



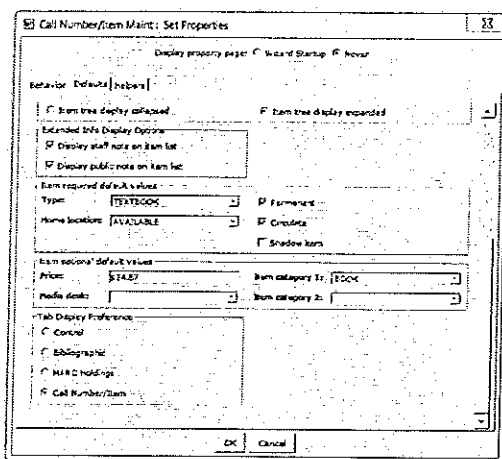
Piqua City Schools

Textbook Management

Steps for adding Textbooks to the Database

1. Using SmartPort, find a MARC record for the textbook. Import it into your database – MARC records can be found in CRC and OCLC. If you cannot find a record there, you must do original cataloging.
2. Using MODIFY TITLE wizard, set the title to “shadowed”
3. Item Group will be TEXTBOOK
4. Set temporary defaults for the CALL NUMBER, ITEM MAINT wizard as follows:
 1. Right-click on wizard
 2. DEFAULT tab – enter additional specific info for items (item group and price)

Steps for adding Textbooks to the Database cont.



Steps for adding Textbooks to the Database cont.

4. Close Set Properties window. Select CALL NUMBER/ITEM MAINT. Wizard.
5. Search and find the specific record you are adding items to.
6. Select MODIFY
7. Click ADD ITEM ,scan book, ADD ITEM, scan book, etc... (assuming you have already put barcode on the book)
8. Items are ready for Circulation!!!!



Policies

- Circ Rules:
 - All students are allowed to checkout 2 books.
 - All students are allowed to checkout 1 textbook.
- Student Profiles allow students to checkout a maximum of 3 books.
- Each year when you add more textbooks this will need to be increased by MDECA.

Topics of Concern.....

- Call Numbers - Prefix of TXT
- Due dates for textbooks – CRD
- Elem has 6 textbooks....policy says only one at a time. Check in old book before check out next one. (As always you can override)

Topics of Concern.....cont.

- Textbook should not count as one of the two allowed books.
- Can we check it out for a year?
- Can elem move books to another building if they have a surplus and the other building is short?

Errors you may encounter when checkout out texbooks....

- When users are blocked due to a max limit imposed by the Circ Rule, you should see the message, *"user can't check out any more of this item type"*, when prompted for the override.
- If users are blocked due to a max limit imposed by the User Profile policy, you should see the message, *"User has too many checkouts"*, when prompted for the override.

REPORTS

- Shelflist
 - Too large
 - Spreadsheet w/pivot table shows status and total titles. (see handout)
- Overdue Reports
 - You may go in and exclude the item group TEXTBOOK from the report.
 - You may run an Overdue Report for Textbook only

Questions?



Let's get started!



We should have some books that have arrived to work on. Let's pair up and together we will work on modifying the title records and adding items.

Also, check scheduled reports and exclude Textbook item group.

Value of Collection


Setting up the report

- **Click** Schedule New Reports wizard.
- **Select** the INFOhio tab
- **Select** CAS: Value of Collection.
- **Click** Setup & Schedule.


Basic Information Tab

- **Change** the Report name and/or Title if you wish. It should reflect the content of the report.
- **Description** is a good place to note any special notes to yourself. If you save the report as a template, you will see this screen each time you run it.
- **Title** appears on each page.
- **Footer** appears at the bottom of each page (optional)

Call Number Selection Tab

- Use gadgets  to ensure correct formatting of data entry.
- **Select** your library. If Library is left blank, all buildings are reported.

Item Selection Tab

- **Make** selections as appropriate.
- Use gadgets  to ensure correct formatting of data entry.

Output Options

- Do not make any changes. The defaults are best.

Running and saving the report

1. **Click** Run Now.
2. **Click** Finished Reports wizard.
3. **Select** report name and click View.
4. **Select** report view options:
 - a. Uncheck 'View log'.
 - b. Uncheck 'Format report'
5. **Customize** the report and/or save it if you wish.

Sample format:

Group	# items	# w/price	Price Total
Kalida High School:			
BIOGRAPHY	458	456	\$ 4,502.02
COLLBIOG	101	101	\$ 1,169.23
FICTION	2,215	2,199	\$ 19,038.15
KIT	107	81	\$ 8,795.86
NONFICTION	3,029	2,762	\$ 29,003.33
OVERSIZED	76	76	\$ 1,200.41
PERIODICAL	1,043	1,038	\$ 3,551.18
PROFESSNAL	110	110	\$ 2,383.64
REFERENCE	662	662	\$ 19,541.05
VERTICAL	101	101	\$ 161.10
VIDEO	309	309	10,017.35
Library Totals:	8,256	7,934	\$ 100,026.59
Number of items with no price:			322
Number of items with price:			7,934
Average value of items with price:			\$ 12.61

This report will give you a list of your textbook titles, an item count for each title, and a status count for each title.

1. Run a shelf list report in spreadsheet format. Select call number, status, and title. Select Library if doing multiple buildings.

WARNING: Do NOT select barcode.
Excel groups rows by 'unique row'
If you select BARCODE, that would make each row unique.

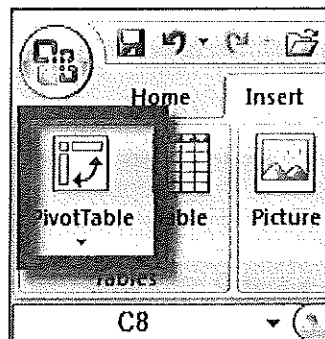
Other Field Selections:

<input type="checkbox"/> Barcode	<input checked="" type="checkbox"/> Call Number	<input checked="" type="checkbox"/> Status
<input checked="" type="checkbox"/> Title	<input type="checkbox"/> Item Group	<input type="checkbox"/> Material Type
<input type="checkbox"/> Funding Source	<input type="checkbox"/> Creation Date	<input type="checkbox"/> Inventory date
<input type="checkbox"/> Circ Notes	<input type="checkbox"/> Public Notes	<input type="checkbox"/> Staff Notes
<input type="checkbox"/> Last Activity Date	<input type="checkbox"/> Last Checkout Date	<input type="checkbox"/> Total Number of Checkouts
<input type="checkbox"/> Author	<input type="checkbox"/> Price	<input type="checkbox"/> Library
<input type="checkbox"/> User	<input type="checkbox"/> Inhouse Checkouts	<input type="checkbox"/> Pub. Year

2. Open results in Finished Reports (Excel).

	A	B	C
1	Call Number	Status	Title
2	GENERAL ALGEBRA	CHECKEDOUT	AGS Algebra 1
3	GENERAL ALGEBRA	AVAILABLE	AGS Algebra 1
4	GENERAL ALGEBRA	CHECKEDOUT	AGS Algebra 1
5	GENERAL ALGEBRA	CHECKEDOUT	AGS Algebra 1
6	GENERAL ALGEBRA	CHECKEDOUT	AGS Algebra 1
7	GENERAL ALGEBRA	CHECKEDOUT	AGS Algebra 1
8	GENERAL ALGEBRA	CHECKEDOUT	AGS Algebra 1
9	GENERAL ALGEBRA	CHECKEDOUT	AGS Algebra 1
10	GENERAL ALGEBRA	CHECKEDOUT	AGS Algebra 1
11	GENERAL ALGEBRA	AVAILABLE	AGS Algebra 1
12	GENERAL ALGEBRA	CHECKEDOUT	AGS Algebra 1

3. In Excel, INSERT a PIVOT TABLE (Examples that follow are from Excel 2007. This is also possible in previous versions.)



4. Select the data range (default selects all in the worksheet)

Have the PivotTable inserted into a New WorkSheet.

Click OK.

Create PivotTable

Choose the data that you want to analyze

Select a table or range

Table/Range:

Use an external data source

Choose Connection...

Connection name:

Choose where you want the PivotTable report to be placed

New Worksheet

Existing Worksheet

Location:

OK Cancel

5. Select the columns you want grouped.

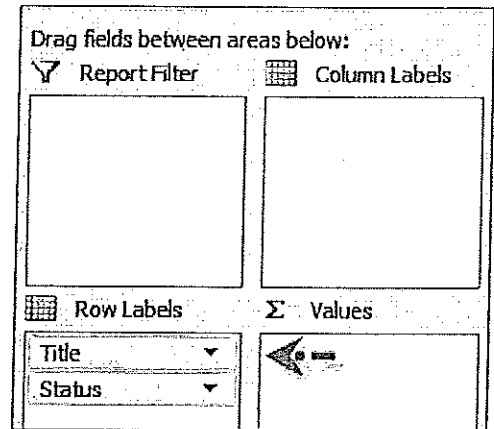
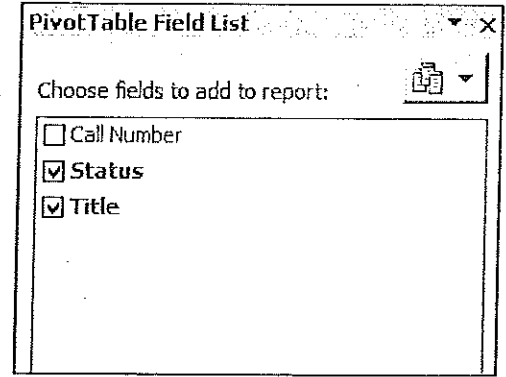
IMPORTANT: Check them in order from largest group to smallest grouping so they will appear correctly in the Row Labels area.

Examples:

Group and count by Title then Status

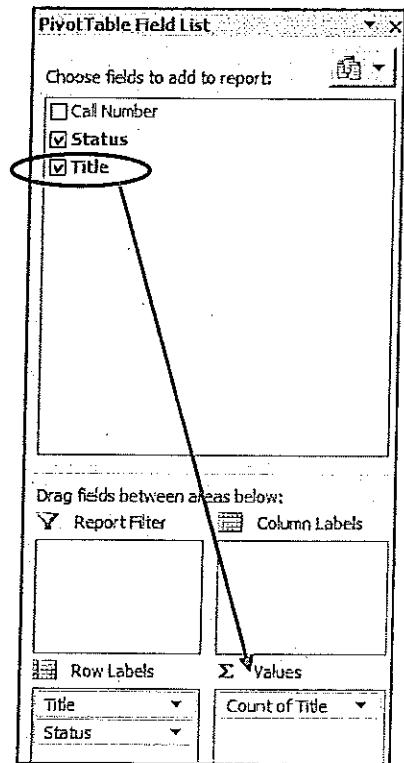
Group and count by Library, Title, status, etc.

As FIELDS are selected, they are added to the ROW LABELS area.



6. Add the fields you want counted to the Sigma Values box by dragging from the Choose Fields box at the top of the screen.

In the example that follows, just Title was selected.



Results: Grouped by Title

Row Labels	Values Count of Title	Count of Status
A history of western music / J. Peter Burkholder, Donald Jay Grout, Claude V. Palisca	45	45
AVAILABLE	45	45
AGS Algebra 1	167	167
AVAILABLE	50	50
CHECKEDOUT	117	117
AGS Algebra 2	99	99
AVAILABLE	93	93
CHECKEDOUT	6	6
AGS Geometry	185	185
AVAILABLE	25	25
CHECKEDOUT	160	160
American government	484	484
AVAILABLE	431	431
CHECKEDOUT	52	52
LOST-CLAIM	1	1
AP Biology : the unity and diversity of life	46	46
AVAILABLE	11	11
CHECKEDOUT	35	35
AP European History	35	35
AVAILABLE	35	35
AP Government	87	87
AVAILABLE	68	68
CHECKEDOUT	19	19