

# Textbook Tracker

## Guided Tour



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# Textbook Tracker Guided Tour



## Getting Started

This guided tour takes you through a full-working version of Textbook Tracker and will highlight many of Textbook Tracker's easy-to-use features and integrated capabilities. For your first tour through Textbook Tracker, we recommend you follow the guide suggestions using the sample data.

After the guided tour, feel free to add actual books and patrons from your school. This will give you an excellent idea of how Textbook Tracker will benefit you. If you would like to go through the guided tour a second time, simply reinstall the demo disk.

Place the COMPANION Demo CD into your CD drive. For *Windows* installations, go to **My Computer**, and double-click on the COMPANION Demo CD. Double-click on the installer located in the Textbook Tracker folder and follow the installation instructions. For *Macintosh*, double-click on the COMPANION icon when it appears on your Desktop. Double-click on the installer located in the Textbook Tracker folder and follow the installation instructions.

## Entering Data

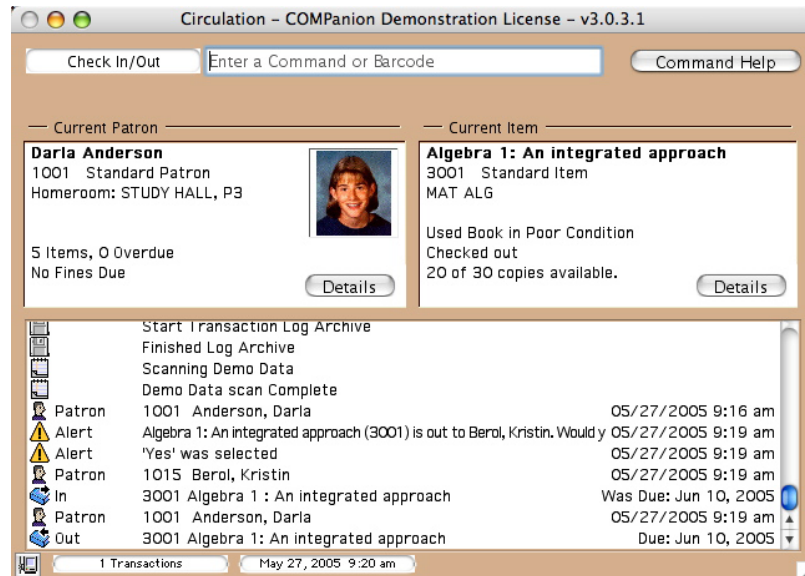
Where you read text written like this: Sample Text, type it into the program.

Textbook Tracker users typically enter data with bar code readers/scanners but in this guided tour all bar code numbers will be entered via the keyboard followed by pressing the **Return** or **ENTER** key. If you have any questions, please call us toll-free at:

**1-800-347-6439**

## Circulation Window

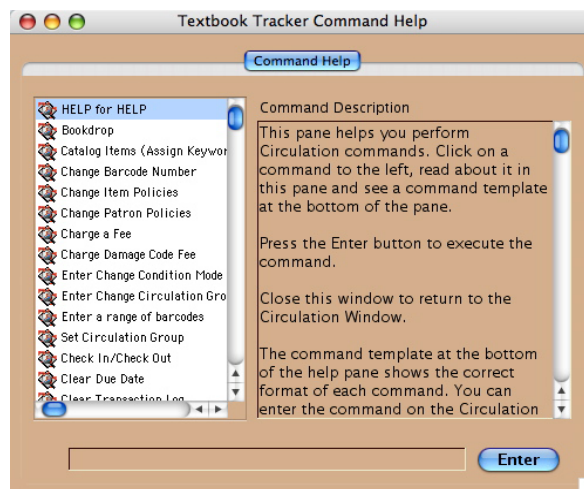
Daily activities such as circulation, inventory and fines are performed from the Circulation window. Textbook Tracker automatically displays all commands entered from the keyboard and bar code reader in the Command line.



Intuitive commands perform routine circulation activities. You can type **T** for **Find Title**, **L** for **Locate Patron**, **B** for **Bookdrop**, and **I** for **Inventory**. Textbook Tracker has both visual and audio warnings for common alerts such as **Overdue Item**, **Inactive Patron**, **Fine Due**, etc.

## Circulation Help

All transaction functions can be performed directly from the Circulation window; however, if you don't know the command code, click on **HELP**. The left portion of the window displays the command name, the right portion gives a brief description, and the command line at the bottom lets you execute the command directly from the **Circulation HELP** window.

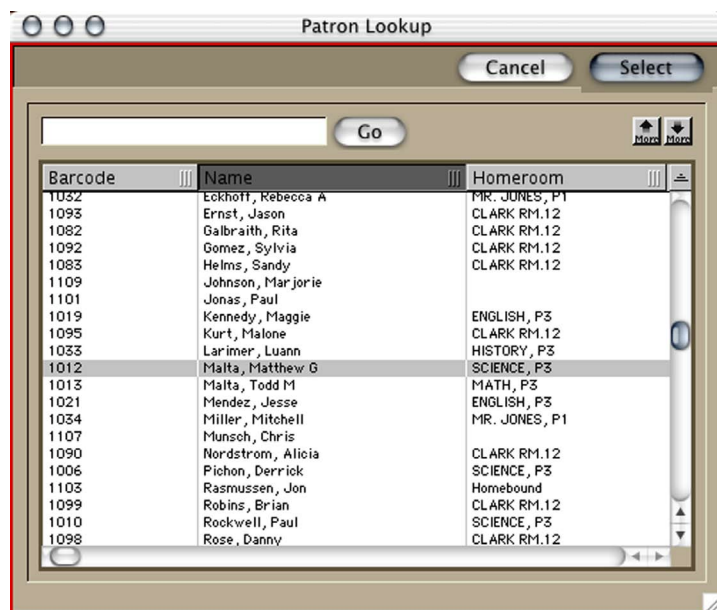


Close the window when you are finished.

## Locate Patron

Matthew Malta needs *World History: Connections Today* (bar code 3270) for his English class, and he doesn't know his patron number.

- To find his number, use the **Locate Patron** command to browse patrons.
- Type: L MAL .



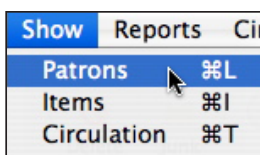
- To select Matthew Malta, click **Select**.

## Check In/Out Item

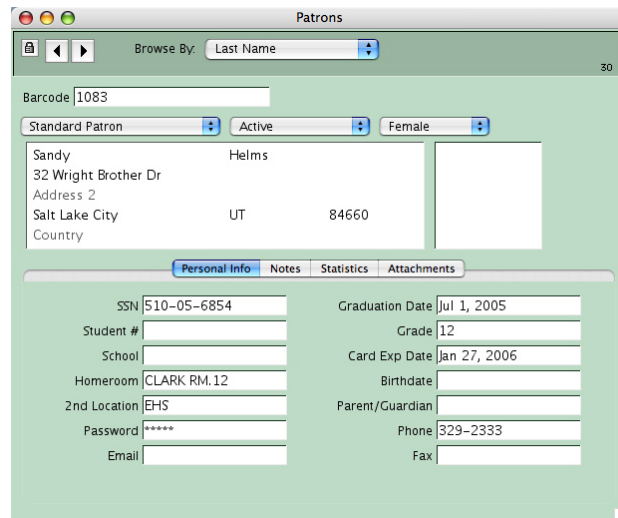
- Now type 3270  to check out the book to Matthew. You may continue to check items out to him by entering another bar code.

## Patrons

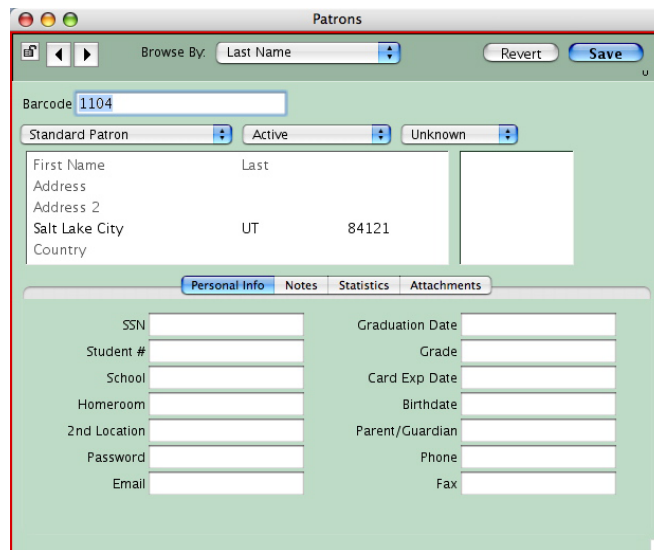
The Patrons window stores complete information about a patron, such as demographics, textbook use status, loaned items and patron contact. You can also enter notes or comments about individual patrons.



- To view a patron record, go to the **Show** menu and select **Patrons**.
- Next go to the **Patrons** menu and select **Find**. Type Helms and click **Find**.



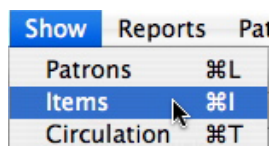
- Add yourself as a patron. Select **New Patron** from the **Patrons** menu. Textbook Tracker automatically assigns the next available patron bar code number. Use this number or enter a number of your choice. **[TAB]** from field to field and complete the information.



- Click **Save** and close the window when you are finished.

## Textbooks

Information about each item in your inventory is kept in the **Items** window. This data can be typed directly into Textbook Tracker or imported from a tab-delimited text file.



- Go to the **Show** menu and select **Items**, then select **New Title** from the **Items** menu.

- Enter your favorite textbook. Type a *Call Number* (users often follow library call number guidelines for this field.) **TAB** through the fields to complete the record.

- In the **Items** window, click on the **Copy Information** button, after saving record, to continue on to see and enter copy information.

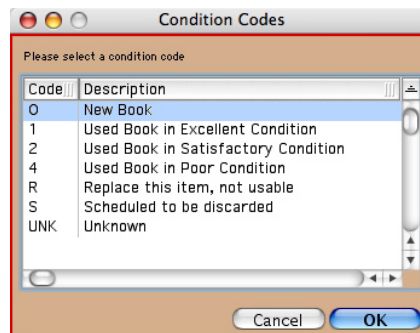
A title can have as many copies as required. In **Copy Information**, information for the specific title is displayed at the top of the window.

- Enter information about a specific copy of the textbook you entered. **TAB** through the fields to complete the record. Click **Save** and close the window when you are finished.

## Item Condition

You notice that a textbook that has only been in circulation for one year is in poor condition. You can quickly change the condition status of the item at the circulation window.

- To change the condition code of the item, type **CL** **ENTER**. This brings up a list of customizable condition codes. Double-click on *Used book, in poor condition*.



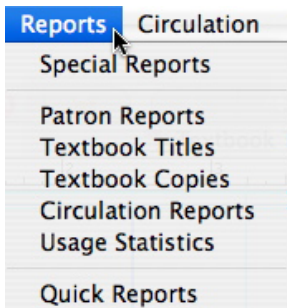
- Type 3088 **ENTER** to change the condition of *Biology* from *New Book* to *Used Book, in poor condition*.

To return to check in/out, type the period key (.) and **ENTER**.

## Reports

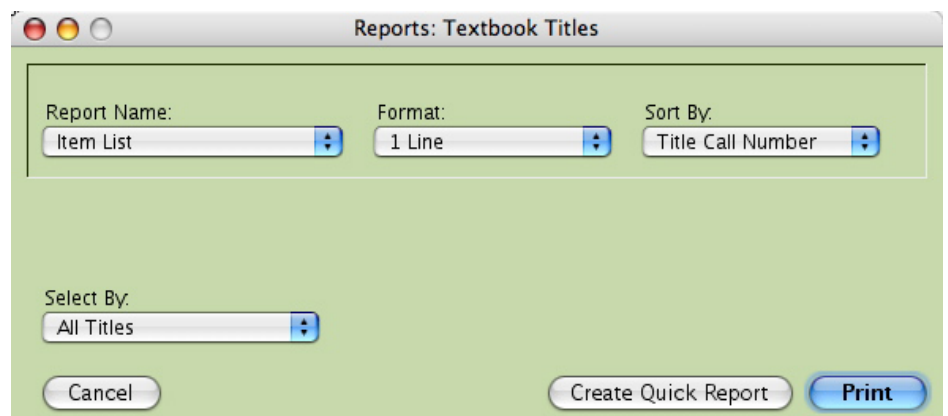
Many customizable reports, including bar code label reports for both patrons and textbooks, are available in a variety of formats. This allows you to choose precise information to meet your needs.

Every report has similar select, sort, and print options. Each may be output to your screen, a disk, or printer.



Suppose your teachers want to see a list of all textbook titles in order to select which books they will use for the coming year.

- To print a report of all textbook titles, go to the **Reports** menu and select **Textbook Titles**.
- In the **Reports: Textbook Titles**, select *Item List, 1 Line*. There are a number of options you may choose to sort by. In this example, we will sort by *Call Number*, which is the default. Click on *Title Call Number* to view the sorting options available from the pull down menu. Next, we will **Select by All Titles**.
- Click **Print**. The report will then appear in a new window.



The following report will display on your screen.

CALL NUMBER	TITLE	AUTHOR	COPIES
ART 7	Art : Images and Ideas		14
ART 8	A World of Images		16
BUS KEY	Century 21 Keyboarding and informa..		35
ENG 7	Language of Literature		12
ENG 8	Prentice Hall Writing & Grammar : ...		11
ENG 8	Prentice Hall Literature : Timeless...		16
ENG 8	Writer's Craft : Level 8		25
FRE 8	Discovering French Bleu : Deuxieme...		17
GER 10	Komm Mit : Level 1		14
HER 8	Decisions for Teen Health		13
HER 8	Teen Health : Course 2		14
HIS 10	World History : Connections today	Merki, Mary Bronson	45
HIS 10	World History-Connections Today	Ellis	1
HIS 8	Texans and Texas		9
HIS 9	America : the people and the dream		22
HIS 9	The Americans : Reconstruction thr...		21
LIT BRA	Dandelion Wine	Bradbury, Ray	28
LIT POT	The Chosen	Potok, Chaim	68
LIT POT	...	...	...

- All reports within Textbook Tracker may be edited. When finished, close the window.

## Fines and Payments

Fines and Payments can be handled directly from the **Circulation** window to quickly provide students with account information.

- A patron, Marijane Lou Coots (1036), returns *Precalculus* (3526) with slight water damage. Scan or type in Marijane's barcode 1036 then type the command F for Fee, then the fee amount, and the description of the fee. Press **ENTER** when the message is as desired. (i.e., F \$3.00 Water damage on item 3526.) You will see the fee charged to Marijane's account in the transaction log in the **Circulation** window.
- If you wish to view the patron's fees, charges and payments, simply type F and **ENTER**. The **Fee Charges and Payments Window** pops up.
- When finished, close the window.

Date	Type	Description	Total	Balance
Mar 26, 2002	Fee	Water damage on item 3526	3.00	3.00

### Web

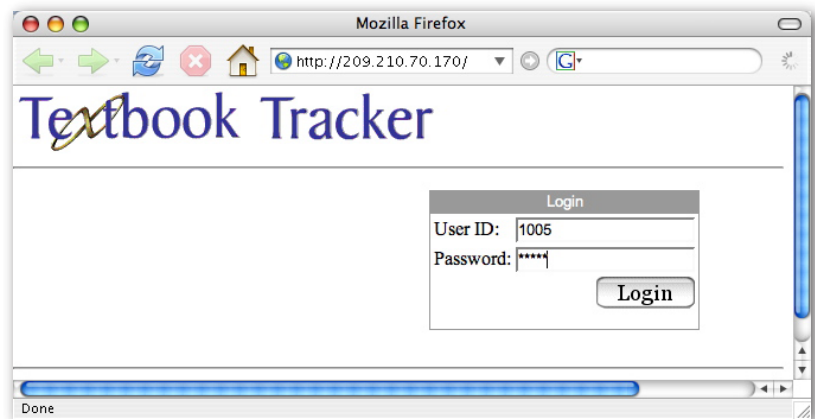
Use the following instructions to view how Textbook Tracker's Web features work. To demo Textbook Tracker's Web capabilities, you must have TCP/IP turned on. If you have enough memory you can demo Textbook Tracker's Web on the same computer. If not, you can use a computer that can connect to your computer through a network or the Internet.

After starting the Textbook Tracker demo, look for your IP address at the top of the Transaction Log. If your hardware is properly configured, the transaction list should read:

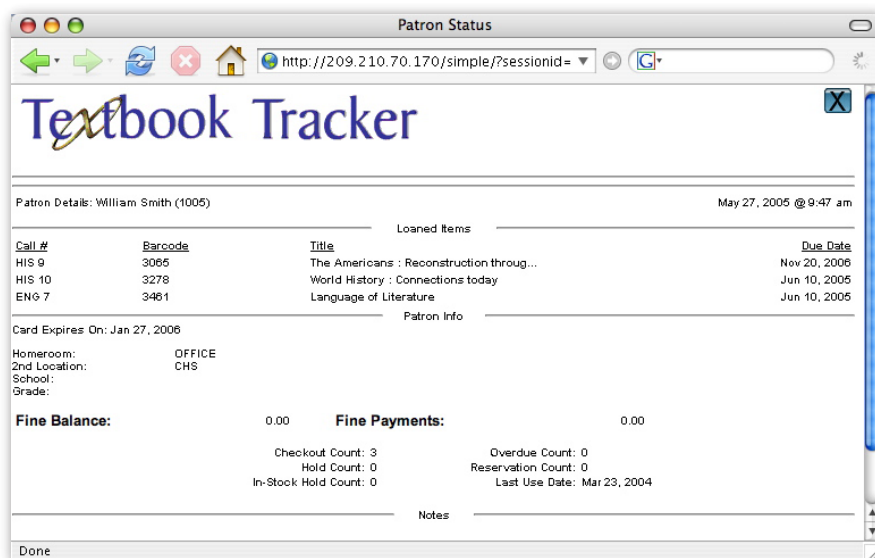
TCP is Active, IP address is: (IP Address)  
Web services activated.

- To view your collection from another location, enter your IP address into the URL field of your Web Browser on any computer. This allows you to access your collection using Textbook Tracker's Web capabilities. The IP address will be specific to your computer.

In order to view the demo capabilities from another computer, your demo must stay running. Textbook Tracker contains a Web server—it must be running to demo Textbook Tracker's Web features. You cannot run Textbook Tracker and Personal Web Server simultaneously without changing the ports on your Personal Web Server.



- When you have entered your IP address in the URL field of your Internet Browser, you will see Textbook Tracker's Web Login. For this example type in 1005 for the **Patron Barcode** and Smith for the **Patron Password**. Click on **Login**. This will take you to the Patron Status window. Close the window when you are done.



## Preferences

Using Preferences from the edit menu, you can customize Textbook Tracker at any time to meet your needs. You can define policies that determine how each textbook is circulated. For example, you can set policies to determine how long textbooks can be checked out and how long textbooks can be held for a patron. You can also customize your sounds, data archiving schedule, display settings, administration information, calendar, and more from within Textbook Tracker preferences.

## Technical Support and Product Updates

COMPANION offers technical support 24-hours a day, 365-days a year via toll-free telephone for customers with a support subscription (first year FREE). Textbook Tracker also has built-in technical support features. Licensed users can update to the most current version of Textbook Tracker by simply running a utility. This feature is disabled in this DEMO version, but is described to show how simple it is to update the software.

- From the **File** menu, select **Utilities**. In the resulting window, select the **Utility Type** of **Check for Updates**.
- When the **OK** button is clicked, Textbook Tracker finds the latest version via the Internet, downloads it to the user's machine and automatically updates the software. (This feature requires an Internet connection.)

## Hardware Recommendations

These are the hardware recommendations for Textbook Tracker:

### *Macintosh*

- Mac G3+
- System 10.2+
- 256 MB of RAM

### *Windows*

- Pentium III+
- Windows 2000 or XP
- 256 MB of RAM

## Conclusion

A guided tour provides only an overview of the unique features and functionality Textbook Tracker will offer you. To find out more about how Textbook Tracker's advanced technology can benefit you, your school district, etc., contact COMPanion.

For More Information Call Toll-Free

**1.800.347.6439**

International Call 801.943.7277

[www.TextbookTracker.com](http://www.TextbookTracker.com)