location you specify.

Copy Policy—This report includes copies within the policy code range you specify.

Copy Sequence #—This report includes copies with sequence numbers within your specified range. Copies are assigned a sequence number in the order that they are entered into the system.

Copy Status—This allows you to limit the report to copies that are unavailable, lost, discarded, checked out, or on in-stock hold.

Copy Sublocation—This report includes copies classified within the sublocation you specify.

Copy Vendor—This report includes the copy vendor, pulled from the **Vendor** field located on the **Copy Inventory** tab of the **Copy Information** window (page 166).

Funding Source—This report includes copies with the funding source you specify.

Inventory Date—This report includes copies inventoried during the date range you specify.

No Last Used Date—This report selects copies that have never circulated.

Not Inventoried Date—This report can be used to find items that were not marked as inventoried in a particular date range. This makes selecting items to be marked as **Lost** from inventory much easier.

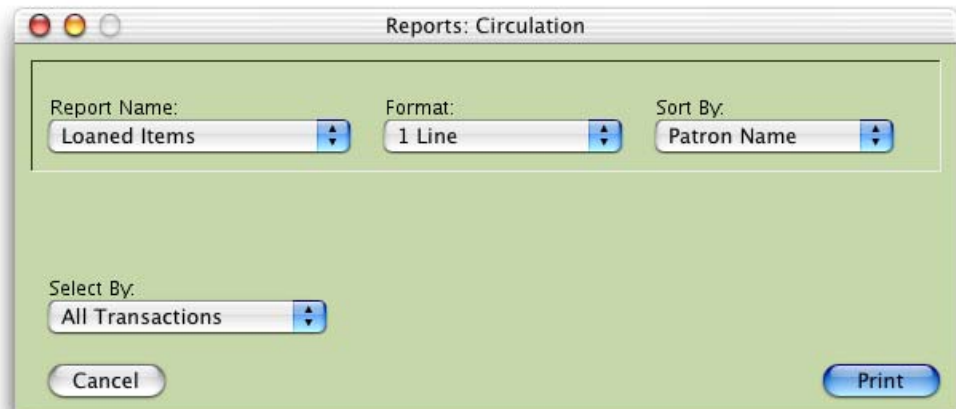
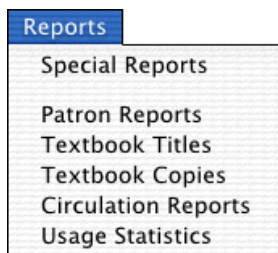
Title—This report selects copies alphabetically by title. Articles such as 'A', 'An' or 'The' are ignored when specified as such in the MARC record. For example, *The Wizard of Oz* will be sorted under W. This reports lists all the copies of a title between a specified range.

Circulation Reports

Preparing Circulation Reports

Circulation reports gather information from Textbook Tracker's transactions and statistics records and presents it in a number of different formats. You can get lists of loaned items, temporary items, overdue items, fines, requests, reservations, lost items, and much more. In Textbook Tracker terminology, circulation lists are designed for use by the administrator and circulation notices are designed for distribution to patrons.

To prepare Circulation Reports, follow these steps:



- Step 1. Choose **Circulation Reports** from the **Reports** menu.
- Step 2. Choose the type of report you want from the **Report Name** drop-down menu.
- Step 3. Choose how you want your report **Format** displayed.
- Step 4. Choose the **Sort By** order for this report.
- Step 5. Use the **Select By** drop-down menu to select which Patron Records to include in the report.
- Step 6. Click the **Print** button to prepare the report.

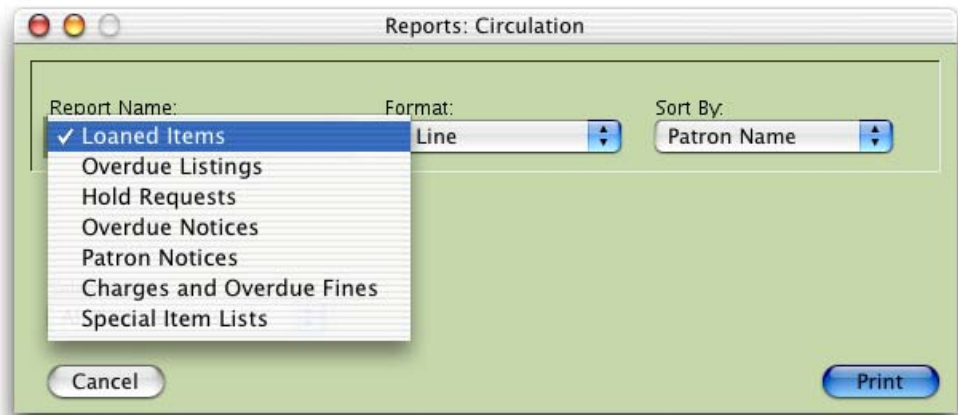
- ✓

Loaned Items
- Overdue Listings
- Hold Requests
- Overdue Notices
- Patron Notices
- Charges and Overdue Fines
- Special Item Lists

Loaned Items

These reports prepare lists for administrative use. All copies in the database will be included, as will their status. Items loaned to special, system, or inactive patrons (Barcode #'s between 1 and 50) are not included in this report.

When the **Use Copy Number** box is checked, then the copy number will replace the copy call number in the report.



Loaned Items Report Formats

- ✓

1 Line
- 1 Line Landscape
- Detailed
- Complete

1 Line—Includes primary transaction information for each loaned item. The report includes each patron’s name and barcode, and each item’s title, call number, barcode and due date. An asterix indicates overdue items and the date they were due will be highlighted in red.

1 Line Landscape—This report is the same as the **1 Line** report, but is in a landscape format. This allows more room for displaying the title.

Detailed—Includes full transaction information for each loaned item. All available information is included in this report.

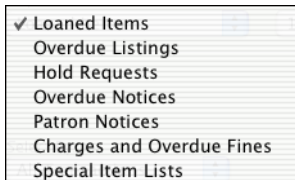
Complete—This Report contains all available information in the formats stated above.

Loaned Items Sort By Options

See page 260 for complete and detailed descriptions of Loaned Items **Sort By** options.

Loaned Items Select By Options

See page 261 for complete and detailed descriptions of Loaned Items **Select By** options.



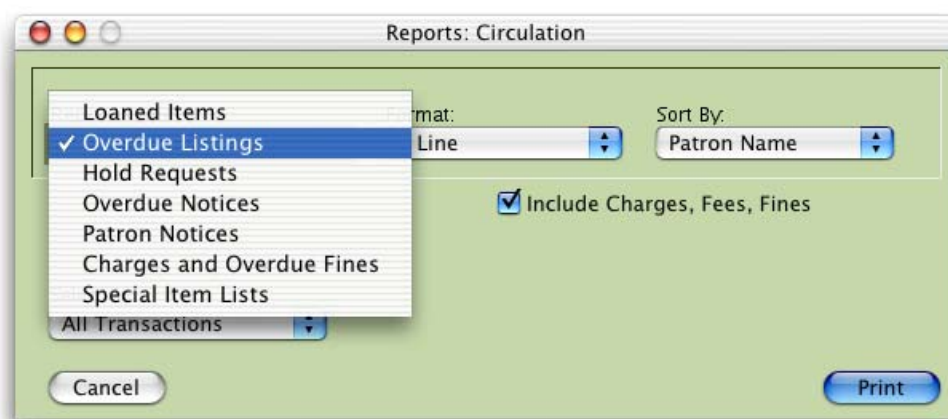
Overdue Listings

These reports prepare lists for administrator use. Only overdue items are included in the report. Items loaned to special system patrons (barcode #'s between 1 and 50) or inactive patrons are not included in this report.

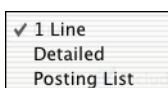
This report includes an implicit selection of any overdue item. If you use a selection that uses the **Due Date**, that selection will be used rather than the implicit values.

If the **Include Charges, Fees, Fines** box is checked, then notices and entries will print for overdue fines for returned items, miscellaneous fees, and lost or damaged charges.

When the **Use Copy Number** box is checked, then the copy number will replace the copy call number in the report.



Overdue Listings Report Formats



1 Line—Includes primary transaction information for each patron with overdue items. It displays the patron's name, barcode and phone number along with the number of overdue items, those currently checked out and the patron's current fine balance.

Detailed w/Copy Cost—Includes full transaction information for each overdue item. All available information is included. This report includes each patron's name and barcode number, phone number, each item's title, barcode number, call number, cost, due date, and the number of days the item is overdue. The date that's highlighted red indicates the overdue date.

Posting List—Includes name, number of overdue items and charges due. This report can be posted to inform patrons that have overdue items and charges.

Overdue Listings Sort By Options

See page 260 for complete and detailed descriptions of Overdue Listings **Sort By** options.

Overdue Listings Select By Options

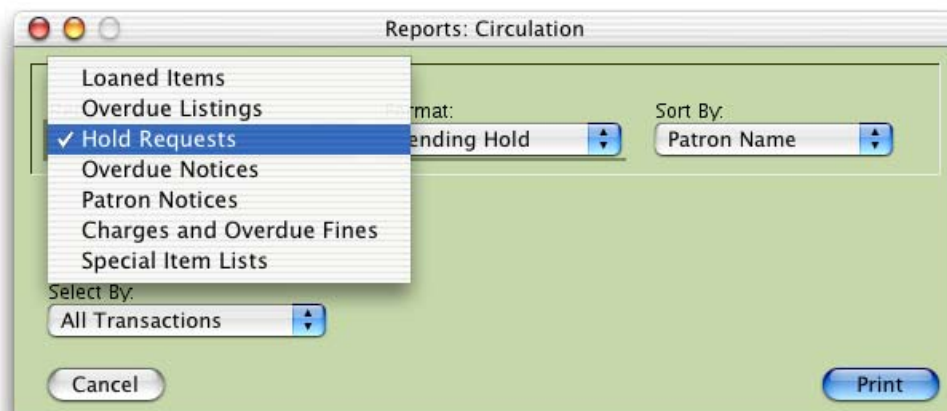
See page 261 for complete and detailed descriptions of Overdue Listings **Select By** options.

- ✓ Loaned Items
- Overdue Listings
- Hold Requests
- Overdue Notices
- Patron Notices
- Charges and Overdue Fines
- Special Item Lists

Hold Requests

These reports prepare hold request and in-stock hold lists.

When the **Use Copy Number** box is checked, then the copy number will replace the copy call number in the report.



Hold Requests Report Formats

- ✓ Pending Hold
- In Stock

Pending Hold—Only includes hold requests which are currently pending. For pending holds, the request date is the date on which the hold was placed. The expiration date is the date the request expires. Textbook Tracker automatically removes expired hold requests at the beginning of each day.

In-Stock—A report that lists selected items being held for patrons. Only in-stock requests are selected. For in-stock requests, the in-stock date is the date on which the item first became available for a patron. The expiration date is the date on which the request expires. Textbook Tracker automatically removes expired requests at the beginning of each day.

Hold Requests Sort By Options

See page 260 for complete and detailed descriptions of Hold Requests **Sort By** options.

Hold Requests Select By Options

See page 261 for complete and detailed descriptions of Hold Requests **Select By** options.

- ✓ Loaned Items
- Overdue Listings
- Hold Requests
- Overdue Notices
- Patron Notices
- Charges and Overdue Fines
- Special Item Lists

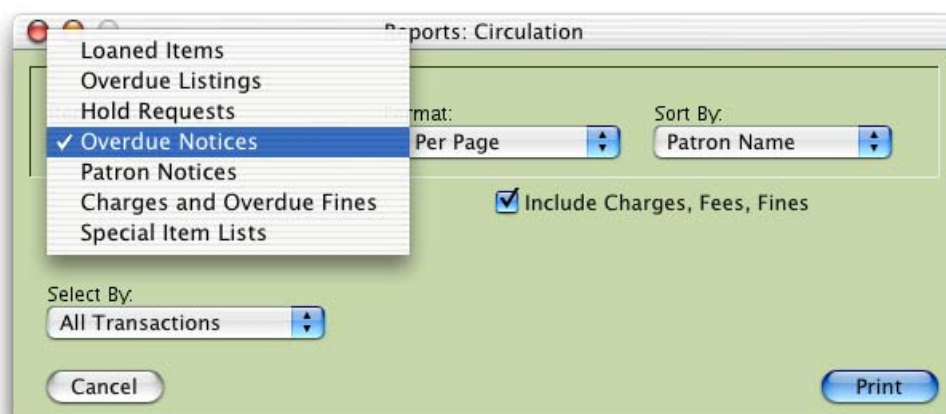
Overdue Notices

These notices are sent to patrons to inform them that they have overdue items and should return them. You can change the text of these notices using the **Letters** preference.

Overdue notices are generated for all overdue items unless you limit them by selecting a range of due dates. For example, you can set the date range to generate overdue notices only for items overdue by more than a week.

If you select **Include Charges, Fees, Fines** then charges, fees and fines are included in the reports. Otherwise, they are ignored.

When the **Use Copy Number** box is checked, then the copy number will replace the copy call number in the report.



Overdue Notices Report Formats

The following are the formats for overdue notices:

- ✓ 4 Per Page
- 2 Per Page
- Self Mailer
- Overdue Letters with Summary
- Overdue Letters
- Overdue Letters, to Parents
- Email

4 per Page—Overdue slips printed 4 per page. One slip is printed for each overdue item or charge. This is a good format to use when each patron has only 1 or 2 overdue items. The slip includes the patron's name, barcode number, location, level, sublocation, government ID, balance, and the item's title, barcode number, author, call number, replacement cost, due date, return date, daily fine/fee rate, and fine balance for each item.

2 per Page—Overdue slips printed 2 per page. One slip is printed for each patron with an overdue item. Up to 4 items can be included on each slip. If patrons have several overdue items, this format is preferable over the 4 per page format because it saves paper. The slip includes the patron's name, barcode number, location, sublocation, government ID, level, policy, and balance, and the item's title, barcode number, call number, date, fine/fee amount by item, amount paid by item, fine/fee balance by item, and replacement cost. It also includes the total number of items the patron has overdue and the fine/fee amount due on the slip.

**NOTE:**

You must have your
Email preferences
correctly configured for
this to work.

Self Mailer—An overdue notice in letter format designed to be folded and mailed without an envelope. If there are several overdue items, the letter runs onto a second page. The letter includes the patron's name, address, location, and barcode number, and each item's title, barcode number, due date, return date, number of fine/fee days calculated, fine/fee rate, total balance by item and replacement cost. This format is excellent if notices are mailed. Just fold, staple and stamp—the return and patron addresses are automatically printed on the mailer.

Overdue Letters with Summary—An overdue notice in letter format. This letter includes all items a patron has overdue. If there are several overdue items, the letter runs onto a second page. The letter includes the patron's name, address, barcode number, and each item's title, author, barcode number, call number, due date, return date, daily fine/fee rate, the number of fine/fee days totaled, the total balance due by item, and the total balance due for all items. After the last letter, a summary is displayed.

Overdue Letters—Same as the previous report, but without the summary page at the end.

Overdue Letters, to Parents—Same as the previous report, but is addressed "To the Parents or Guardian of" rather than the actual patron.

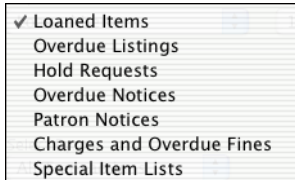
Email—An overdue notice sent to the patron using the email address in the patron record. A summary report is prepared so you have record of which patrons were sent email notification.

Overdue Notices Sort By Options

See page 260 for complete and detailed descriptions of Overdue Notices **Sort By** options.

Overdue Notices Select By Options

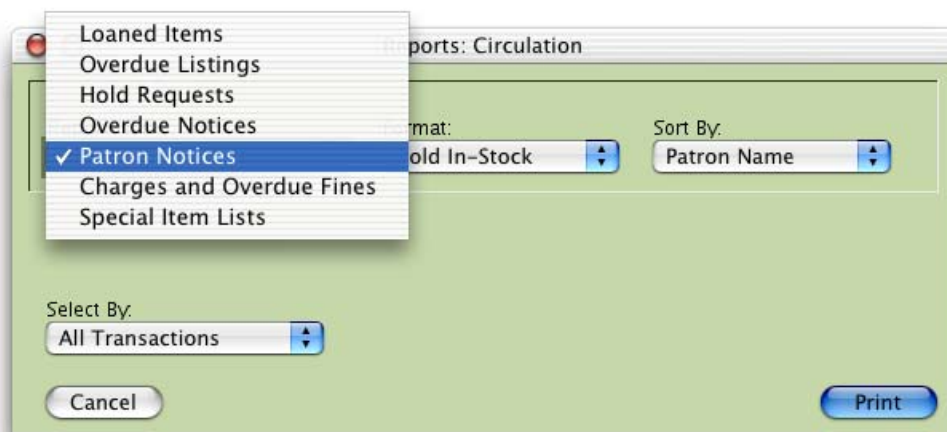
See page 261 for complete and detailed descriptions of Overdue Notices **Select By** options.



Patron Notices

These include the following notices. You can change the text of these notices using the **Letters** preference (see “Circulation Tab” on page 79).

When the **Use Copy Number** box is checked, then the copy number will replace the copy call number in the report.



Patron Notices Report Formats

Hold In-Stock—Notice sent to a patron to inform them that a book they have requested is available.

Patron Notices Sort By Options

See page 260 for complete and detailed descriptions of Patron Notices **Sort By** options.

Patron Notices Select By Options

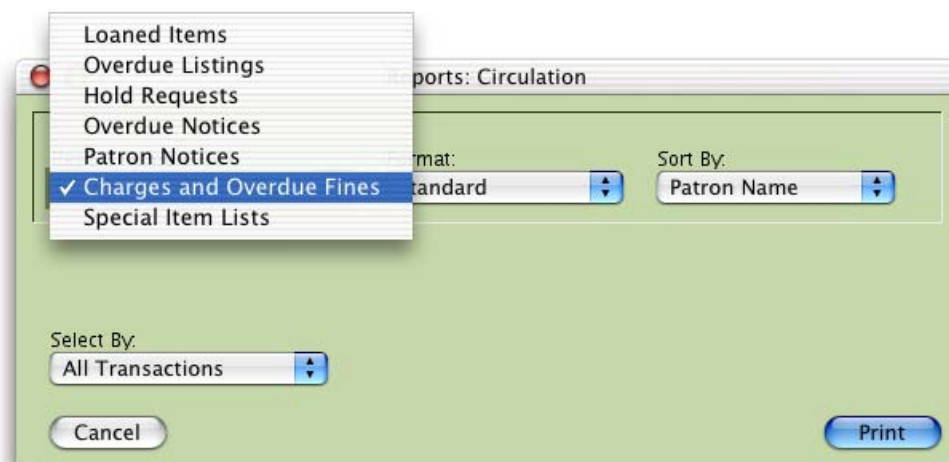
See page 261 for complete and detailed descriptions of Patron Notices **Select By** options.

- ✓ Loaned Items
- Overdue Listings
- Hold Requests
- Overdue Notices
- Patron Notices
- Charges and Overdue Fines
- Special Item Lists

Charges and Overdue Fines

These reports include both fines and overdue records with fines. Within specified ranges, only fines and other charges will be printed. Use these reports to see who owes your institution money. Only circulation records where an actual fine is due are included. Thus, an overdue item with no fine is not included.

When the **Use Copy Number** box is checked, then the copy number will replace the copy call number in the report.



Charges and Overdue Fines Report Formats

- ✓ Standard
- Charges Only
- Fines Only

Standard—Displays transactions for currently overdue items and unpaid fines/charges issued against a patron.

Charges Only—Only displays transactions where a charge is due (charges are fees that have reached their maximum limit and are no longer accruing). Does not include fines for currently overdue items.

Fines Only—Only displays transactions where a fine is due (fines are fees that are still accruing). Does not include other charges, such as previously overdue items.

Charges and Overdue Fines Sort By Options

See page 260 for complete and detailed descriptions of Charges and Overdue Fines **Sort By** options.

Charges and Overdue Fines Select By Options

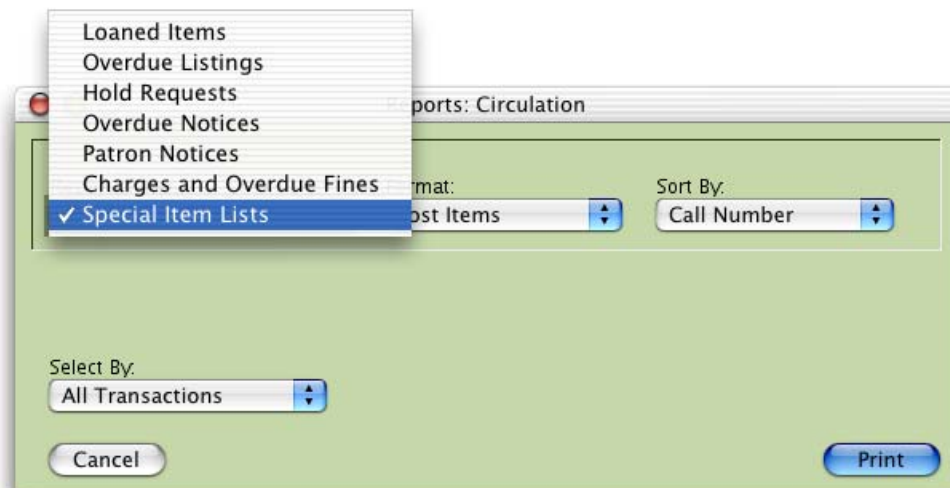
See page 261 for complete and detailed descriptions of Charges and Overdue Fines **Select By** options.

- ✓ Loaned Items
- Overdue Listings
- Hold Requests
- Overdue Notices
- Patron Notices
- Charges and Overdue Fines
- Special Item Lists

Special Item Lists Reports

These reports are designed to show items with special status codes.

When the **Use Copy Number** box is checked, then the copy number will replace the copy call number in the report.



Special Item Lists Report Formats

- ✓ Lost Items
- Discarded Items
- Library Use Items
- On Repair Items
- On Order Items
- Archived Items

Lost Items—All items which are considered lost are checked out to patron barcode #1.

Discarded Items—All items which are checked out to patron barcode #2.

Institution¹ Use Items—All items which are checked out to Patron barcode #3.

On Repair Items—All items which are checked out to patron barcode #4.

On Order Items—All items which are checked out to patron barcode #5.

Archived Items—All items which are checked out to patron barcode #6.

Special Items Sort By Options

See page 260 for complete and detailed descriptions of Special Items **Sort By** options.

Special Items Select By Options

See page 261 for complete and detailed descriptions of Special Items **Select By** options.

1. This term can be changed by terminology preferences. Default term for an institution under a school license is **School**.

✓ Patron Name

Patron Homeroom

Patron 2nd Location

Call Number

Due Date

Circulation Group Code

Patron School

Circulation Reports Sort By Options

Use the **Sort By** drop-down menu to select the order which you want the items listed in your report.

The following is a list of **Sort By** values for circulation reports.

Patron Name—Report sorted alphabetically by the patron’s name.

Patron Homeroom¹—This report is sorted alphabetically by **Starting With** location, and within each location by patron name. Each location begins on a separate page. This makes it easy to distribute reports to different locations.

Patron 2nd Location²—This report is sorted alphabetically by sublocation, and within each location by patron name. Each sublocation begins on a separate page. This makes it easy to distribute reports to different sublocations.

Call Number—Report sorted in call number order. This sorting order makes it easy to use the report to search for returned items that haven’t been recorded as returned by Textbook Tracker.

Due Date—This report is sorted by due date then by patron name. This sorting order makes it easy to find transactions in due-date order.

Circulation Group Code—This report is sorted by circulation group.

Patron School³—This report is sorted by patron school.

1. The name for Location is customized in Preferences. Your customized name will appear.
2. The name for Sublocation is customized in Preferences. Your customized name will appear.
3. This term can be changed my terminology preferences. Default term for an institution under a school license is **School**.

✓ All Transactions
Archived on Date
Circulation Group Code
Copy Institution
Copy Location
Copy Sublocation
Days Overdue
Discarded on Date
Due Date
In-Stock Expire
Item Barcode
Item Policy
Lost on Date
Patron 2nd Location
Patron Barcode
Patron Grade
Patron Homeroom
Patron Name
Patron Policy
Patron School
Request Expire
Temporary Items
Transaction Date

Circulation Reports Select By Options

Use the selection drop-down menu to specify which transactions should be examined for inclusion into the report. Each circulation report has its own selection filter, but by specifying additional selection options, you can further restrict the number of records examined and displayed for your report. For example, the **Loaned Items** report only includes loaned items, but you can further restrict the report to only include loaned items only from a specific locations using the selection drop-down menus.

You can enter up to six values for selection criteria using **And**, **Or**, and **And Not** (Boolean Logic). When you choose values in the selection drop-down menus, other fields appear, asking you for **Starting With** and **Ending With** values.

All Transactions—All transactions are examined using the selection criteria for each report format.

Archived on Date—This report only includes items archived during a date range you specify. If you enter only a **Starting With** date, Textbook Tracker will assume a **Ending With** date in the “far future.” If you enter only an **Ending With** value the **Starting With** value will be assumed to be in the very “far past.”

Circulation Group Code—This report includes items in circulation groups.

Copy Institution—This report includes transaction for a specified range of copy institutions. If you enter only a **Starting With** (or **Ending With**) selection, Textbook Tracker will select all records where the copy institution matches the entered text.

Copy Location—This report includes transaction for a specified range of copy locations. If you enter only a **Starting With** (or **Ending With**) selection, Textbook Tracker will select all records where the copy location matches the entered text.

Copy Sublocation—This report includes transaction for a specified range of copy sublocations. If you enter only a **Starting With** (or **Ending With**) selection, Textbook Tracker will select all records where the copy sublocation matches the entered text.

Days Overdue—This report includes transactions with due dates computed between the **Starting With** and **Ending With** ranges of days overdue. If you enter only a **Starting With** selection, Textbook Tracker will assume a “very large” ending value. If you enter only an **Ending With** value, the **Starting With** value is assumed to be zero. For example, to select items which are at least seven days overdue, enter “7” in the **Starting With** field. To find items that are seven or fewer days overdue enter an **Ending With** value of “7”. To locate items that are due in the next seven days, enter a **Starting With** value of “-7” and an **Ending With** value of “0”. The results of this selection are exactly the same as if you put dates into the **Due Date** selection criteria.

Discarded on Date—This report only includes items discarded during a date range you specify. If you enter only a **Starting With** date, Textbook Tracker will assume an **Ending With** date in the “far future.” If you enter only an **Ending With** value the **Starting With** value will be assumed to be in the very “far past.”

Due Date—This report includes transactions that have a due date within a date range you specify. A due date has different meanings depending on the type of transaction involved. For an item checked out, the due date is the date an item is due back. For a hold request, the due date is the date on which the request expires. For a reservation, the due date is the date a reservation begins. If you enter **only** a **Starting With** date, Textbook Tracker will assume an **Ending With** date in the “far future.” If you enter only an **Ending With** value the **Starting With** value is assumed to be in the “far past.”

In-Stock Expire—This report only includes in-stock holds that expire in the date range you specify. If you enter only a **Starting With** date, Textbook Tracker will assume an **Ending With** date in the “far future.” If you enter only an **Ending With** value the **Starting With** value will be assumed to be in the very “far past.”

Item Barcode—This report includes transactions for a specified range of item barcodes.

Item Policy—This report includes transactions for a specified range of patron policies. If you enter only a **Starting With** (or **Ending With**) selection, Textbook Tracker will select all records where the policy name matches the entered text.

Lost on Date—This report only includes items lost during a date range you specify. If you enter only a **Starting With** date, Textbook Tracker will assume an **Ending With** date in the “far future.” If you enter only an **Ending With** value the **Starting With** value will be assumed to be in the very “far past.”

Patron 2nd Location¹—This report only includes transactions for patrons in the sublocations you specify. If you enter only a **Starting With** (or **Ending With**) selection, Textbook Tracker will select all records where the sublocation matches the entered text.

Patron Barcode—This report includes transactions for a specified range of Patron Barcodes. If you enter only a **Starting With** (or **Ending With**) selection, Textbook Tracker will select all records where the barcode matches the entered text.

Patron Grade²—This report only includes items with patron levels within the range you specify. If you enter only a **Starting With** (or **Ending With**) selection, Textbook Tracker will select all records where the level matches the entered text.

Patron Homeroom³—This report only includes transactions for patrons in the locations you specify. Typically, this is used for preparing overdue listings for a group of patrons in a specified homeroom. If you enter only a **Starting With** (or **Ending With**) selection, Textbook Tracker will select all records where the homeroom matches with the entered text.

Patron Name—This report includes transactions for a specified range of patron names. If you enter only a **Starting With** (or **Ending With**) selection, Textbook Tracker will select all records where the name matches the entered text.

Patron Policy—This report includes transactions for a specified range of patron policies.

Patron School—This report includes transaction for a specified range of patron schools. If you enter only a **Starting With** (or **Ending With**) selection, Textbook Tracker will select all records where the patron school matches the entered text.

Request Expire—This report only includes hold requests that expire during a date range you specify. If you enter only a **Starting With** date, Textbook Tracker will assume an **Ending With** date in the “far future.” If you enter only an **Ending With** value the **Starting With** value will be assumed to be in the very “far past.”

✓ All Transactions
Archived on Date
Circulation Group Code
Copy Institution
Copy Location
Copy Sublocation
Days Overdue
Discarded on Date
Due Date
In-Stock Expire
Item Barcode
Item Policy
Lost on Date
Patron 2nd Location
Patron Barcode
Patron Grade
Patron Homeroom
Patron Name
Patron Policy
Patron School
Request Expire
Temporary Items
Transaction Date

1. The term used for 2nd Location is customized in **Preferences**. Your custom term will appear here.

2. The custom term used for Grade is customized in **Preferences** and appears here.

3. The name for Homeroom is customized in **Preferences**. Your customized name will appear here.

Temporary Items—This report only includes transactions for temporary items. Because reservations and hold requests cannot be performed on temporary items, this option should not be used for those reports.

Transaction Date—This report includes transactions performed during a transaction date range you specify. The transaction date is the date on which the transaction was performed. If you enter only a **Starting With** date, Textbook Tracker will assume an **Ending With** date is the “far future.” If you enter only an **Ending With** value, the **Starting With** value is assumed to be in the very “far past.”

Usage Statistics

Preparing Usage Statistics Reports

Usage Statistics give you insight on how your textbooks are being used, return rates, usage by item, and patron policies. Time and group-based statistical reports can be created.

Of course, no single institution will use *all* these reports, so experiment with your choices to determine which reports are applicable to your institution.

Statistics are collected on an hourly basis for each patron/item transaction that occurs. Therefore, there may be thousands of statistical records saved for your institution. For example, when a patron of type STU borrows a textbook of type HBF during the 10th hour of June 1, 2002, a statistics record is created. If more STU patrons borrow more HBF textbooks during this hour, the statistic counts are updated. Also, if a FAC patron borrows a textbook, additional statistical records are created for this policy.

Therefore, not only are statistic records time-based, but they can provide information on which patron groups are using textbooks, and which item groups are getting used most. For example, using these reports, you can see which patron groups are borrowing which item groups. These types of statistics can answer questions that would be very difficult to determine without computers.

Many statistics reports are available. After using Textbook Tracker for a few months, you might gain some interesting insights into the operation of your institution by examining these reports.

To prepare **Usage Statistics Reports** follow these steps.

- Step 1. Choose **Usage Statistics** from the **Reports** menu.
- Step 2. Choose the type of report you want from the **Report Name** drop-down menu.
- Step 3. Choose how you want your report **Format** displayed.
- Step 4. Choose the **Sort By** order.
- Step 5. Use the **Select By** drop-down menu to select which records to include in this report.
- Step 6. Click the **Print** button to prepare the report.

Reports

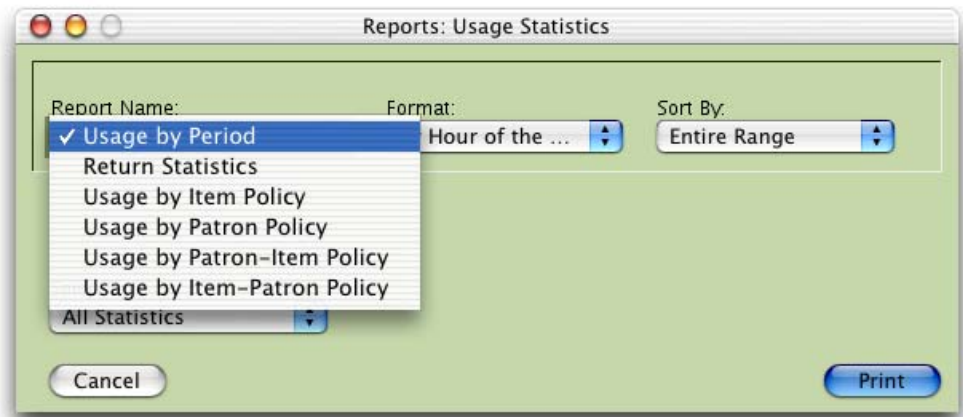
Special Reports

Patron Reports
Textbook Titles
Textbook Copies
Circulation Reports
Usage Statistics

- ✓ Usage by Period
- Return Statistics
- Usage by Item Policy
- Usage by Patron Policy
- Usage by Patron-Item Policy
- Usage by Item-Patron Policy

Usage by Period

Allows the user to examine textbook usage over different time periods. Use these reports to answer questions, such as: “Which months have the most activity?” or “Are some days of the month busier than others?”



Usage by Period Report Formats

- ✓ by Hour of the Day
- by Day of the Week
- by Day of the Month
- by Month of the Year
- by Hour by Day

by Hour of the Day—Provides statistics on transactions during certain hours of the day. Use this report to determine what hours of the day are the busiest for your institution.

by Day of the Week—Provides statistics on transactions during specific days of the week. Use this report to determine which days of the week are the busiest for your institution.

by Day of the Month—Provides statistics on transactions during specific days of the month. Use this report to determine which days of the month are the busiest for your institution.

by Month of the Year—Provides statistics on transactions during specific months of the year. Use this report to determine which months of the year are the busiest for your institution.

by Hour by Day—Prints a grid with hours down the left side and days of the week across the top, displaying usage in every cell. Use this report to determine which hours of the day are busiest on which days of the week.

Usage by Period Sort By Options

See page 272 for complete and detailed descriptions of Usage by Period **Sort By** options.

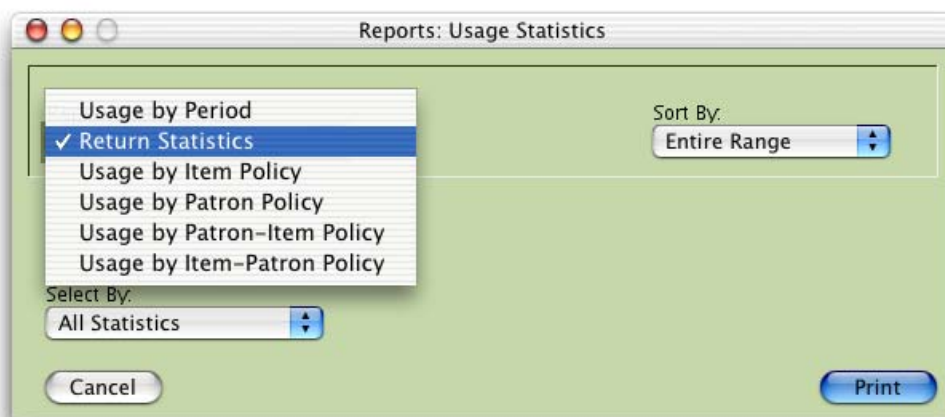
Usage by Period Select By Options

See page 272 for complete and detailed descriptions of Usage by Period **Select By** options.

- ✓ Usage by Period
- Return Statistics
- Usage by Item Policy
- Usage by Patron Policy
- Usage by Patron-Item Policy
- Usage by Item-Patron Policy

Return Statistics

Prints a summary report on how close to the due date items are returned. A negative number indicates that items are returned before the due date, a positive number indicates that items are returned after the due date. This information can be used to help determine if your institution's loan period matches the actual return rate of your patrons.



Return Statistics Sort By Options

See page 272 for complete and detailed descriptions of Return Statistics **Sort By** options.

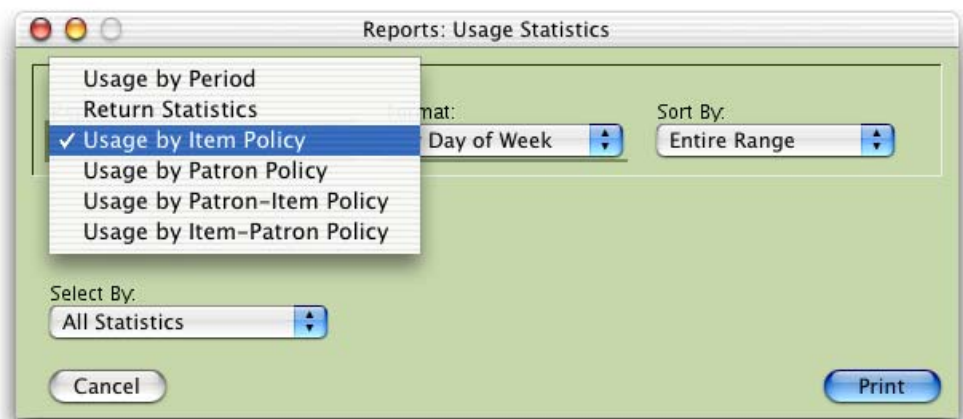
Return Statistics Select By Options

See page 272 for complete and detailed descriptions of Return Statistics **Select By** options.

- ✓ Usage by Period
- Return Statistics
- Usage by Item Policy
- Usage by Patron Policy
- Usage by Patron-Item Policy
- Usage by Item-Patron Policy

Usage by Item Policy

Allows the user to see if items with a specific policy are used during different periods.



Usage by Item Policy Report Formats

- ✓ by Day of Week
- by Month
- by Patron Policy

by Day of Week—Prints a grid with item policies down the left side and days of the week across the top. Textbook usage is printed in each cell. Use this report to determine which item groups are being used on which days of the week. This information can be used for budgeting, staffing and other uses.

by Month—Prints a grid with item policies down the left side and months of the year across the top. Textbook usage is printed in each cell. Use this report to determine which item groups are being used during which months of the year. This information can be used for budgeting, staffing and other uses.

by Patron Policy—For each item policy, patron policies are listed along with the types of activities performed. Use this report to determine what items patrons are using.

Usage by Item Policy Sort By Options

See page 272 for complete and detailed descriptions of Usage by Item Policy **Sort By** options.

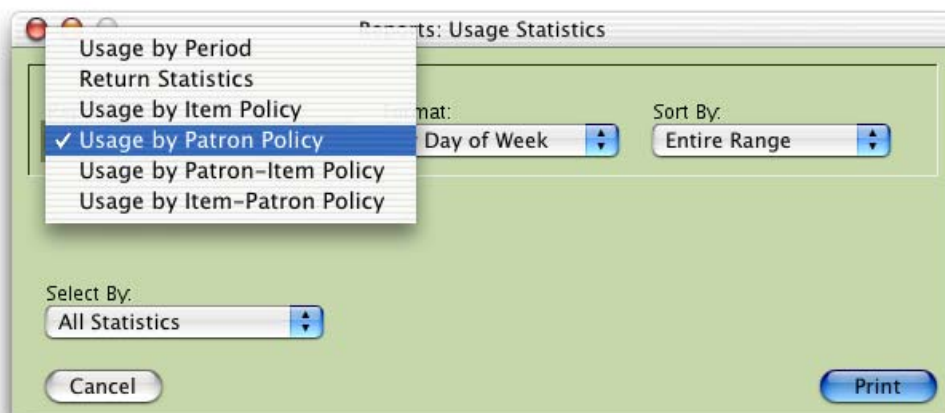
Usage by Item Policy Select By Options

See page 272 for complete and detailed descriptions of Usage by Item Policy **Select By** options.

- ✓ Usage by Period
- Return Statistics
- Usage by Item Policy
- Usage by Patron Policy
- Usage by Patron-Item Policy
- Usage by Item-Patron Policy

Usage by Patron Policy

Allows the user to see which types of patrons are being issued textbooks during different periods.



Usage by Patron Policy Report Formats

- ✓ by Day of Week
- by Month
- by Patron Policy

by Day of Week—Prints a grid with patron policies down the left side and days of the week across the top. Textbook usage is printed in each cell. Use this report to determine which patron groups are borrowing which days of the week. This information can be used for budgeting, staffing and other uses.

by Month—Prints a grid with patron policies down the left side and months of the year across the top. Textbook usage is printed in each cell. Use this report to determine which patron groups are being issued textbooks during which months of the year. This information can be used for budgeting, staffing and other uses.

by Item Policy—Use this report to determine what textbook items patrons are being issued.

Usage by Patron Policy Sort By Options

See page 272 for complete and detailed descriptions of Usage by Patron Policy **Sort By** options.

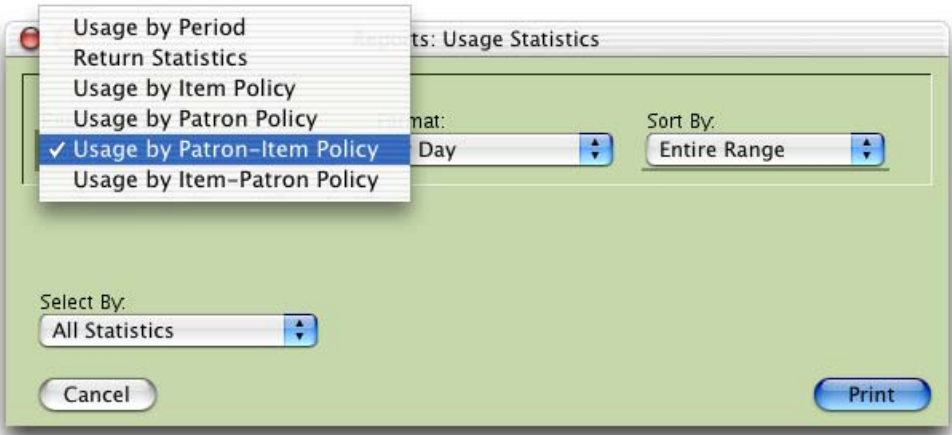
Usage by Patron Policy Select By Options

See page 272 for complete and detailed descriptions of Usage by Patron Policy **Select By** options.

- ✓ Usage by Period
- Return Statistics
- Usage by Item Policy
- Usage by Patron Policy
- Usage by Patron-Item Policy
- Usage by Item-Patron Policy

Usage by Patron-Item Policy

Allows the user to examine combinations of Patron and Item policies.



Usage by Patron-Item Policy Report Formats

- ✓ by Day
- by Month

by Day—Prints a grid with patron/item policy pairs down the left side and days of the week across the top. Textbook usage is printed in each cell. Use this report to determine which circulation groups are being used on which days of the week.

by Month—Prints a grid with patron/item policies down the left side and months of the year across the top. Textbook usage is printed in each cell. Use this report to determine which circulation groups are borrowing during which months of the year.

Usage by Patron-Item Policy Sort By Options

See page 272 for complete and detailed descriptions of Usage by Patron-Item Policy **Sort By** options.

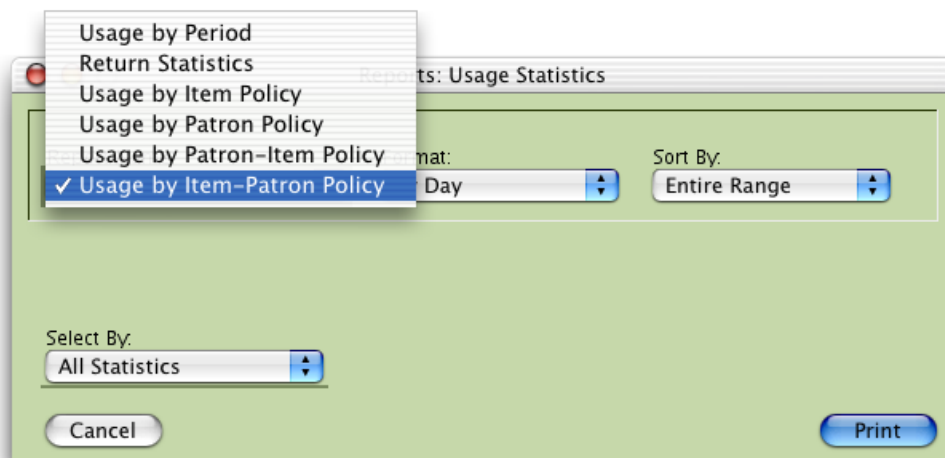
Usage by Patron-Item Policy Select By Options

See page 272 for complete and detailed descriptions of Usage by Patron-Item Policy **Select By** options.

- ✓ Usage by Period
- Return Statistics
- Usage by Item Policy
- Usage by Patron Policy
- Usage by Patron-Item Policy
- Usage by Item-Patron Policy

Usage by Item-Patron Policy

Allows the user to examine combinations of item and patron policies.



Usage by Item-Patron Policy Report Formats

- ✓ by Day
- by Month

by Day—Prints a grid with item/patron policies down the left side and days of the week across the top. Textbook usage is printed in each cell. Use this report to determine which item/patron groups are being used on which days of the week.

by Month—Prints a grid with item/patron policies down the left side and months of the year across the top. Textbook usage is printed in each cell. Use this report to determine which groups are being used during which months of the year.

Usage by Item-Patron Policy Sort By Options

See page 272 for complete and detailed descriptions of Usage by Item-Patron Policy **Sort By** options.

Usage by Item-Patron Policy Select By Options

See page 272 for complete and detailed descriptions of Usage by Item-Patron Policy **Select By** options.

✓ Entire Range
Month

Usage Statistics Sorting Options

Typically, the subtotals returned by the reports are what you might expect; however, if you want further monthly subtotals (providing the date range spans more than one month), select a the **Sort By** option **By Month**, or else select the **Entire Range** option.

Entire Range—Reports using the entire range of Textbook Tracker Usage Statistics data.

Month—Reports using specified months of Textbook Tracker Usage Statistics data.

✓ All Statistics
Date Range

Usage Statistics Selection Options

All Statistics—You can instruct Textbook Tracker to prepare reports using **All Statistics** or only statistics over a specified **Date Range** (see below).

Date Range—Enter a **Starting** and **Ending Date** range. If you enter ONLY a **Starting Date**, the ending date is assumed to be in the “far future.” If you enter ONLY an **Ending Date**, the **Starting Date** is assumed to be in the “far past.” If you don’t enter any date, the **Starting Date** is set for one year in the past. For example, you can enter the date December 1, 2003 as: “Dec 1, 2003” or “12/01/03”¹ or “12.1.03” or “12 1 03”. If the year is 2003, you can just enter “12/1”. If the current month is December, you can just enter “1”.

1. When you enter a two digit date, values between 0-30 are assumed to be 2000-2030 and values between 31-99 are assumed to be 1931-1999.

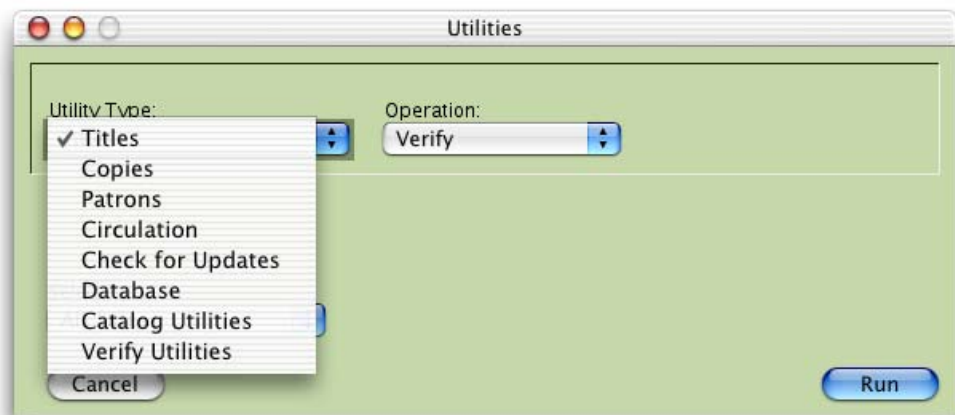
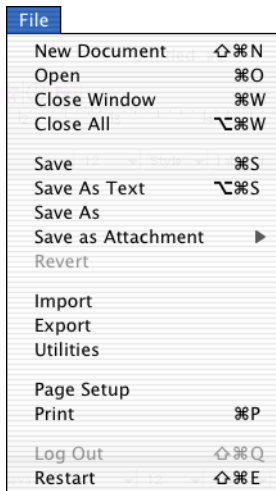
Title Utilities

Most of the circulation operations in Textbook Tracker are designed to modify individual pieces of data one entry at a time. Utilities can change large amounts of information in your Textbook Tracker database with a single command.

Utilities are used to modify records in your database and export data from Textbook Tracker (for use with other electronic systems) or between Textbook Tracker databases.

How to Initiate a Title Utility

From the **File** menu, select **Utilities**.



Use the following steps to run a title utility.

- Step 1. Select **Titles** from the **Utility Type** drop-down menu.
- Step 2. If the utility you've selected has more than one option, an **Operation** drop-down menu appears. Select an **Operation** from the drop-down menu. Some operations will require additional information. Fill in the specific information as required by the utility.
- Step 3. Some utilities will require **Sort By** options. Use the **Sort By** drop-down menu to select how the records are to be sorted by the utility.
- Step 4. Use the **Select By** drop-down menu to select which records are to be processed by the utility. You can make up to six selections with **And**, **Or**, and **And Not** (Boolean logic).
When you choose values in the selection drop-down menus, other fields may appear, asking for additional information.
- Step 5. Press the **OK** button. As Textbook Tracker performs the utility, a **Status** window appears. You can abort the utility by clicking **Cancel**. Note, this will only stop the utility in its tracks; any records modified before you stop the utility will remain modified.
- Step 6. When *some* utilities are processing, you may perform other tasks within Textbook Tracker. For example, you may issue items or prepare a report. Some utility operations execute at lower priorities than other Textbook Tracker processes. Thus, if you run a **Report**, the utility will rest while the report is processing.



NOTE:

User’s may perform tasks while some utilities are processing.

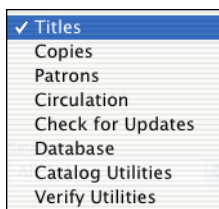
However, **UNDER NO CIRCUMSTANCES SHOULD YOU EVER DO ANYTHING** during the **Rebuild** utility.

If the utility status window is hidden behind other windows, select it from the **Windows** menu to bring it to the forefront.

- Step 7. When the utility is complete, the status window automatically closes and a “utility complete” entry is placed in the Circulation Log. Many utility functions create entries in the log so you can view which records have been modified.

W A R N I N G !

Before you use any **Utility**, you need to **Archive** your data. Thus, if you discover that you’ve performed an operation that has damaged your data, you can recover from a previous archive.



Title Utility Types

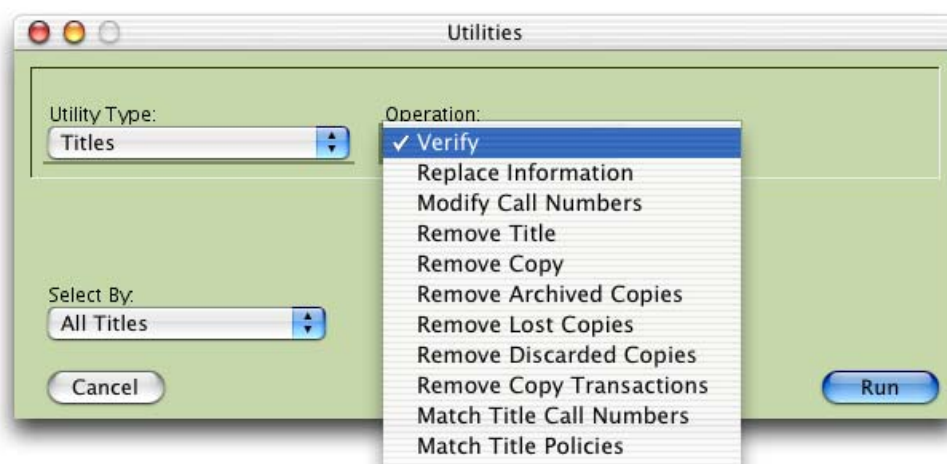
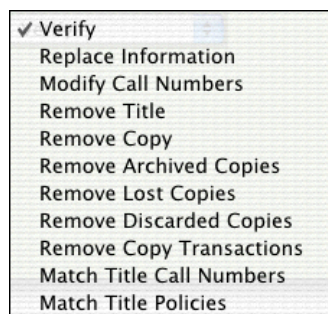
Item utilities are used to modify groups of items in your collection. These utilities let you easily and quickly add, modify, and remove information for large groups of items. For example, you can remove groups of items, replace copy locations for groups of items, and change call number prefixes for a group of items.

To make changes to a group of items, that group must have something in common for Textbook Tracker to select. For example, you can change the location for all items in a certain medium type.

Items utilities can be performed on many different groups of items. The **Select By** options available are the same as **Item Reports** (see “Textbook Title Reports Select By Options” on page 242).

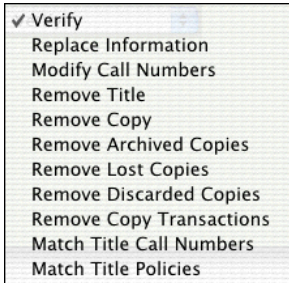
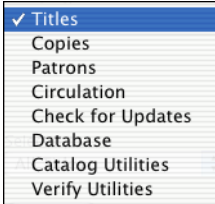
Titles: Verify

Use this utility to verify the internal status of item groups. This procedure reviews statistical information and the internal data relations of your items. If problems are found, they are automatically fixed. If you’ve had your data damaged due to power outages or other hardware failures, you should run this utility to repair any damage.



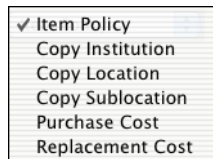
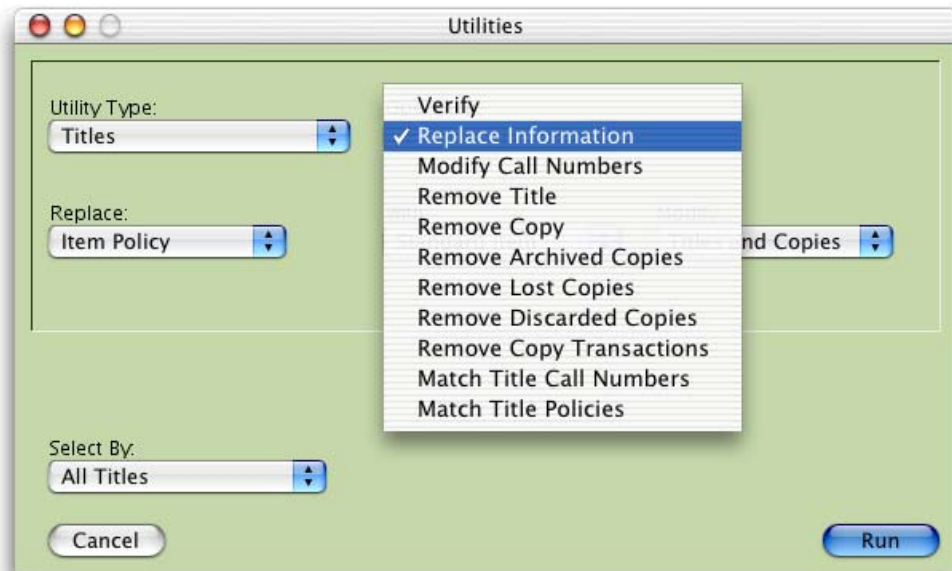
Verify Select By Options

The **Verify Select By** options are the same as the **Titles Reports Select By** options (for a complete listing, please see *Textbook Title Reports Select By Options*” on page 242).



Titles: Replace Information

Use this utility to change an existing value to a new value for a group of items.



Replace Information Replace Menu

Title Policy—Replaces the policy for selected copies. If you select only **Titles & Copies**, all copies for that title are updated. Use the drop-down menu to specify which policies are to be modified.

Copy Institution—Replaces the copy collection data with whatever you specify.

Copy Location—Replaces the copy location data with the information that you specify.

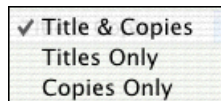
Copy Sublocation—Replaces the copy sublocation data with the information that you specify.

Purchase Cost—Replaces the copy purchase cost with the information that you specify.

Replacement Cost—Replaces the copy replacement cost with the information that you specify.

Replace Information With Menu

Use this menu to select the policy that you would like to replace to old one with.

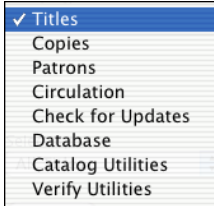


Replace Information Modify Menu

The **Modify** drop-down menu will only appear when you have item policy selected from the **Replace** drop-down menu. You can choose to replace the policy (selected from the **With** drop-down menu) on titles, copies, or both titles and copies.

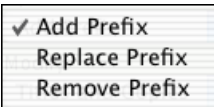
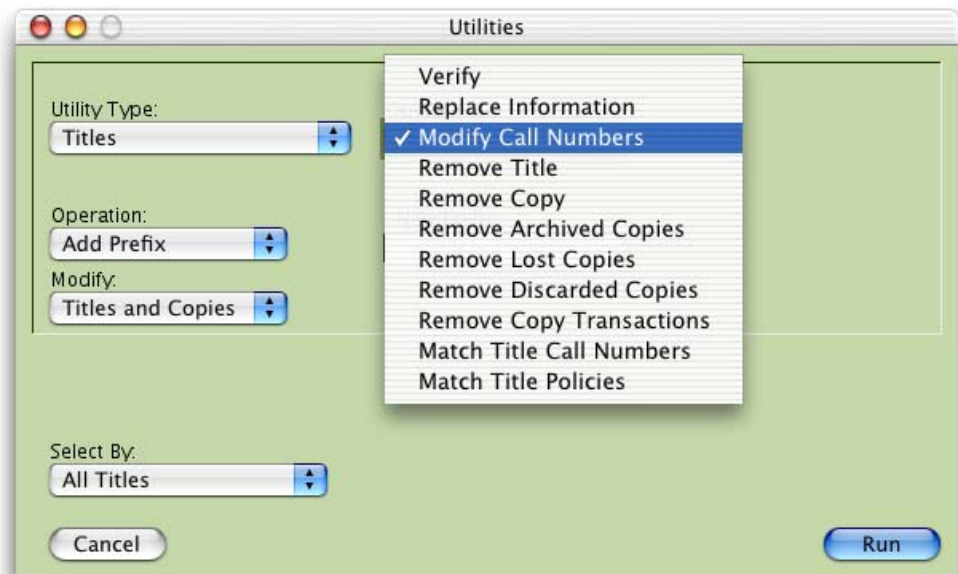
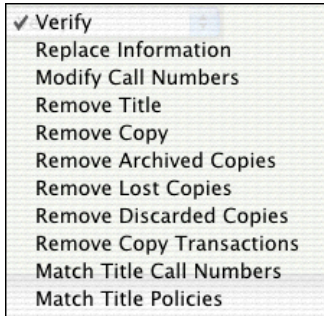
Replace Information Select By Options

The **Replace Information Select By** options are the same as the **Titles Reports Select By** options (*for a complete listing, please see Textbook Title Reports Select By Options" on page 242*).



Titles: Modify Call Numbers

Use this utility to modify call numbers for titles and/or copies. Only the records selected using the **Select By** drop-down menu are examined or modified.

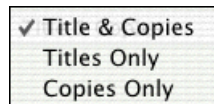


Modify Call Numbers Operation Menu

Add Prefix—Adds a specified prefix to selected items. Selection of this **Operation** opens the **New Prefix** data-entry field.

Replace Prefix—Replaces a specified prefix with a new value. Selection of this **Operation** opens the **Replace Prefix** and the **With** data-entry fields.

Remove Prefix—Removes a specified prefix in matching records. Selection of this **Operation** opens the **Remove Prefix** data-entry field.



Modify Call Numbers Modify Menu

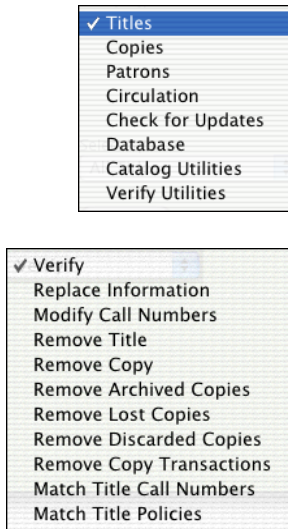
Titles & Copies—Modifies all titles and copies.

Titles Only—Modifies titles only.

Copies Only—Modifies copies only.

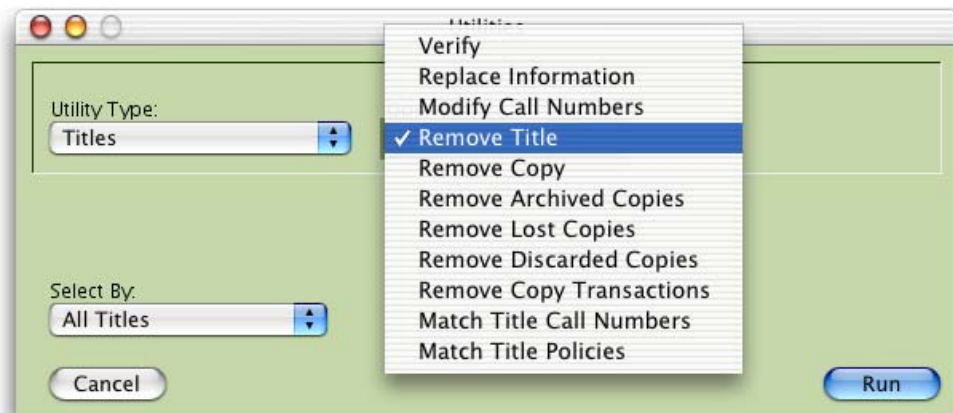
Modify Call Numbers Select By Options

The **Modify Call Numbers Select By** options are the same as the **Titles Reports Select By** options (*for a complete listing, please see Textbook Title Reports Select By Options* on page 242).



Titles: Remove Title

Use this utility to remove a group of titles. All the titles that you select will be removed from Textbook Tracker, along with any associated copies.



When a title is removed, all pending holds are removed; all reservations for any of the title's copies are also removed.

Before performing this utility, Textbook Tracker will ask that you select one of the following options:

Lost—This option will check out all of the title's copies to the **Lost** system patron and then remove the title from your database. Once the title has been removed, any copies that were previously checked out can now be tracked using the **Lost** system patron.

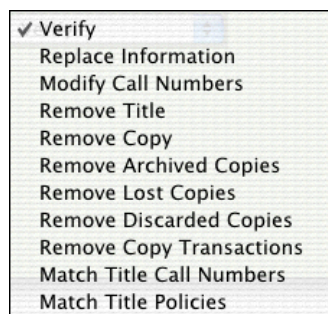
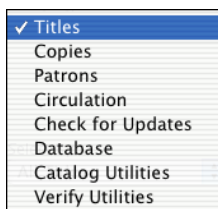
Ignore—Regardless if a title has copies that are currently checked out, this option will unceremoniously remove all of the copies (again, checked out or not) and then the title.

Keep—If a title has copies that are currently checked out, this option will not delete the title or the copies that are currently loaned. However, all copies that have a parent title and are *not* checked out *will* be removed.

Cancel—Quits the utility without making any changes.

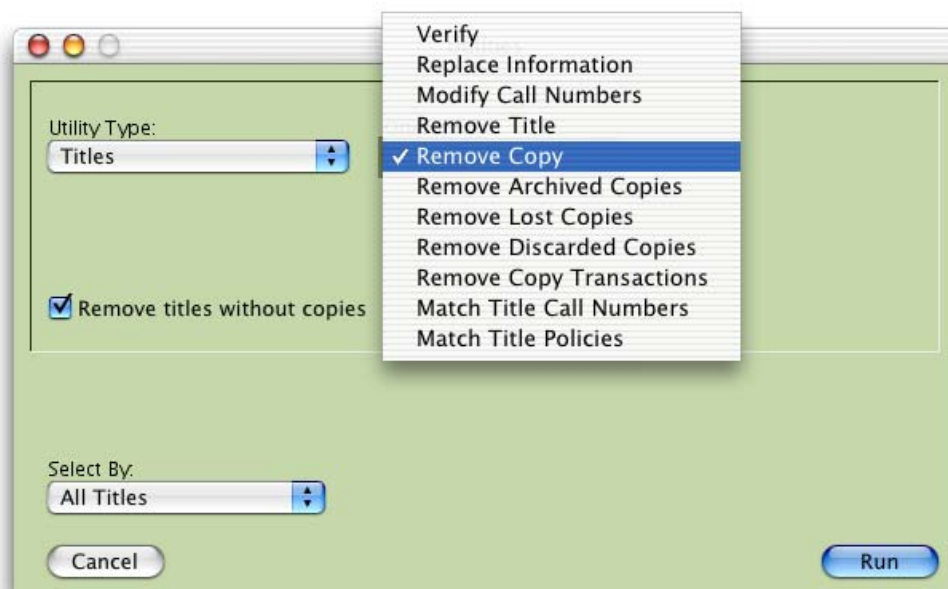
Remove Title Select By Options

The **Remove Title Select By** options are the same as the **Titles Reports Select By** options (*for a complete listing, please see Textbook Title Reports Select By Options* on page 242).



Titles: Remove Copy

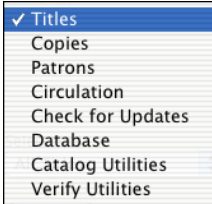
Use this utility to remove a group of item copies. All the selected copies are removed from Textbook Tracker. This utility does not remove copies that are checked out. When copies are removed, all reservations for the copy are also removed.



Remove titles without copies—If all the copies for a title are removed, the title will also be removed if the **Remove titles without copies** checkbox is marked.

Remove Copy Select By Options

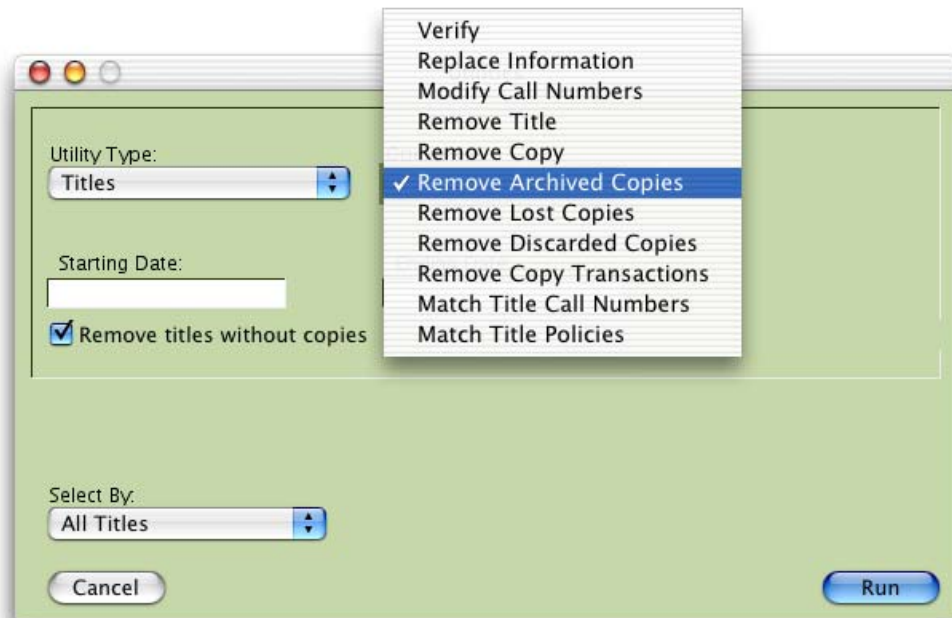
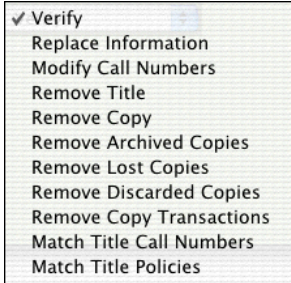
The **Remove Copy Select By** options are the same as the **Titles Reports Select By** options (*for a complete listing, please see Textbook Title Reports Select By Options* on page 242).



Titles: Remove Archived Copies

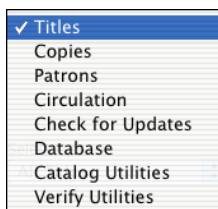
This utility removes all copies that had their status set to **archived** between the **Starting** and **Ending** dates specified. If you leave the **Starting Date** blank, Textbook Tracker uses "January 1, 1900." If you leave the **Ending Date** blank, Textbook Tracker uses "January 1, 2050." Thus, if you leave both dates blank, *all* archived copies will be removed.

The title record will also be removed if the **Remove titles without copies** checkbox is marked and there are no remaining copies for that title.



Remove Archived Copies Select By Options

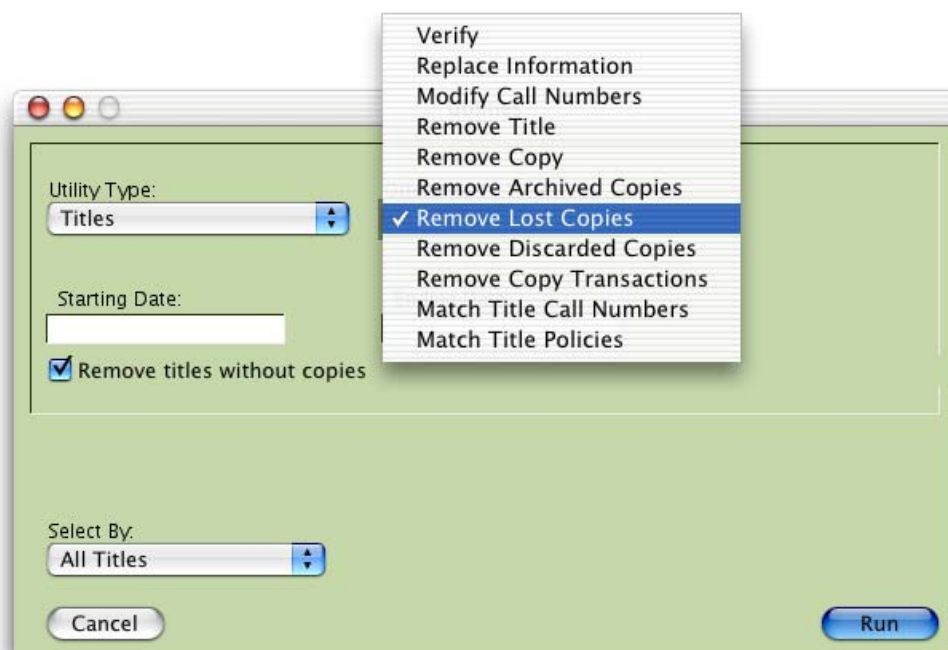
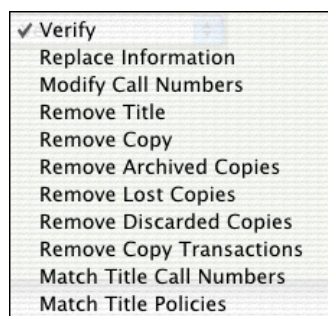
The **Remove Archived Copies Select By** options are the same as the **Titles Reports Select By** options (*for a complete listing, please see Textbook Title Reports Select By Options" on page 242*).



Titles: Remove Lost Copies

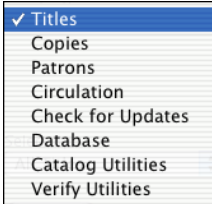
This utility removes all copies which had their status set to **lost** between the **Starting** and **Ending** dates specified. If you leave the **Starting Date** blank, Textbook Tracker uses "January 1, 1900." If you leave the **Ending Date** blank, Textbook Tracker uses "January 1, 2050." Thus, if you leave both dates blank, all lost copies are removed.

The title record will also be removed if the **Remove titles without copies** checkbox is marked and there are no remaining copies for that title.



Remove Lost Copies Select By Options

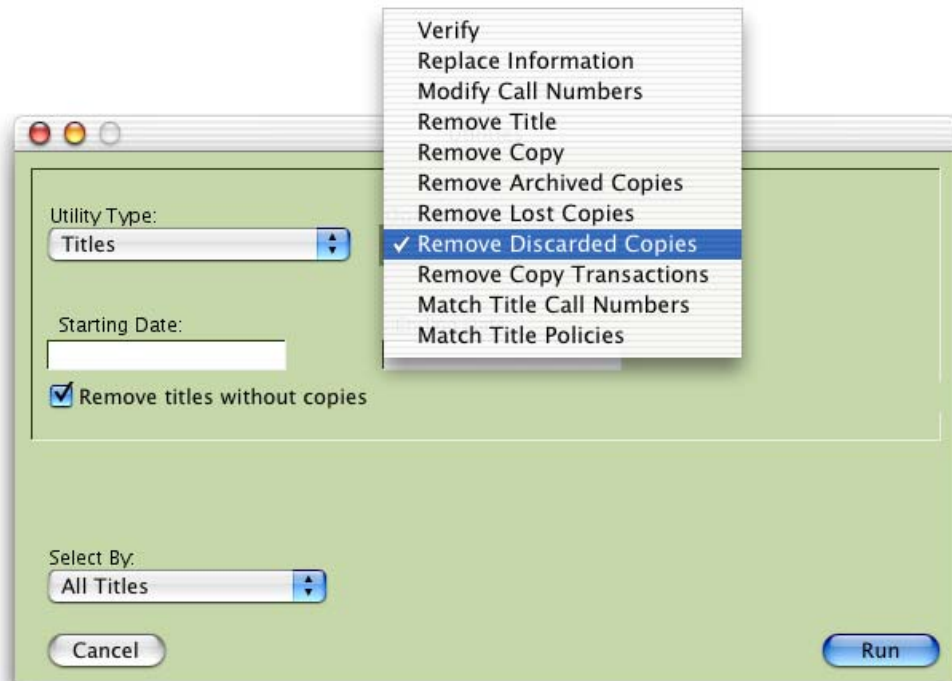
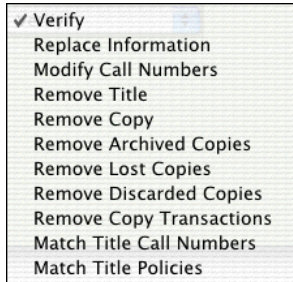
The **Remove Lost Copies Select By** options are the same as the **Titles Reports Select By** options (for a complete listing, please see *Textbook Title Reports Select By Options* on page 242).



Titles: Remove Discarded Copies

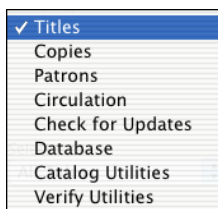
This utility removes all copies which had their status set to **discarded** between the **Starting** and **Ending** dates specified. If you leave the **Starting Date** blank, Textbook Tracker uses "January 1, 1900." If you leave the **Ending Date** blank, Textbook Tracker uses "January 1, 2050." Thus, if you leave both dates blank, all discarded copies are removed.

The title will also be removed if the **Remove titles without copies** checkbox is marked and there are no remaining copies for that title.



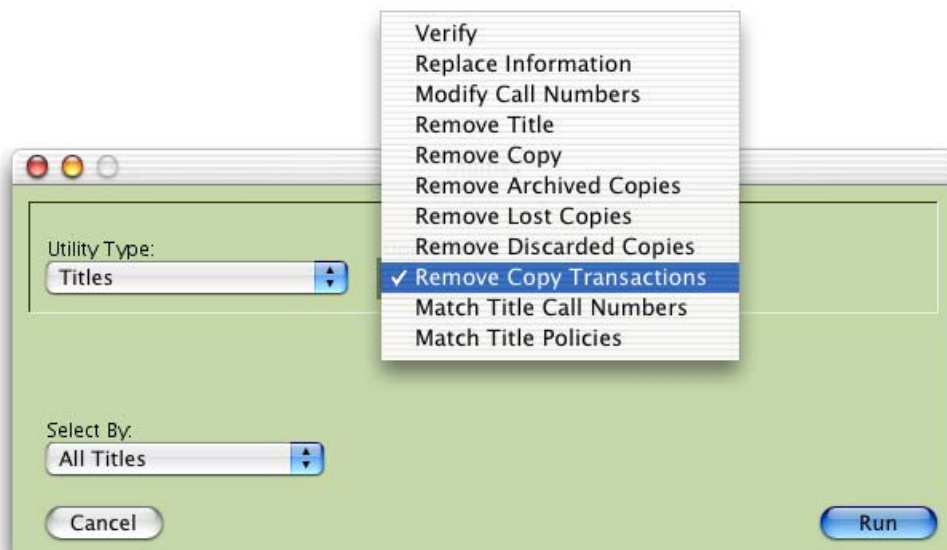
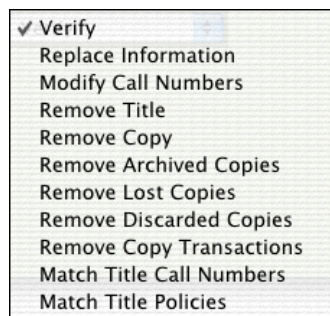
Remove Discarded Copies Select By Options

The **Remove Discarded Copies Select By** options are the same as the **Titles Reports Select By** options (for a complete listing, please see *Textbook Title Reports Select By Options* on page 242).



Titles: Remove Copy Transactions

This utility removes all the selected for specified copy transactions.

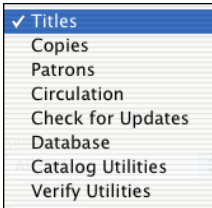


WARNING !

Do not run this utility unless you want to lose circulation status for the selected copies!

Remove Copy Transactions Select By Options

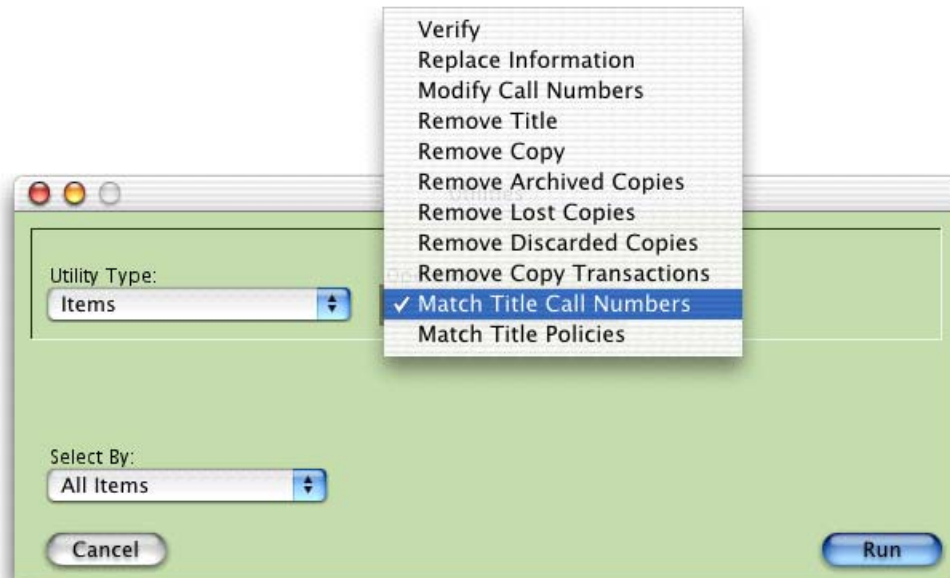
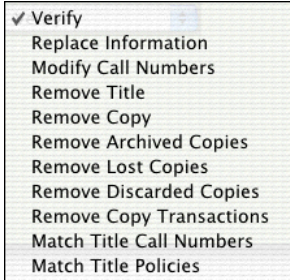
The **Remove Copy Transactions Select By** options are the same as the **Titles Reports Select By** options (for a complete listing, please see *Textbook Title Reports Select By Options* on page 242).



Titles: Match Title Call Numbers

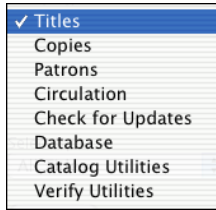
This utility is meant to make title information match copy information instead of allowing the title to be completely different than all of its copies.

If the title call number doesn't match any of its copy's call numbers, then this utility will change the title's call number to match the first copy's call number. If the title call number *already* matches one of its copy's call numbers, then nothing will be changed.



Match Title Call Numbers Select By Options

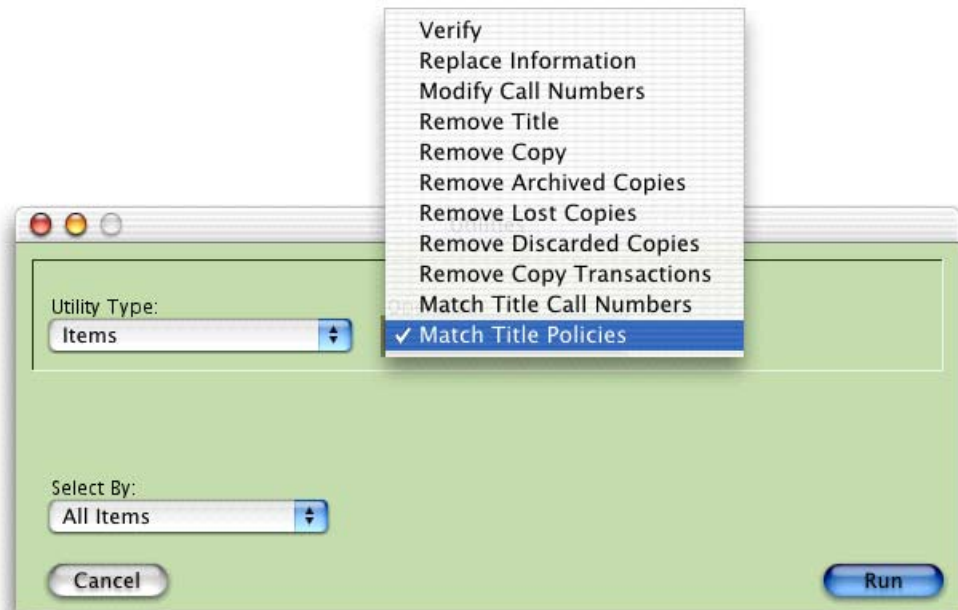
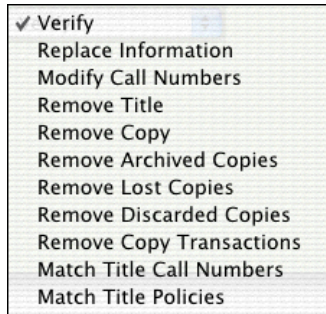
The **Match Title Call Numbers Select By** options are the same as the **Titles Reports Select By** options (*for a complete listing, please see Textbook Title Reports Select By Options" on page 242*).



Titles: Match Title Policies

This utility is meant to make title information match copy information instead of allowing the title to be completely different than all of its copies.

If the title policy doesn't match any of its copy's policies, then this utility will change the title's policy to match the first copy's policy. If the title's policy *already* matches one of its copy's policies, then nothing will be changed.



Match Title Copies Select By Options

The **Match Title Copies Select By** options are the same as the **Titles Reports Select By** options (for a complete listing, please see *Textbook Title Reports Select By Options* on page 242).

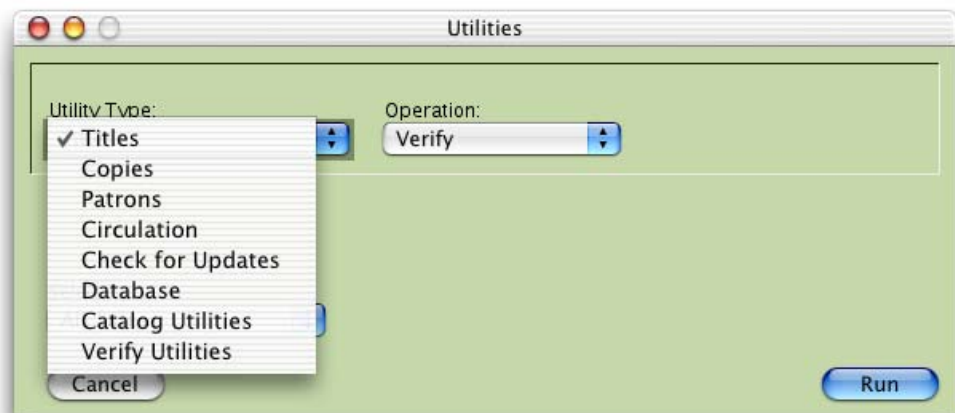
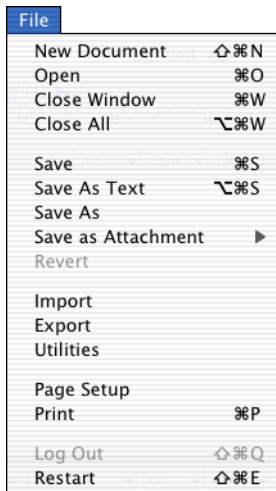
Copy Utilities

Most of the circulation operations in Textbook Tracker are designed to modify individual pieces of data one entry at a time. Utilities can change large amounts of information in your Textbook Tracker database with a single command.

Utilities are used to modify records in your database and export data from Textbook Tracker (for use with other electronic systems) or between Textbook Tracker databases.

How to Initiate a Copy Utility

From the **File** menu, select **Utilities**.



Use the following steps to run a copy utility.

- Step 1. Select **Copies** from the **Utility Type** drop-down menu.
- Step 2. If the utility you've selected has more than one option, an **Operation** drop-down menu appears. Select an **Operation** from the drop-down menu. Some operations will require additional information. Fill in the specific information as required by the utility.
- Step 3. Some utilities will require **Sort By** options. Use **the Sort By** drop-down menu to select how the records are to be sorted by the utility.
- Step 4. Use the **Select By** drop-down menu to select which records are to be processed by the utility. You can make up to six selections with **And**, **Or**, and **And Not** (Boolean logic).
When you choose values in the selection drop-down menus, other fields may appear, asking for additional information.
- Step 5. Press the **OK** button. As Textbook Tracker performs the utility, a **Status** window appears. You can abort the utility by clicking **Cancel**. Note, this will only stop the utility in its tracks; any records modified before you stop the utility will remain modified.
- Step 6. When *some* utilities are processing, you may perform other tasks within Textbook Tracker. For example, you may issue items or prepare a report. Some utility operations execute at lower priorities than other Textbook Tracker processes. Thus, if you run a **Report**, the utility will rest while the report is processing.

**NOTE:**

User's may perform tasks while some utilities are processing.

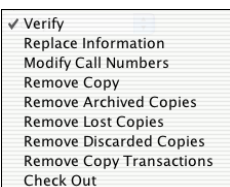
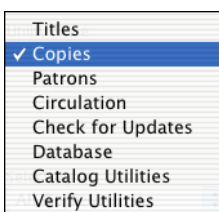
However, **UNDER NO CIRCUMSTANCES SHOULD YOU EVER DO ANYTHING** during the **Rebuild** utility.

If the utility status window is hidden behind other windows, select it from the **Windows** menu to bring it to the forefront.

- Step 7. When the utility is complete, the status window automatically closes and a "utility complete" entry is placed in the Circulation Log. Many utility functions create entries in the log so you can view which records have been modified.

W A R N I N G !

Before you use any **Utility**, you need to **Archive** your data. Thus, if you discover that you've performed an operation that has damaged your data, you can recover from a previous archive.



Copy Utility Types

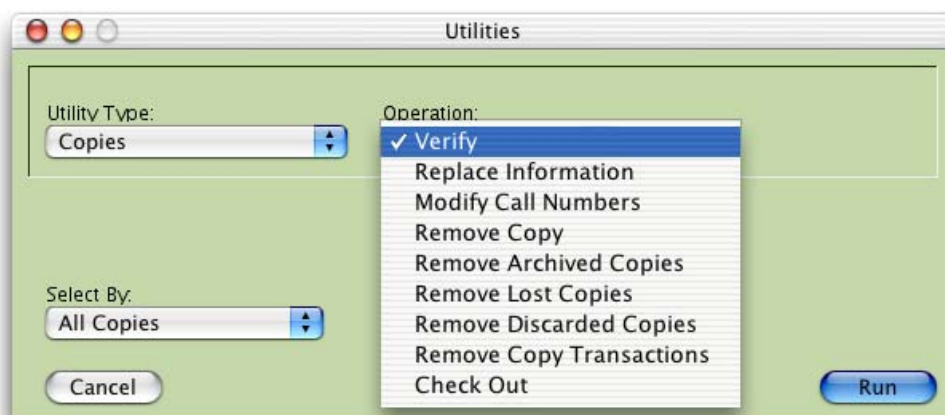
Copy utilities are used to modify groups of copies in your collection. These utilities let you easily and quickly add, modify, and remove information for large groups of copies. For example, you can remove groups of copies, replace copy locations for groups of copies, and change call number prefixes for a group of copies.

To make changes to a group of copies, that group must have something in common for Textbook Tracker to select. For example, you can change the location for all copies in a certain medium type.

Copy utilities can be performed on many different groups of copies. The **Select By** options available are the same as **Copy Reports** (see “Textbook Copies Select By Options” on page 250).

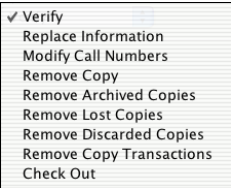
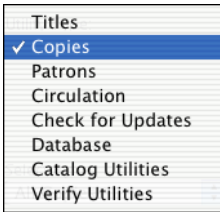
Copies: Verify

Use this utility to verify the internal status of copy groups. This procedure reviews statistical information and the internal data relations of your copies. If problems are found, they are automatically fixed. If you’ve had your data damaged due to power outages or other hardware failures, you should run this utility to repair any damage.



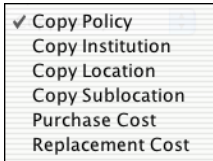
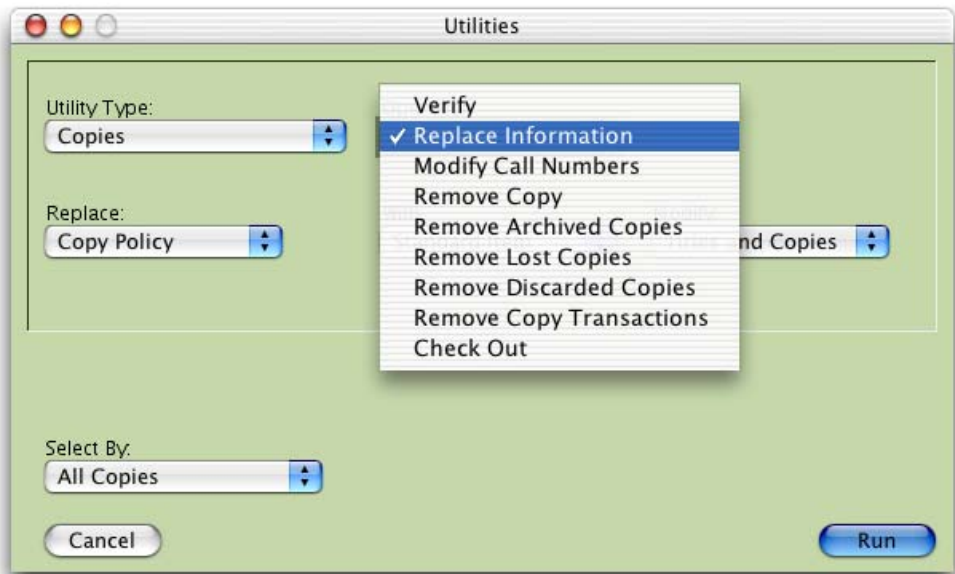
Verify Select By Options

The **Verify Select By** options are the same as the **Textbook Copies Reports Select By** options (see “Textbook Copies Select By Options” on page 250).



Copies: Replace Information

Use this utility to change an existing value to a new value for a group of copies.



Replace Information Replace Menu

Copy Policy—Replaces the policy for selected copies. If you select to **Modify** only **Titles & Copies**, all copies for that title are updated. Use the drop-down menu to specify which policies are to be modified.

Copy Institution—Replaces the copy collection data with whatever you specify.

Copy Location—Replaces the copy location data with whatever you specify.

Copy Sublocation—Replaces the copy sublocation data with the information that you specify.

Purchase Cost—Replaces the copy purchase cost with the information that you specify.

Replacement Cost—Replaces the copy replacement cost with the information that you specify.

Replace Information With Menu

Use this menu to select the policy that you would like to replace to old one with.

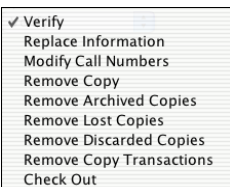
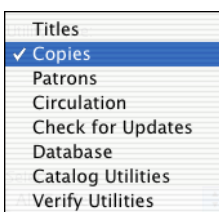


Replace Information Modify Menu

The **Modify** drop-down menu will only appear when you have item policy selected from the **Replace** drop-down menu. You can choose to replace the policy (selected from the **With** drop-down menu) on titles, copies, or both titles and copies.

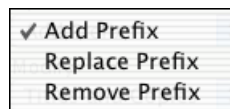
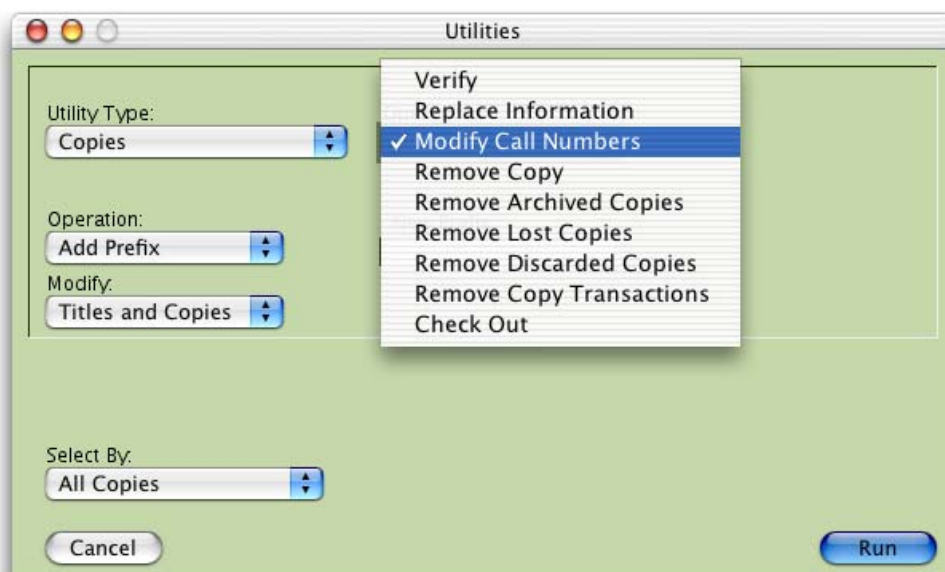
Replace Information Select By Options

The **Replace Information Select By** options are the same as the **Textbook Copies Reports Select By** options (see “Textbook Copies Select By Options” on page 250).



Copies: Modify Call Numbers

Use this utility to modify call numbers for copies. Only the records selected using the **Select By** drop-down menu are examined or modified.

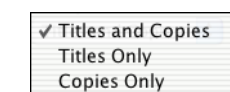


Modify Call Numbers Operation Menu

Add Prefix—Adds a specified prefix to selected copies. Selection of this **Operation** opens the **New Prefix** data-entry field.

Replace Prefix—Replaces a specified prefix with a new value. Selection of this **Operation** opens the **Replace Prefix** and the **With** data-entry fields.

Remove Prefix—Removes a specified prefix in matching records. Selection of this **Operation** opens the **Remove Prefix** data-entry field.



Modify Call Numbers Modify Menu

Use drop-down menus to specify which call numbers are to be modified.

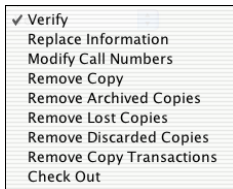
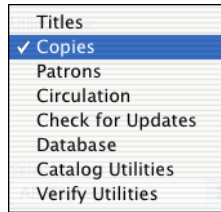
Title Copies—Modifies all titles and copies.

Titles Only—Modifies titles only.

Copies Only—Modifies copies only.

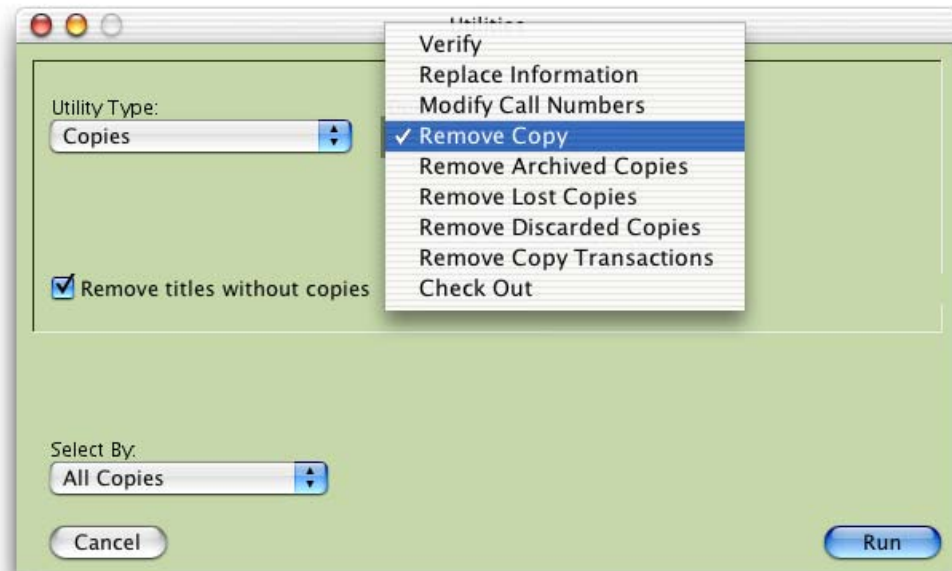
Modify Call Numbers Select By Options

The **Modify Call Numbers Select By** options are the same as the **Textbook Copies Reports Select By** options (see “Textbook Copies Select By Options” on page 250).



Copies: Remove Copy

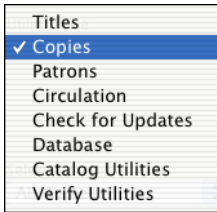
Use this utility to remove a group of copies. All the selected copies are removed from Textbook Tracker. This utility does not remove copies that are checked out. When copies are removed, all reservations for the copy are also removed.



Remove titles without copies—If all the copies for a title are removed, the title will also be removed if the **Remove titles without copies** checkbox is marked.

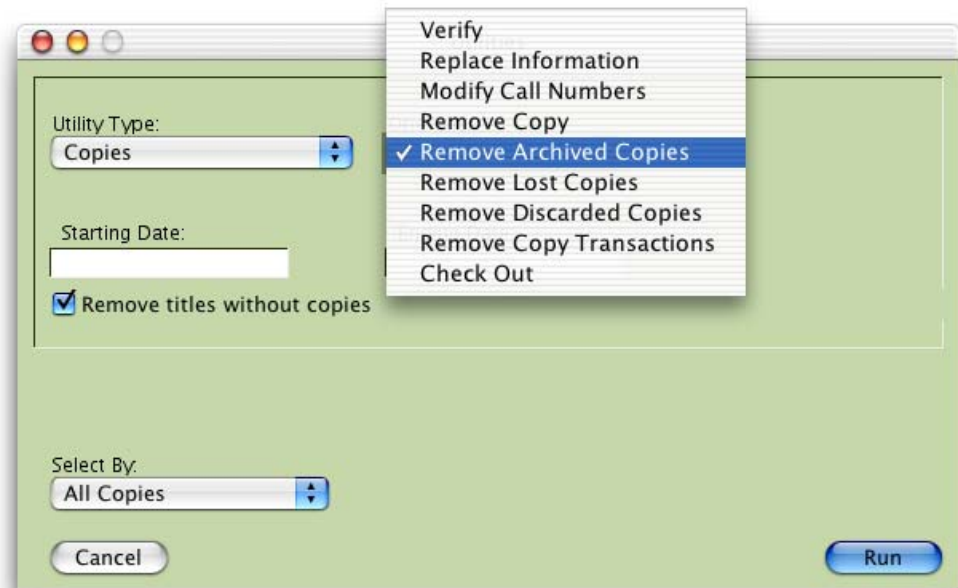
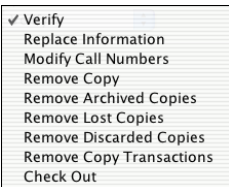
Remove Copy Select By Options

The **Remove Copy Select By** options are the same as the **Textbook Copies Reports Select By** options (see *"Textbook Copies Select By Options"* on page 250).



Copies: Remove Archived Copies

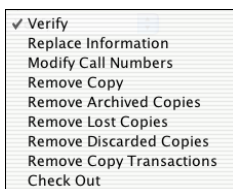
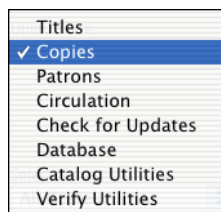
This utility removes all copies that had their status set to **archived** between the **Starting** and **Ending** dates specified. If you leave the **Starting Date** blank, Textbook Tracker uses "January 1, 1900." If you leave the **Ending Date** blank, Textbook Tracker uses "January 1, 2050." Thus, if you leave both dates blank, *all* archived copies will be removed.



The title record will also be removed if the **Remove titles without copies** checkbox is marked and there are no remaining copies for that title.

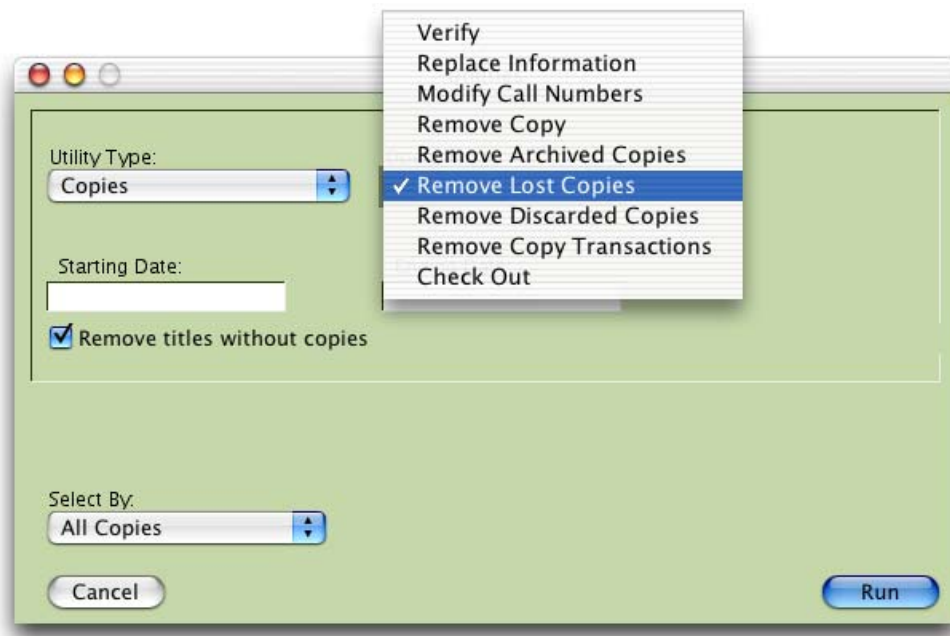
Remove Archived Copies Select By Options

The **Remove Archived Copies Select By** options are the same as the **Textbook Copies Reports Select By** options *please see Textbook Copies Select By Options" on page 250).*



Copies: Remove Lost Copies

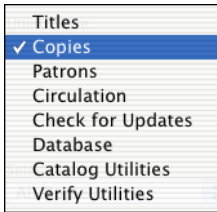
This utility removes all copies which had their status set to **lost** between the **Starting** and **Ending** dates specified. If you leave the **Starting Date** blank, Textbook Tracker uses "January 1, 1900." If you leave the **Ending Date** blank, Textbook Tracker uses "January 1, 2050." Thus, if you leave both dates blank, all lost copies are removed.



The title record will also be removed if the **Remove titles without copies** checkbox is marked and there are no remaining copies for that title.

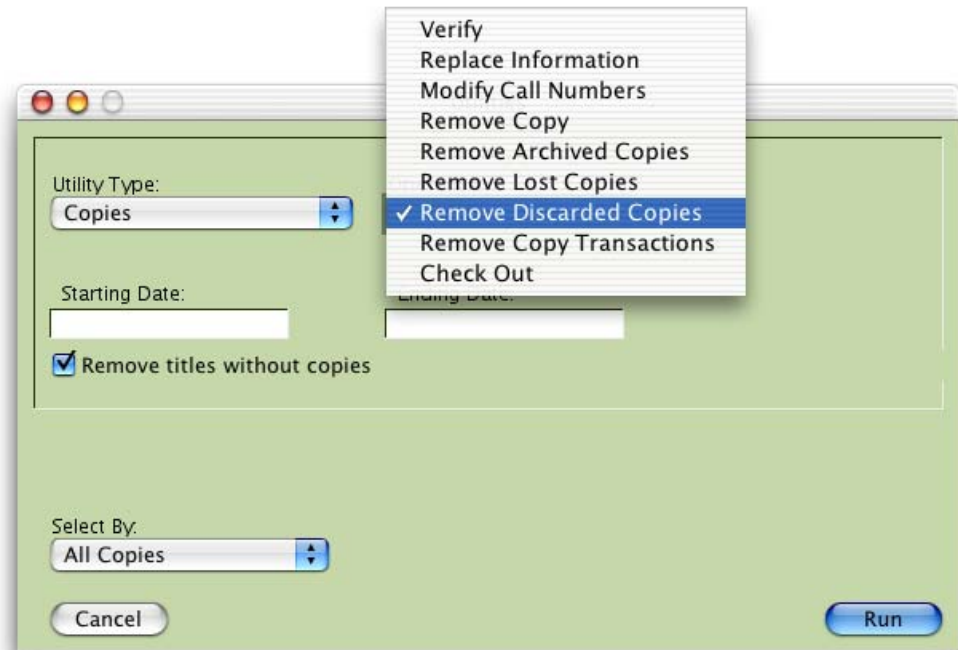
Remove Lost Copies Select By Options

The **Remove Lost Copies Select By** options are the same as the Textbook **Copies Reports Select By** options (see "Textbook Copies Select By Options" on page 250).



Copies: Remove Discarded Copies

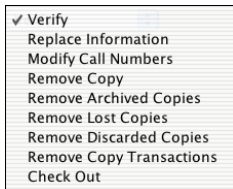
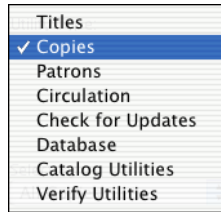
This utility removes all copies which had their status set to **discarded** between the **Starting** and **Ending** dates specified. If you leave the **Starting Date** blank, Textbook Tracker uses "January 1, 1900." If you leave the **Ending Date** blank, Textbook Tracker uses "January 1, 2050." Thus, if you leave both dates blank, all discarded copies are removed.



The title will also be removed if the **Remove titles without copies** checkbox is marked and there are no remaining copies for that title.

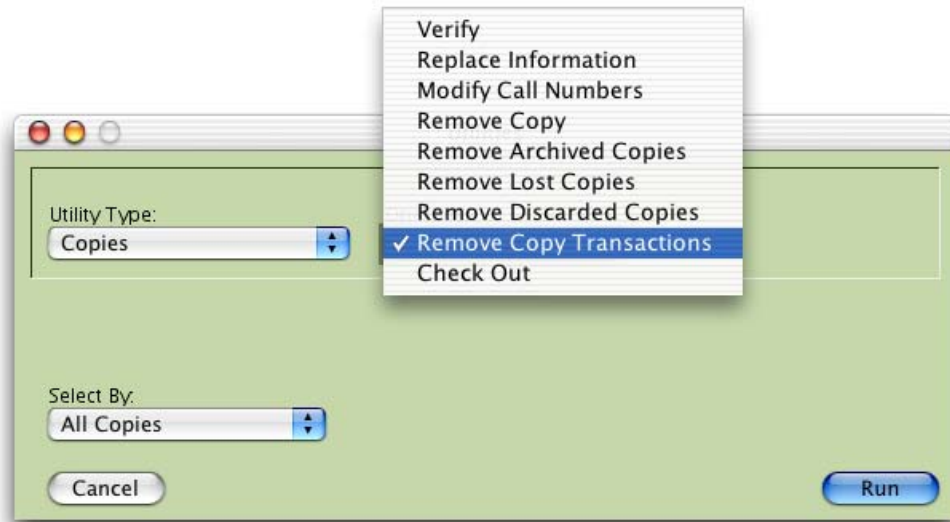
Remove Discarded Copies Select By Options

The **Remove Discarded Copies Select By** options are the same as the **Textbook Copies Reports Select By** options (see "Textbook Copies Select By Options" on page 250).



Copies: Remove Copy Transactions

This utility removes all the selected for specified copy transactions.

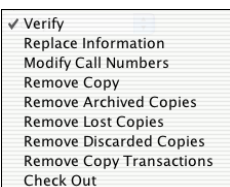
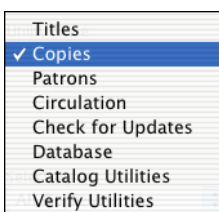


W A R N I N G !

Do not run this utility unless you want to lose circulation status for the selected copies!

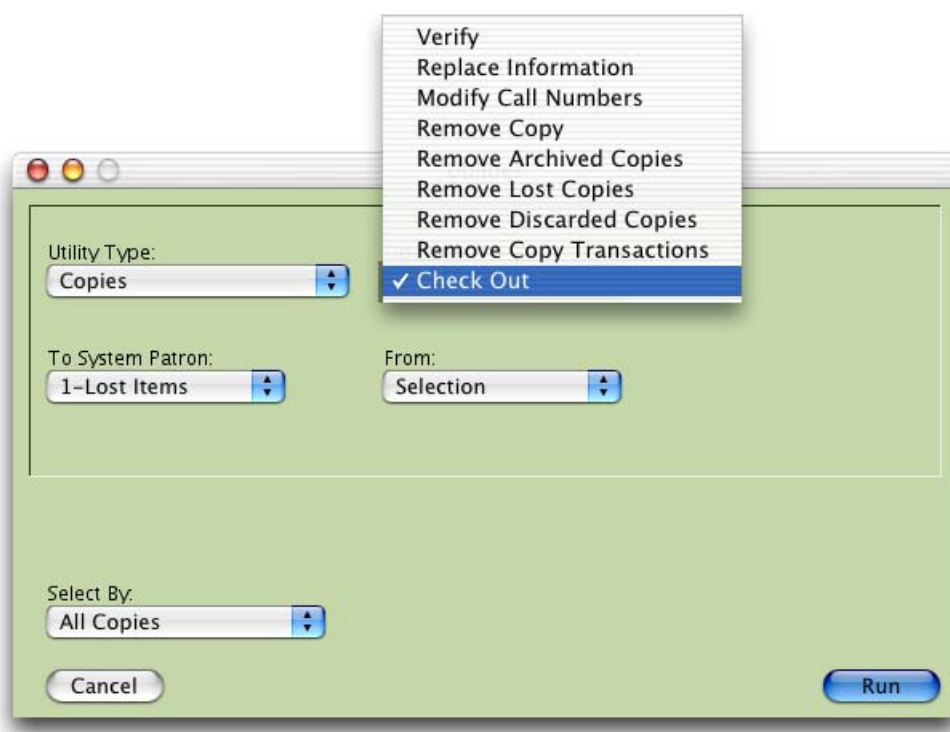
Remove Copy Transactions Select By Options

The **Remove Copy Transactions Select By** options are the same as the **Textbook Copies Reports Select By** options (see *“Textbook Copies Select By Options”* on page 250).



Copies: Check Out

This utility will run a batch process for checking out to special system patrons. For more information on special patrons, please review page 179.



To System Patron

Using this drop-down menu, you may choose which system patron to check out items en masse. You may choose from the **Lost Items** patron, **Discarded Items** patron, **Institution Use Items** patron, **On Repair Items** patron, **On Order Items** patron, or the **Archived Items** patron (*read more about system patrons on page 179*).

From

Using this drop-down menu, you may choose the patrons or items you would like to transfer items from. You may choose from **Selection** (which allows you to access the **Select By** options described below), **Lost Items** patron, **Discarded Items** patron, **Institution Use Items** patron, **On Repair Items** patron, **On Order Items** patron, or the **Archived Items** patron (*read more about system patrons on page 179*).

Remove Copy Transactions Select By Options

The **Remove Copy Transactions Select By** options are the same as the **Textbook Copies Reports Select By** options (*see "Textbook Copies Select By Options" on page 250*).

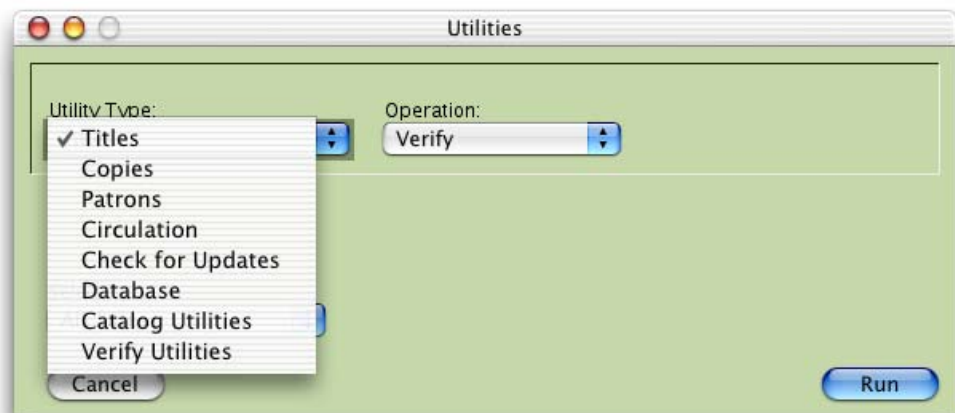
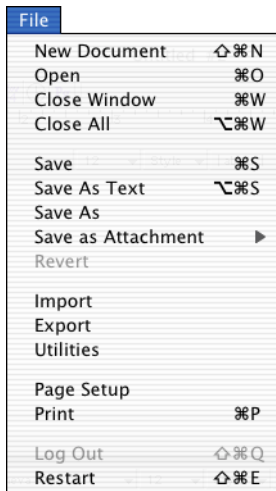
Patron Utilities

Most of the circulation operations in Textbook Tracker are designed to modify individual pieces of data one entry at a time. Utilities can change large amounts of information in your Textbook Tracker database with a single command.

Utilities are used to modify records in your database and export data from Textbook Tracker (for use with other electronic systems) or between Textbook Tracker databases.

How to Initiate a Patron Utility

From the **File** menu, select **Utilities**.



Use the following steps to run a patron utility.

- Step 1. Select **Patrons** from the **Utility Type** drop-down menu.
- Step 2. If the utility you've selected has more than one option, an **Operation** drop-down menu appears. Select an **Operation** from the drop-down menu. Some operations will require additional information. Fill in the specific information as required by the utility.
- Step 3. Some utilities will require **Sort By** options. Use **the Sort By** drop-down menu to select how the records are to be sorted by the utility.
- Step 4. Use the **Select By** drop-down menu to select which records are to be processed by the utility. You can make up to six selections with **And**, **Or**, and **And Not** (Boolean logic).
When you choose values in the selection drop-down menus, other fields may appear, asking for additional information.
- Step 5. Press the **OK** button. As Textbook Tracker performs the utility, a **Status** window appears. You can abort the utility by clicking **Cancel**. Note, this will only stop the utility in its tracks; any records modified before you stop the utility will remain modified.
- Step 6. When *some* utilities are processing, you may perform other tasks within Textbook Tracker. For example, you may issue items or prepare a report. Some utility operations execute at lower priorities than other Textbook Tracker processes. Thus, if you run a **Report**, the utility will rest while the report is processing.



NOTE:

User's may perform tasks while some utilities are processing.

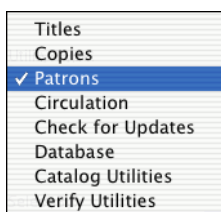
However, **UNDER NO CIRCUMSTANCES SHOULD YOU EVER DO ANYTHING** during the **Rebuild** utility.

If the utility status window is hidden behind other windows, select it from the **Windows** menu to bring it to the forefront.

- Step 7. When the utility is complete, the status window automatically closes and a "utility complete" entry is placed in the Circulation Log. Many utility functions create entries in the log so you can view which records have been modified.

W A R N I N G !

Before you use any **Utility**, you need to **Archive** your data. Thus, if you discover that you've performed an operation that has damaged your data, you can recover from a previous archive.

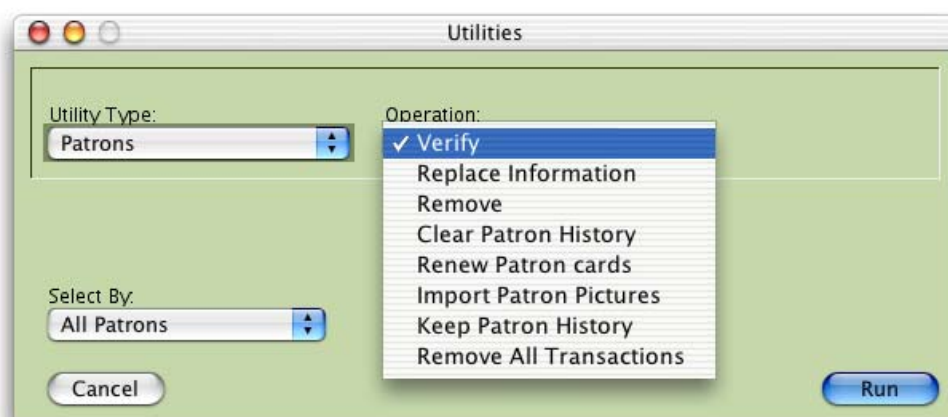


Patron Utility Types

Use Textbook Tracker utilities to change or remove groups of patrons. For example, there are utilities to change patron policies and update expiration dates. Patrons may be selected from the same criteria as **Patron Reports** (see “Patron Report Select By Options” on page 235).

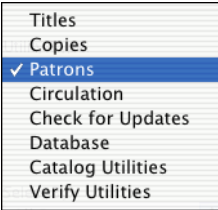
Patrons: Verify

Use this utility to verify and review the data and status of a group of patrons. This procedure reviews all the circulation information and statistics for the patrons selected and ensures that it is accurate. This procedure also examines the graduation year for each patron and adjusts the grade to match.



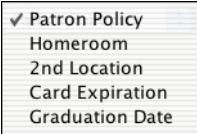
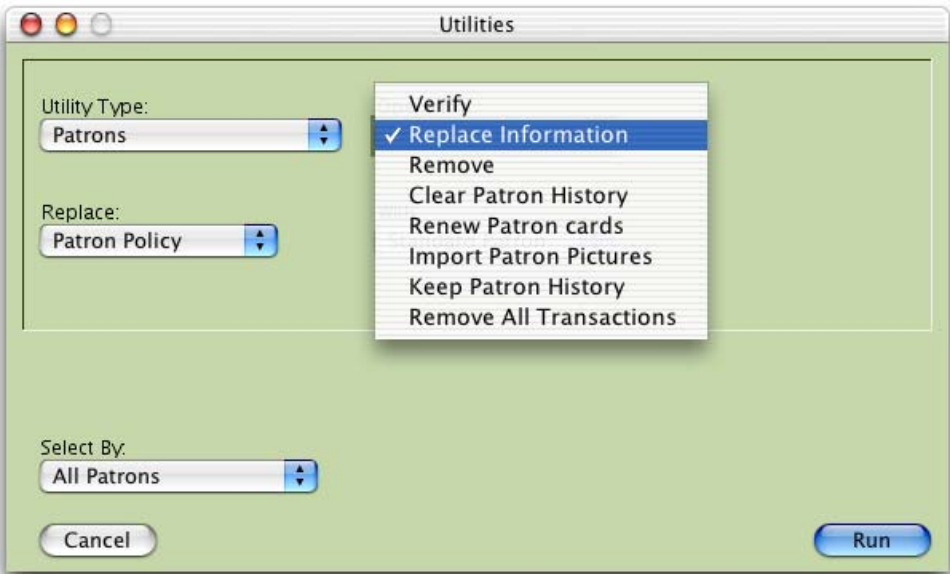
Verify Select By Options

The **Verify Select By** options are the same as the **Patron Reports Select By** options (for a complete listing, please see Patron Report Select By Options” on page 235).



Patrons: Replace Information

Use this utility to change existing values to new values for a group of patrons.



Replace Information Replace Menu

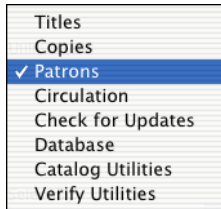
- Patron Policy**—Replaces policies for selected patrons.
- Homeroom**—Replaces the location field for selected patrons. In schools, this field is typically called the **Homeroom**.
- 2nd Location**—Replaces the sublocation field for selected patrons.
- Card Expiration**—Replaces the card expiration date with a specified date.
- Graduation Date**—Replaces the graduation date with a specified date.

Replace Information With Menu

Use this menu to select the policy that you would like to replace to old one with.

Replace Information Select By Options

The **Replace Information Select By** options are the same as the **Patron Reports Select By** options (*for a complete listing, please see Patron Report Select By Options” on page 235*).

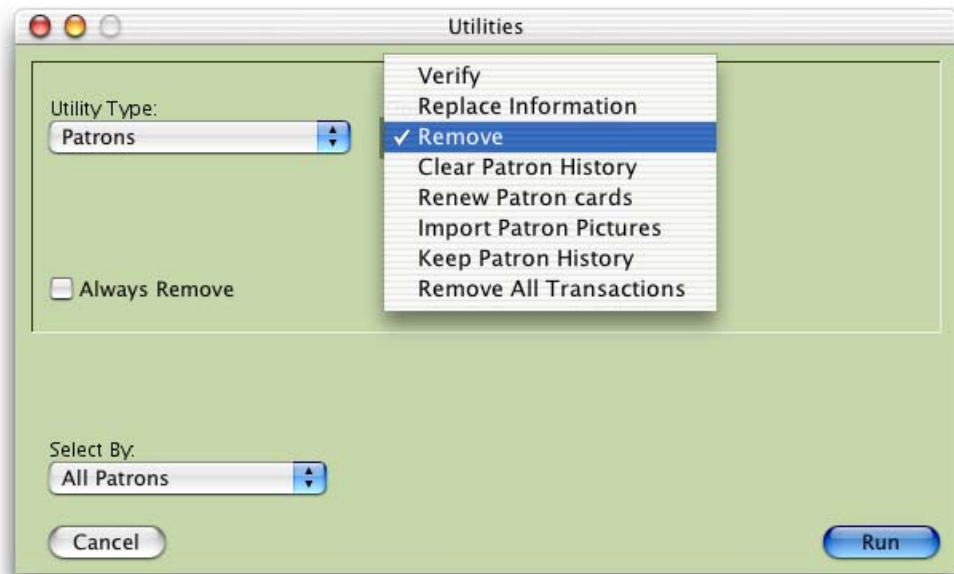
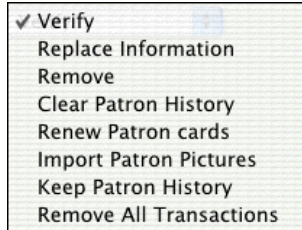


Patrons: Remove Patron

Use this utility to remove a group of patrons. Use the **Select By** drop-down menu to select the patrons you want to remove. This utility does not remove patrons who have items checked out or have a current balance due to the school unless you have selected the **Remove Patrons with Checkouts, Fines, Fees** checkbox.

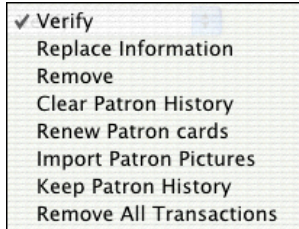
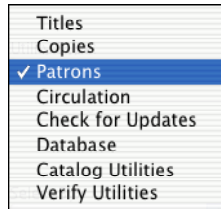
Items checked out to patrons that are going to be removed are marked as **Lost** and any pending fines or charges are forgiven—the patron is then removed.

When a patron is removed, all their holds and reservations are also removed. If there are any **Patron History** records, all but **Payment History** is removed.



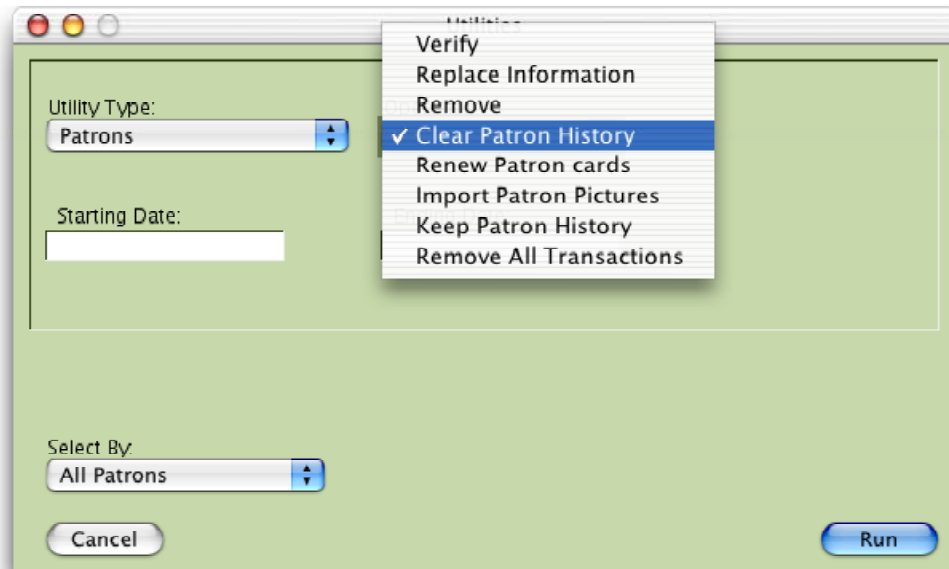
Remove Patron Select By Options

The **Remove Select By** options are the same as the **Patron Reports Select By** options (*for a complete listing, please see Patron Report Select By Options* on page 235).



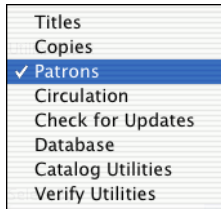
Patrons: Clear Patron History

This utility removes all **Patron History Records** that were created between the **Starting** and **Ending** dates specified. If you leave the **Starting Date** blank, Textbook Tracker uses "January 1, 1900." If you leave the **Ending Date** blank, Textbook Tracker uses "January 1, 2050." Thus, if you leave both dates blank, all lost copies are removed.



Clear Patron History Select By Options

The **Clear Patron History Select By** options are the same as the **Patron Reports Select By** options (*for a complete listing, please see Patron Report Select By Options" on page 235*).



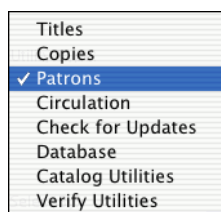
Patrons: Renew Patron Cards

Renews any patrons whose cards have expired or will expire in the next two weeks. Card is renewed for the period specified in the patron policy.



Renew Patron Cards Select By Options

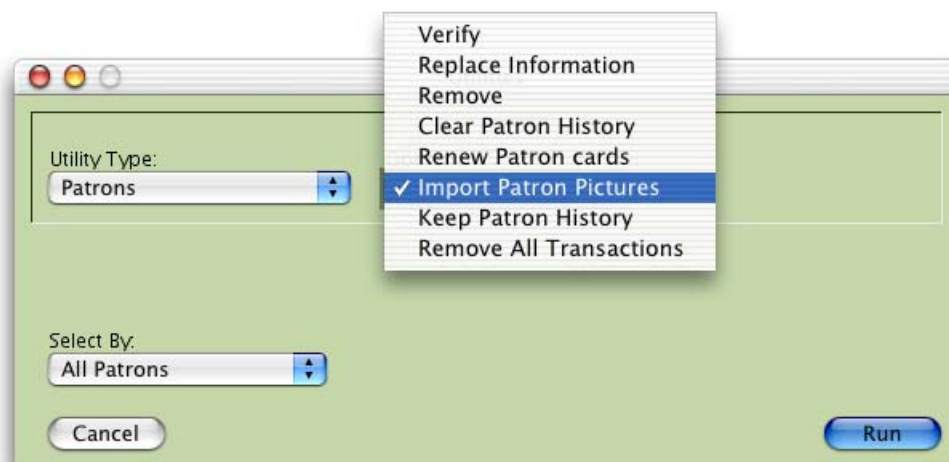
The **Renew Patron Cards Select By** options are the same as the **Patron Reports Select By** options (*for a complete listing, please see Patron Report Select By Options" on page 235*).



Patrons: Import Patron Pictures

Use this utility to import patron pictures into Textbook Tracker. Running this utility opens up a standard operating system explorer window. Guide Textbook Tracker to the directory folder, CD-ROM, or storage media device containing your patron pictures. Textbook Tracker will attempt to match your pictures to your patrons depending on the image filenames.

For example, let's say that you have a student named John Doe whose barcode in Textbook Tracker is 1080 and you would like to import a "jpeg" picture of him. His picture file must be named "1080.jpg" so that Textbook Tracker can match it to John's barcode. If all your patron image files were created using patron barcode numbers (e.g. "1080.jpg"), then Textbook Tracker will individually import each picture into your patron data, accessible through **Patron Management**.

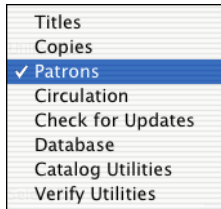


The **Import Patron Pictures** utility will first attempt to match the filename by **Barcode**, then **Govt ID**, and finally **Community ID** (see page 134 for more information about *Govt ID* and *Community ID*). If Textbook Tracker is unable to match your filename to a patron using the above criteria, the picture will be ignored and reported in the **Transaction log**.

You can import most standard image files in Textbook Tracker (i.e. **GIF, JPEG, PICT**).

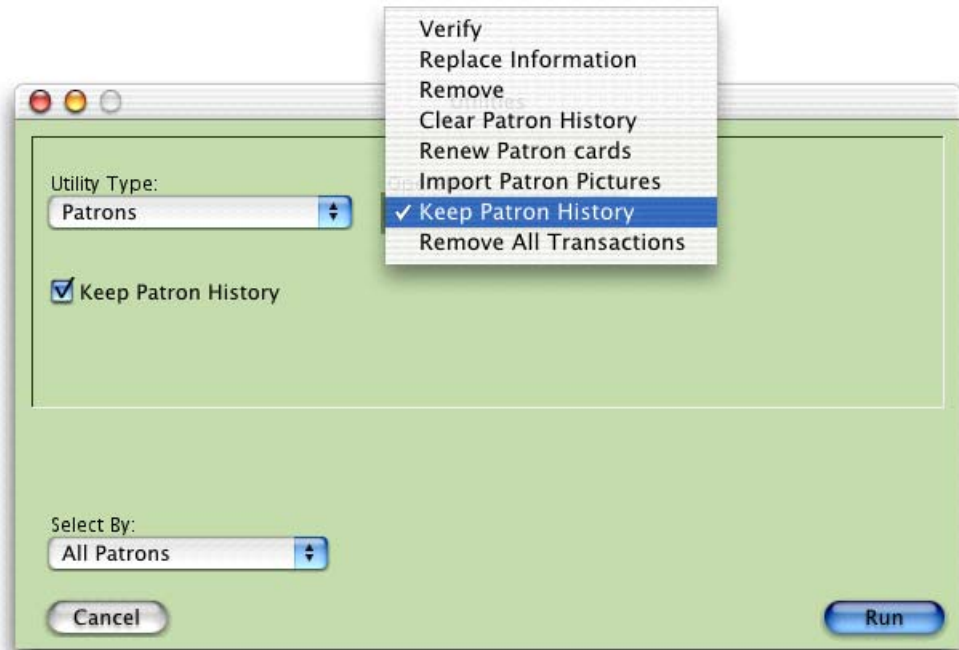
Import Patron Pictures Select By Options

The **Import Patron Pictures Select By** options are the same as the **Patron Reports Select By** options (see "Patron Report Select By Options" on page 235)



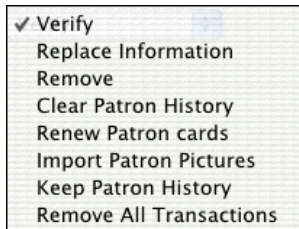
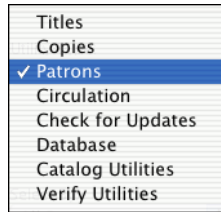
Patrons: Keep Patron History

Sets the **Keep Patron History** option for each selected patron to match the status of the **Keep Patron History** checkbox specified in the **Patron Management Statistics** tab (see “*Show History*” on page 130).



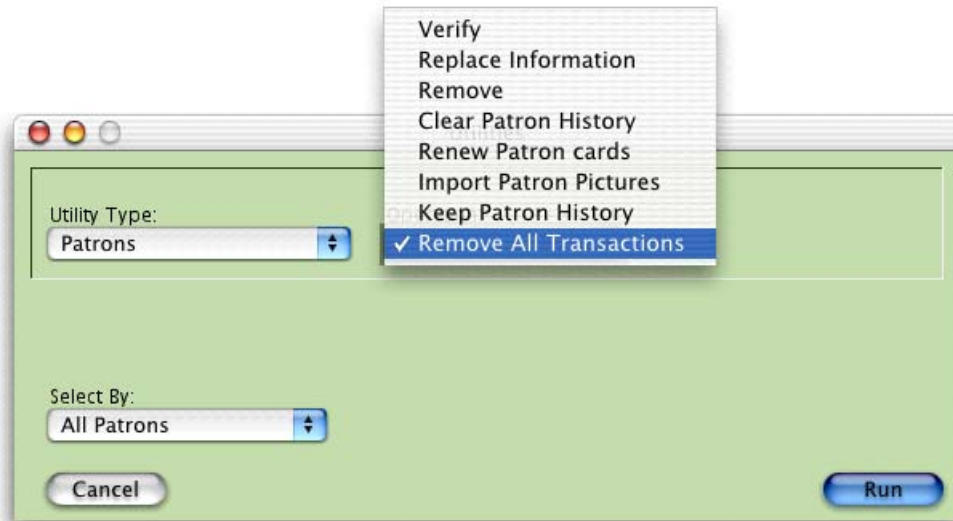
Keep Patron History Select By Options

The **Clear Patron History Select By** options are the same as the **Patron Reports Select By** options (for a complete listing, please see *Patron Report Select By Options* on page 235).



Patrons: Remove All Transactions

This utility removes all transactions for the specified patrons.



W A R N I N G !

Do not run this utility unless you want to lose circulation status for the selected patrons!

Remove All Transactions Select By Options

The **Remove All Transactions Select By** options are the same as the **Patron Reports Select By** options (*for a complete listing, please see Patron Report Select By Options" on page 235*).

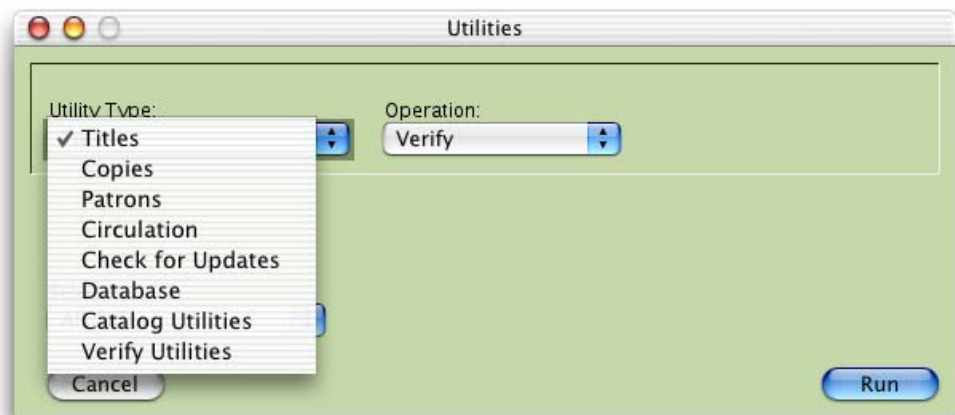
Other Utilities

Most of the circulation operations in Textbook Tracker are designed to modify individual pieces of data one entry at a time. Utilities can change large amounts of information in your Textbook Tracker database with a single command.

Utilities are used to modify records in your database and export data from Textbook Tracker (for use with other electronic systems) or between Textbook Tracker databases.

How to Initiate a Utility

From the **File** menu, select **Utilities**.



Use the following steps to run a utility.

- Step 1. Select **Circulation, Check for Updates, Database, Catalog Utilities, or Verify Utilities** from the **Utility Type** drop-down menu.
- Step 2. If the utility you've selected has more than one option, an **Operation** drop-down menu appears. Select an **Operation** from the drop-down menu. Some operations will require additional information. Fill in the specific information as required by the utility.
- Step 3. Some utilities will require **Sort By** options. Use **the Sort By** drop-down menu to select how the records are to be sorted by the utility.
- Step 4. Use the **Select By** drop-down menu to select which records are to be processed by the utility. You can make up to six selections with **And, Or, and And Not** (Boolean logic).
When you choose values in the selection drop-down menus, other fields may appear, asking for additional information.
- Step 5. Press the **OK** button. As Textbook Tracker performs the utility, a **Status** window appears. You can abort the utility by clicking **Cancel**. Note, this will only stop the utility in its tracks; any records modified before you stop the utility will remain modified.
- Step 6. When *some* utilities are processing, you may perform other tasks within Textbook Tracker. For example, you may issue items or prepare a report. Some utility operations execute at lower priorities than other Textbook



NOTE:

User’s may perform tasks while some utilities are processing.

However, **UNDER NO CIRCUMSTANCES SHOULD YOU EVER DO ANYTHING** during the **Rebuild** utility.

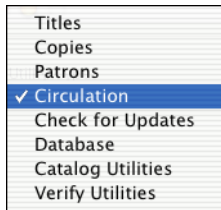
Tracker processes. Thus, if you run a **Report**, the utility will rest while the report is processing.

If the utility status window is hidden behind other windows, select it from the **Windows** menu to bring it to the forefront.

- Step 7. When the utility is complete, the status window automatically closes and a “utility complete” entry is placed in the Circulation Log. Many utility functions create entries in the log so you can view which records have been modified.

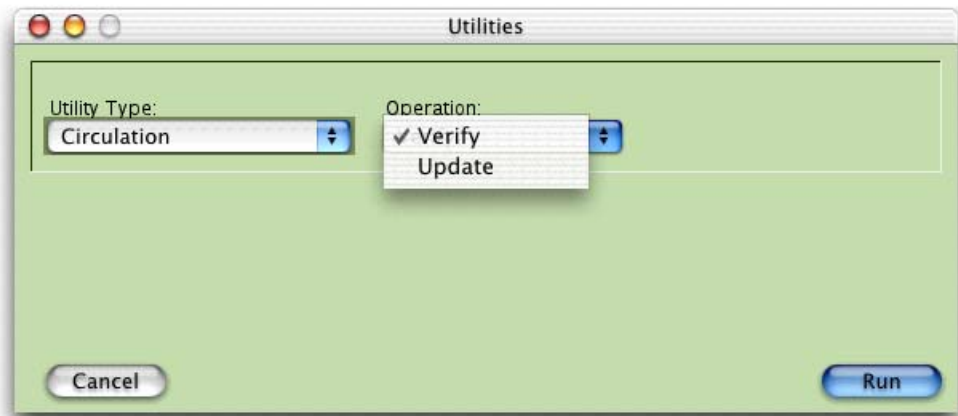
W A R N I N G !

Before you use any **Utility**, you need to **Archive** your data. Thus, if you discover that you’ve performed an operation that has damaged your data, you can recover from a previous archive.



Circulation

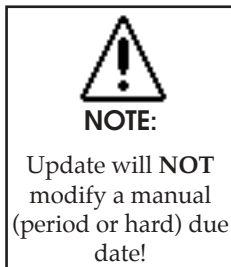
Using this utility will retroactively apply the policy change, therefore holding someone responsible for something they were not accountable for that point in time.

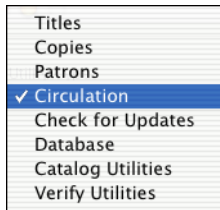


Circulation Operation Menu

Verify—Examines all circulation records for internal consistency. Bad circulation records are either fixed or removed, depending on the type of problem detected. This utility does not update circulation records with policy changes.

Update—Performs the **Circulation Verify** function for all circulation records, but also updates changes in policies which have occurred since the last transaction. Use this utility if you've set new fine rates and want them applied to existing transactions.





Check for Updates

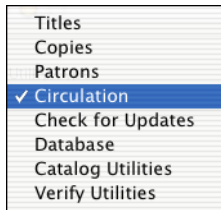
If you have an Internet connection, you can check for Textbook Tracker updates from COMPanion's server. If an update is available, a description of the update is shown, and you can choose to update your Textbook Tracker Data Station or wait for a future date. This utility is only available for the Data Station; Textbook Tracker Client Workstations do not offer this selection.



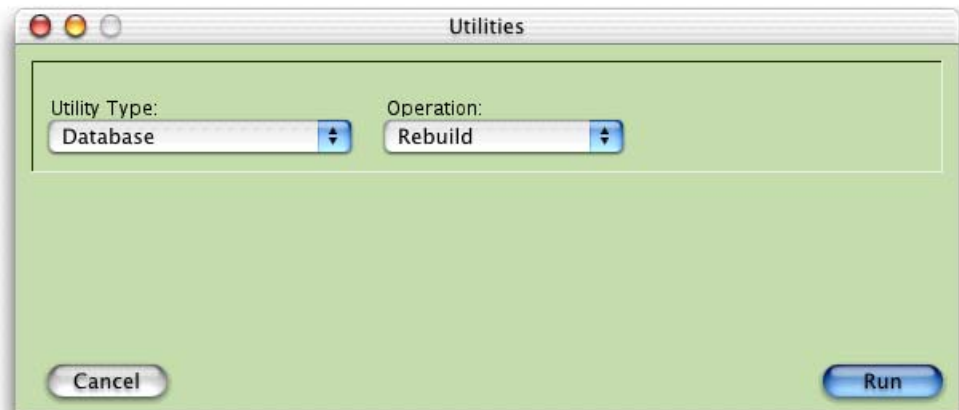
Check for Updates Operation Menu

Get Read-Me—This operation will download your version's "read me" file. This file will describe any changes that have occurred since the last version of Textbook Tracker.

Get Update—This operation will query the update server to check if you have the most recent version of Textbook Tracker. If a newer version exists, you will be able to update.



Database

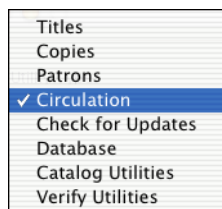


NOTE:

**UNDER NO
CIRUMSTANCES SHOULD
YOU EVER DO ANYTHING**
during the **Rebuild** utility.

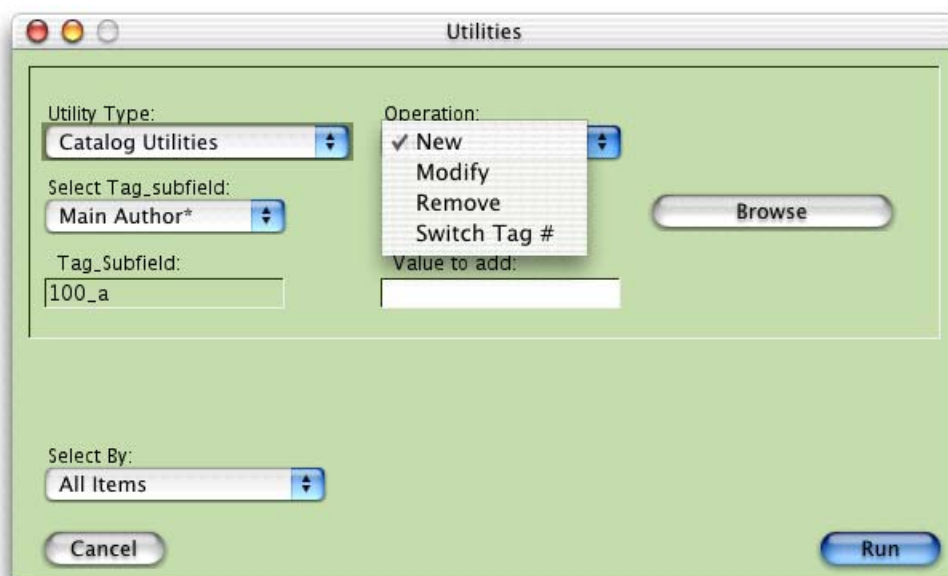
Database utilities allow you to correct problems with the record structures saved on your hard disk. Unlike the **Verify** utility type, these utilities don't look at individual pieces of data—they look at entire records. If you've had a power outage (or other serious problems with your hardware), you may need to run this utility.

The **Rebuild** utility rebuilds all data files and then runs all **Verify** (Patrons/Items) routines. If data damage is detected, it's automatically fixed. Some records may not be fixed because they are irreparably damaged. If unrecoverable damage is detected, you'll be notified and will have to restore from a backup before you can continue. Textbook Tracker tries very hard to recover your data. If it can't be done, there is nothing COMPANION can further do to restore the data. Your best protection are frequent backups of your valuable data. Run this **Utility** once a month to keep data in good order.



Catalog Utilities

Catalog Utilities allow the user to add **New**, **Modify**, **Remove**, or **Switch Tag #** of any information in a MARC record within your collection. Only records in a selected range are examined for modification. When an asterix ("*") appears next to a selection in the **Select Tag_subfield** drop-down menu, it means that only one (of the selected) is allowed per item. For example, you can only have *one* **Main Author*** per title and there can be only one **Medium*** type.



W A R N I N G !

Catalog Utilities permanently modify groups of records. If you are unsure (or just want to be safe), perform an **Archive** of your data before you perform this utility. In the event of a huge mistake, you can restore your old data. Be extra careful when you use these routines!

Since Textbook Tracker stores data in a MARC format, making changes involves modifying data to your MARC tags and subfields. This utility allows you to specify a specific subfield, or specify multiple subfields within the same tag.

When checking for data to modify, you can specify wildcard characters for matching purposes. Use the "*" character to specify any number of characters, and the "?" character to specify a wildcard match for only one (or none) character.

If you specify *only* a tag in the **Tag/Subfield** area, then you must specify subfields in the other fields.

Thus, to remove all subfields in the **260** tag, Enter only "260" in the Tag field, and in the **Value to Remove** field enter "_a*_b*_c*" The wildcard character, "*", causes Textbook Tracker to match all values, and since this is a Remove operation, it will remove all the specified subfields. When all subfields are removed from a tag, the tag itself is automatically removed. Use "_?" to specify "any subfield."

☒ Main Author*
 Secondary Author(s)
 Title
 Subject - Topical
 Subject - General
 Subject - Chronological
 Subject - Geographic
 Notes - Content*
 Notes - General
 Notes - Summary
 Publisher*
 Interest Code
 Curriculum Code
 Bibliographic Code
 Series
 Medium*
 Other

Thus, to look for all author listings that begin with Asimov, enter "Asimov*" as we do in the following example:

In this example, the user wants all author entries for Isaac Asimov to have the same format.

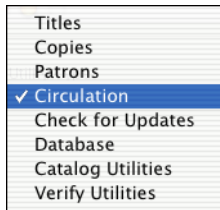
- Step 1. Set the selection to only examine records where the author is Asimov.¹
- Step 2. Specify that we want to modify only data in 100_a.
- Step 3. Just to be sure, we check to see that the author begins with "Asimov."
- Step 4. We replace matching 100_a's with "Asimov, Isaac."
- Step 5. Click **OK** to start changing your data.

Click **Cancel** to abort the utility.

WARNING !

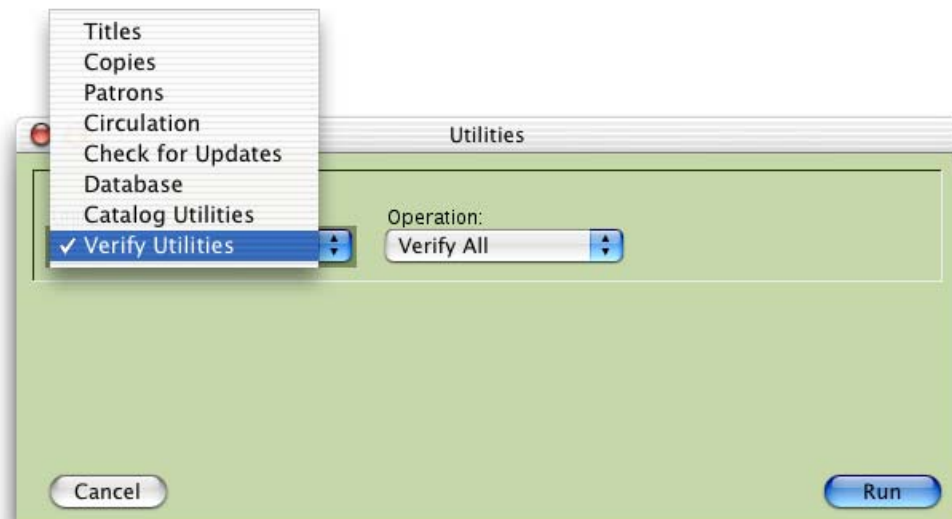
Changes already performed can not be undone! Only unprocessed records are cancelled. Any record which was modified by the utility will stay modified.

1. In this example, the utility would also change author *Janet* Asimov's entries to Isaac. We should have specifically selected the author as "Isaac Asimov." Use this utility with great care!



Verify Utilities

Verify Utilities are used to verify data that Textbook Tracker data files and internal relationships are valid and logical. When bad relationships are identified, they are corrected. Verification does not rebuild database structures or indexes.



Verify Utilities Operation Menu

Verify All—Verifies all data files (including patrons, items and circulation) with one command.

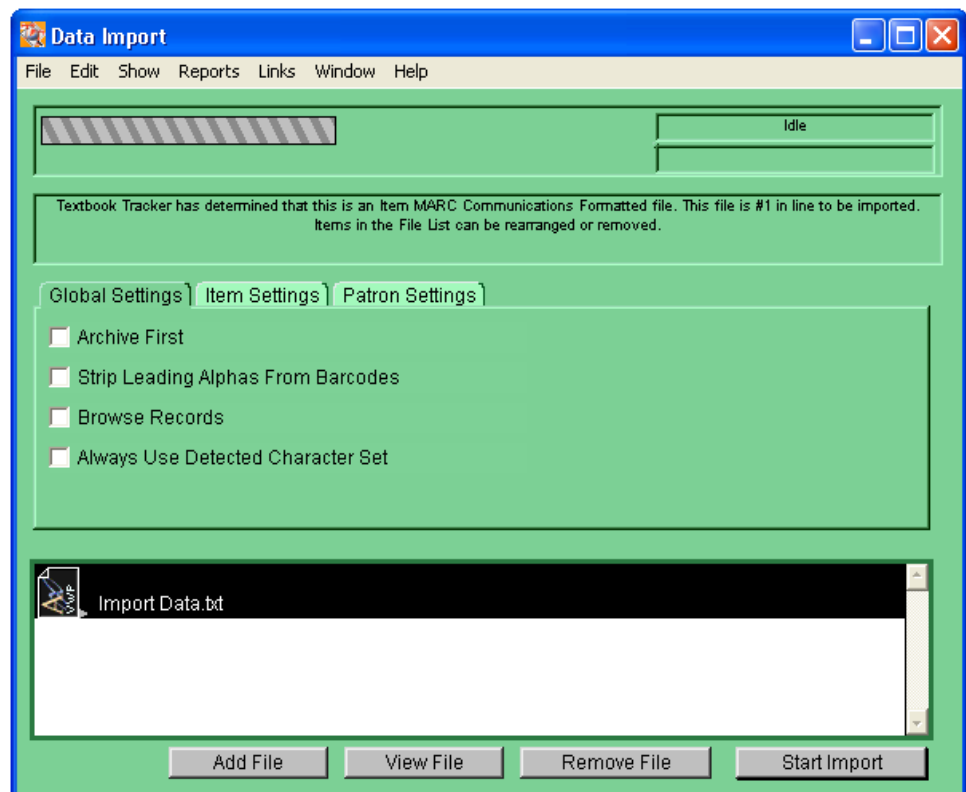
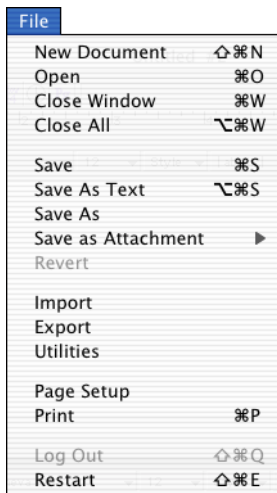
Data Import

There are times when you'll want to add information into Textbook Tracker from other sources (such as MARC records from a book purchase or patron information from a central database). The process of adding information into Textbook Tracker from other sources is called **importing**.

Textbook Tracker supports importing of patron and item information.

Data Import Dialog

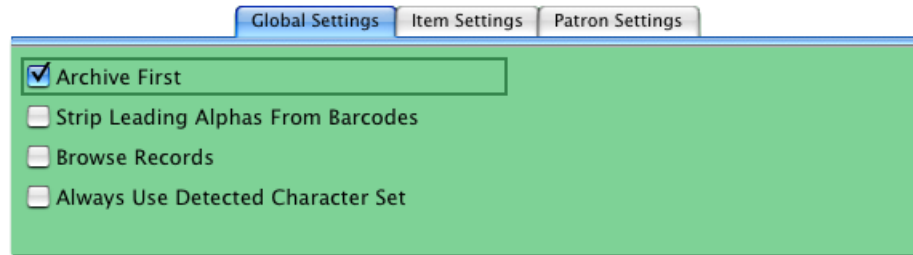
There are two ways of importing patron or item data into Textbook Tracker. The first is to select **Import** from the **File** menu. The second way is to drag the import file onto the **Circulation** window. When importing patrons or items, you'll see the following window appear.



The window above is shown for special format, tab-delimited, MARC and MicroLIF imports. The following pages show you how to set your import preferences.

Global Settings

These are your **Global Settings**.



The screenshot shows a software window titled 'Global Settings' with three tabs: 'Global Settings', 'Item Settings', and 'Patron Settings'. The 'Global Settings' tab is active. It contains a list of four settings, each with a checkbox:

- ☒ Archive First
- ☐ Strip Leading Alphas From Barcodes
- ☐ Browse Records
- ☐ Always Use Detected Character Set

Archive First—When this option is selected, Textbook Tracker will **Archive** your data before the import is performed. This is useful when bad data is imported and it's necessary to go back to a previous database. Default is **ON**. The archive that is created will be placed in the folder specified in your **Archive Preferences** (see “*Archive Preferences*” on page 67 for more information).

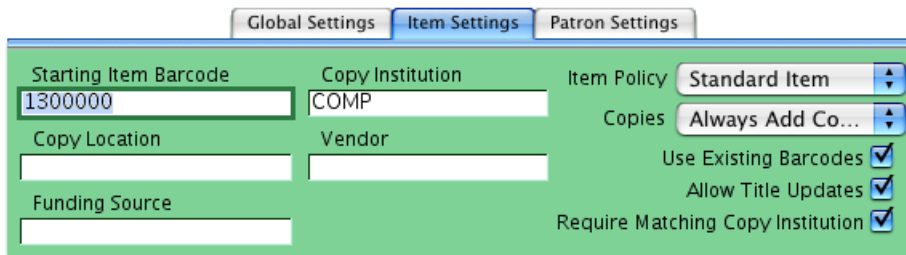
Strip Leading Alphas From Barcodes—When this option is selected, leading alpha characters on imported barcodes are ignored. For example, “XYZ100” would be turned to “100” if this option is **ON**. Default is **OFF**.

Browse Records—When this option is selected, the user may choose browse all the records first before deciding to import them.

Always Use Detected Character Set—If this box is checked, Textbook Tracker will automatically determine the character set that it believes the import files uses. If unchecked, those files containing high ASCII values will open a browse window that allows you to select between different character sets.

Item Settings

These are your Item Settings.



Global Settings			Item Settings	Patron Settings
Starting Item Barcode	Copy Institution	Item Policy	Standard Item	
1300000	COMP	Copies	Always Add Co...	
Copy Location	Vendor	Use Existing Barcodes	☒	
		Allow Title Updates	☒	
Funding Source		Require Matching Copy Institution	☒	

Starting Item Barcode—If a new item barcode number is required, Textbook Tracker will assign numbers beginning with the value you enter in this field. Textbook Tracker always checks to see if a barcode is already in use, and if it is, a new barcode number is automatically selected. Default is “1300000”.

Copy Location—If the Copy Location of the imported record isn’t specified, your location value will be put into **852_b**. Default is blank.

Funding Source—If the copy funding code for the imported item record isn’t specified, your funding code will be put into **852_1**. Default is blank.

Copy Institution—If the Copy Institution for the imported record isn’t specified, your collection value will be put into **852_a**. Default will be the first four letters of your school/institution name (see “School Information Tab” on page 95 for more information).

Vendor—Default value for Vendor that Textbook Tracker will use when the imported item record does not specify a vendor.

Item Policy—If an imported item doesn't have an item policy defined in the record, this policy will be used. Default is **Standard Item**.

Copies—Specifies how copies are managed on import. Default is **Always Add Copies**.

- ✓ Always Add Copies
- Never Add Copies
- Add Found Copies

Always Add Copies—When importing, any copies that exist in the import file are imported to either **Add New Copies** or **Update Existing Copies**. If the title record being imported doesn't contain any copies, then a new default copy is added to the imported title record even if Textbook Tracker already has a matching title that has a copy

Never Add Copies—Copies in imported records are essentially ignored. Only the title information is imported.

Add Found Copies—If you're updating titles and a match is made, add or update the copy as appropriate. If not updating titles, simply add a new title for every imported record and add all copies that were included in the import record (no matching; matching barcodes are reassigned).

Use Existing Barcodes—When this option is selected, barcode numbers found in imported records are used *as is* during import. When this option is unchecked, all item barcodes are reassigned using your **Starting Item Barcode** number (see *"Item Management Preferences"* on page 87 for more information). Default is checked.

If you know for sure that your vendor assigned "dummy" barcode numbers with your MARC records, you'll want to turn this option *off* to force Textbook Tracker to assign new barcode numbers according to your system preferences.

Allow Title Updates—When this option is checked, imported data will update existing titles if specific key fields match. When this option is *not* checked, new item records will be added and *no* titles will be updated. Default is checked.

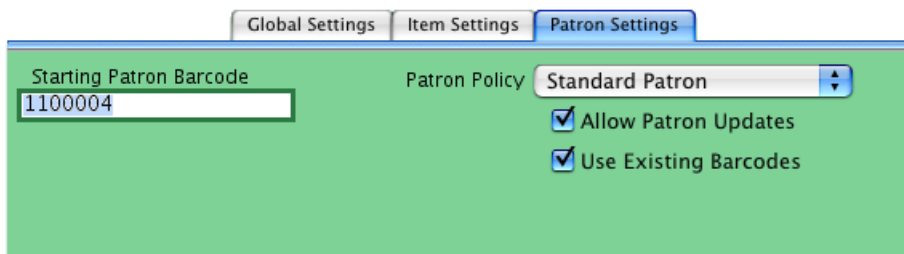
Typically, you'll want Textbook Tracker to add new copies to existing titles, or use the import function to update brief records. If however, you want Textbook Tracker to create new title records for each MARC record imported, unchecked this option.

Checked—If the title or copy data is matched, existing title records are modified (whether that means adding copies or updating copy and title info).

Unchecked—Existing titles are never modified by an import. If a barcode matches another, it is reassigned. Title records are always added—copies may (or may not) be added.

Require Matching Copy Institution—When checked, copy data is ignored where the **852_a** collection code doesn't match the current collection code specified on the **School Information Preferences** window (see *"School ID Code"* on page 93). When there is no **852_a** information, it is assumed to be the local collection code. When unchecked, all copies are imported—no matter what the **852_a** tag contains. Default setting is unchecked.

Patron Settings



The screenshot shows the 'Patron Settings' dialog box with three tabs: 'Global Settings', 'Item Settings', and 'Patron Settings'. The 'Patron Settings' tab is active. It contains a text field for 'Starting Patron Barcode' with the value '1100004'. To the right is a dropdown menu for 'Patron Policy' set to 'Standard Patron'. Below these are two checked checkboxes: 'Allow Patron Updates' and 'Use Existing Barcodes'.

Starting Patron Barcode—If a new patron barcode number is required, Textbook Tracker will begin assigning numbers beginning with this value. Textbook Tracker always checks to see if a value is already in use, and if it is, a new number is automatically selected. Default is “1100000”.

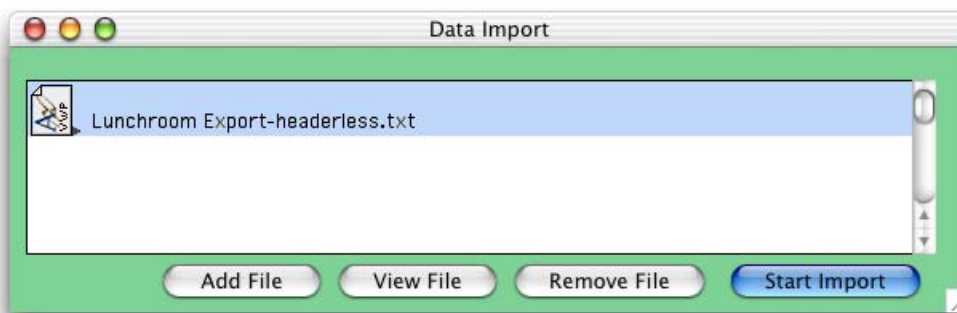
Patron Policy—If the patron you’re importing doesn’t have a policy defined in their import file, this policy will be applied as the default. Default is **Standard Patron**.

Allow Patron Updates—When this box is checked, imported data is used to update existing patrons if specific key fields match. When this box is not checked, only new records are added. Default is checked.

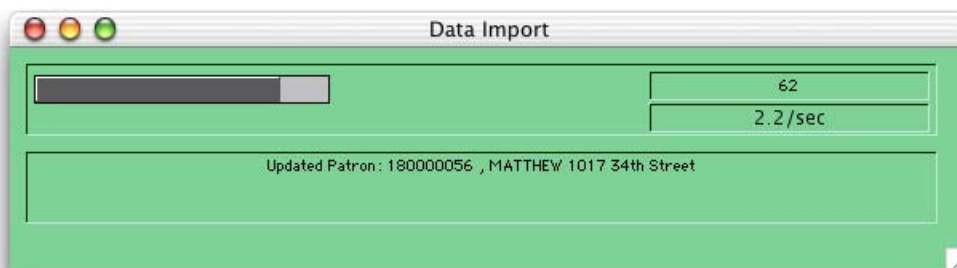
Use Existing Barcodes—When this box is checked, barcode numbers found in imported records are used *as is* during import. When this option is not checked, all barcodes are reassigned using your **Starting Patron Barcode** number (*see “Item Management Preferences” on page 87 for more information*). Default is checked.

To view the file before it's imported, select it and click on the **View File** button. To add additional files for import, drag them into the **File Import List** field (shown below), onto the Textbook Tracker program icon, or onto the **Circulation** window. Alternately, you may use the **Add File** button to open an explorer-type browser window which allows you to search your computer hard drive for files you would like added. To remove a file from the import queue, select (highlight) the file that you want removed from the list below and click the **Remove File** button.

Click **Start Import** to begin the import.



During import, the status of the import will be shown at the top of this window.



Use the **Stop** button to cancel the import. Use the **Pause Import** to halt the import temporarily. If you would like to continue with the import after it has been paused, click on the **Resume Import** button.

W A R N I N G !

Importing Statistical Information

Be careful when importing statistical information. The numbers you import (such as **Copies Available** or **January Usage**) will replace the current Textbook Tracker institution/school statistics and could result in loss of information. For example, if the program calculates **25** as the **January** usage, and you import the number **12**, the system will now show **12** although **25** is correct.

Computerized Records

Before we go further, it will help to understand some basic concepts about computerized records. In order to exchange information between different programs (or even between different computer systems), one needs to get the information into a format that many different programs can understand. The standard, called ASCII¹, is widely used to exchange information between different programs and operating systems. Sometimes an ASCII file is called a text file ("**.txt*") because all it contains is textual information.

ASCII files contain two types of characters: *standard visible characters* such as numbers and letters of the alphabet, and *special characters* that are called **Control Characters**.² Control Characters are used for special purposes to control the display or interpret the information in the file. If you have computerized data, you may be familiar with the <tab> and <return> control characters that are used to make text more legible.

When dealing with computerized information systems, you often hear the terms **field**, **record**, and **file**. A **field** is the smallest unit of information stored. An example of a field is a book's title. A **record** is a related group of fields. Many records of the same type saved together are called a **file**. For example, in a **file** of names, a **record** consists of the **fields** "First Name" and "Last Name". A more complex file may include records with other fields such as "Phone Number" and "Address."

In other words, **records** contain **fields** filled with information, and **files** contain many **records**.

In the textbook world, there is a fairly well-defined method of exchanging bibliographic information between computers. This format is called **MARC** (MACHINE-Readable Cataloging). Another format of MARC is called **MicroLIF** (Microcomputer Library Information Format). Textbook Tracker has been programmed to recognize both MARC and MicroLIF files automatically during import, Textbook Tracker can also export in both formats.

In addition to importing and exporting MARC and MicroLIF records, Textbook Tracker is capable of importing and exporting files in a **tab-delimited** format. This format can be used to exchange information with other programs that utilize more complex MARC standards. Most database, spreadsheet, and word processing programs on personal computers support files in a tab-delimited format.

1. American Standard Code for Information Interchange (ASCII)

2. Since **TAB** and **RETURN** aren't visible characters, they are represented in this document as <tab> and <return>.

Tab-Delimited Records

A very common method of exchanging record information between programs is the tab-delimited ASCII file. In the tab-delimited format, fields are separated by the <tab> control character and the end of the record contains the <return> control character.

```
John <tab> Smith <return>
```

```
Bill <tab> Jones <return>
```

```
My First Name <tab> My Last Name <return>
```

Using tab-delimited patron import files, you can transfer information about patrons stored in other computer systems. For example, a school can use this capability to transfer student information from the school administration computer system into Textbook Tracker (or transfer textbook information back to the administration system).

Textbook Tracker's Tab-Delimited Import File Format

In Textbook Tracker, we've enhanced the tab-delimited format by adding special information on the first line of the file, used to interpret the data in the file. This first line is called a header because it's at the head (or beginning) of the file. The header allows programs to figure out where the data in the file belongs. Textbook Tracker headers look like this:

```
###*FileCode/FieldCode/FieldCode/FieldCode/ <return>
```

The ###* doesn't mean anything, but is a rather unusual character combination, unlikely to be found at the beginning of most files. If Textbook Tracker discovers ###* at the beginning of a file, it assumes that the file is in a familiar format.

- N O T E -

The Field Code numbers (shown above) don't have any special meaning other than acting as unique identifiers for each of the fields that can be imported or exported.

The header is optional. If it's present, Textbook Tracker will automatically sort and organize the information and place it into the correct, specified fields. If there is no header, Textbook Tracker displays a window, which allows you to specify the order and type of data getting imported. A header is automatically created for all export files.

Since the header is automatically created on export, the information can be transferred to another copy of Textbook Tracker and automatically imported without the user knowing anything about the file structure. This makes it easy for Administrators to transfer information to Textbook Tracker users. In order to be consistent, Textbook Tracker assumes that the first line of any import file is a header. However, it only knows how to process headers in the format stated on the latter page.

Some fields allow multiple lines of information (such as patron notes). Any <return> located in a field is converted into the '\ ' character on export and on import, the '\ ' character is restored to a <return>. Generally, you don't need to know about this. However, if you were to examine an exported file, you'd see these characters. Also, if you wanted to add a <return> into a file that is getting imported, you can use the '\ ' character to make it happen.

Import File Example

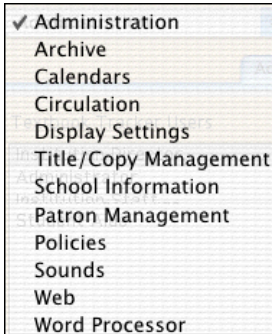
A sample patron import or export file might look like this:

```
###*PT01/1000/1007/1006/ <return>
1100000 <tab> Bill <tab> Smith <return>
1100001 <tab> John <tab> Jones <return>
```

In the example above, the header field codes "1000, 1007, 1006" specify that the fields are ordered by barcode, first name, last name. An item record will be in a similar format, except that different field codes are used and different types of field information is entered (i.e. title or author of the item).

A simple way to study these formats is to export a few records, then examine the export file with Textbook Tracker's Virtual Word Processor.

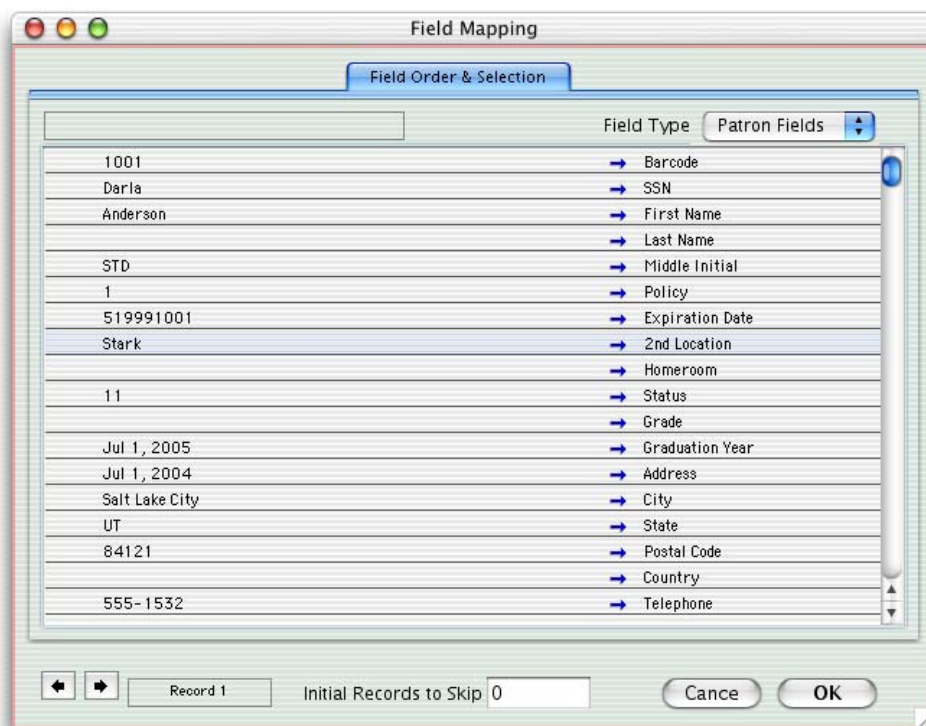
If you export from Microsoft Works, you'll notice that Works also places a header at the beginning of its files. The header contains the titles of the columns in the file you've exported. If you want, you can open your export file with Works and replace the Works header with a valid Textbook Tracker header. If you don't do this manually, you'll have to make sure you select the correct fields on the **Field Mapping** window in Textbook Tracker.

**NOTE:**

The **Field Mapping** window will only appear after you have chosen whether the import file is **Patron** or **Item** and have begun the import process.

Display Field Mapping Window

When there is no header on a tab-delimited file, the **Field Mapping** window appears so that the user can specify which data in the import file goes into what Textbook Tracker field. In the example below, the user has adjusted the order of the fields to match their import file.



Use the **Field Type** drop-down menu to specify **Patrons**, **Items**, or **Circulation Groups** fields. The data from the import file is shown on the left of the window. Textbook Tracker field names are shown on the right hand side.

Use the arrow buttons on the bottom left of the window to examine different records in the import file. If you want to skip some of the records in the import file, you can specify an **Initial records to skip** value. Default is zero.

To adjust the order of the Textbook Tracker fields, highlight and drag the field names. Put the Textbook Tracker field names in the correct order for your imported data. To skip a field, double-click on its line and the arrow will change to a red X. This means the data for this field is ignored and will NOT be imported.

Once the field order has been established, click the **OK** button to import the data. Click **Cancel** to stop importing.

Importing Patron Information

Importing is the process of moving information into Textbook Tracker from outside sources. Typically, this is a quick and easy method of getting information into Textbook Tracker than entering it manually.

Using Textbook Tracker's import function, you can move patron information from other computer applications directly into Textbook Tracker. For example, you might be able to get patron information from the administrative office student database and import it into Textbook Tracker. When students graduate from elementary to middle school, you can provide patron records that the middle school can import into its Textbook Tracker system.

Textbook Tracker can import patron information files in tab-delimited format. Most word processing and spreadsheet applications support files in tab-delimited format.

Rules for Importing Patron Information

When importing patron records, Textbook Tracker first checks if barcode numbers and ID numbers are being imported. If they are, Textbook Tracker makes sure these numbers are unique and not already in use by another patron.

- Textbook Tracker looks for a header that contains a file designation of "PT01"¹ to specify patron information.
`###*PT01/fieldcode/fieldcode.../ <return>`
- During import, Textbook Tracker attempts to locate an existing record that matches the newly imported record. If an existing Textbook Tracker record is located (and **Allow Patron Updates** is selected), the existing record is updated with the imported information. If **Allow Patron Updates** is unchecked, the matching import records are ignored. If no records in the system match, a new record is added.
- In looking for matching records, Textbook Tracker first checks the patron barcode, then the community ID, and government ID. If no matches exist, the import record is considered a new record. New records are assigned barcodes and policies based on the preferences you've entered in the Import window.
- Textbook Tracker v3 supports Textbook Tracker v2 patron headers for compatibility with older data transfer systems.

Uses for Patron Import and Export

The patron import/export routine allows you to share patron information with other computer systems. A city school can get a list of residents from the local utility company. Thus, patron information can be transferred from Textbook Tracker to other programs. For example, a school may hold a final report card if the student owes fines. By giving fine information to the school administration program, others may benefit.

Another use for export/import is to modify information in a group of records. Patron information can be exported, opened in another computer program, modified, then returned to Textbook Tracker. Sometimes this is much easier than modifying records (one at a time) in Textbook Tracker.

1. The file designator consists of two letters followed by two numbers. The letter will never be an "O" so you can be sure that "0" means zero.

Patron Import Fields (Field Name, Field Number)

2nd Location (Sublocation)—1005
 Accession Date—1046
 Address—1011
 Alert Notes—1022
 Barcode—1000
 Card Expiration Date—1047
 Categories Notes—1025{separate category terms with a \ }
 City—1012
 Community ID—1002
 Contact Notes—1020
 Country—1016
 Date of Birth—1045
 Email—1019
 Fax—1018
 First Name—1007
 Gender—1032{Unknown = 0 or U, Male = 1 or M, Female = 2 or F}
 General Notes—1021
 Government ID—1001
 Graduation Date—1048
 Guardian—1049
 Institution / School ID Code—1027{for multi—collection databases (i.e. Central Union)}
 Keep History—1041{Yes or No}
 Last Name—1006
 Level (Grade)—1010
 Location (Homeroom)—1004
 Middle Initial—1008
 Password—1003
 Policy—1028{use policy short code}
 Postal Code—1014
 Previous Policy—1029{use policy short code}
 SIF GUID Import—1200 (SIF functionality is soon to be implemented in Textbook Tracker)
 State—1013
 Status—1026{Active = 1, Lost Card = 2, Usage Blocked = 3, Transferred = 4, Inactive = 5, Other = 6}
 Sublocation—1005
 Telephone—1017

Importing Item Information

Importing is the process of moving information into Textbook Tracker from another source. This is a quick and easy method to get information into Textbook Tracker.

Using Textbook Tracker's import function, you can move item information from other computer applications directly into Textbook Tracker. For example, you might receive item information from vendors and want to import it into Textbook Tracker. If you move textbooks from one collection to another, you can provide an item record that the new location can import into its Textbook Tracker system.

Textbook Tracker can import item information in industry-standard MARC or MicroLIF format (also in tab-delimited format). Most word processing or spreadsheet applications support files in tab-delimited format.

Rules for Importing Item Information

When importing item records, Textbook Tracker first determines if the item is a new record or an existing record that needs updating.

- Textbook Tracker looks for a header that contains a file designation of "FT01"¹ to specify item information.

```
###*FT01/fieldcode/fieldcode.../ <return>
```
- During import, Textbook Tracker attempts to locate an existing record that matches the newly imported record. If an existing record is located (and **Allow Title Updates** is selected), the existing Textbook Tracker record is updated using the imported information. If **Allow Title Updates** is unchecked, matching records from the import file are ignored. If no item records match, a new record is added.
- In looking for matching records, Textbook Tracker first checks the copy barcode, then the ISBN, and LCCN. If Textbook Tracker finds an *exact* match for the barcode, ISBN, or LCCN, then the matching record is updated. If the previous check fails, Textbook Tracker will then check for a matching title, author, medium, call number, publication year, publisher, and then volume. If any matching field is located, then Textbook Tracker will attempt to match the remaining fields—if it's successful, then the title record is updated. If Textbook Tracker finds non-matching fields, then the title record will not be updated and a new item record will be created. With the exception of the title and medium fields, a blank field will be regarded as a match.
- For updated records, if the imported record is MicroLIF or MARC and doesn't contain copy information, a new copy is added to the updated record if **Always Add Copies** is selected for **Item Import Settings**.

Textbook Tracker performs an analysis on each and every MARC record imported so that information is correctly imported from a wide number of vendors. If you find records that don't import correctly, send them to COMPAnion and we'll reprogram Textbook Tracker to properly import them.

Textbook Tracker correctly imports records from the following sources—

1987 MicroLIF
 1991 MicroLIF
 US MARC Communication & MARC 21
 SunLink, WisCAT
 Laser Cat
 Dynix, Follett
 Canadian MARC

...and many others since the printing of this document.

1. The file designator consists of two letters followed by two numbers. The letter will never be an "O" so you can be sure that "0" means zero.

Item Import Fields (Field Name, Field Numbers)

Accompanying Material—2304{300_e}
 Author—2100{100_a}
 Author List—2700{separated by a | }
 Bibliographic Codes—2040{separated by a \ }
Circulation Group Code¹—4001
Circulation Group Description—4002
 Content Notes—2501{505_a}
 Copy (2nd Location) Sublocation—2028{852_c}
 Copy Accession Date—2009{852_1 Accession: (date) | }
 Copy Alert Notes—2019{852_z}
 Copy Barcode—2000{852_p}
 Copy Call Number—2025{852_h}
 Copy Condition—2017{852_1 Condition: (condition) | }
 Copy Funding Source—2022{852_1}
 Copy Inventory Date—2008{852_1}
 Copy Library—2023{852_a}
 Copy Location—2024{852_b}
 Copy Notes—2018{852_x}
 Copy Number—2021{852_t}
 Copy Purchase Cost—2012{852_9}
 Copy Vendor—2016{852_1 Vendor: (vendor) | }
 Copy Volume—2064{852_v}
 Curriculum Codes—2041{separated by a \ }
 Dimensions—2303{300_c}
 District Adoption—2523
 Edition—2250{250_a}
 Extent—2300
 Fifth Subject—2655{650_a, 650_x, 650_y, 650_z}
 First Subject—2651{650_a, 650_x, 650_y, 650_z}
 Fourth Subject—2654{650_a, 650_x, 650_y, 650_z}
 General Materials Designation—2248{245_h}
 General Note—2500{500_a}
 Import Copy Policy—2013{852_1 Policy: (policy code) | }
 ISBN—2020{020_a}
 ISBN Stock Number—2027
 LCCN—2010{010_a}
 Other Physical Details—2302{300_b}
 Physical Description—2301{300_a}
 Previous Title Policy—2053
 Publication Place—2260{260_a}
 Publication Year—2262{260_c}
 Publisher—2261{260_b}
 Replacement Price—2011
 Review Source—2522{521_b}
 Second Subject—2652{650_a, 650_x, 650_y, 650_z}
 Series—2440{440_a}
 State Adoption—2524
 Statement of Responsibility—2247{245_c}
 Subtitle—2246{245_b}
 Summary—2520{520_a}
 Target Audience—2521{521_a}
 Third Subject—2653{650_a, 650_x, 650_y, 650_z}
 Title—2245{245_a}
 Title Call Number—2063{900_a}
 Title Policy—2052
 Title Volume—2026{092_v}

1. The **Circulation Group Code** and the **Circulation Group Description** are imported into Textbook Tracker under the "FT01" file header. Therefore, they will be included in this Item Import Fields list.

Importing Transaction Files

Transaction files are used to enter transactions using text files rather than typing them in manually. Portable barcode readers create transaction files for import into Textbook Tracker. Transaction files can be imported by dropping them onto the **Circulation** window if they have a recognized header. Alternatively, the user can use the **Read Transaction file** transaction command (see *“Import Script / File”* on page 182 for more information).

To automatically recognize a transaction file, Textbook Tracker looks for these headers:

Step 1. **Palm Laser scanner**—Header begins with: ### SmartScan.

When Textbook Tracker is asked to import files with these headers, it will think it's a Transaction File and start processing the contents as transactions.

Data Export

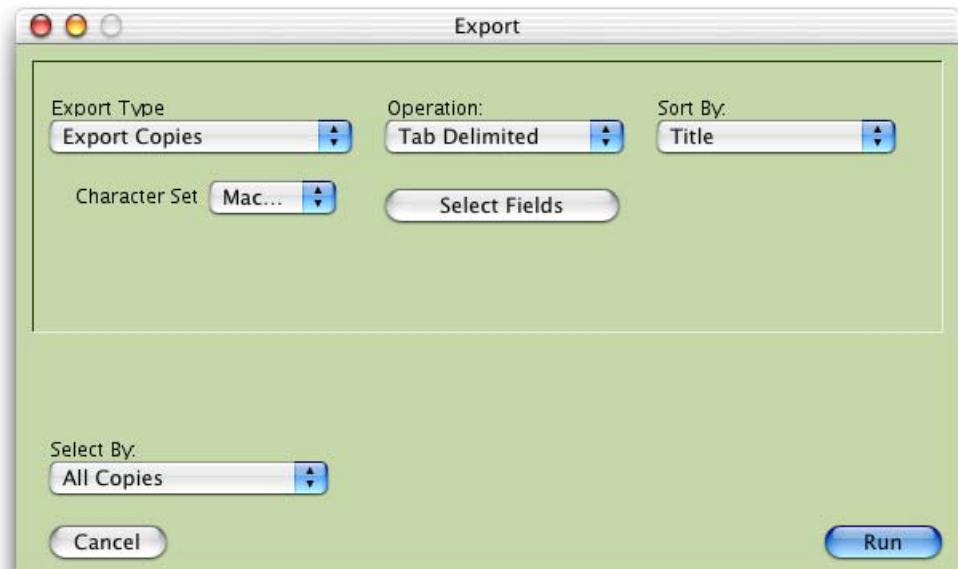
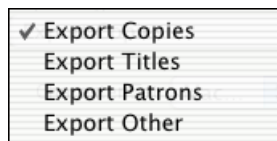
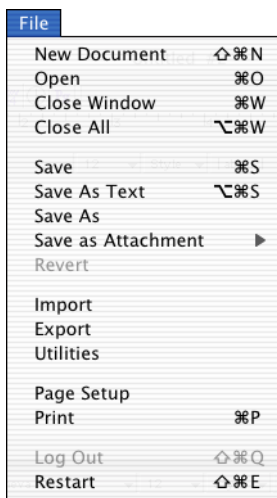
Exporting Data

Exporting is the process of moving information out of Textbook Tracker and preparing it for use in other software applications. You can export records for all (or a specified group) of patrons or items.

Exporting item and patron records does not affect the data that exists in your Textbook Tracker folder. Only a copy of that information is exported; the original record remains intact. You can export copy, title, patron, and other records from Textbook Tracker in **MARC**, **Microlif** and **Tab Delimited** formats.

Data Import Dialog

In order to start exporting data from Textbook Tracker, you will need to select **Export** from the main Textbook Tracker **File** menu. You'll see the following window appear:



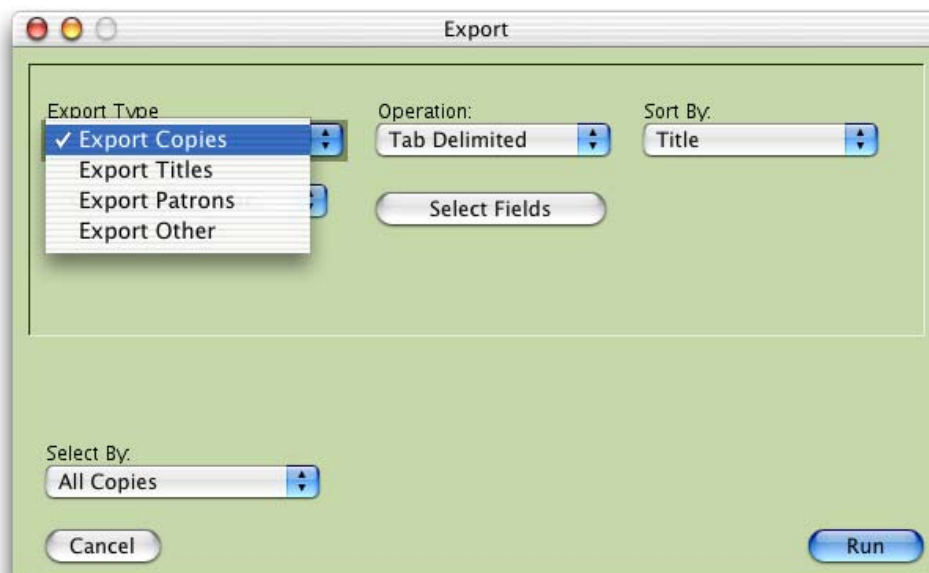
Depending on the data you are exporting, you may choose between several different **Operations**; **Tab Delimited**, **MARC**, **Microlif**, etcetera. The following pages will show you how to set your export options.

- ✓ Export Copies
- Export Titles
- Export Patrons
- Export Other

- ✓ Mac Standard (ASCII)
- Windows Standard (ANSI)
- MARC-8

Export Copies

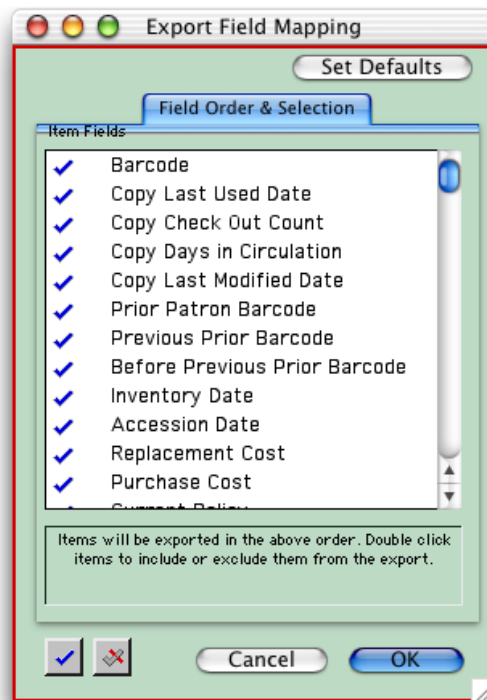
Use **Export Copies** to archive your title copy information, create catalogs for selected copies, or modify copy information using outside applications before importing it back into Textbook Tracker. Select the format of the export in the **Operation** drop-down menu (your only available option is **Tab Delimited**).



You may change how your copy information is exported using the **Character Set**. This is used if, for some reason, you find it necessary to use a specialized character set. This way you're sure to get the results you expect. You may select between **Mac Standard (ASCII)**, **Window Standard (ANSI)**, or **MARC-8**.

Diacritics are the little marks or squiggles written above or below certain letters of the alphabet to indicate special phonetic pronunciation. If you are exporting copy information from Textbook Tracker that contains alphanumeric character with diacritics, they will be correctly preserved upon export.

Clicking on the **Select Fields** button opens the **Export Field Mapping** window.



- HINT -

You can use the checkmark buttons at the bottom of the window to select or deselect all fields.

Use the **Set Defaults** button to configure a default list of fields.

Click on a line to exclude it from export (clicking on a line will change the blue check mark to a red “x”). Click and drag lines to change the order of their export. See “Item Export Fields: (Field Name, Field Number)” on page 340 for a description of the fields which can be exported. Textbook Tracker automatically creates a file header that can be used by any COMPanion product to import exported files without the user knowing *anything* about the contents of the data.

Selecting **Print** from the **File** menu will print a report of your selections.

You can use the Virtual Word Processor integrated into Textbook Tracker to view any file you’ve exported. To view an exported file, use **Open** from the **File** menu to select the file (*for more information on import formats, see “Importing Item Information” on page 329*).

Export Copies Sort By Options

Data can be sorted before export by selecting the **Sort By** selection. Only data for the copies selected is exported. The **Tab Delimited** format only exports one-copy-per-line. Thus, if you export a title with *ten* copies, you’ll end up with *ten* tab delimited records getting exported.

The **Export Copies Sort By** options are the same as the **Copy Reports Sort By** options (*for a complete listing, “Textbook Copies Sort By Options” starting on page 249*).

Export Copies Select By Options

The **Export Copies Select By** options are the same as the **Copy Reports Select By** options (*for a complete listing, “Textbook Copies Select By Options” starting on page 250*).

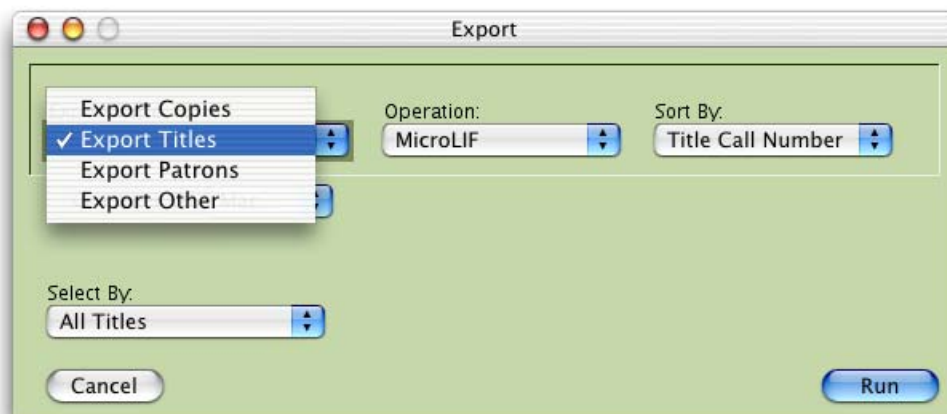
☒ Export Copies
☐ Export Titles
☐ Export Patrons
☐ Export Other

Export Titles

Use **Export Copies** to archive your title information, create catalogs for selected titles, or modify title information using outside applications before importing it back into Textbook Tracker. Select the format of the export in the **Operation** drop-down menu. **MicroLIF** and **MARC** are standard bibliographic formats. Please keep in mind that a **MARC** export only supports about 1,000 single title records with a maximum length of 10,000 characters. Anything more than this will break the export file. If you have records with many copies and lots of information, it is preferable to use a **MicroLIF** export.

☒ MicroLIF
☐ MARC

☒ Mac Standard (ASCII)
☐ Windows Standard (ANSI)
☐ MARC-8



Export Titles Sort By Options

The **Export Titles Select By** options are the same as the **Titles Reports Sort By** options (for a complete listing, "Textbook Title Report Sort By Options" starting on page 241).

Export Titles Select By Options

The **Export Titles Select By** options are the same as the **Titles Reports Select By** options (for a complete listing, "Textbook Title Reports Select By Options" starting on page 242).

- ✓ Export Copies
- Export Titles
- Export Patrons
- Export Other

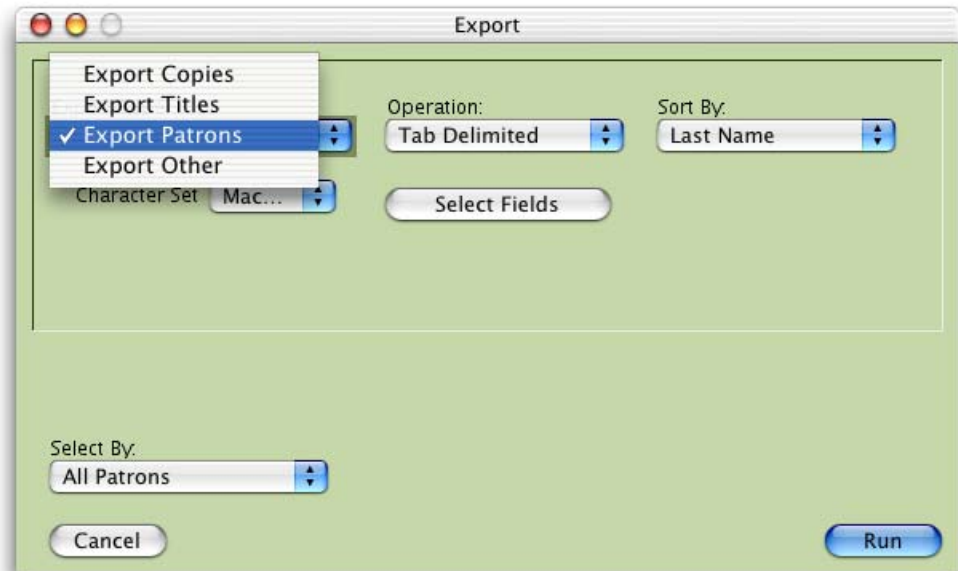
Export Patrons

Use **Export Patrons** to export records for all (or a specified group) of patrons. Exporting patron records will not effect the original Textbook Tracker record in your database. Only a copy of this information is exported; the original record will remain the same.

You can export patron records from Textbook Tracker in standard **Tab Delimited** (also known as ASCII) format. You can examine this kind of file with almost any word processor, spreadsheet or database application.

- ✓ Mac Standard (ASCII)
- Windows Standard (ANSI)
- MARC-8

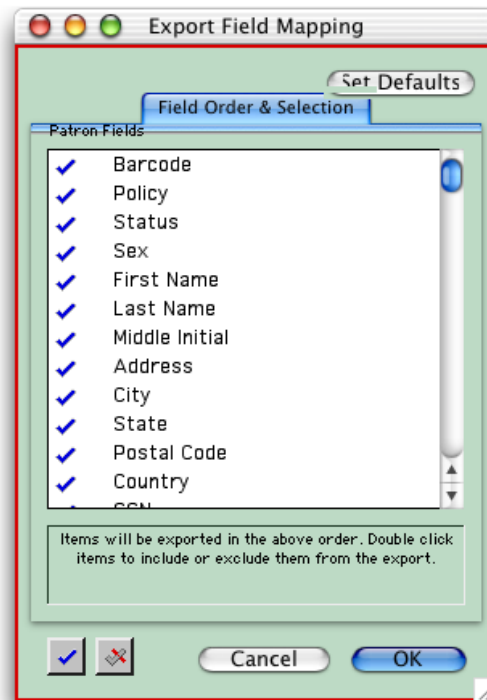
- ✓ MicroLIF
- MARC
- Tab Delimited
- Texas Library Connection



You may change how your copy information is exported using the **Character Set**. This is used if, for some reason, you find it necessary to use a specialized character set. This way you're sure to get the results you expect. You may select between **Mac Standard (ASCII)**, **Window Standard (ANSI)**, or **MARC-8**.

Diacritics are the little marks or squiggles written above or below certain letters of the alphabet to indicate special phonetic pronunciation. If you are exporting copy information from Textbook Tracker that contains alphanumeric character with diacritics, they will be correctly preserved upon export.

Clicking on the **Select Fields** button opens the **Export Field Mapping** window, where you can choose to export all (or some of) your patron records.



- HINT -

You can use the checkmark buttons at the bottom of the window to select or deselect all fields.

Use the **Set Defaults** button to configure a default list of fields.

Click on a line to exclude it from export (clicking on a line will change the blue check mark to a red "x"). Click and drag lines to change the order of the export. See "Patron Export Fields: (Field Name, Field Number)" on page 340 for a description of the fields which can be exported. Textbook Tracker automatically creates a file header which is used by Textbook Tracker programs to import an exported file without the user knowing anything about the contents of the data.

Selecting **Print** from the **File** menu will print a report of your selections.

You can use the Virtual Word Processor integrated into Textbook Tracker to view any file you've exported. To view an exported file, use **Open** from the **File** menu to select the file (*for more information on import/export formats, see "Importing Patron Information" on page 327*).

Export Patrons Sort By Options

The **Export Patrons Transactions Sort By** options are the same as the **Patron Reports Sort By** options (*for a complete listing, "Patron Report Sort By Options" starting on page 234*).

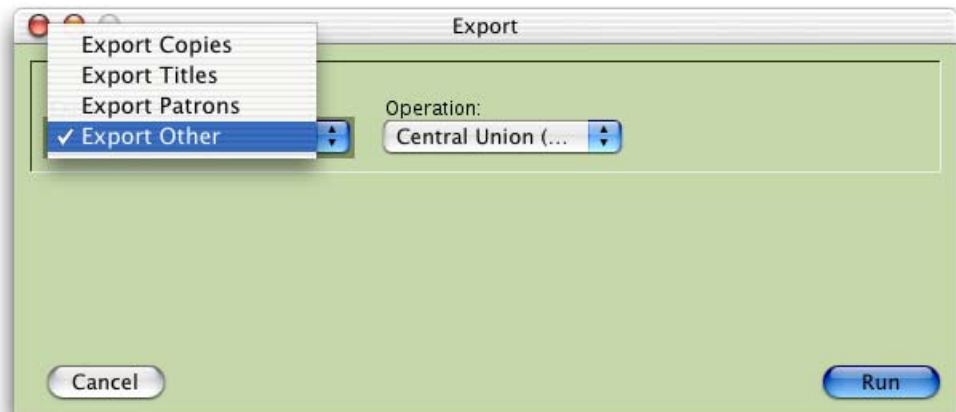
Export Patrons Select By Options

The **Export Patrons Transactions Select By** options are the same as the **Patron Reports Select By** options (*for a complete listing, "Patron Report Select By Options" starting on page 235*).

- ✓ Export Copies
- Export Titles
- Export Patrons
- Export Other

- ✓ Central Union (Everything)
- Calendars
- Policies
- Preferences
- Address Books
- Patrons
- Items
- Vendors
- Routes
- Budgets
- Orders
- Subscriptions

Export Other



This utility allows the administrator to export other Textbook Tracker data.

Using the **Operation** drop-down menu, select the data you want exported.

You may choose to export **Central Union (Everything)**, **Calendars**, **Policies**, **Preferences**, **Address Books**, **Patrons**, **Items**, **Vendors**, **Routes**, **Budgets**, **Orders**, and **Subscriptions**.

When the **Run** button is selected, the export will begin and a dialogue window will appear, asking where you would like it saved.

To import it into another Textbook Tracker database, import as you would any other import file. Textbook Tracker will recognize the data and import it correctly.

Patron Export Fields: (Field Name, Field Number)

Current Fine Balance—1030
Current Reservations Count—1038
Fine Payments—1031
In-stock Holds Count—1039
Last Use Date—1042
Last Validation Date—1043
Life-to-Date Overdue Count—1035
Life-to-Date Usage Count—1033
Name Index—1009
Next Validation Date—1044
Number of items currently checked out—1034
Number of items currently on hold—1037
Number of items currently overdue—1036
Patron RSN—1099
Reserves Count—1040

Item Export Fields: (Field Name, Field Number)

Available for Check Out—2044
Before Previous Prior Barcode—2007
Copy Checked Out Count—2002
Copy Count—2043
Copy Days in Circulation—2003
Copy Last Date Used—2001
Copy Last Modified Date—2004
Extent—2300 {full description}
First Used Date—2048
Full Title—2240 {title: subtitle}
Last Modified Date—2050
Last Modified User ID—2051
Last Used Date—2049
Last Validation Date—2054
Previous Policy Short Code—2014
Previous Prior Barcode—2006
Prior Patron Barcode—2005
SmartMARC Matching Score—2046
Title Accession Date—2047
Title Accession Date-2047
Title Life-to-Date Usage Count—2045
Title RSN—2099

MARC/MicroLIF Records

Textbook Tracker can read and write MARC or MicroLIF records¹. Textbook Tracker will automatically recognize which type of record you are reading. Therefore, you don't have to worry about the format of the bibliographic data you receive.

What Are MARC & MicroLIF Records?

MARC (**MA**chine-**R**eadable **C**atalogue) records are designed for computers to communicate with each other. For the casual users, these records are difficult to read. Even if you have the proper training, they can be hard to decipher. Most users/patrons of your institution/school won't know what a MARC record is, let alone know how to read one. Textbook Tracker takes the information in the MARC record and converts it for "human" usage within the program. Textbook Tracker can save a copy of the MARC record for transfer to other computer users. The format that Textbook Tracker displays is called MicroLIF.

MicroLIF (**Micro**computer **L**ibrary **I**nformation **F**ormat) records can contain the same information as MARC records, but they are much easier for you to read. There are some examples of this at the end of this chapter.

Saving MARC/MicroLIF Records

Although the MARC/MicroLIF formats are industry standards, the type and location of some information located within the MARC record varies from vendor to vendor. In order to be compatible with as many different vendors as possible, Textbook Tracker automatically analyzes the MARC record in order to extract the information required for your institution/school.

Conversion Rules

During Import, Textbook Tracker takes an entire MARC record into memory and then searches for matching information to use with Textbook Tracker. Some vendors place information for multiple copies of an item within the same MARC record. Textbook Tracker will locate the information pertinent for each copy, as long as the information is in a format that Textbook Tracker recognizes.

During import, Textbook Tracker will automatically match existing items with new items. First, if a barcode matches, Textbook Tracker replaces old title and copy information. Second, if the ISBN and title match, Textbook Tracker replaces the old title with the new information. Third, if the LCCN and title match, Textbook Tracker replaces the old title with the new information. Fourth, if all previous options fail, Textbook Tracker matches a title, author, publisher, publication, date, medium, extent, and edition. When a match is detected, information in the imported record is used to update the existing record. The assumption is that newer records contain more accurate information.

Please note that if you import new information, then any information you may have modified in existing records is lost. For example, let us say you have a title and you add some title notes of your own. Then, you get a MARC record for that title and import it. If that MARC record includes a series statement, then that series statement will replace the one you have entered. As with *all* imported data, blank data NEVER replaces existing data, therefore, if the imported record had no series statement, your data would not be disturbed.

1. Textbook Tracker only exports *title* information in MARC format. Copy information can be exported tab-delimited.

If the input file contains records that do not conform to the published standards for that format, the record will be skipped. Textbook Tracker utilizes a sophisticated system that attempts to decode incoming records, even when they don't conform to the published standards. If you find records that don't work with Textbook Tracker, please send copies of them to COMPanion and we will update our engine to correctly interpret the non-standard records.

Conversion Help

If you have any problems with your data, send COMPanion a diskette with your sample MARC or MicroLIF data, a note with the nature of your problem, and the source of the records. We will work with the supplier of your data to ensure compatibility with Textbook Tracker and report our findings to you directly.

A Shortcut

If your import files are named something similar to: MARC001, MARC002, MARC003 (i.e. they end in three digits), then Textbook Tracker will automatically continue reading additional files. That is, once MARC001 is read, Textbook Tracker will continue with MARC002 and so on. This trick works for MARC, MicroLIF and custom import formats. Using this trick, you can read up to 100 files with one import command.

Central Administrator

If you've purchased the **Central Administrator** license, you'll benefit from some additional capabilities for your Textbook Tracker Data Stations. The **Central Administrator Workstation** has all the features of a **Single User** Textbook Tracker license *plus* the ability to access and modify any Data Station in the district.

- N O T E -

The Central Administrator capabilities are an optional feature of Textbook Tracker. You must purchase a separate license to use this feature.

The Central Administrator is installed similar to a Textbook Tracker Data Station, with several slight differences.

- The installer is called **Central Administrator Installer**.
- The program is called **Textbook Tracker Central Administrator**.
- You'll need separate Central Administrator registration codes.
- The Central Administrator program creates an empty data folder during startup. This data folder can be used to store local Central Administrator data, however, most of the time the program will be connected to a remote Data Station as if it were a Administrator Workstation for that Data Station.

The Central Administrator works exactly like a Textbook Tracker Data Station, with the following differences:

- A new **District** tab appears on the Administration Preference window (*see "Configuring the Central Administrator" on page 345*).
- A new **District** menu appears in the menu bar.

Using the District Menu

The **District** menu allows the user to choose which Data Station they would like to connect to. When the Central Administrator is connected to a Data Station, it operates *exactly* like a Administrator Workstation installed for that Data Station.

- N O T E -

In order to use the **District** menu, you must be logged into the Central Administrator at the **Institution Director** password level.

When you change Data Stations using the **District** Menu, you may have to identify yourself by entering a **User Name** and **Password**. Make sure you're configured as an **Institution Director** or **Central Administrator** on all the systems you'll be accessing.

- When the Central Administrator has **Local** selected, the program works exactly like a Single User Textbook Tracker License.
- To move between collections, go to the **District** menu and select the location to connect with.
- You may be requested to give a password in order to connect to a Data Station as if you were in the actual building. You must have a valid user name and password on the remote Data Station. When adding your name to the user list, be sure to select **Institution Director** as your level status. Use the same password in each building and the same form of your name to make logging onto the Central Administrator program easier.

Configuring the Central Administrator

Before you can use Central Administrator to examine or control other school Data Stations, you'll need to configure the Central Administrator using the **District** tab.

- Step 1. Select **Preferences** from the **Edit** menu.
- Step 2. Click on the **District** tab of the **Administration** preference window.
- Step 3. For each Data Station that you want to control, add it by clicking on the **Specify IP** buttons. Enter the Data Stations IP address and a **Friendly Name**. The **Friendly Name** is the name you will see in the new **District** menu; it doesn't have to match the name of the controlling institution or school. If you're going to add several addresses, click on the **Keep window open after adding** checkbox. This will keep the window open after each new address is configured. When you are finished, click on the **Cancel** button or use the OS standard window close box.

Technical Details

Textbook Tracker contains several advanced technologies. Although it's not necessary to understand how Textbook Tracker does what it does, this chapter is for the technical person who wants to know more about the inner workings of Textbook Tracker.

Textbook Tracker Is Unique

Textbook Tracker is built on top of a proprietary cross platform (Windows and Macintosh) development system. The core components of this system consist of these unique technologies:

- A prioritized multi-threaded scheduling system which schedules and manages all the executable components of the program. All processes within Textbook Tracker are prioritized and queued automatically by our scheduler.
- A powerful communications system that supports TCP/IP communications protocols and addressing. This system can handle thousands of simultaneous messages. All messages are encrypted for communications confidentiality. Only authorized messages are processed by the system.
- A powerful relational database optimized for storing and accessing school information. Saved data is encrypted for added data security. The database is very high performance—on a high end G3 processor with a quick disk drive, it can fully duplicate up to 30 copies per second.
- A powerful word processor which uses its own virtual memory manager to support very large documents with small amounts of physical memory. Documents can be freely moved between supported platforms.
- A “class library” for developing cross platform human interfaces.
- A proprietary toolbox of code used by all subsystems.
- Integrated debugging tools. Integrated diagnostic and debugging systems are used throughout all our tools.
- A fully distributed transaction-based client/server architecture. The server (Data Station) processes requests from all clients. Only information necessary for processing is moved between clients and the data station. This places very low demands on already overloaded wide-area networks.

How do the Client Workstations communicate with the Data Station?

When the Data Station creates installer folders, the TCP/IP address of the Data Station is saved inside that folder. When the installer creates a workstation, this same addressing information is placed inside the workstation application. This addressing information is saved in an encrypted format which can only be read by Textbook Tracker.

What happens if the Data Station's address changes?

If the address of the Data Station is changed—none of the Client Workstations will be able to communicate with it and all Client Workstations will have to be installed again. To force the Data Station to build new installers, quit the Data Station, remove the installer folders and restart the Data Station. New installers are automatically created.

Can I move my VWP (Textbook Tracker Word Processor) documents to other word processing programs?

Yes, the Virtual Word Processor has a **Save As Text** option; however, you'll lose all document formatting.

Can I move my other word processing documents into Textbook Tracker's Word Processor?

Yes, with your other word processor, use the **Save as Text** option. The Virtual Word Processor can open TEXT (*.txt) documents; however, you'll lose all document formatting.

Shortcut Keys

Accelerator and Hotkey Commands

Hotkeys—Hotkeys are the underlined characters in a menu item or dialog box that allow users to access the item or control by pressing that character's key on the keyboard. In the case of dialog controls, the user may have to hold down the <alt> key before pressing the hotkey. Hotkeys are sometimes referred to as *shortcut* keys, *access* keys, or *mnemonic* keys.

Windows Shortcut Keys

Ctrl+Shift+N	<u>N</u> ew Document
Ctrl+O	<u>O</u> pen
Ctrl+W	Close <u>W</u> indow
Ctrl+Alt+W	Close All
Ctrl+S	<u>S</u> ave
Ctrl+Shift+S	Save As Text
Ctrl+P	<u>P</u> rint
Ctrl+Shift+Q	Log Out
Ctrl+Shift+E	Restart
Ctrl+Q	<u>E</u> xit Textbook Tracker
Ctrl+Z	Undo
Ctrl+Shift+Z	Redo
Ctrl+X	<u>C</u> ut
Ctrl+C	<u>C</u> opy
Ctrl+V	<u>P</u> aste
Ctrl+A	Select <u>A</u> ll
Ctrl+F	<u>F</u> ind
Ctrl+G	Find Again
Ctrl+;	<u>P</u> references
Ctrl+L	Patrons
Ctrl+I	Items
Ctrl+T	Circulation

Accelerator keys—An accelerator key is a keyboard shortcut that is accessed by holding down modifier keys (<shift>, <ctrl>, <alt>, or combinations of these) and pressing another key on the keyboard. Accelerator shortcuts appear to the right of a menu item text.

Macintosh Shortcut Keys

⇧+⌘+N	New Document
⌘+O	Open
⌘+W	Close Window
⌘+⇧+W	Close All
⌘+S	Save
⌘+⇧+S	Save As Text
⌘+P	Print
⌘+⇧+Q	Log Out
⇧+⌘+E	Restart
⌘+Q	Exit Textbook Tracker
⌘+Z	Undo
⇧+⌘+Z	Redo
⌘+X	Cut
⌘+C	Copy
⌘+V	Paste
⌘+A	Select All
⌘+F	Find
⌘+G	Find Again
⌘+;	Preferences
⌘+L	Patrons
⌘+I	Items
⌘+T	Circulation

Circulation Commands

Circulation Commands

Here is a helpful list of Circulation command shortcuts.

*	Import Script/File
. {date}	Set Override Due Date.
.	Clear Override Due Date.
..	Clear Transaction Window.
+	Show Patron Notes.
++	Show Item Copy Notes.
+++	Print Circulation Log.
# {comment}	Places a comment in the Circulation Log.
d	Print Transaction.
o {item barcode} (current patron required)	Overnight Checkout.
x	Clear Current Patron/Item and mode. Sets Check In/Out mode.
x {item barcode}	Make Item Current.
x {patron barcode}	Make Patron Current.
z	Clear Circulation Log.
r r	Process a range of barcode numbers.
cg	Circulation Groups.
b {item barcode}	Bookdrop an item.
/ {old barcode=new barcode}	Change Patron / Item barcode.
q	Query or Find.
qa	View Patron details.

Circulation Modes

h (current patron required)	Hold mode.
as	Self service checkout mode.
asb	Self Service bookdrop mode.
b	Bookdrop mode.
i (date is optional)	Inventory mode.
ib (date is optional)	Inventory Bookdrop mode.
x	Clear current mode. Sets mode back to check in/out mode.

Holds and Renew Commands

h (item barcode) (current patron required)	Place a hold on an item.
qe (patron required)	Renew patron items from list.
ra (patron barcode) or (current patron required)	Renew all items for patron.
r (item barcode)	Renew mode.

Find Commands

c (call number optional)	Find item by call number.
L (patron name optional)	Find patron.
t (title optional)	Find item by title.

Patron Commands

+	Show patron note.
+ (comment)	Append patron note.
+#	Clears a patron note.
+# text	Replaces a patron note.
f (current patron required)	View charges and payments.
f (charge amount) (description) (current patron required)	Charges a fee to a patron.
p (patron required)	Make patron current.
q (patron barcode)	Display patron details.
q (current patron required)	Display patron details.
qe (patron barcode) or (current patron required)	Open Patron Renewals window.
ra (patron barcode) or (current patron required)	Renew all copies.
/ (old barcode) = (new barcode)	Change barcode (item or patron).

Item Commands

++	Show item notes.
++ (command)	Append copy notes.
++#	Clear copy notes.
++# (comment)	Replace copy notes.
cg	Opens the Circulation Groups mode.
cn	Opens the Circulation Groups window.
cl	Opens the Condition Codes window/mode.
dl	Opens the Damage Codes window/mode.
h (item barcode) (current patron required)	Places a hold on an item.
km (item barcode)	Recall copy with email notification.
q (item barcode)	Display item details.
r (item barcode)	Renew item.
/ (old barcode) = (new barcode)	Change barcode (item or patron).

Change Information Modes

ch	Opens Change Location window.
ch_a (optional institution)	Change copy institution.
ch_b (optional location)	Change copy location.
ch_c (optional sublocation)	Change copy sublocation.
np (location required)	Set change patron location mode.
v (classification required)	Set classification mode.
up	Set change patron policy mode.
ui	Set change item policy mode.
ur	Set restore policy mode (item or patron).
x	Clear current mode/sets mode to check in/out mode.

System Patrons

1	Lost Item Patron.
2	Discarded Patron.
3	For School Use Patron.
4	On Repair Patron.
5	On Order Patron.
6	Archived Patron.
8	Unknown Status Patron.

Glossary

ASCII—American Standard Code for Information Interchange—a universal encoding system for text characters.

Attachments—Electronic files or documents that appear on the patron or item record where they are “attached.” These attachments can be accessed from patron or item **Details**.

Archive/Backup—Archives are scheduled automatic backup copies of your data. Archiving does not eliminate the need to do daily backups. Remember, the difference between a backup and an archive is that the **backup** is done to something (Zip, Jaz, CD-RW, digi-tape) that can be stored off-site, while **archiving** makes a duplicate file on the same computer. An archive file will not be very helpful for restoring your data if the computer is stolen, the hard drive fails, or burns in a fire.

Bookdrop—Circulation mode for checking in books.

Boolean Logic—Named after George Boole. A logical combinatorial system using the variable operators AND, OR, and NOT. This logic can have one of two values, true or false.

CDR—Compact disc-recordable. A compact disc on which you can write only once and thereafter is read-only.

CDRW—Compact disc-re-writable. A compact disc on which you can write to and read from several times.

Check In/Out—Circulation mode for checking out or checking in textbooks. Rules that apply are: 1) if Current Patron doesn't currently have the copy checked out and the copy is available, check it out to the Current Patron; 2) if the Current Patron doesn't currently have the copy and the copy is checked out to someone else, ask the user if the copy should be checked in—if yes, then try checking it out to the Current Patron; or 3) if the Current Patron has the copy already checked out, check the book in. What this mode does, as has been shown, depends on the conditions above.

Client—A computer, program, or process that requests the service of another computer in order to download files for manipulation, run applications, or request application-based services. A client is useless without a file server.

Copy—Any reproduction or duplicate item, book, video, cassette, VCR, or Electronic document or file that is cataloged in Textbook Tracker.

Data—Numerical or other information represented in a form suitable for computer processing.

Data Station—The Textbook Tracker program that performs the processing and permits access to the data. Includes the ability to circulate, import, export, manage patrons, manage items (catalog), run reports, and perform certain maintenance functions (this is the server program and doesn't necessarily require server hardware).

Details—Additional information about the patron or item that can be accessed.

Discarded Items—A “special” patron (barcode 2) that will change the status of an item to discarded. When an item is damaged, weeded, or discarded, and must be flagged for reports or removal, just check out the item to the **Discarded Items** patron.

Drop-down Menu—A menu in a graphical user interface, whose title is normally visible but whose contents are revealed only when the user activates it, normally by

pressing the mouse button while the pointer is over the title, whereupon the menu items appear below the title. The user may then select an item from the menu or click elsewhere, in either case the menu contents are hidden again. A menu item is selected either by dragging the mouse from the menu title to the item and releasing or by clicking the title and then the item. When a drop-down menu appears in the main area of a window (as opposed to the menu bar) it may have a small, downward-pointing triangle to the right.

Hold—Also known as a pending hold. Use this when all copies are checked out and someone wants any copy of that item as soon as one is available.

HTTP—Hypertext Transfer Protocol. The WWW page prefix indicating the clickable “hotlink” arrangement used to instantly take you to a different page. A protocol used to request and transmit files, especially webpages and webpage components, over the Internet or other computer network.

In-Stock Hold—A hold that has been filled and is awaiting pick up by the patron indicated. Notices do not currently print automatically but can be printed from **Circulation Reports**.

Inventory—Circulation mode that electronically date stamps the last time the copy was seen by the system. In addition, inventory will indicate when the copy is out of shelf order by placing “??->” next to the Circulation Log entry. Textbook Tracker will change the inventory date every time the copy is checked in or checked out since that was the last time the copy was seen by the system.

Inventory/Bookdrop—Circulation mode that performs the standard inventory functions and will check in any copies with a status of checked out, lost, archived, or discarded. If you do not want the status of the item to change, then use the **Inventory** mode instead.

ISBN—International Standard Book Number.

Item—Any book, video, cassette, VCR, or Electronic document or file that is cataloged in Textbook Tracker.

LCCN—Library of Congress Control (Card/Catalog) Number.

Links—A built-in launcher for electronic files or documents.

Lost Items—A “special” patron (barcode 1) that will change the status of an item to lost. When an item is lost from inventory or by a patron, just check the item out to the **Lost Items** patron.

MARC—MAchine-Readable Cataloging.

MicroLIF—Microcomputer Library Information Format.

Patron —Anyone who can borrow or is issued textbooks.

PPP—Point to Point Protocol. A protocol used by TCP/IP routers and PC’s to send packets over dial-up and leased connections.

Rebuild—This utility rebuilds all data files and then runs all verification (Patrons/Items) routines. If data damage is detected, it’s automatically fixed. Some records may not be fixed because they are irreparably damaged. If unrecoverable damage is detected, you’ll be notified and will have to restore from a backup before you can continue. Textbook Tracker tries very hard to recover your data. If it can’t be done, there is nothing COMPanion can further do to restore the data. Your best protection is frequent backups of your valuable data.

Sequence Number—An internal accession number for patrons, items and copies. Shown in patron and item management as a small black number in the upper right of the screen. A unique identifier assigned to every patron, item and copy added to the system. It can be reassigned by the system but not by the user.

Server—A computer program that provides service to client stations with access to files and printers as shared resources on a computer network. This is useless without clients.

Reservation—A transaction that prematurely checks-out a specific copy for a specific date range. Can be used for school units where the textbooks need to be available between certain dates and cannot be checked out. Only the patron with the reservation can check out the copy. If the copy doesn't get checked out by the person with the reservation, it will return to an available status.

SMTP—Simple Mail Transfer Protocol.

Special Patrons—Textbook Tracker-defined patrons that perform certain tracking tasks and functions (i.e. lost items, discarded items, on-order items, on repair items, archived items).

Symbology—The study or interpretation of symbols or symbolism. In the case of Textbook Tracker, the barcode symbology studies barcode symbols.

TCP/IP—Transmission Control Protocol/Internet Protocol. A communication protocol between computers, used as a standard for transmitting data over networks and as the basis for standard Internet protocols.

Temporary Items—An item barcode that only exists while it is checked out. As soon as the item is checked in, it is removed from the system. Temporary items are only visible in circulation reports or on the patron's record. They cannot be inventoried. Use temporary barcodes for items that circulate infrequently or for Inter-School Loan. See **Circulation Preferences** for directions on setting up a range of barcodes for temporary items. See **Circulation Basics** for creating a temporary item while in **Check In/Out** mode.

UPC—Universal Product Code. A number and bar code that identify an individual consumer product.

URL—Uniform Resource Locator. An internet address, usually consisting of the access protocol (http), the domain name (i.e. "www.goalexandria.com"), and optionally the path to a file or resource residing on that server.

WWW—World Wide Web. All of the users and resources on the internet that are using HTTP.

Windows—A list of all currently open windows or screens in the Textbook Tracker program. A fast way to switch between windows without having to close or minimize the previous windows.

Workstation—The Textbook Tracker program for additional circulation and cataloging stations. Includes the ability to circulate, import, export, manage patrons, manage items (catalog), and run reports. Only some maintenance and database related functions are available on this program whereas all maintenance and database related functions are available on the Data Station. This is a client program and doesn't actually have direct access to the data—makes processing requests of the Textbook Tracker Data Station

INDEX

A

Adding New Patrons 129
Adding New Titles or Copies 144
Adding Records 48
Adding Users 58, 60
Adjust Item Holds 173
Adjusting or Removing Item Holds 194
Alert Note 136, 167
Alex Web Preferences 121
Alexandria
 Import/Export Format 324
Alexandria Updates 312
Archived Items 179
Attachments
 Patron 138
 Title 163
Author 153
Authority Reports 221

B

Barcode 164
Barcode Labels 229, 246
Billing Details Report 258
Bookdrop Mode 186

C

Calendar
 Close Dates 69
Calendar Notes 214
Calendar Preferences 68, 69
Call # 165
Call Number 149
Canadian subject Headings 87
Catalog During Circulation 201
Catalog Utilities 314
Cataloging
 During Circulation 201
Categories 136
 Bibliography 159
 Curriculum 159
 Interest 159
Change Item Policies 201
Change Patron Location 201
Change Patron Policies 201
Changing Patron Data 302
Changing the User Name 64, 66
Charges and Payments 191
Charges-Payments 173
Charging a Fee 192
Check for Updates 312
Checking Items In 176
Checking Items Out and In 201
Circulation

Commands
 Issue Routing Slip 198
 Start Classification Mode 201
Circulation Log 73
Circulation Menu 173
Circulation Policies 107
Circulation Window 169
Classification Mode 201
Clear Current Patron and Item 202
Clear Patron History 304
Clear the Transaction Log 182
Closed Days 69
Colors, Window 83
Command Bar Codes 216
Command Line 171
Community ID 134
Configuring the District Librarian 345
Contact Notes 136
Content Notes 160
Conversion Rules, MARC Data 341
Copy # 164
Copy List Reports 239, 249
Copy Notes 167
Copy Statistics 168
Copy Usage Report 245
Custom Bar Code Labels 219
Customizing Alex Web 121

D

Database Utilities 313
Default Item Medium 90
Default Item Policy 90
Defaults
 Word Processor 123
Defining Groups 64, 66
Discarded Items 179
Display Settings 83
Display Settings Preferences 83, 326
District Librarian 344
District Menu 343, 344
Don't Show in Alexandria
 Researcher 162
Duplicating Records 49

E

Edition 150
e-Mail address 135
Export
 Patron Data 337
 Patrons 337
Exporting Patron Data 337
Extent 156

F

Fax 135
Field Mapping Window 326

Follett Interleaved 2 of 5 75
Font Settings 123
French Subject Headings 87
Funding Source 165

G

General Materials Designator, GMD 150
General Notes 136
Government ID 134
Grade 135
Graduation Date 135
Groups 64, 66

H

Handling Charges and Payments 191
Header Line, Import/Export 324
Help for Commands 172
Hold Preferences 78
Hold Requests 192
Hold Requests Report 254
Holds
 Web 121

I

Import
 MARC, Settings 319
 Patrons, Settings 321
 Transaction Files 331
Import Preferences 317, 333
Import/Export
 ASCII 323
 Computerized Records 323
 Control Characters 323
 Examples 325
 Format 324
 Header Format 324
 Importing Statistical Information 322
 Item field Orders 330
 MARC 323
 MicroLIF 323
 Overview 323
 TAB Delimited Records 324
 TAB-Delimited Files 323
Installing Alexandria
 Alexandria WEB 31
 End User License 23
 Installation Summary 17
 System Requirements 15
Installing Alexandria Data Station 22
In-Stock Hold Letter 80
Inventory Control 195
Inventory Reports 196, 245
ISBN 150
Issue Routing Slip Command 198
Item Analysis Report 240
Item Information Window 140

Item Lists 238
Item Policy 149
Items Menu 141

K

Keyword
 Start Classification Command 201

L

Language Preference 96
LC Juv Headings 87
LC Subject Headings 87
LCCN 150
Level 135
Librarian 96
Librarian User Level 61
Library Administrator User Level 61
Library Aide User Level 61
Library Calendar 213
 Printing 213
 Report 213
Library Information Preferences 88
Library Staff User Level 61
Loan Periods, Policies 102
Loaned Items Report 247
Locate a Patron by Name 197
Locating Patrons and Items 197
Location 135
Lost Items 179

M

Mailing Labels 230
Make a Patron Current 197
Make a Patron or Item Current 198
Manual Checkout Sheet 215
MARC 341
 Overview 341
MARC records 139
Margins 123
Menu
 District 343
MicroLIF 341
Monthly Usage Report 239

N

National Agricultural Library
 Headings 87
National Library of Medicine
 Headings 87
Next Barcode 87, 90
Notices
 Overdue 80

O

Orders Preferences 94, 97
Overdue Listing Report 253
Overdue Notice 80
Overdue Notices 255

P

Password 135
Patron Barcode 132
Patron Counts 228
Patron Desk Reference 225
Patron History 97, 137, 302
Patron Information Window 125
Patron Management Preferences 94, 97
Patron Notices 257
Patron Password 135
Patron Payment History 226
Patron Picture 133
Patron Policy 132
Patron Preferences 99
Patron Statistics 136
Patron Utilities 302
Patrons
 Special 131
Patrons Menu 126
Period Due Date 70
Phone 135
Place 155
Policies
 Printing 212
 Reports 212
Port ID 121
Preferences
 Access Levels 61
 Adding Users 58, 60
 Calendar 68, 69
 Display Settings 83, 326
 District Librarian 345
 Holds 78
 Import 317, 333
 Library Information 88
 Orders 94, 97
 Patron 99
 Patron Management 94, 97
 Reservations 78
 Routes 108
 Sounds 108, 113
 Web 121
 Word Processor 121
Preferences Report 218
Print
 Library Calendar 213
 Policies 212
Print the Transaction Log 181
Printing
 Authority Reports 221
Publication Date Summary Report 239
Publication Year 155
Publisher 155

R

Rebuild 313
Recall Letters 80
Registration Dialog 21, 26
Remove Patron Holds 173
Remove Patrons 303
Removing a Title or Copy 145
Removing Patron Holds 194
Removing Records 49
Removing Users 60
Renewing an Item 200
Replace Information 276, 290
Replace Patron Information 302
Replacement 155
Replacement Cost 155
Reports
 Authority Lists 221
 Circulation 251
 Command Bar Codes 216
 Item 237, 243
 Overview 205
 Patron 223
 Policies 212
 Quick Reports 209
 Special Reports 211
Researcher User Level 64, 66
Reservation Notices 80
Reservation Preferences 78
Reservations 192
 Web 121
Reserving an Item 192
Return Statistics 267
Rolodex Cards 231
Routes Preferences 108

S

Saving MARC/MicroLIF Records 341
School Library Preferences 94
Sears Headings 87
Self Service Checkout User Level 64, 66
Series 155
Settings
 Word Processor 123
Show
 Item Details 173
 Patron Details 173
Show Item Copy Notes 181
Show Patron Notes 181
Show Statement of Responsibility 91
Sounds Preferences 108, 113
Special Item Lists 259
Special Patrons 131, 174
Spine Labels 249
Start Bookdrop 173
Start Classification Command 201
Start Classification Mode 201
State Classification Mode 201
Statistics
 Patron 136

Student Aide User Level 61
Subjects 157
Summary 161
System Analysis 222
System Requirements 15

T

TAB Delimited Records 324
Taking Inventory 195
Temporary Items 201
Title 152
Title Statistics 162
Tool Tips 84
Transaction Command Line 171
Transaction Log 170
Transferring data from Alexandria v3 32
Transferring data from Alexandria v4 32

U

Update
 Circulation Records 311
Updates
 Alexandria 312
Usage by Item Policy Report 268
Usage by Item/Patron Policy Report 271
Usage by Patron Policy Report 269
Usage by Patron/Item Policy Report 270
Usage by Period Report 266
User Access Levels 61
Utilities
 Catalog 314
 Circulation 311
 Database 313
 Item 275, 289
 Overview 273, 287, 299, 309
 Patron 301, 302
 Replace Information 276, 290
 Verify 316
Utility
 Call Number Prefix 277, 291
 Change Item Policy 276

V

Verify
 All 316
 Circulation Records 311
 Items 275, 289
Verify Items 275, 289
Verify Patron Status 301
Volume 150
VWP Settings 123

W

Web Preferences 121
Window Colors 83
Word Processor Preferences 121, 123



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