



W S I P C

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# WSIPC Guide to Textbook

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# About This Guide

The Textbook module helps you manage your district's textbook inventory. You can track a textbook from the time it is ordered and monitor its use throughout your school district.

Textbooks in your district's inventory can be assigned to and returned from Entities, classrooms, staff members, and students in various ways, including the use of barcode scanners.

You can also connect the Textbook module to Fee Management to handle fines and fees related to late, lost, or damaged textbooks.

Several reports and utilities are also available in the Textbook module to help you manage your district's textbook inventory.

## What You Should Know Before You Start

You'll find that this Guide is much more helpful if you have experience with Student Demographics, Current Scheduling, and Educator Access Plus.

## Be Sure You're Signed In

This Guide is intended to be read while you are working in the Textbook module, so be sure you are signed in. Many of the procedures and concepts discussed in the Guide are best understood if you practice as you read.


## How to Use This Guide

This section shows you how to follow navigation paths in a Guide, and how to navigate around the Guide using various features. This section also describes how and when screen shots are used in the Guide.

## Navigation Paths

The procedures in this Guide begin with navigation menu paths. Select the Display Navigation Menu Paths check box in User Preferences to ensure that you can follow these paths. The option is not available in User Preferences if it is already enabled for the entire district. To learn more about setting User Preferences, see the *WSIPC Guide to Skyward's School Management System*.

## Getting Around

If you're using this Guide electronically, you can click any text in blue font to move to the section of the Guide that the text refers to. Because the Guides are published in PDF format, you can also use the PDF navigation pane to quickly move from one section to another. If the pane is hidden, click the **Bookmark** button  in the menu bar on the left side of the screen.

## Screen Shots

You'll find screen shots throughout the guide to help you learn how to use the software. The data entered in the screen shots in this Guide is an example of the data you might enter. These screen shots are updated with each edition to make sure what you see on your screen matches what you see in the Guide. To prevent the Guide from becoming a lengthy picture book, WSIPC Guides use screen shots only to help illustrate a key idea or when options on a screen are described. This allows WSIPC Guides to be effective *and* concise.

## What's in a WSIPC Guide

WSIPC Guides are designed to provide readers with everything they need to know to safely and effectively use Skyward's software. WSIPC strives to make Guides that address the diverse needs of these audiences. Therefore, this Guide doesn't contain information customized for specific audiences, districts, or schools.

If you need to create educational materials that address the specific needs of your Service Center or district, consider using this Guide as a starting point for developing your own customized materials.

## Do Not Post This Guide to the Public Internet

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## What's New in This Edition

This section highlights the significant changes to the Guide since the last edition such as content about new features, important notes and cautions, and sections of the Guide that have been expanded or moved.

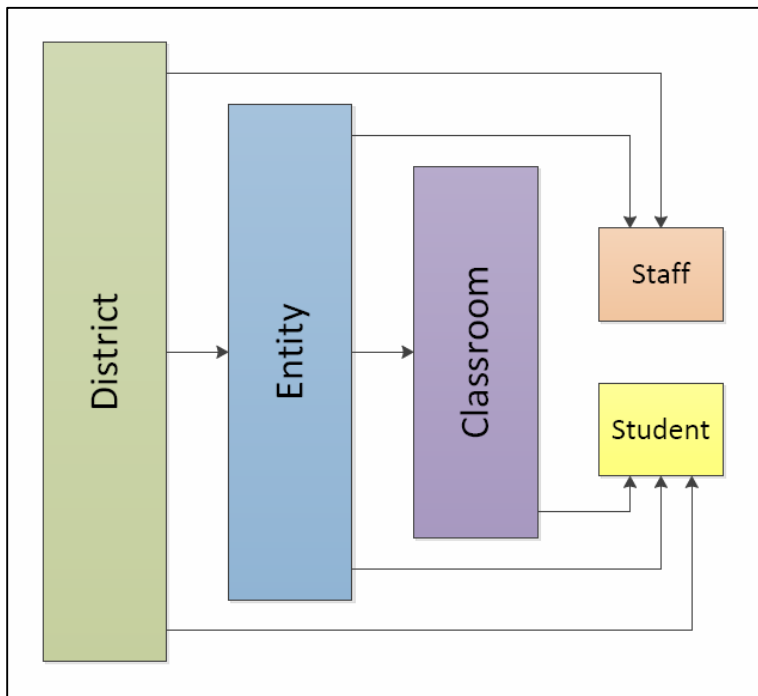
Description of Change	Page #
This Guide has been updated to reflect WSIPC's March 2016 software release version 05.16.02.00.04.	N/A
Added details about the Sync Textbook Fines to Fee Management Utility.	<a href="#">66</a>

# Understanding the Textbook Distribution and Return Chain

The Textbook module can track the life of a textbook from the time it is ordered through the time it is assigned to students and staff members, and then returned. There are several ways to manage this life cycle, and your district's size and business practices determine which model you choose.

For example, small districts with few Entities may decide to distribute textbooks directly from the district to the student or staff member, bypassing the Entity and the classroom. Large districts, on the other hand, may add the Entity or classroom levels to their distribution chain to better manage the greater volume of textbooks.

Figure 1 illustrates the models a district can use to manage textbook distribution. At the end of a term or school year when textbooks are returned, the various models of the Distribution Chain work in reverse.



**Figure 1 – Models of the textbook distribution chain**

# Managing Textbook Titles

A *textbook title* refers to a specific textbook publication. For example, *Introduction to Physical Science* is a textbook title. Both the district and any Entity can add textbooks they have ordered or purchased to the Textbook Master where information about textbook inventory resides.

The Textbook Master is where you go to manage your district's or Entity's textbook inventory. It provides you information on the textbook titles and the numbers of copies you own of each textbook title. It also keeps track of the number of copies of each textbook title that are assigned or are available.

## Adding Textbook Titles

When you purchase a textbook title that doesn't already exist in the Textbook Master, you enter the information about the textbook title in the Textbook Master. If you are purchasing textbook titles that you have purchased before, see "[Adding Textbooks](#)" (page 12) to learn how to add textbooks to an existing textbook title.

To add a textbook title:

1. Go to Student Management\Administration\TE\TM.
2. From the list of Entities at the top of the screen, do one of the following:
  - If the school district made the purchase, select (000).
  - If an Entity made the purchase, select that Entity.
3. Click Add.
4. Configure the Textbook Title Maintenance screen (Figure 2). Table 1 describes each option on this screen.
5. Click Save.

**Textbook Title Maintenance**

\* Book Code: HS-SCI-ASTRO  
 Short Title: Intro Astronomy  
 Title: Introduction to Astronomy  
 Medium Type: BOOK Textbook  
 Edition: 3  
 ISBN: 978-0935702057  
 Cost: \$76.09  
 Price: \$76.09  
 Publisher: WSIPC PU000 WSIPC Publications  
 Owned By:  Entity (specified below)  District (Entity 000)  
 Entity:  
 Classroom Book:

**Textbook Inventory Details**

Total Inventory: 50  
 Total Assigned: 0  
 Total Available: 0  
 Total Created: 0  
 Have to Return:   
 Books on Order:   
 Number on Order: 10

Asterisk (\*) denotes a required field

Figure 2 – Textbook Title Maintenance screen

Option	Description
Book Code	Code defined by the district or Entity that identifies the textbook title. Code can be a maximum of 12 characters.
Short Title	An abbreviated description of the textbook title.
Title	Full textbook title.
Medium Type	Medium of the textbook, such as Book, Audio Book, DVD, or Electronic Device.
Edition	Edition of the textbook title.
ISBN	International Standard Book Number of the textbook.
Cost	Cost to purchase or replace each textbook. This may be different than the list price of the textbook.
Price	List price of the textbook.
Publisher	Name of the textbook title’s publisher.

Option	Description
Owned By	Identifies if the textbook title is purchased and owned by the Entity or by the District.
Entity	Entity that purchased and owns the textbook title. This option is only available if Entity is selected as the Owned By option, indicating that an Entity within the district owns the textbook title.
Classroom Book	Prevents any copies of this textbook title from being assigned to a student or a staff member. Select this option if this textbook title is assigned to a class.
Total Inventory	Number of copies of the textbook title you have received through your purchase.
Total Assigned Total Available Total Created	Automatically populated as inventory changes.
Have to Return	Identifies that copies of this textbook title must be returned. If this option is not selected, it is assumed that the assignee can keep the textbook assigned to them, however it does not prevent you from returning the textbook.
Books on Order	Indicates that textbooks have been ordered but not yet received. This option is only available if you use the basic method of maintaining textbooks that are on order. To learn more about maintaining textbooks on order, see " <a href="#">Managing Textbook Titles on Order</a> " (page 8).
Number on Order	Number of copies of the textbook title you have ordered but not yet received. This option is available only if you use the basic method of maintaining textbooks that are on order. To learn more about maintaining textbooks on order, see " <a href="#">Managing Textbook Titles on Order</a> " (page 8).

**Table 1 – Description of options on the Textbook Title Maintenance screen**

## Managing Textbook Location

In addition to information about the textbook title, you can also keep track of the location of the textbooks that you have purchased.

To manage textbook location:

1. Go to Student Management\Administration\TE\TM.
2. Select a textbook title.
3. Click Location.
4. In the Department, Aisle, Bin, or Shelf boxes, type the location of the textbooks for this title.
5. Click Save.

## Managing Textbook Titles on Order

Textbook titles on order are textbook titles you have ordered but have not received from the vendor. There are two ways to manage textbook titles that are on order: the Basic method and the Advanced method.

The Basic method allows you to track the number of textbook titles on order, and nothing more. Districts that allow each Entity to purchase its own textbooks must use this method.

The Advanced method allows you not only to track the number of textbooks on order, but other information about the order such as the order's date, status, and requisition number. To use the Advanced method, you must make all textbook purchases at the district level.

## Using the Basic Method to Manage Textbooks on Order

When you add a textbook title, you specify whether the textbooks are on order. To learn how to add a textbook title, see "[Adding Textbook Titles](#)" (page 5). When you receive the textbooks, you can manually change the number of textbooks received until all the textbooks have been received.

To use the Basic method to manage Textbooks on Order:

1. Go to Student Management\Administration\TE\TM.
2. Select a textbook title.
3. Click Edit.
4. Add the number of textbooks you have received to the number in the Total Inventory box.
5. Subtract the number of textbooks you have received from the number in the Number on Order box. This box is available only if Books on Order is selected.
6. If the new sum in the Number on Order box is zero (0), clear the Books on Order check box. This shows that you are not waiting for more copies of this textbook title to arrive.
7. Click Save.

## Using the Advanced Method to Manage Textbooks on Order

The Advanced method for managing textbooks on order allows you to track more information about your textbook purchase than the Basic method does. If your district allows each Entity to purchase their own textbooks and track their own orders, you cannot use this method.

### Enabling the Advanced Method to Manage Textbooks on Order

Before you can use the Advanced method to manage textbooks on order, you must enable the configuration option.

To enable the Advanced method to manage textbooks on order:

1. Go to Student Management\Administration\TE Setup\CF\TC
2. Select the Maintain Book Orders in District Entity check box.
3. Click Save.

## Adding a Textbook Order Using Advanced Textbook on Order Tracking

After you have created a textbook title and have enabled the option, you can begin using the Advanced method for textbook order tracking.

To add a textbook order using Advanced Textbook on Order tracking:

1. In Entity 000, go to Student Management\Administration\TE\TM.
2. Click Maintain Book Orders.
3. Click Add.
4. In the Order Date box, enter the date the textbook order was placed.
5. (Optional) In the Requisition Number box, enter the requisition number of the order.
6. In the Order Status box, select an order status. The order status is a set of values that your district defines. To learn more about Order Status Codes, see "[Order Statuses](#)" (page 69).
7. Click Add to enter information about the items in this order.
8. In the Book Code box, enter the Book Code of the textbook you ordered.
9. In the Order Quantity box, enter the number of textbooks you ordered.
10. Click Save.
11. To add more items to this order, repeat steps 7 through 10.
12. When you have finished adding items to the order, click Save.

## Receiving a Textbook Order using Advanced Textbook on Order Tracking

When you have received your order, you must record it so that the textbooks are automatically added to your inventory.

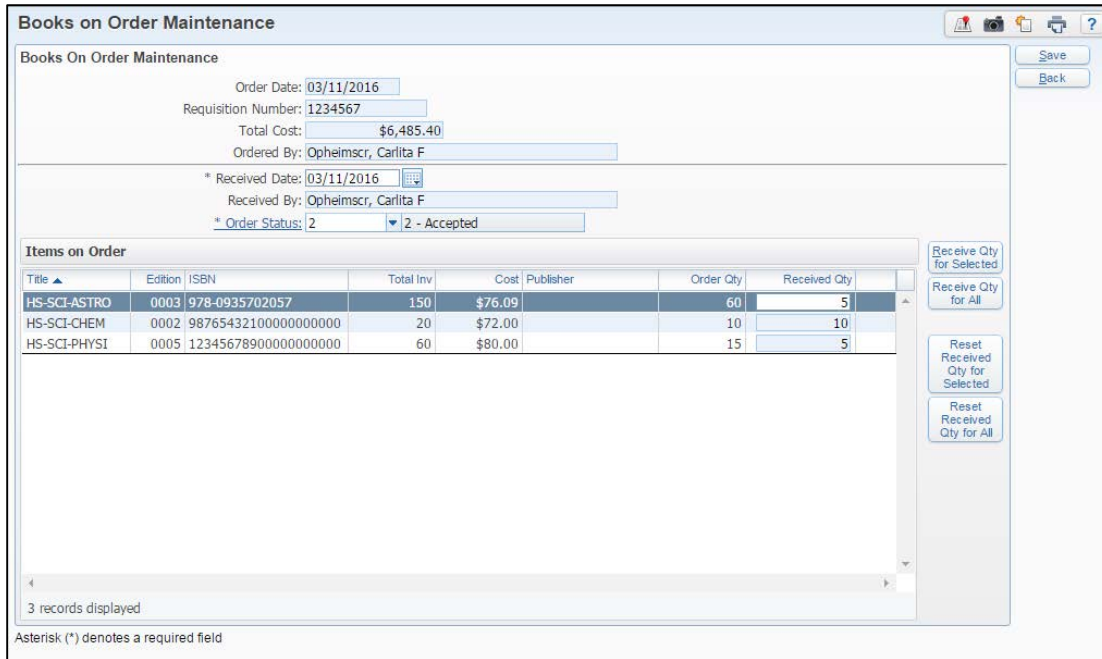
To receive a textbook order using Advanced Textbook on Order tracking:

1. In Entity 000, go to Student Management\Administration\TE\TM.
2. Click Maintain Book Orders.
3. On the Maintain Books on Order – Order Details screen, select the order that you received and click Receive.
4. In the Order Status box on the Books on Order Maintenance screen (Figure 3), modify the status if needed.
5. The Received Qty column is where you specify the number of textbooks of each title you received. Do one of the following:
  - To edit the number for the selected textbook title, click Receive Qty for Selected.
  - To edit the number for all textbook titles in the order, click Receive Qty for All.
6. Enter the number of textbooks you received for each textbook title. To reset the number for the selected title to the original value, click Reset Received Qty for Selected. To reset the number for all textbook titles to their original values, click Reset Received Qty for All.
7. When you have entered the number of textbooks received, click Save.

---

**Note** Received textbooks are automatically added to your inventory in the Textbook Master. You do not need to manually adjust the Total Inventory of the textbook title.

---



**Figure 3 – Books on Order Maintenance screen where you can update the Order Status. In this example, a shipment of textbooks is being received.**

## Adding Textbooks

Each time the inventory of a textbook title is updated, either manually by you or automatically by advanced textbook order tracking, you must create the Textbook Records to match the actual number of copies you have of the textbook title. For example, in Figure 4, there are 50 Textbook Records created for the *Introduction to Astronomy* textbook title.

To add textbooks:

1. Go to Student Management\Administration\TE\TM.
2. Select a textbook title.
3. Click Create Books.
4. Configure the Create Books screen (Figure 4). Table 2 describes each option on this screen.
5. Click Create.
6. A confirmation screen appears notifying you of the number of Textbook Records created and any errors that may have occurred. Click Close.

**Create Books**

Entity: 000 - WSIPC School District

Textbook Code: HS-SCI-ASTRO

Textbook Title: Introduction to Astronomy

**Textbook Details**

Total to Create: 50

Number to Start With: 1

Cost: 76.09

Date Purchased: 03/11/2016 Friday

\* Condition: NEW

Asterisk (\*) denotes a required field

**Figure 4 – Create Books screen. In this example, 50 Textbook Records are created.**

Option	Description
Total to Create	Number of Textbook Records to create. This number is calculated automatically based on the number of textbooks in your inventory that do not have a Textbook Record. You can change the number of textbooks to create if you do not want to create the total number of textbooks in your inventory, but you cannot create more textbooks that you have in your inventory.
Number to Start With	Book Number to use for the first Textbook Record to be created. This is the lowest number not assigned to an existing Textbook Record for that textbook title. You can change the starting number.
Cost	Cost you entered when you created the textbook title. This value may be updated only from the Textbook Master Record.
Date Purchased	The date the textbooks were purchased.
Condition	Condition of the textbooks to be created.

Option	Description
Reason Not Available	Reason the textbook is not available at the district level. This is only available if an Entity owns the textbook title.

**Table 2 – Description of options on the Create Books screen**

## Viewing Textbook Records

Once you have created Textbook Records for each textbook in your inventory, you can view the properties of each Textbook Record.

To view Textbook Records:

1. Go to Student Management\Administration\TE\TM.
2. Select a textbook title.
3. Click View All Books. The Textbook Details screen shows the number of Textbook Records created for the textbook title you selected. It also shows other information including the textbook’s availability, cost, and purchase date.

## Managing Textbook Barcodes

Barcodes must be created for each textbook if you want to use textbook assignment and return methods that use a barcode scanner.

### Creating Textbook Barcodes

Typically, textbook barcodes are generated on labels so they can be attached to each textbook. Figure 5 is an example of a template used to generate textbook barcodes.

To create textbook barcodes:

1. Go to Student Management\Administration\TE Setup\UT\TB\CB.
2. Do one of the following:
  - Click Add to create a new template.
  - Edit to modify an existing template.

3. Configure the Textbook Barcode Ranges screen (Figure 5). Table 3 describes several options on this screen.
4. Click Save and Run.

**Textbook Barcode Ranges**

Template Settings  
\* Template Description:   
 Share with other users in entity 000

Report Type  
 Range  Individual

Bar Code File Options  
Print Report:   
Page Break when Book Changes:   
Number of Labels for each Book:

Form Options  
File Format:   
Labels Used:  Avery 5160 or Compatible

Advanced Print Options  
Start with Label:   
Left Margin Offset: 0.   
Top Margin Offset: 0.   
Vertical Spacing:   
Horizontal Spacing:   
 Print Additional Line  
Additional Line:

Asterisk (\*) denotes a required field

Buttons: Save, Save and Run, Back

Figure 5 - Example of a template for creating textbook barcodes

Option	Description
Report Type	<p>Determines the textbooks the report is run on.</p> <ul style="list-style-type: none"> <li>▪ <b>Range</b> - Allows you to choose a range of textbooks to create barcodes for.</li> <li>▪ <b>Individual</b> - Allows you to choose specific textbooks.</li> </ul>
Print Report	<p>Determines whether a summary page is printed that lists the textbooks a barcode was created for.</p>
Page Break when Book Changes	<p>Determines whether a page break is added between barcodes of each textbook title.</p>
Number of Labels for each Book	<p>Number of barcodes to print for each textbook.</p>
File Format	<p>Format of the barcode file.</p> <ul style="list-style-type: none"> <li>▪ <b>Barcode Report</b> - Generates a PDF containing the bar codes.</li> <li>▪ <b>ASCII Export File</b> - Generates a data file to be used with other barcode generation software.</li> </ul> <p>To learn more about the selections available for each option, see "<a href="#">Choosing a File Format</a>" immediately below this table.</p>

**Table 3- Description of options on the Textbook Barcode Ranges screen**

## Choosing a File Format

As mentioned in Table 3 above, in the File Format box, you choose either Barcode Report or ASCII Export File.

Table 4 describes the options that are available when you select Barcode Report in the File Format box. Table 5 describes the options that are available when you select ASCII Export File in the File Format box.

<b>Note</b>	If you select a File Format of Barcode Report, the report that contains all barcodes appears on your screen. If you selected a File Format of ASCII Export File, go to Student Management\Administration\TE Setup\UT\TB\VE to retrieve the data file.
-------------	---

Option	Description
Start with Label	Identifies where on the sheet of labels to begin printing. This is useful if some of the labels on the first sheet have already been used.
Left Margin Offset	Horizontal distance between the left edge of the sheet and the first column of bar codes. The default Left Margin Offset is 0.25.
Top Margin Offset	Horizontal distance between the top edge of the sheet and the first row of bar codes. The default Top Margin Offset is 0.30.
Vertical Spacing	Vertical distance between lines of barcodes. The smaller the value, the greater the spacing. The default Vertical Spacing is 5.79.
Horizontal Spacing	Horizontal adjustment between columns of barcodes. The default Horizontal Spacing is 0. You can enter a negative number to reduce horizontal space less than the default value.
Print Additional Line	Allows an extra line to print with District-defined text.

**Table 4 – Description of options available when you select Barcode Report in the File Format box**

Option	Description
File name to be Created	Name of the data file to be generated.
Number of Labels Across	Number of labels across the page.
Number of Labels Down	Number of labels down the page.

**Table 5 – Description of options available when you select ASCII Export File in the File Format box**

## Using Default Advanced Print Options

You can change the default values of the Left Margin Offset, Right Margin Offset, Vertical Spacing, and Horizontal Spacing settings in the Create Textbook Bar Codes template.

To use Default Advanced Print Options:

1. Go to Student Management\Administration\TE Setup\CF\TC.
2. Select Change default Advanced Print Options for Barcode printing.
3. Click Choose Settings.
4. Enter default values for the Left Margin Offset, Right Margin Offset, Vertical Spacing, Horizontal Spacing, and Print Additional Line.
5. To overwrite all existing Create Textbook Bar Codes templates with these default values, select Override Advanced Print Options on existing templates.
6. Click Save.
7. Click Save.

# Managing Textbook Records

After Textbook Records are created, you can modify their properties or delete them from your inventory. For example, you can mark a textbook as unavailable, or mark a textbook to be removed.

## Marking a Textbook as Unavailable

You can temporarily mark a textbook as unavailable without assigning it to an Entity, a classroom, a staff member, or a student. You might do this for a textbook that needs to be repaired before it can return to circulation.

To mark a textbook as unavailable:

1. Go to Student Management\Administration\TE\TM.
2. Select a textbook title.
3. Click View All Books.
4. Select a textbook.
5. Click Edit.
6. Clear the Available check box.
7. In the Reason Not Available box, select a reason that the textbook is not available.
8. Click Save.

When the textbook is ready to be circulated, repeat this procedure but select the Available check box.

---

**Note** If a textbook is assigned to an Entity, a classroom, a staff member, or a student, the Available check box is automatically cleared. Its availability cannot be changed manually.

---

## Marking a Textbook to be Removed

You can specify that a textbook be removed from inventory. Doing so does not actually remove the textbook from inventory or make it unavailable for assignment.

You can use the Textbook Status Report to identify textbooks that have been flagged for removal. For information about this report, see "[Textbook Status Report](#)" (page 63).

To mark a textbook to be removed:

1. Go to Student Management\Administration\TE\TM.
2. Select a textbook title.
3. Click View All Books.
4. Select a textbook.
5. Click Edit.
6. Select the Remove Book From Inventory check box. The Date Removed and Removed By boxes are populated automatically with the current date and your name.
7. Click Save.

## Deleting a Textbook from your Inventory

You can delete a textbook from your inventory as long as it is not assigned to an Entity, classroom, staff member, or student, or marked as not available.

To delete a textbook from your inventory:

1. Go to Student Management\Administration\TE\TM.
2. Select a textbook title.
3. Click View All Books.

4. Select a textbook.
5. Click Delete.

---

**Note** If you do not plan on replacing the textbook that you deleted, you must adjust the total inventory of the textbook title in the Textbook Master.

---

# Assigning Textbooks

There are several ways to assign textbooks, depending on the textbook distribution method that you choose. This section discusses how to assign textbooks to an Entity, to Courses and classes, to staff members, and to students.

## Assigning Textbooks to an Entity

In "[Understanding the Textbook Distribution and Return Chain](#)" (page 4), you learned about several textbook distribution models. Some of these models route textbooks through the Entity before they are assigned to a classroom, to a student, or to a staff member. This model is typically used if you purchase textbooks at the district level and have several Entities in the district to distribute the textbooks to. Figure 6 (page 23) shows an example of a textbook being assigned to an Entity.

---

<b>Note</b>	Once textbooks have been assigned to an Entity, they appear in the Textbook Master Browse screen in that Entity. They also appear in the Textbook Master Browse screen in Entity 000, but are marked unavailable and have a Reason Not Available Code attached.
-------------	---

---

To assign textbooks to an Entity:

1. In Entity 000, go to Student Management\Administration\TE\TM.
2. Expand the Textbook Record that you want to assign to an Entity.
3. In the Entities Assigned To area, click Assign to Entity.
4. Configure the Assign Textbooks to Entities screen (Figure 6). Table 6 describes each option on this screen.
5. Click Assign.
6. The Book Assignment Summary screen appears, notifying you of the number of textbooks successfully assigned. If any textbooks were not assigned, the book number and reason it was not assigned is listed. Click Close.

**Assign Textbooks to Entities**

Textbook Code: HS-SCI-ASTRO  
 Textbook Title: Introduction to Astronomy  
 Total Inventory: 55 Total Assigned: 1 Total Available: 49

**Textbooks to Assign**

**Entity Selection**  
 \* Entity: 401 WSIPC High School  
 Inventory: 0 Assigned: 0 Available: 0

Select Textbook Numbers By:  Range  Individual

Textbook Number: Low 1 High 15

\* Reason Not Available: ASG Assigned  
 Distribution Code: E Dist to Entity

Asterisk (\*) denotes a required field

Figure 6 - Assign Textbooks to Entities screen

Option	Description
Entity	Entity to which the textbooks are assigned.
Select Textbook Numbers by	<p>Determines how textbook numbers are selected.</p> <ul style="list-style-type: none"> <li><b>Range</b> – Use if the textbooks you are assigning are numbered in sequential order (such as assigning ten textbooks numbered 1 to 10). If you are assigning textbooks by range, enter the low and high textbook numbers to be assigned.</li> <li><b>Individual</b> – Use if the textbooks you are assigning are not in sequential order. If you are assigning textbooks individually, click Textbook Numbers to select each textbook to be assigned.</li> </ul>
Reason Not Available	Reason Code explaining why this batch of textbooks isn't available at the district level after you've assigned them to the Entity. The Reason Not Available Code, as defined by your district, identifies why a textbook in your inventory is not available.

Option	Description
Distribution Code	(Optional) Distribution Code for this batch of textbooks. The Distribution Code, as defined by your district, specifies how a textbook is distributed.

**Table 6 – Description of options on the Assign Textbooks to Entities screen**

## Assigning Textbooks to Courses and Classes

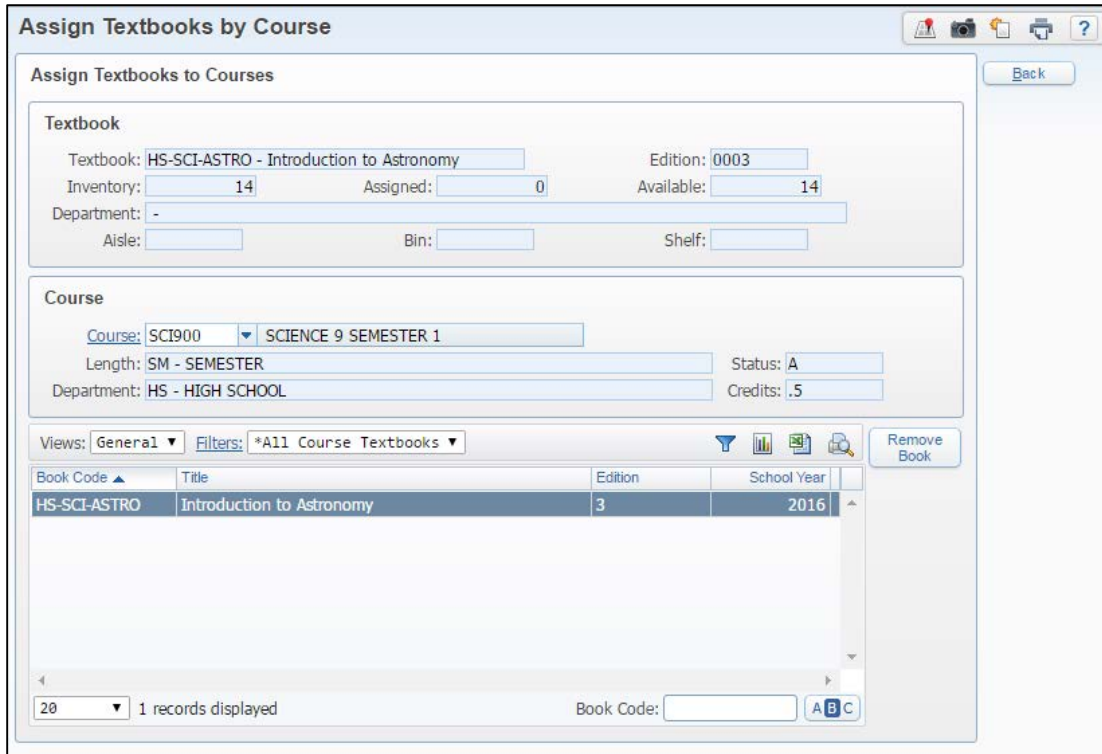
Some textbook distribution chain models route textbooks through a classroom before the teacher assigns them to a student. In some cases, textbooks can also be assigned to a classroom without being further assigned to a student.

### Specifying Courses That Use a Textbook Title

You can specify which Courses use a textbook title. This helps reduce the number of classes that appear for you to select from when you assign the textbooks to a class. Figure 7 shows a textbook title being assigned to a Course.

To specify courses that use a textbook title:

1. Select an Entity other than Entity 000.
2. Go to Student Management\Administration\TE\TM.
3. Select a textbook and click Assign to Course.
4. In the Course box, enter the Course number that uses the selected textbook title.
5. Click Assign.
6. When the confirmation message appears, click Yes.
7. Repeat steps 4 through 6 to specify additional Courses that use the selected textbook title.
8. When you are finished, click Back.



**Figure 7 – Assign Textbooks by Course screen. In this example, a textbook title is being added to a course.**

## Removing a Course from a Textbook Title

If a Course no longer uses a textbook title, you must remove its association with the textbook title.

To remove a Course from a textbook title:

1. Select an Entity other than Entity 000.
2. Go to Student Management\Administration\TE\TM.
3. Select a textbook and click Assign to Course.
4. In the Course box, enter the Course number that is associated with the textbook title.
5. In the Textbooks Assigned to Course area, select the textbook title to be disassociated with the course, and click Remove Book.
6. When the confirmation message appears, click Yes.

## Assigning Textbooks to Classes

Textbooks can be assigned to a class before they are distributed to students. If the district purchases a textbook, it can only be assigned to a class after the district has assigned it to the Entity. However, you don't need to specify Courses that use a textbook title before the textbooks can be assigned to a class.

To assign textbooks to a class:

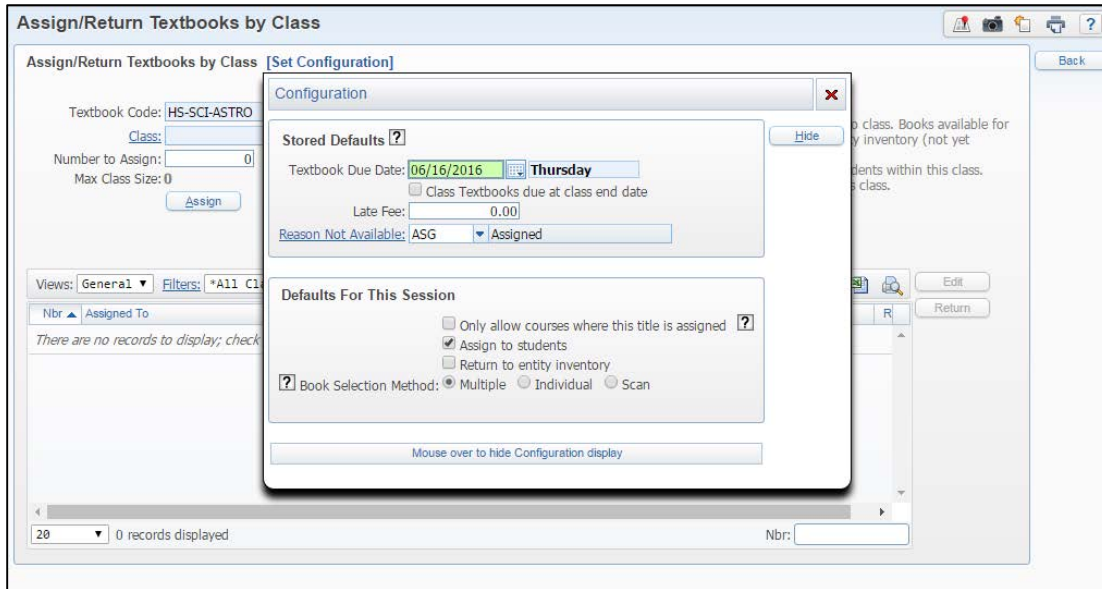
1. Select an Entity other than Entity 000.
2. Go to Student Management\Administration\TE\TM.
3. Select a textbook and click Assign/Return by Class.
4. Click Set Configuration to configure the defaults on the Configuration screen (Figure 8 on page 27) for every textbook assignment made to the selected class. Table 7 describes each option on the Configuration screen.
5. Select a Class and configure the Assign/Return Textbooks by Class screen (Figure 9 on page 29). Options vary based on the Book Selection Method option you choose (see Table 7).
6. Click Assign.

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<b>Note</b>	If you assigned books to students, the list in the lower area of the Assign/Return Textbooks by Class screen reflects which book was assigned to each individual student.
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
7. Repeat steps 5 and 6 to assign more textbooks to classes.



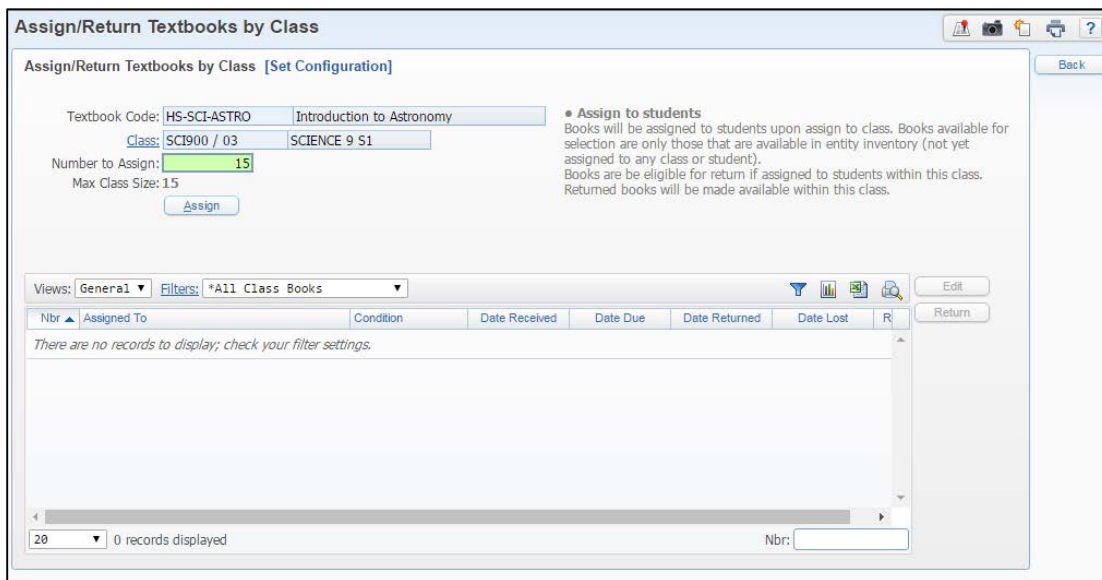
**Figure 8 –The Configuration screen is accessed from the Assign/Return Textbooks by Class screen**

AREA	PURPOSE OF AREA
Stored Defaults	Predefined default values
Options in This Area	Description of Options
Textbook Due Date	Date when the textbook must be returned. This option is available only if you are also assigning textbooks to students in this process.
Class Textbooks due at class end date	Makes the due date of the textbook the same date as the end of the Control Set associated with the class. This option is available only if you are also assigning textbooks to students in this process.
Late Fee	Not used when assigning textbooks.
Reason Not Available	District-defined code that identifies why a textbook in your inventory is not available.

AREA	PURPOSE OF AREA
Defaults For This Session	Identifies default values for the current session
Options in this Area	Description of Options
Only allow courses where this title is assigned	Determines whether all classes are available for selection, or whether only classes of courses associated with the textbook are available. See <a href="#">"Specifying Courses That Use a Textbook Title"</a> (page 24) to learn more about associating textbook titles with courses.
Assign to Students	Allows you to assign textbooks to students enrolled in a specified class. Books available for selection are only those that are not yet assigned to any class or student. Textbooks are assigned to students alphabetically by last name.  <b>Example:</b> If you are assigning 10 textbooks to the class and this option is selected, the textbooks are assigned to the first 10 students in the class.
Return to entity inventory	Books are eligible for return if they are assigned to the specified class. They are returned from the class and made available in Entity inventory when choosing to process a book that is already assigned to the class.
Book Selection Method: Multiple	Assigns the first available textbooks regardless of Book Number.  <b>Note:</b> The Number To Assign box appears when you select Multiple. It specifies the number of textbooks to assign to the class. The Max Class Size beneath this option provides guidance on how many textbooks are needed based on how many students are enrolled in the class.
Book Selection Method: Individual	Specifies which textbooks you are assigning.  <b>Note:</b> The Select Textbooks button appears when you select Individual. It allows you to assign specific textbooks to the class. The Max Class Size number beneath this option shows how many textbooks the class needs based on how many students are enrolled in the class.

Options in this Area	Description of Options
<p>Book Selection Method: Scan</p>	<p>Assigns a textbook to students or returns it to Entity inventory by scanning the barcode.</p> <p><b>Note:</b> The Scan Code box appears when you select Scan. It allows you to scan the barcode on a book to assign specific books to the class or students. The Max Class Size number beneath this option shows how many textbooks the class needs based on how many students are enrolled in the class. To learn more about the Scan option click the  button.</p>

**Table 7 - Assigning Textbooks to a class: Configuration screen defaults**



**Figure 9 - Example of options that appear on the Assign/Return Textbooks by Class screen. Some of the options vary based on the Book Selection Method. In this example, the textbooks are being assigned to a class *and* to students in the class.**

## Assigning Classroom Textbooks

Classroom Textbooks are assigned to a class, but not further assigned to a student. Typically, the textbooks remain in the classroom and are shared by students. Textbooks are designated as Classroom Textbooks by the district or Entity that purchased them. To learn how to designate a book as a Classroom Textbook, see "[Adding Textbook Titles](#)" (page 5). If the district purchases a Classroom Textbook, the textbook can be assigned to a class only after it is assigned to an Entity. To learn how to assign textbooks to Entities, see "[Assigning Textbooks to an Entity](#)" (page 22).

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<b>Note</b>	Classroom Textbooks are shared among all classes that meet in the same room. For example, if a textbook is assigned to a class in Room 101, that textbook is automatically assigned to all other classes that meet in Room 101 for the entire school year.
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To assign a Classroom Textbook to a class:

1. Select an Entity other than Entity 000.
2. Go to Student Management\Administration\TE\CT.
3. Expand the Class Record.
4. In the Textbooks Assigned area, click Add Textbook.
5. Configure the Assign Textbooks screen (Figure 10). Table 8 describes each option on this screen.
6. Click Process.

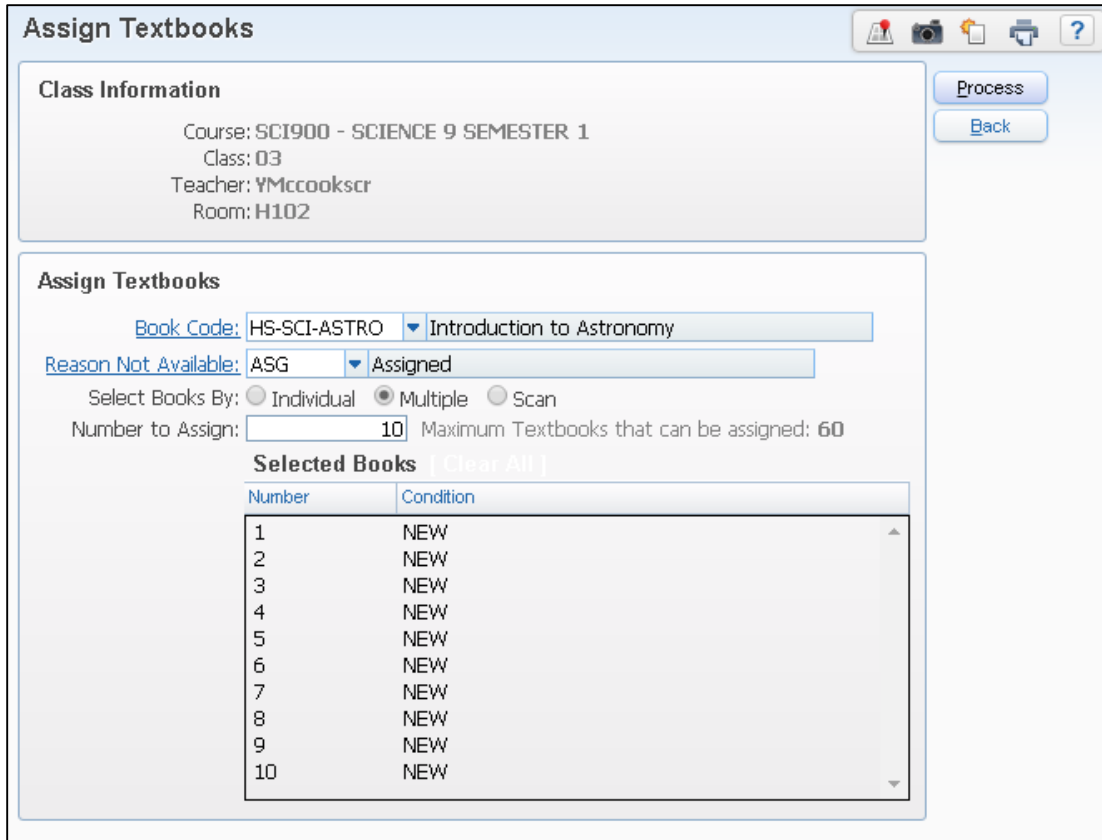


Figure 10 - Assign Textbooks screen

Option	Description
Book Code	Code of the textbook title to assign to the class. Only textbook titles that are marked as Classroom Book are available.
Reason Not Available	District-defined code that identifies why a textbook in your inventory is not available.
Select Books By: Individual	<p>Allows you to specify which textbooks you are assigning. When you select Individual, the Select Books option appears. This allows you to select the textbooks to assign to the class.</p> <p>After you click Select Books, you can use the Unselect All option on the right hand side of the screen to remove all textbooks from the Select Available Textbooks list.</p>

Option	Description
Select Books By: Multiple	Assigns the first available textbooks. The Number to Assign box appears when you select Multiple, allowing you to specify the number of textbooks to assign to the class. The Maximum Textbooks that can be assigned shows how many textbooks are available.
Select Books By: Scan	Allows you to scan the barcode of each textbook you are assigning. When you select Scan, the Textbook Code box appears. Scan the barcode of each textbook to be assigned to the class. The textbook title automatically appears in the Title box.

**Table 8 – Description of options on the Assign Textbooks screen**

## Assigning Textbooks to Staff Members

You can assign textbooks to staff members at either the district level or the Entity level. Textbooks assigned to staff members cannot be further assigned to a class or a student.

This section discusses the three ways to assign textbooks to staff members: by textbook title, by staff member, or using a barcode scanner

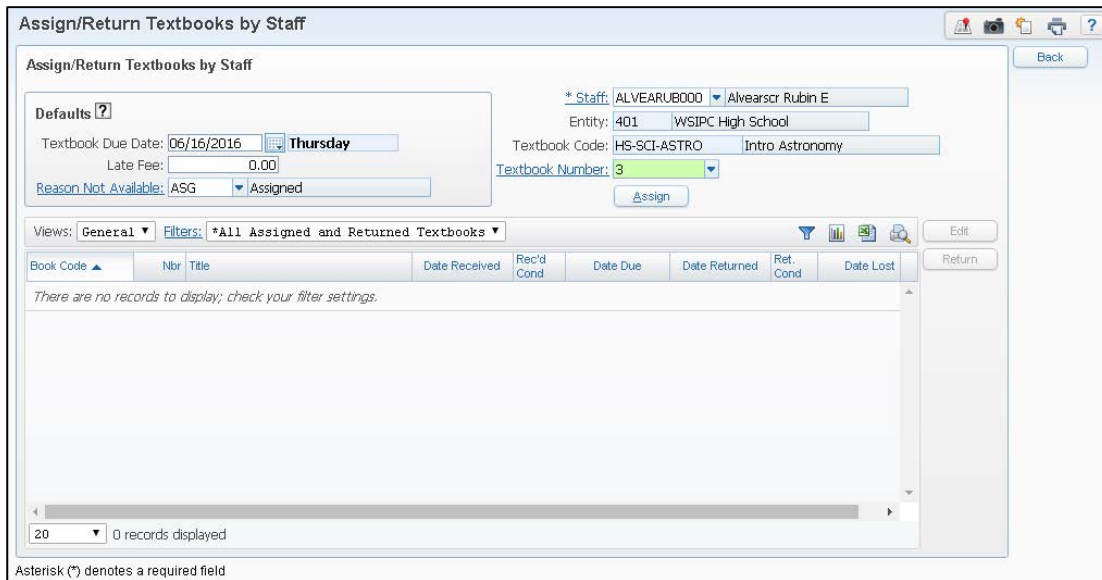
### Assigning Textbooks to Staff Members by Textbook Title

To assign textbooks to staff members by textbook title, you first select a textbook title and then select the staff members to assign a textbook to. This is useful if you must assign the same textbook title to several staff members.

To assign textbooks to staff members by textbook title:

1. Select an Entity other than Entity 000.
2. Go to Student Management\Administration\TE\TM.
3. Select a textbook title and click Assign/Return by Staff.
4. In the Defaults area on the Assign/Return Textbooks by Staff screen (Figure 11), enter the defaults for every textbook assignment made in this process. Table 9 describes each option on the screen.

5. Configure the remaining options on the Assign/Return Textbooks by Staff screen (refer to Figure 11 and Table 9).
6. Click Assign.
7. Repeat steps 4 and 5 to assign textbooks to additional staff members.



**Figure 11 – Assign/Return Textbooks by Staff screen. Textbooks are being assigned to staff members by textbook title.**

AREA	PURPOSE OF AREA
Defaults	Defines information used during textbook assignment and return by staff
Options in This Area	Description of Options
Textbook Due Date	Date when the textbook must be returned.
Late Fee	Not used when assigning textbooks.
Reason Not Available	District-defined code that identifies why a textbook in your inventory is not available.

AREA	PURPOSE OF AREA
Assign/Return Textbooks by Staff	Identifies Staff, Entity, Textbook assignment information
Options in this Area	Description of Options
Staff	Namekey of the staff member to assign the textbook to.
Textbook Code	Code of the textbook to be assigned to the staff member. This box is available only when assigning textbooks to staff members by staff.
Textbook Number	Book Number of the textbook to be assigned to the staff member.

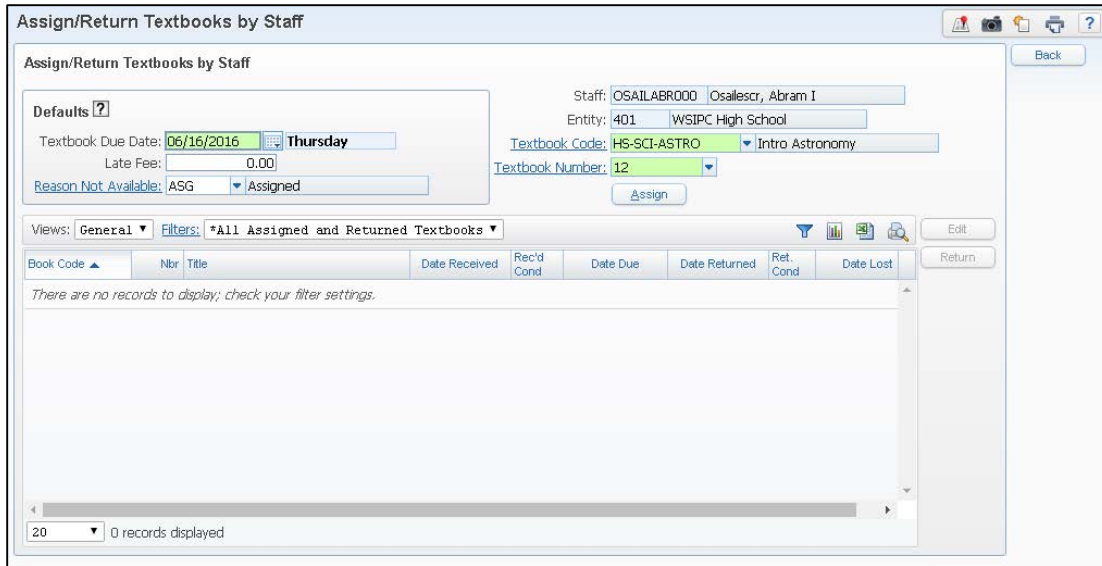
**Table 9 – Description of the default options and the configurable options on the Assign/Return Textbooks by Staff screen**

## Assigning Textbooks to Staff Members by Staff Member

Using the By Staff Member method, you first select a staff member and then assign textbook titles to the staff member. This is useful if there are several textbooks to be assigned to the same staff member.

To assign textbooks to staff members by staff member:

1. Go to Student Management\Administration\TE\SF.
2. Click the arrow next to a staff member’s name.
3. In the Books Assigned to Staff area, click Assign/Return.
4. In the Defaults area on the Assign/Return Textbooks by Staff screen (Figure 12), enter the defaults for every textbook assignment made in this process. Table 9 above (page 34) describes each option in the Defaults area.
5. Configure the Assign/Return Textbooks by Staff screen (Figure 12). Enter all remaining applicable information about the textbook assignments. Table 9 above (page 34) describes the options on the screen that you can configure.
6. Click Assign.
7. Repeat steps 5 and 6 to assign more textbooks to the staff member.



**Figure 12 - Assign/Return Textbooks by Staff screen. Textbooks are being assigned to staff members by staff member.**

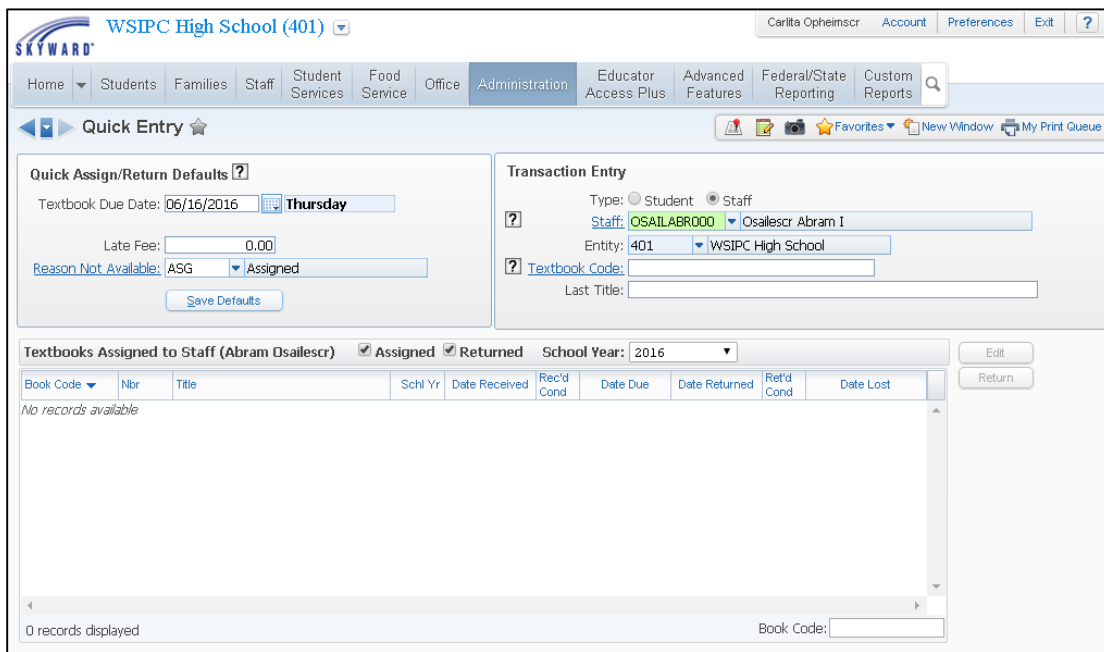
## Assigning Textbooks to Staff Members Using a Barcode Scanner

If your district or Entity has a barcode scanner, you can assign textbooks to staff members using this method. Each textbook must be labeled with a barcode, and the Entity must generate staff Namekey barcodes. To learn how to generate barcode labels for textbooks, see "[Managing Textbook Barcodes](#)" (page 14).

To assign textbooks to staff members using a barcode scanner:

1. Go to Student Management\Administration\TE\QA.
2. In the Quick Assign/Return Defaults area on the Quick Entry screen (Figure 13), enter the defaults for every textbook assignment made in this process. Table 10 describes each option in the Quick Assign/Return Defaults area.
3. Click Save Defaults.
4. In the Transaction Entry area on the Quick Entry screen (Figure 13), select Staff.
5. Click in the Staff box.
6. Using the barcode scanner, scan the staff member's Namekey barcode.

7. Do one of the following:
  - If you are in Entity 000, scan the Entity ID.
  - If you are in an Entity other than 000, go to step 8.
8. Scan the textbook barcode. The textbook is assigned to the staff member. Your cursor remains in the Textbook Code box so you can scan another textbook barcode. The Last Title box shows the title of the last textbook you assigned to the staff member.
9. To assign textbooks to another staff member, delete the Namekey from the Staff box and repeat steps 5 through 8.



**Figure 13 – Quick Entry screen. Textbooks are being assigned to staff members using a barcode scanner.**

Option	Description
Textbook Due Date	Date when the textbook must be returned.
Class books due at class end date	Identifies that the due date of the textbook is the same as the end of the Control Set that is associated with the class.
Late Fee	Not used when assigning textbooks.
Reason Not Available	District-defined code that identifies why a textbook in your inventory is not available.

**Table 10 - Default options on the Quick Assign/Return area of the Quick Entry screen**

## Enabling and Printing a Receipt

If the option is enabled, you can print a receipt that details all the textbook assignments, returns, and fees charged and paid, for a student or staff member from the Quick Assign/Return screen.

To enable receipt printing from the Quick Assign/Return screen:

1. Go to Student Management\Administration\TE Setup\CF\TC.
2. Select the Print POS Receipt in Quick Assign/Return check box.
3. Click Footer Text.
4. Type the text to appear at the bottom of each receipt.
5. Click OK.
6. Click Save.

To print a receipt from the Quick Assign/Return screen:

1. Go to Student Management\Administration\TE\QA.
2. After you have assigned or returned textbooks, click Print Receipt. The receipt appears on the screen.
3. Click Print.

# Assigning Textbooks to Students

You can assign textbooks to students in a central location or in a classroom. The method you choose depends on your school district's size and business practices.

## Assigning Textbooks to Students in a Central Location

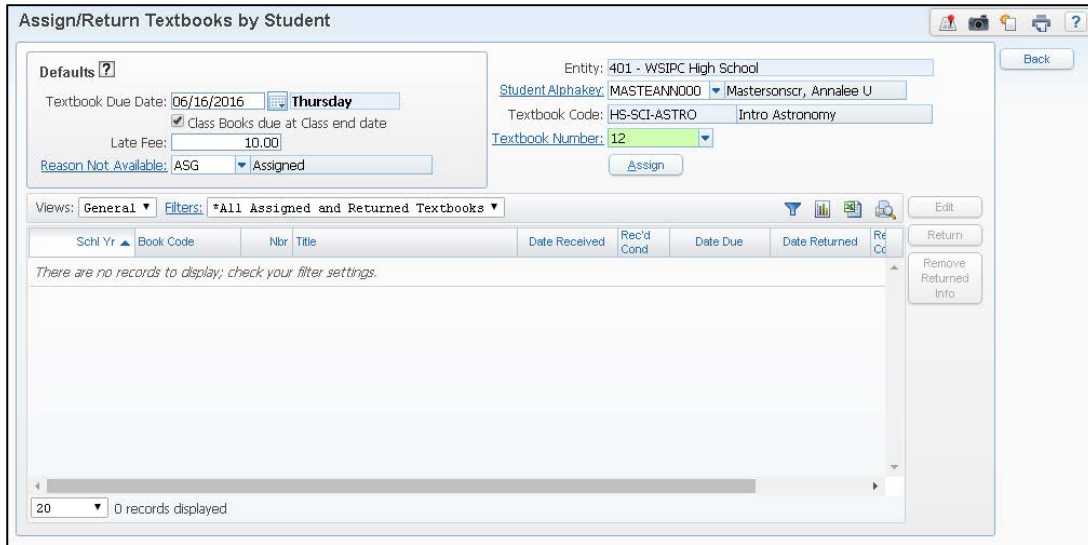
Typically, you assign textbooks from a central location if all your textbooks are centrally stored in that location, such as a book room or the library. Textbooks can be assigned this way either at the district level or at an Entity.

### Assigning Textbooks in a Central Location by Textbook Title

This method is best if your district or Entity requires each class to check out textbooks from a central book storage area for that class and does not use a barcode scanner.

To assign textbooks in a central location by textbook title:

1. Go to Student Management\Administration\TE\TM.
2. Select a textbook title and click Assign/Return by Student.
3. In the Defaults area of the Assign/Return Textbooks by Student screen (Figure 14), enter the defaults for every textbook assignment made in this process. Table 11 describes each option in the Defaults area.
4. Configure the remaining applicable information about the textbook assignments on the Assign/Return Textbooks by Student screen (Figure 14). Table 11 describes the options on the screen that you can configure.
5. Click Assign.
6. Repeat steps 4 and 5 to assign textbooks to more students.



**Figure 14 – Assign/Return Textbooks by Students screen. Textbooks are being assigned to students by textbook title.**

AREA	PURPOSE OF AREA
Defaults	Defines information used during textbook assignment and return by student
Options in This Area	Description of Options
Textbook Due Date	Date when the textbook must be returned.
Late Fee	Not used when assigning textbooks.
Reason Not Available	District-defined code that identifies why a textbook in your inventory is not available.
AREA	PURPOSE OF AREA
Assign/Return Textbooks by Staff	Identifies Staff, Entity, Textbook assignment information
Options in this Area	Description of Options
Student Alphakey	Namekey of the student to assign the textbook to.
Textbook Code	Code of the textbook to be assigned to the student. This box is available only when assigning textbooks to students by student.
Textbook Number	Book Number of the textbook to be assigned to the student.

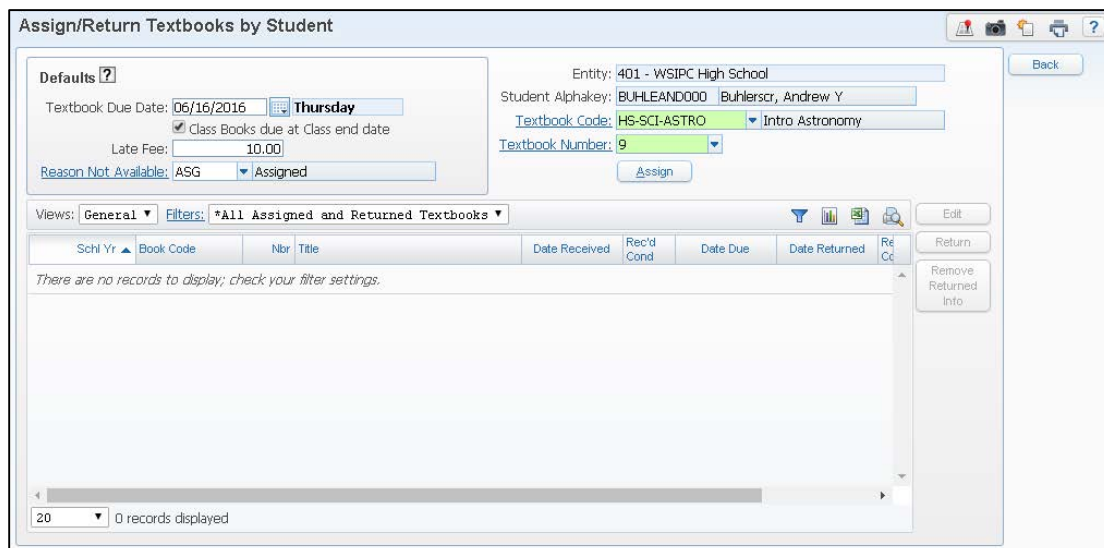
**Table 11 – Description of the default options and the configurable options on the Assign/Return Textbooks by Students screen**

## Assigning Textbooks in a Central Location by Student

This method is best if your district or Entity requires each student to check out textbooks from a central book storage area and doesn't use a barcode scanner.

To assign textbooks in a central location by student:

1. Go to Student Management\Administration\TE\ST.
2. Expand a student's record.
3. In the Books Assigned to Student area, click Assign/Return.
4. In the Defaults area of the Assign/Return Textbooks by Student screen (Figure 15), enter the defaults for every textbook assignment made in this process. Table 11 above (page 39) describes each option in the Defaults area.
5. Configure all remaining applicable information about the textbook assignments on the Assign/Return Textbooks by Student screen (Figure 15). Table 11 above (page 39) describes the options on the screen that you can configure.
6. Click Assign.
7. Repeat steps 5 and 6 to assign more textbooks to the selected student.



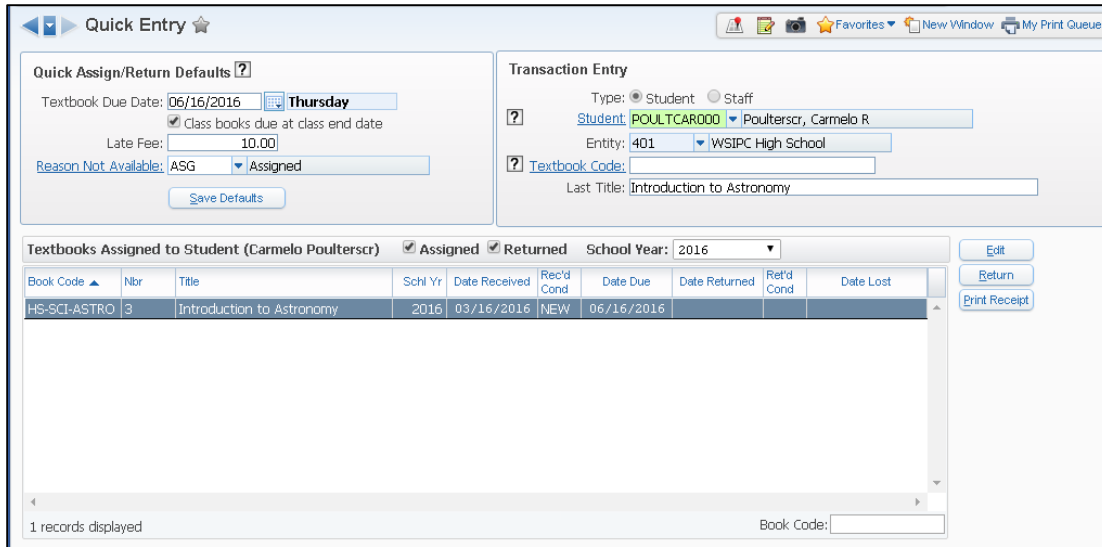
**Figure 15 - Assign/Return Textbooks by Students screen. Textbooks are being assigned to students by student.**

## Assigning Textbooks in a Central Location Using a Barcode Scanner

Consider using this method if your district or Entity uses a barcode scanner, has labeled each textbook with a barcode, and has generated student Namekey barcodes. To learn how to generate barcode labels for textbooks, see "[Managing Textbook Barcodes](#)" (page 14).

To assign textbooks to students using a barcode scanner:

1. Go to Student Management\Administration\TE\QA.
2. In the Quick Assign/Return Defaults area on the Quick Entry screen (Figure 16), enter the defaults for every textbook assignment made in this process. Table 12 describes each option in the Quick Assign/Return Defaults area.
3. Click Save Defaults.
4. In the Transaction Entry area on the Quick Entry screen (Figure 16), select Student.
5. Click in the Student box.
6. Using the barcode scanner, scan the student's Namekey barcode.
7. Scan the textbook barcode. The textbook is assigned to the student. Your cursor remains in the Textbook Code box so you can scan another textbook barcode. The Last Title box shows the title of the last textbook you assigned to the student.
8. If you want to assign textbooks to another student, delete the Namekey in the Student box and repeat steps 5 through 7.



**Figure 16 – Quick Entry screen. Textbooks are being assigned to students using a barcode scanner.**

Option	Description
Textbook Due Date	Date when the textbook must be returned.
Class books due at class end date	Identifies that the due date of the textbook is the same as the end of the Control Set that is associated with the class.
Late Fee	Not used when assigning textbooks.
Reason Not Available	District-defined code that identifies why a textbook in your inventory is not available.

**Table 12 - Default options in the Quick Assign/Return area of the Quick Entry screen**

### Printing a Receipt

If the option is enabled, you can print a receipt that details all the textbook assignments, returns, and fees charged and paid, for a student or staff member from the Quick Assign/Return screen. See [“Enabling and Printing a Receipt”](#) (page 37) to learn how to enable the Print Receipt option.

To print a receipt from the Quick Assign/Return screen:

1. Go to Student Management\Administration\TE\QA.

2. After you have assigned textbooks, click **Print Receipt**. The receipt appears on the screen.
3. Click **Print**.

## Assigning Textbooks to Students in a Classroom

Typically, teachers assign textbooks to students in their classes if you have distributed textbooks to each teacher. Textbooks can be assigned this way only if you use the Distribution Chain that includes the classroom as part of the chain. To learn how to assign textbooks to Courses and classes, see "[Assigning Textbooks to Courses and Classes](#)" (page 24).

Once textbooks have been assigned to a class, the teacher of that class can assign them to their students.

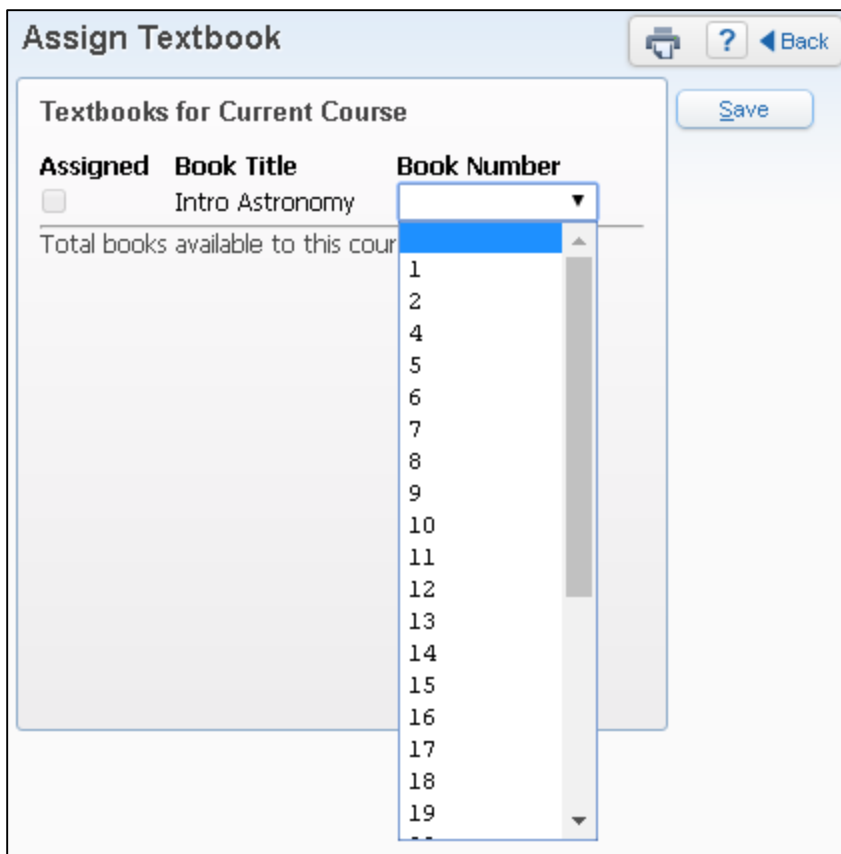
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<b>Note</b>	Teachers must have a minimum of 2/1 security access to the Assign Textbooks to Students line item (WS\WA\EP\TA\MC\TS) to assign textbooks to students.
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To assign textbooks to students in a classroom:

1. In Educator Access Plus, go to **Teacher Access** and click **My Classes**.
2. Click **Class Options** next to the class in which you want to assign textbooks.
3. Click **Assign Textbooks to Students**.
4. Expand the student's record.
5. In the **Assigned Textbooks** area, click **Assign**.
6. In the **Book Number** box on the **Assign Textbook** screen (Figure 17), select a textbook to assign to the student from the **Textbooks for Current Course** list for that class.
7. Click **Save**.



**Figure 17 – Assign Textbook screen. Students in a classroom are being assigned textbooks.**

# Returning Textbooks

Similar to assigning textbooks, there are several methods you can use to return textbooks. You do not need to use the same distribution method for returning textbooks as the one you used to assign them.

## Returning Student and Staff Textbooks

Because textbooks assigned to classes, staff members, and students are specific to a school year, all textbooks must be returned to the Entity at the end of a school year. This section discusses the various methods you can use to return textbooks assigned to students and staff members.

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<b>Note</b>	Textbook assignments from the district to the Entity are not school year specific, so it is not necessary to return textbooks from the Entity to the district.
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## Returning Textbooks by Textbook Title

Consider using this method if your district or Entity requires each class to return textbooks to a central book storage area and you don't use a barcode scanner. You can use this method regardless of how textbooks were originally assigned to students and staff members.

To return textbooks by textbook title:

1. Go to Student Management\Administration\TE\TM.
2. Select a textbook title and do one of the following:
  - If a student is returning the textbook, click *Assign/Return by Student*.
  - If a staff member is returning a textbook, click *Assign/Return by Staff*.
3. In the Defaults area of the *Assign/Return Textbooks by [Student/Staff]* screen, enter a Late Fee if applicable.

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<b>Note</b>	Textbook Due Date, Class Books due at Class end date and Reason Not Available are not used when returning textbooks.
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4. Do one of the following:
  - In the Student Alphakey box, enter the student’s Namekey.
  - In the Staff box, enter the staff member’s Namekey.
5. In the list on the Assign/Return Textbooks screen, select a book to return. This area lists textbooks assigned to the student or staff member.
6. Do one of the following:
  - If the book was returned today, there are no lost or damage fees, and the condition of the book has not changed, click Return and skip to step 10. The Late Fee amount in the Defaults area is automatically applied if today’s date is after the Date Due.
  - If the book was returned on a date other than today, if it was lost, damaged, if the condition of the book has changed, or if you are assessing a late fee other than what is entered in the Defaults area, click Edit.
7. Enter all applicable information regarding the textbook return on the [Student/Staff] Textbook Maintenance screen (Figure 18). Table 13 describes each option on this screen.
8. Click Save.
9. Repeat steps 4 through 8 until you have returned all textbooks.

The screenshot shows the 'Student Textbook Maintenance' interface. It includes a top navigation bar with icons for home, camera, print, and help. The main content area is divided into several sections:

- Assignment Record Data:** Contains input fields for Entity (401), Student (JAYESCLI000 - Cliff X Jayescr), Book Code (HS-SCI-ASTRO), Title (Introduction to Astronomy), Book Nbr (7), Reference Nbr (000), Cost (76.09), and Date Received (03/16/2016).
- Date Due:** 04/05/2016
- Date Returned:** 03/16/2016
- Condition Received:** NEW
- Condition Returned:** USE
- Date Found:** (empty)
- Lost Book Info:** Date Lost, Lost Fee (0.00), and Amt Paid (0.00).
- Late Fee Info:** Late Fee (0.00) and Amt Paid (0.00).
- Bad Condition Info:** Cond. Fee (0.00) and Amt Paid (0.00).

On the right side, there are 'Save' and 'Back' buttons.

**Figure 18 – [Student/Staff] Textbook Maintenance screen**

Option	Description
Date Due	Date that the textbook should be returned. This was populated when the textbook was assigned to the student or staff member. Modify if needed.
Date Returned	Date the textbook was returned.
Condition Received	Condition of the textbook when it was assigned to the student or staff member. This was populated when the textbook was assigned to the student or staff member. Modify if needed.
Condition Returned	Condition of the textbook when it was returned.
Date Found	Date a textbook marked as lost was found.
Lost Book Info – Date Lost	Date a textbook marked as lost was reported missing.
Lost Book Info – Lost Fee	Amount charged to the student or staff member for losing the textbook. This box is available only if a Date Lost is entered.
Lost Book Info – Amt Paid	Amount that the student or staff member paid toward the Lost Fee charge.
Late Fee Info – Late Fee	Amount charged to the student or staff member for returning the textbook late. This box is available only if a date is entered in the Date Returned box. It is automatically populated with the amount you entered in the Defaults area if the Date Returned is later than the Date Due. Modify if needed.
Late Fee Info – Amt Paid	Amount the student or staff member paid toward the Late Fee charge.
Bad Condition Info – Cond Fee	Amount charged to the student or staff member for damages made to the textbook. This is available only if a Date Returned is entered.
Bad Condition Info – Amt Paid	Amount that the student or staff member paid against the Cond Fee charge.

**Table 13 – Description of options on the Student / Staff Textbook Maintenance screen**

## Returning Textbooks by Student or Staff Member

Consider using this method if your district or Entity requires each student or staff member to return all textbooks for all classes to a central book storage area and you do not use a barcode scanner. You can use this method regardless of how textbooks were assigned to students and staff members.

To return textbooks by student or staff member:

1. Go to one of the following:
  - For students, go to Student Management\Administration\TE\ST.
  - For staff members, go to Student Management\Administration\TE\SF.
2. Expand the student's or staff member's record.
3. In the Books Assigned to Student or Books Assigned to Staff area, click Assign/Return.
4. In the Defaults area of the Assign/Return Textbooks by [Student/Staff] screen, enter a Late Fee if applicable.

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<b>Note</b>	Textbook Due Date, Class Books due at Class end date and Reason Not Available are not used when returning textbooks.
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5. Select a book to be returned from the list of textbooks assigned to the student or staff member.
6. Do one of the following:
  - If the book was returned today, there are no lost or damage fees, and the condition of the book has not changed, click Return and skip to step 10. The Late Fee amount in the Defaults area is automatically applied if today's date is after the Date Due.
  - If the book was returned on a date other than today, if it was lost, damaged, if the condition of the book has changed, or if you are assessing a late fee other than what is entered in the Defaults area, click Edit.

7. Enter all applicable information regarding the textbook return. Figure 18 above (page 46) shows an example of the [Student/Staff] Textbook Maintenance screen. See Table 13 above (page 47) to learn more about each option on this screen.
8. Click Save.
9. Repeat steps 5 through 8 until you have returned all textbooks.

## Returning Textbooks Using a Barcode Scanner

Consider using this method if your district or Entity uses a barcode scanner, has labeled each textbook with a barcode, and has generated student Namekey barcodes. To learn more about generating barcode labels for textbooks, see "[Managing Textbook Barcodes](#)" (page 14).

To return textbooks using a barcode scanner:

1. Go to Student Management\Administration\TE\QA.
2. In the Quick Assign/Return Defaults area on the Quick Entry screen (see Figure 16 on page 42), enter the defaults for every textbook return made in this process. Table 12 on page 42 describes each option in the Quick Assign/Return Defaults area.
3. Click Save Defaults.
4. In the Transaction Entry area on the Quick Entry screen (see Figure 16 on page 42), select Student or Staff depending on who is returning textbooks.
5. Click in the Student or Staff box.
6. Using your barcode scanner, scan the student's or staff member's Namekey barcode.
7. Now, your cursor is automatically positioned in the Textbook Code box. Scan the textbook barcode.
8. The textbook has been returned from the student or staff member. With your cursor remaining in the Textbook Code box, scan another textbook barcode. The Last Title box displays the title of the last textbook you returned from the student.

9. Do one of the following:
  - If the book was returned today, there are no lost or damage fees, and the condition of the book has not changed, click **Return** and skip to step 10. The Late Fee amount in the Defaults area is automatically applied if today's date is after the **Date Due**.
  - If the book was returned on a date other than today, if it was lost, damaged, if the condition of the book has changed, or if you are assessing a late fee other than what is entered in the Defaults area, click **Edit**.
10. Enter all applicable information regarding the textbook return. Figure 18 above (page 46) shows an example of the [Students/Staff] Textbook Maintenance screen. See Table 13 (page 47) to learn more about each option on this screen.
11. If you want to collect textbooks from another student or staff member, delete the Namekey in the Student or Staff box and repeat steps 4 through 9.
12. When you have finished returning textbooks, click **Back**.

## Printing a Receipt

If the option is enabled, you can print a receipt that details all the textbook assignments, returns, and fees charged and paid, for a student or staff member from the Quick Assign/Return screen. See "[Enabling and Printing a Receipt](#)" (page 37) to learn how to enable the Print Receipt option.

To print a receipt from the Quick Assign/Return screen:

1. Go to Student Management\Administration\TE\QA.
2. After you have returned textbooks, click **Print Receipt**. The receipt appears on the screen.
3. Click **Print**.

## Returning Textbooks in a Classroom

If you assigned textbooks to classes before they were assigned to students, you can allow teachers to return textbooks in their classroom.

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<b>Note</b>	Teachers must have a minimum of 2/1 security access to the Assign Textbooks to Students line item (WS\WA\EP\TA\MC\TS) to collect returning textbooks from students.
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To return textbooks in a classroom:

1. In Educator Access Plus, go to Teacher Access and click My Classes.
2. Click Class Options next to the class in which you want to assign textbooks.
3. Click Assign Textbooks to Students.
4. Expand the student's record.
5. Click the arrow next to Assigned Textbooks.
6. Click Edit/Return next to the textbook to be returned.
7. Enter all applicable information regarding the textbook return. See Figure 18 (page 46) for an example of the Student Textbook Maintenance screen. Table 13 (page 47) describes each option on this screen.
8. Click Save.

## Returning Textbooks Using the Return Textbook by Book Code Utility

The Return Textbook by Book Code Utility was designed to return textbooks without knowing whom the textbook was originally assigned to. Figure 19 shows an example of the Return Textbooks by Book Code screen when using this utility.

To return textbooks using the Return Textbook by Book Code Utility:

1. Go to Student Management\Administration\TE Setup\UT\BC.
2. If a textbook is returned after the Date Due listed on the Textbook Assignment Record in the Late Fee box, enter the amount to be charged.

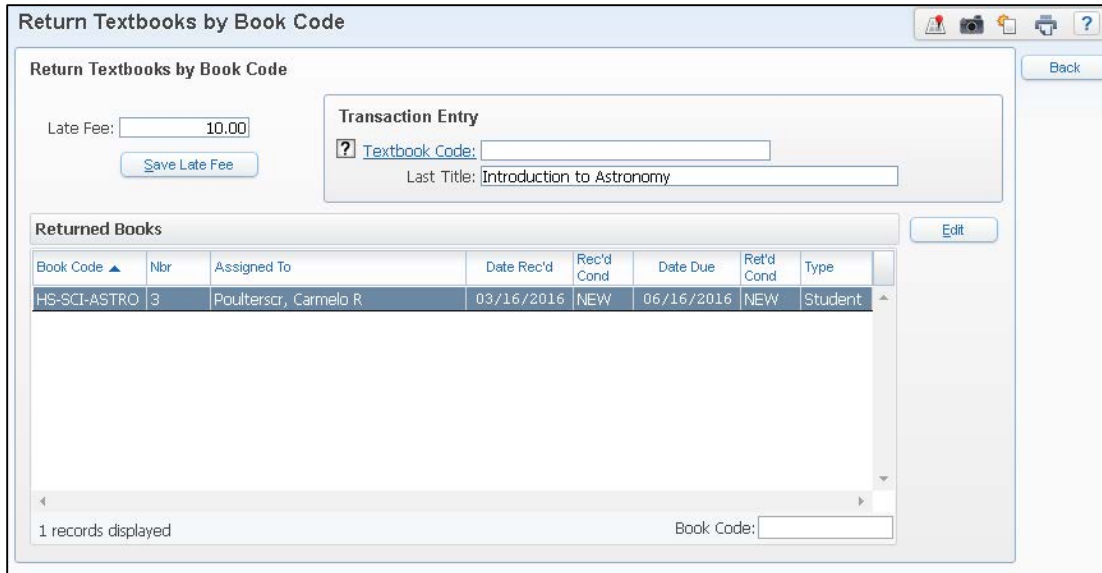
3. Click Save Late Fee.
4. Do one of the following:
  - Place your cursor in the Textbook Code box and scan the barcode of the textbook.
  - If you do not have a scanner, type the Textbook Code and the Book Number, separated by a space, and press the Enter key on your keyboard.
5. The textbook has been returned from the student or staff member. With your cursor remaining in the Textbook Code box, scan another textbook barcode. The Last Title box displays the title of the last textbook you returned from the student.

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<b>Note</b>	When using the Return Textbooks by Book Code Utility, the Return Date defaults to the current date.
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6. If the book was returned on a date other than today, if the book was lost, damaged, if the condition of the book has changed, or if you are assessing a late fee other than what is entered in the Defaults area, click Edit.
7. If you are editing the return information, enter all applicable information regarding the textbook return. See Figure 18 (page 46) for an example of the Student Textbook Maintenance screen. Table 13 (page 47) describes each option on this screen.
8. When you have finished returning textbooks, click Back.



**Figure 19 – Return Textbooks by Book Code screen**

## Returning Textbooks to the Entity

Classroom Textbooks or textbooks assigned to a class before being assigned to students must be returned to the Entity at the end of a term or school year.

### Returning Textbooks Assigned to Classes

Textbooks may have been assigned to classes before being assigned to students. Students return these textbooks to the class. At the end of the term or school year, these textbooks must be returned to the Entity.

You can return textbooks to the Entity individually, by class, or you can run a utility that returns all unassigned textbooks to the Entity.

### Returning Textbooks Assigned to a Specific Class Back to the Entity

You can return all or individual textbooks that were assigned to a specific class back to the Entity.

To return textbooks assigned to a specific class back to the Entity:

1. Select an Entity other than Entity 000.
2. Go to Student Management\Administration\TE\TM.
3. Select a textbook title and click Assign/Return by Class.

4. Click **Class** and select a class.
5. Select a record from the list in the lower part of the screen that does not have a name in the **Assigned To** column. These textbooks are ready to be returned to the Entity.
6. Click **Return**.
7. Do one of the following:
  - To return only the selected textbook to the Entity, select **Individual**.
  - To return multiple textbooks from the class to the Entity, select **Multiple**.
8. In the **Number of Textbooks** box, enter the number of textbooks to return to the Entity. The **Maximum Textbooks that can be returned** box shows the number of textbooks that are assigned to the class but are not assigned to a student.
9. Click **Return**. A confirmation screen appears notifying you of the number of textbooks returned to the Entity and lists any errors that occurred.
10. Click **Close**.

### **Returning All Textbooks Assigned to Classes Back to the Entity**

You can return all textbooks back to the Entity, regardless of what class they were assigned to.

To return all textbooks assigned to classes back to the Entity:

1. Select an Entity other than Entity 000.
2. Go to **Student Management\Administration\TE Setup \UT\RT**.
3. Enter applicable ranges, and click **Run**.
4. Review the textbooks to be returned, and click **Process**.
5. When the confirmation message appears, click **Yes**.

## Returning Classroom Textbooks

Textbooks may have been assigned to classes and designated as a Classroom Textbook. These textbooks remained in the classroom and were not assigned to students. At the end of the term or school year, these textbooks must also be returned to the Entity.

This section explains how you can return Classroom Textbooks individually or return multiple Classroom Textbooks from a class.

### Returning Classroom Textbooks Individually to the Entity

Follow the procedure below if you want to return Classroom Textbooks individually to the Entity.

To return Classroom Textbooks individually to the Entity:

1. Select an Entity other than Entity 000.
2. Go to Student Management\Administration\TE\CT.
3. Click the arrow next to a class.
4. Click the arrow next to Textbooks Assigned.
5. Click the arrow next to a textbook title.
6. Click the arrow next to Book Detail.
7. Click Return next to the textbook you want to return to the Entity.

### Returning Multiple Classroom Textbooks to the Entity

Follow the process below if you want to return multiple Classroom Textbooks to the Entity.

To return multiple Classroom Textbooks to the Entity:

1. Select an Entity other than Entity 000.
2. Go to Student Management\ Administration\TE\CT.
3. Expand a Class Record.
4. Expand the Textbooks Assigned area.

5. Expand a textbook title.
6. In the Book Detail area, click Return Books.
7. Configure the Return Class Books screen (Figure 20). Table 14 describes the options on this screen.
8. Click Process.

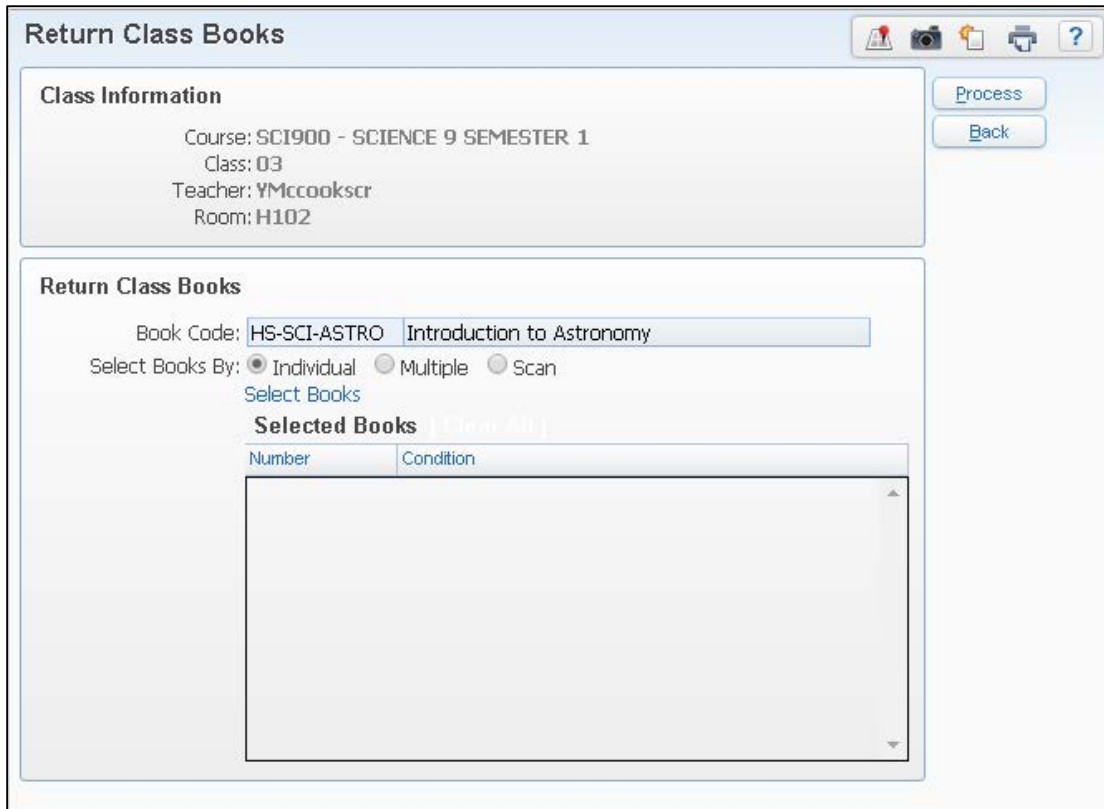


Figure 20 - Return Class Books screen

Option	Description
Select Books By: Individual	Determines how textbooks are returned. When you select Individual, the Select Books option appears. This allows you to select the textbooks you are returning. Unselect All removes textbooks from the Select Books list.

Option	Description
Select Books by: Multiple	Determines how textbooks are returned. Choose <b>Multiple</b> if you want the first available textbooks to be returned. The <b>Number to Assign</b> box allows you to specify the number of books to be returned. The <b>Maximum Textbooks</b> that can be returned shows how many books can be returned.
Select Books By: Scan	Allows you to scan the barcode of each textbook you are returning. Choose <b>Scan</b> if you want to scan the barcode of each textbook to be returned from the class. The textbook title automatically appears in the <b>Title</b> box.

**Table 14 – Description of options on the Return Class Books screen**

# Using Textbook-to-Fee Management

Textbook-to-Fee Management links the Textbook and Fee Management modules, allowing Lost, Late, and Bad Condition Fees incurred in the Textbook module to be automatically applied in Fee Management.

This section explains how to configure the Textbook module to link with Fee Management, and shows how Fee Management Records are created by the process.

## Configuring Textbook-to-Fee Management

The following procedure provides an example of how to configure Textbook-to-Fee Management for an Entity.

To configure Textbook-to-Fee Management:

1. Go to Student Management\Administration\TE Setup\CF\TC.
2. If your staff members are Fee Management Customers and you want to use Textbook-to-Fee Management for staff member charges as well, select the Allow billing of staff for late/lost/damaged textbooks check box.

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<b>Note</b>	This option is only available if your district is using the Fee Management module.
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3. Click Textbook-to-Fee Management Entity Setup.
4. Click Add.
5. Configure the Textbook-to-Fee Entity Maintenance screen (Figure 21). Table 15 describes each option on this screen.
6. Click Save.
7. Repeat steps 4 through 6 for any additional Entities that use Textbook-to-Fee Management.

**Textbook-to-Fee Entity Maintenance**

\* Entity: 401 WSIPC High School

\* Lost Charge: LOST (dropdown: LOST ITEM (BOOK, LOCK, UNIFORM, ETC.))

\* Lost Payment: PAID (dropdown: PAID)

\* Late Charge: FINE (dropdown: FINE)

\* Late Payment: PAID (dropdown: PAID)

\* Bad Cond. Charge: FINE (dropdown: FINE)

\* Bad Cond. Payment: PAID (dropdown: PAID)

Asterisk (\*) denotes a required field

**Figure 21 - Textbook-to-Fee Entity Maintenance screen**

Option	Description
Entity	The Entity that will use Textbook-to-Fee Management.
Lost Charge	Bill Code to use for charges relating to a lost textbook.
Lost Payment	Bill Code to use for payments relating to a lost textbook.
Late Charge	Bill Code to use for charges relating to a late textbook.
Late Payment	Bill Code to use for payments relating to a late textbook.
Bad Cond. Charge	Bill Code to use for charges relating to a bad condition textbook.
Bad Cond. Payment	Bill Code to use for payments relating to a bad condition textbook.

**Table 15 – Description of options on the Textbook-to-Fee Entity Maintenance screen**

# Fee Management Records Created by Textbook-to-Fee Management

When a Lost Charge, Late Charge, or Bad Condition Charge is entered on a student's Textbook Assignment Record, a Fee Management Charge Record is automatically added to the student's customer account. To learn more about entering a Lost, Late, or Bad Condition Charge on a Textbook Record, see "[Returning Textbooks](#)" (page 45).

Figure 22 is an example of a Fee Management Record created by the Textbook-to-Fee Management process as a result of a lost textbook.

The screenshot shows a software window titled "Fee Activity Maintenance". Inside, there is a form titled "Edit Fee Activity" with a help icon. The form contains the following fields and values:

- Customer: Jayescr, Cliff X
- Bill Type: G - General
- Pay Plan: (None)
- Bill Code: Intro Astronomy [\$76.09]
- Effective Date: 03/16/2016
- Due Date: 03/16/2016
- Amount: 76.09
- Paid: 0.00
- Comment: LOST: Intro Astronomy [\$76.09]

There are also "Save" and "Back" buttons on the right side of the form.

**Figure 22 - Example of a Fee Management Record created as a result of a lost textbook**

# Using Textbooks by Number

Textbooks by Number is designed for school districts that use serial numbers to track their textbooks. In this approach, no two textbooks have the same Book Number, even if they are different textbook titles.

Textbooks by Number is an easy way for these districts to find out if a textbook is available and to whom it is assigned. You cannot assign or return textbooks using Textbooks by Number.

To find a textbook using Textbook by Number:

1. Go to Student Management\Administration\TE\TN.
2. In the Book Nbr box at the bottom of the screen, enter the Book Number and press the Enter key on your keyboard. Information about the book appears in the Entry by Textbook list.

# Running Textbook Reports

The Textbook module offers many helpful reports. For example, you can use the Inventory Worksheet to reconcile your textbook inventory with data in the Textbook module. This section describes each report.

## Class Roster Textbook List

The Class Roster Textbook List Report shows students in a class and the textbooks that have been assigned to them. No data appears on this report unless textbooks are assigned to classes before they are assigned to students. To learn more about assigning textbooks to classes, see "[Assigning Textbooks to Courses and Classes](#)" (page 24).

## Course Textbook List

The Course Textbook List Report shows textbooks assigned to Courses.

## Inventory Worksheet

The Inventory Worksheet allows you to reconcile your inventory of textbooks with the data in the Textbook module. It allows you to write in counts and notes, and provides a signature section.

## Print Unassigned Books Not Available

The Print Unassigned Books Not Available Report is available only at Entity 000. This report lists textbooks not assigned to an Entity but marked unavailable.

## Student with Outstanding Balances

The Student with Outstanding Balances Report shows students who have textbooks checked out with an outstanding (unpaid) Lost Fee, Late Fee, or Bad Condition Fee.

## Textbook List

The Textbook List Report shows a list of all textbook titles and information, including total number in inventory, total number assigned, total available, price, and cost for each textbook title.

## Textbook Status Report

The Textbook Status Report shows whether each textbook is assigned and to whom it is assigned.

## Textbooks Assigned to Classes

The Textbooks Assigned to Classes Report shows textbooks assigned to classes.

## Textbooks by Department

The Textbooks by Department Report lists textbooks assigned to each department. No data appears on this report unless textbooks are assigned to classes before they are assigned to students. To learn more about assigning textbooks to classes, see ["Assigning Textbooks to Courses and Classes"](#) (page 24).

## Textbooks by Publisher

The Textbooks by Publisher Report lists textbooks from each publisher.

## Textbook Inventory History

The Textbook Inventory History Report lists Transaction Records (assignments and returns) for each textbook.

## Textbooks on Order

The Textbooks on Order Report is available only at Entity 000, and only if Maintain Book Orders in District Entity is enabled. This report lists all textbooks on order, the number of textbooks ordered, and the number of textbooks received.

## Textbooks Assigned to Staff

The Textbooks Assigned to Staff Report lists textbooks assigned to staff members. You can run the All Textbooks version of the report for a list of all textbooks assigned to staff in the current school year. The Only Past Due version of the report provides a list of textbooks assigned to staff with a Due Date in the past which includes prior school years. The Only Lost version of this report lists textbooks assigned to staff that have been marked as Lost in all school years.

## Textbooks Assigned to Students

The Textbooks Assigned to Students Report allows you to report on textbooks assigned to students in three ways. The All Textbooks version of the report lists all textbooks assigned to students in the current school year. The All Textbook Report Ranges related to Course/Class only affect books that are checked out to students through a course or class. The Only Past Due version of the report provides a list of textbooks assigned to students with a Due Date in the past, which includes prior school years. The Only Lost version of the report lists textbooks assigned to students that have been marked as Lost in all school years.

## Textbooks Needed for Student

The Textbooks Needed for Students Report lists textbooks a student needs based on the student's schedule. No data appears on this report unless textbooks are assigned to Courses or classes. To learn more about assigning textbooks to classes, see "[Assigning Textbooks to Courses and Classes](#)" (page 24).

# Running Textbook Utilities

This section describes the utilities available in the Textbook module.

## Mass Assign Textbook Condition Codes

The Mass Assign Textbook Condition Codes Utility changes the Condition Code on a set of textbooks.

## Mass Assign Textbook Reason Not Available

The Mass Assign Textbook Reason Not Available Utility changes the Reason Not Available Code on a set of textbooks.

## Mass Delete Textbooks

The Mass Delete Textbooks Utility is available only in Entity 000 and deletes selected textbooks. Textbooks can be deleted only if they are not assigned to a student, a staff member, a class, or an Entity.

## Mass Delete Assigned Textbooks

The Mass Delete Assigned Textbooks Utility deletes a set of textbooks assigned to students and staff members. This utility was designed to delete workbooks or other consumables that do not need to be returned.

## Mass Update Past Due Textbooks

The Mass Update Past Due Textbooks Utility updates textbooks assigned to students that are past due. You can change the textbook condition, mark the textbooks as Lost, or apply a late fee.

## Return Textbook by Book Code

The Return Textbook by Book Code Utility allows you to return textbooks by entering the Textbook Code, without knowing to whom the textbooks were assigned. To learn more about running this utility, see "[Returning Textbooks Using the Return Textbook by Book Code Utility](#)" (page 51).

## Return Textbooks to Entity

The Return Textbooks to Entity Utility returns excess textbooks assigned to classes back to the Entity inventory. Any textbooks assigned to a class, but not assigned to a student, are unassigned from the class and made available in the Entity inventory. To learn more about running this utility, see "[Returning Textbooks Assigned to Classes](#)" (page 53).

## Scan Barcode to Find 'Assigned To'

The Scan Barcode to Find 'Assigned To' Utility allows you to scan the barcode attached to a textbook to find out who the textbook is assigned to.

## Sync Textbook Fines to Fee Management

The Sync Textbooks Fines to Fee Management Utility synchronizes Lost, Late, or Bad Condition fees and payments entered in the Textbook module with actual fees in the Fee Management module. Fee amounts are modified within Fee Management to match what is entered in the Textbook module, with the exception of situations where the Textbook Record contains amounts less than what has been paid within Fee Management. In such cases, the Textbook module is updated to match what is recorded in Fee Management. This utility allows you to preview the records affected prior to final processing.

## Textbook Assignment Audit

The Textbook Assignment Audit Utility finds all textbooks assigned in a date range that do not have a return date. If the process finds the same book twice, the Textbook Assignment Record that does not match the school year is removed. If the process does not find the same book twice, the school year is changed on the book assignment to the school year entered. This utility identifies all textbooks currently assigned without a return or lost date from a previous school year, and moves them to the current school year without changing the original due date.

For example, a student is assigned a book in the 2014-15 School Year and does not return it. When this utility is run, the book is identified and moved into the 2015-16 School Year without changing the original Due Date. This allows you to mark the book as Returned or Lost.

## Textbook Bar Codes Utilities

The Create Textbook Bar Codes and View Exported Files/Save Locally for Bar Codes utilities create textbook barcodes for use with a scanner. To learn more about generating textbook barcodes, see "[Managing Textbook Barcodes](#)" (page 14).

## Update Textbook Due Dates

The Update Textbook Due Dates Utility updates the due date on textbooks assigned to classes first and then to students. This utility changes the due date to match the end date of the class.

## Upload from SKY630 Data Collector

The Upload from SKY630 Data Collector Utility is not used in Washington State.

# Administrative Setup

The following sections describe the configuration and codes that are used in the Textbook module.

## Configuration

There are several configuration options to use when setting up the Textbook module.

To access Textbook Configuration:

- Go to Student Management\Administration\TE Setup\CF\TC.

To learn how to use the Maintain Book Orders in District Entity option to activate advanced textbook on order tracking, see "[Using the Advanced Method to Manage Textbooks on Order](#)" (page 9).

To learn how to use the Change default Advanced Print Options for Barcode printing option to modify the default label format for barcodes, see "[Using Default Advanced Print Options](#)" (page 18).

To learn how to use the Print POS Receipt in Quick/Assign Return option to allow receipt printing when you assign or return books by barcode scanning, see "[Enabling and Printing a Receipt](#)" (page 37).

To learn how to configure the Textbook-to-Fee Management feature, see "[Using Textbook-to-Fee Management](#)" (page 58).

## Codes

This section describes each code that is used in the Textbook module.

To access Codes:

- Go to Student Management\Administration\TE Setup\CO.

## Order Statuses

Order Status Codes are used to indicate the status of a textbook order. For example, PLA for “placed,” SHP for “shipped,” and RCV for “received” are common Order Status Codes. Order Status Codes are only available if the Advanced Textbook on Order option is enabled. To learn more about enabling and using the Advanced Textbook on Order tracking method, see [“Using the Advanced Method to Manage Textbooks on Order”](#) (page 9).

## Reasons Textbooks Are Not Available

Reason Not Available Codes specify why a textbook is not available to be assigned to an Entity, classroom, staff member, or student. For example, you may use a code of ATE to indicate that a book has been assigned to an Entity and therefore not available in the district inventory to be assigned elsewhere. For larger districts that have many Entities, consider using the Entity ID as part of the Reasons Not Available Codes to indicate where a textbook has been assigned to.

## Textbook Conditions

Textbook Condition Codes specify the physical condition of a textbook. Examples of Textbook Condition codes include NEW for “new textbooks,” USD for “used textbooks,” and DMG for “damaged textbooks.”

## Textbook Mediums

Textbook Medium Codes specify the medium of a textbook title. Often times a textbook title is an actual book, which you may use the code BOOK to categorize. Other examples of Textbook Medium Codes include DVD, or WKBK for “workbook.” You can also mark a Textbook Medium as an “Electronic Device.”

## Textbook Distribution Codes

Textbook Distribution Codes explain how or why textbooks are transferred between inventories. For example, you may have a Textbook Distribution code of DTE to indicate "District to Entity transfer."

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