

B3: Big Picture: TexTrack Textbook Tracking

Agenda:

1. Introduction
 2. How it works
 3. Customize Options
 4. Maintenance
 5. Transactions
 6. Reporting
 7. Form Letters
 8. Web Viewer
-
1. Introduction to TexTrack
 - a. TexTrack does textbook tracking. Assign numbers to textbooks and keep track of which student or teacher has which book. Also assess charges for lost, damaged or sold books.
 - b. Features – Generate or capture existing book numbers, print bar code labels, check in and out textbooks, mark books as lost or damaged, charge fines and fees, send letters to parents regarding book status. Easy to understand reports.

 2. How it works – Overview
 - a. Book masterfile – Textbook Maintenance.
 - b. Copy masterfile – one record for each book copy.
 1. Each copy has a STATUS – In, Out, Overdue, Lost, Sold.
 2. Each copy record has Customer number, date/time out, plus the user who checked it out.
 3. Complete book number = Prefix/Book/Copy - #####-#####-#####. Using the Prefix is optional.
 4. What about the bar code on the book? You may use either the book/copy number as the bar code or any unique number you choose. This means if your textbooks have bar codes on them from a different software package, you can still use those existing bar codes with TexTrack.
 - c. History file – records every single in and out transaction.
 - d. Charges go directly to Tracks – charged to the Customer/Student's account.
 1. Fees for damage, missing bar codes
 2. Lost book fees
 3. Fees for buying the book if the book is sold

3. Customize Options
 - a. Book Copy Numbers with or without Prefix.
 - b. Indicate Condition Codes on check out and check in or not.
 - c. Assign Lost Textbook Item and Sold Textbook Item.
 - d. Assign charges to GL Accounts.
 - e. Customize receipt printing for TexTrack.
 - f. Assign due dates for your books.
 - g. On Check In screen: Display all Tracks charges for the student or only TexTrack charges?
 - d. Capture Existing Numbers – allows you to use existing bar code numbers on your books. Creates a cross reference between the TexTrack book/copy number and the bar code number.
 - e. Global Status Change – marks books as Overdue or Lost.

Customize Options - Play School High School

Books | Accounts | Receipts | Due Dates

Scan at

Condition Code Check Out Check In

Teacher Number

Class Number

Use Prefix

Condition Codes

1 Good Show All Charges

2 Fair

3 Poor

4

5

OK Cancel

Customize Options - Play School High School

Books | Accounts | Receipts | Due Dates

Lost Textbook Item

LOST Lost Textbook

Sold Textbook Item

SOLDTB Sold Textbook

Lost Books - use GL Account on Department

Other charges - use GL Account on Department

Sold Books - Use GL Account on Dept.

OK Cancel

CM ZPLAY 03/19/06

Customize Options - Play School High School

Books | Accounts | Receipts | Due Dates

Print receipts for Checked Out books:

Print receipt for sold books

Use Receipt Printer

Use Report Printer

Customize Options - Play School High School

Books | Accounts | Receipts | Due Dates

Date Code End of Year Date 06/05/06

OK Del

Date Code	Date
End of Year	06/05/06
End of Semester	01/15/06
May 15th	05/13/06

4. Maintenance files
 - a. Textbook Maintenance – one record for each book title.

- b. Department Maintenance – optional, like History, English, Science.
 - c. Teacher Maintenance – optional, like Smith, Jones, Edwards.
 - d. Class Maintenance – optional, like English 9, Biology, Spanish 2.
 - e. Prefix Maintenance – optional, may be used for number of school site or a specific type of book.
 - f. Cross Reference Maintenance – if you use bar code number that is different from the book number.
 - g. Textbook Copy Maintenance – use to delete a book from inventory.
 - h. Check Status – scan a bar code on a book to determine its status. In inventory or checked out? Shows student name and date checked out.
5. Transactions
 - a. Check out screen – based on options selected, you can scan Teacher Code and/or Class Code first. Then scan Student number or select Customer from lookup.
 1. TexTrack checks to make sure student can check out books (in Cust Mntce).
 2. TexTrack checks to make sure student doesn't already have one of this title (by checking the TXTRACK file).
 3. When you scan a book copy, it should have a STATUS of "IN" if it exists in your inventory. If it isn't "IN," the program assumes it wasn't checked in properly the last time, asks if you want to check it in and then out again.

TexTrack Check Out Screen - Play School High School

Customer: DANSON, CHRISTOPHER Teacher Number: JOANNE SMITH

Scan or enter bar code: Class Number: ENGLISH 9

Book Number	Title	Customer	Condition	Books Out	Amt
0000-2323-0001	Geometry and You	Danson, Christopher	Good	2	32.75

Use Due Date in Textbook Maintenance

Delete Books Instead of Checking Out

? F2 Menu F5 Show F6 Print F8 Customer

ZPLAY 03/15/06

- b. Check in
1. TexTrack checks to make sure book is “OUT” and then changes STATUS to “IN.”
 - i. If Sold, warns you.
 - ii. If Lost, asks if you want to reverse the charge to student.
Automatically creates a credit against the original charge.

TexTrack Check In Screen - Play School High School

Scan or enter bar code:

Book Number	Title	Customer	Cond	Books Out	Amt
0000-2323-0001	Geometry and You	Danson, Christopher	Good	1	
0000-2323-0001	Missing Bar Code	Danson, Christopher			3.00
0000-2323-0001	Damaged Book	Danson, Christopher			2.00

Customer: 901258 Danson, Christopher

Books Out		TexTrack Charges Only			
Book	Price	Rec. No	Description Amt Due		
4567	Treasure Island				
Lost 24.53				0.00	0.00

? F2 Menu F4 Chgs F5 Show F6 Print F8 Customer

ZPLAY 03/15/06

- c. Tagging Lost Books
 - 1. TexTrack marks the book as LOST and charges the student account for the Price of the book.
 - d. Selling Books
 - 1. TexTrack marks the book as SOLD with student info.
 - 2. Charges the student's account for the price of the book.
6. Reporting – a partial list
- a. Textbook Listing – can show detail for each book or a book count for each title.
 - b. Checked Out Textbooks by Teacher, Class, Title, Department, Student.
 - c. Lost Textbook Report – by Teacher, Class, Title, Department, Student.
 - d. Textbook History Report – shows history for a specific book copy. NEW!
 - e. Customer Textbook History Report – history for a specific Customer. NEW!
 - f. Instant statements for students showing books checked out.
 - g. Textbook Status Summary Report showing totals for each title.
 - h. Prints textbook bar codes.
7. Form Letters
- a. Form letter Maintenance – to warn about overdue or lost books, charges due.
 - b. Printing Form Letters – print letters or send via email.
8. Web Viewer Options – Refer to Session B5
- a. Many functions can be also be done through Web Viewer, allowing teachers to check out/check in books in the classroom.