

# CIMS Student Textbook Management

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Last Updated August 2008

## Introduction

The purpose of textbook tracking is to:

- Inventory Textbooks
- Assign Textbooks effectively to meet your building methods (by course, book room, library, student)
- Track issues and returns to and from the students and/or to and from Teachers, Report
- Automatically build charges to students for lost or damaged textbooks, send statements
- Be able to use CIMS to manage, transfer, and utilize textbooks more efficiently - District Wide

Textbooks can be managed for any/all students K-12. In a non-course-oriented school (Elementary), textbooks can be assigned by homeroom. In master schedule oriented schools (Jr., Sr.), textbooks can be assigned by course and section.

### ***Inventory Textbooks:***

This is a two step process. First define the book, if it is a new publication, as new to the system. The only way to define a new book, is by district defined Textbook code. Then indicate and sequence each copy of the publication as new purchases are made.

In CIMS, each textbook has its own record. Sequence number MUST BE unique throughout the whole district, ie: each book in the district is barcoded with a sequence number. NO TWO BOOKS should have the same sequence number.

In order for sequencing to be effective there must be a district policy/procedure on ordering and utilizing sequence numbers. In some districts, the first 3 digits of the sequence number indicates a building#. In this strategy, schools can order their own barcodes not having to worry about potential for duplication of sequence numbers. In other districts where central purchasing may take care of ordering, a single sequence number ordering system may work better as you would not have to house separate number piles for each location.

Once a textbook is defined to the system by the district, purchases of that textbook require an additional sequence number to make each book unique. By doing this additional step, you will be able to manage your textbooks individually, know the status of each book, and be able to report on your inventory.

Central management of textbooks is mandatory. Once a textbook code has been inputted once, all other schools take advantage of this when entering subsequent copies.

### ***Transfer Textbooks between Schools/Locations***

There is reporting and online searching for schools to be able to see what textbooks may be available elsewhere. This lends itself an opportunity to see what texts are being used and to share textbooks more effectively. Since sequence numbers are unique district wide there is no danger of transferring/utilizing books between buildings. In CIMS, there is an option to transfer textbooks between locations while keeping history so that schools know where textbooks belong and what sharing has occurred.

## ***Assign Textbooks to the Master Schedule (Mandatory for High Schools & those utilizing Teacher Connect)***

Go into your master schedule and define the textbooks that are required per course and section (there is a carryforward from year to year so this information will only need to be maintained for new sections after initial setup). By doing this, you will be able to show what textbooks are required on student schedules based on the courses that have been selected.

## ***Manage Issues and Return for Textbooks and Students***

With inventory in place, it is possible to assign individual textbooks to students. There are a variety of ways to achieve this. You can assign textbooks individually per student, i.e.: Jane Doe needs textbooks A, B and C. Alternatively, you can auto-assign textbooks by course and section or in an Elementary School environment by homeroom. The course list of students appears and automates the distribution process immensely. (This function also available in Teacher Connect). Finally there is an option that can be used in situations like the library where students can assign out their own textbooks.

Once textbooks are issued, reports can be generated showing statistics or details of what textbooks are out and those that are still in inventory.

The return process can be managed per student or by course and section. Books may also be placed out of commission, lost, or charged to students. At all times you can tell online by student or by textbook what the status is of your books.

Issue and return features are also available in the Teacher's Helper GUI which means teachers can issue and return books ONLINE for students in their course/section.

## ***Assigning Textbooks to Teachers***

In some environments like Elementary Schools you may only wish to track textbooks given to teachers. CIMS will allow this to occur because there are teacher issue/return options. In other environments, you may wish to track the books going to teachers, then to students. CIMS cannot handle this. You either use CIMS to manage textbooks with teachers or with students - it is NOT hierarchical.

## ***Transferring Outstanding Textbook Fees to Student Fees***

At semester and yearend, all outstanding textbook fees can automatically generate assessment lines in the school fees module. It is critical to do your best FIRST to collect textbooks. Once you post lost textbooks to fees, if a student returns items it means two operations, ie: cancel the fee owing AND return the textbook.

## ***Managing retirements/fixes to textbooks, changing replacement cost***

There are options in CIMS to mass retire textbooks, ie: put them out of circulation. This will assist in managing re-binding and out of circulation activities for textbooks that can no longer be utilized. There is also an option to mass change the replacement cost of a textbook. This will assist in altering charges to students for textbooks that have de-valued over time.

## **Relationships with Other CIMS Modules**

Textbook Management is dependent on CIMS Student. A student must exist in order to assign textbooks to that student. Utilizing CIMS School Fees is optional. If you want to automate the entry of assessment for lost textbooks, then school fees can be used in conjunction with Textbook.

## **Textbook Inventory**

There is little setup to start utilizing the textbook module. A few categories and circulation codes need to be in place, and then you are ready to go.

The largest task is the initial nightmare of marking and recording your existing inventory. This is a labour intensive (one-time only) activity that must be done accurately the first time. Make sure to discuss and resolve the following questions within your school and according to district guidelines:

- What will be your sequence number strategy?
- What will you use to number your textbooks ... Barcodes, Marker?????
- Where will you number each book, make a rule! When books are returned, you do not want to have to hunt everywhere to find the book number. Be consistent at the location of the numbering. Will you number them twice to avoid students ripping numbers off!

The sequence number strategy is important. Everybody must follow the same rules religiously as an duplication of sequence number makes the system useless.

Once a unique textbook is added the first time, each occurrence of that text district wide automatically fill-in based on that first definition.

### ***Pre-Requisite Setup Items***

In order to begin using CIMS Textbook, setup items exist mostly to assist in textbook reporting.

#### **Category Codes**

When textbooks are defined to CIMS, you can attach a category code to them. This may assist in locating textbooks by subject area or in reporting on books by subject area. Category codes are school specific. It is our recommendation that district office manage these codes if you forecast significant textbook transfers and district reporting. If this is the case, category codes should be consistent for all schools (or at least consistent for Elementary Schools and for Secondary Schools).

#### **Condition Codes**

Condition codes can be used when books are initially inventoried and when students/teachers issue or return them. This adds additional information to your collection on knowing how many may require replacement etc. The use of category codes is optional. In your system setup TXB.100 each school can identify whether condition codes are mandatory or not. If they are not mandatory, then the system will not force condition codes to be entered meaning there is no guarantee that condition codes exist with text issues or returns.

Condition codes can have an effect on charges to students. In a condition code you can indicate a percentage cost of replacement or a flat fee. For instance if a book is returned and you put a condition code of REB (requires rebinding) .. then within that condition code you can have a flat fee value of \$15. When the system goes to post textbook charges, that student would automatically receive a charge of \$15 for that textbook.

## Textbook Type Codes

Similar to category codes, you can attach a textbook type to inventory, i.e.: Paperback, Novel, LabBook, and Workbook. This will assist in reporting and searching for certain items.

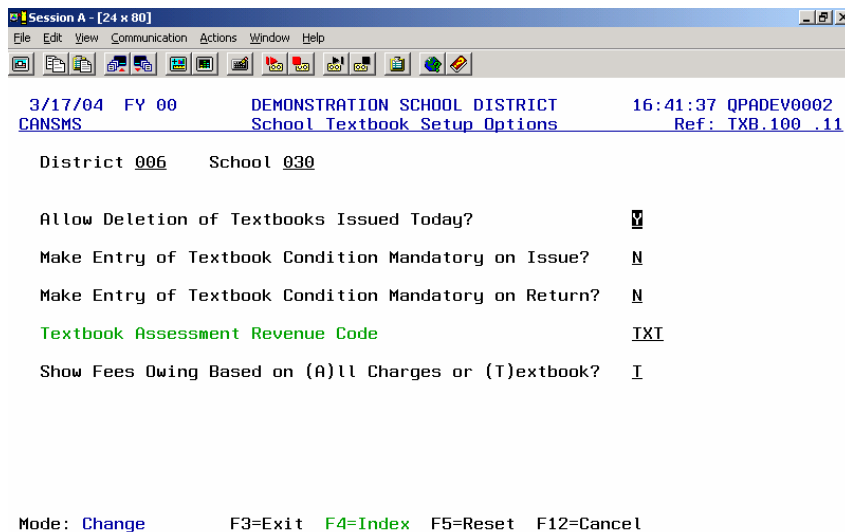
## Textbook Status Codes

Users do not pre-define textbook status. A textbook can either be:

- IN - In inventory, currently not assigned to a student - available for issuing
- OUT - Currently assigned to a student
- OCC - Book is currently out of commission, cannot be signed out

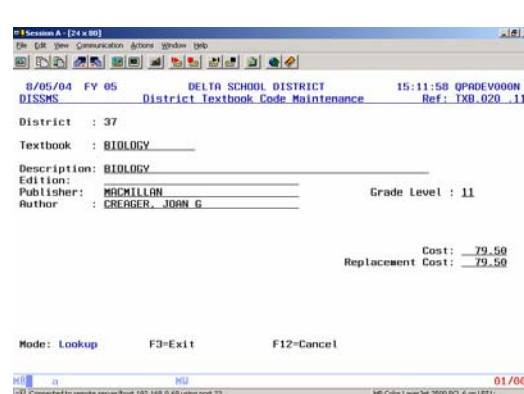
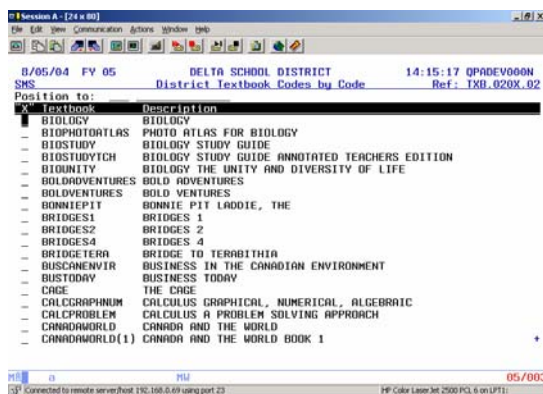
## Textbook Setup Options TXB.100

Textbook setup options setup your textbook environment. There are a few prompts to confirm whether condition code is mandatory, and necessary items to link your textbook module to school fees for posting. Setup must be complete before any activity begins.



## Define Textbook - District (TXT.020)

Use this item to define the Textbook district wide. ISBN is not appropriate as the ISBN number can change for version numbers of the same book. Sample List:



### **Define Textbook to CIMS (TXB.101)**

Use this item to define brand new textbooks to CIMS as well as to update existing inventory with new purchases of existing books.

As mentioned previously, numbering strategy is important. Make sure you have spent time to answer:

- How will you number your textbooks? Textbooks will have a two part number - Unique textbook identifier as well as a sequence number.
- What will you use to number your textbooks ... Barcodes, Marker?????
- Where will you number each book, make a rule! When books are returned, you do not want to have to hunt everywhere to find the book number. Be consistent at the location of the numbering.

### Using 'Index in TXB.101

There is textbook reporting options BUT many search questions can be found without having to go to a report. Learn to use the Index items:

- Index by ISBN - to find textbook by unique identifier for your school or at all schools
- Index by Sequence - to identify who's textbook all schools, or to find next available numbers
- Index by Description - you know a textbook Name but not ISBN

\*Note: There is an item for indexing 'Exclude Status' You can use this to narrow what appears. Eg: Exclude status OCC and OUT to a see a list of available textbooks.

### Define New Textbook

You can utilize the 'Index' option by ISBN or by UPC in TXB.101 to confirm that the Textbook does not already exist. If the book does exist in your school, do not 'A'dd another textbook. Use 'A'dd only when a new title needs to be inventoried.

If you need to add more copies of an existing book, refer to the next section

Session A - [24 x 80]

File Edit Transfer Appearance Communication Assist Window Help

Print Copy Paste Send Recv Display Color Map Record Stop Play Quit Clipboard Support Index

7/16/03 FY 00 DEMONSTRATION SCHOOL DISTRICT 11:54:38 QPADEV0002  
 CANSMS School Textbook Maintenance Ref: TXB.101 .11

District : 006 STATUS : RETURNED JULY 15, 2003

School : 030

Textbook : ARC1234567 TEACHER : DJONES DAVIE JONES Date Entered: 7/11/03  
 Sequence: 13 MM/DD/YY

Description: INTRODUCTION TO CALCULUS

Author : DONNA BELL Grade Level : 12  
 ISBN : ARC1234567 Publication Year: 1964

Storage Location: BOOKROOMA

Condition : VG Category: MAT Type: WRK Cost: 44.10  
 Replacement Cost: 35.00

Status : IN \* IN/OUT/OOC \*

Status Desc:

Mode: Change F3=Exit F4=Index F12=Cancel Add Multiple Copies? N  
 Transaction History? N

MA a 22/076

**TEXTBOOK:** Input a unique Textbook Number (as defined by the district in TXB.020)

**SEQUENCE:** Sequence numbers are unique to the district. No two textbooks, regardless of textbook code, can have the same sequence number. This will match the barcode number you place on the book. Must be numeric.

**DESCRIPTION:** Indicate the Book Title exactly as shown on the cover. Note: If this ISBN was found as being entered, the entire screen will be filled in. This makes it easier to review/update if necessary.

**AUTHOR, YEAR:** Indicate Author and Year. This is helpful information when searching for Book Titles

**ISBN:** Indicate the ISBN# no dashes or slashes ONLY if not being as your textbook#. If you have utilized ISBN as your Textbook number - you do not have to indicate it a second time in this alternate field.

**STORAGE LOCATION, GRADE LEVEL:** Optional Information

**COST/REPLACE COST:** Indicate the estimated cost of the textbook. It is the replacement cost that autofills when generating assessment for lost books. Make sure there is a value in cost and replacement for items that may be chargeable.

**CONDITION, CATEGORY, TYPE:** Categorize your textbook according to your setup items.

**STATUS:** Indicate the current status of this particular book. If you will be creating multiple copies, ensure that the status is IN so that all copies will also show 'Ready to Circulate'.

Users will rarely manage status from within TXB.101. In normal situations, the book will go IN and OUT automatically from student issues programs. Maintain this field only on situations where:

- a) You want to be able to put the book out of commission.
- b) You want to assign a book out to someone other than a teacher or student

SPECIAL NOTE: The current status of the textbook is shown at the top of the screen. This assists in knowing more about the IN, OUT status, i.e.: If the book status is OUT but the student has lost the text, then the top status will show LOST.

SPECIAL NOTE: You can view complete history for this book by selecting 'View Transaction History'. This is a non-annual file indicating all activity that has occurred for this particular volume. This will show all students and/or teachers who have ever been assigned the book. It also shows school transfers of the book.

SPECIAL NOTE: You cannot delete a textbook that is in circulation. The only way to 'Delete a textbook is to ensure that the book status is IN and that no transaction history has occurred for the text.

### Assigning New Copies to existing Textbook

It is important to NOT re-define already defined textbooks with new first series numbers. Make sure to search first by Description, or Author, or ISBN and then if found, you will be 'Changing any sequence number of this book to duplicate for more!

**Pre-Requisite:** The system is NOT smart enough to auto-assign the next valid sequence number. Check from your physical barcodes what the next available sequence number you wish to assign will be. It makes sense to have the labels available anyways - as you will need to affix them to the textbooks.

- 1) Select to 'Index and input the ISBN Number
- 2) With your cursor placed beside any appropriate text (any copy you see of the ISBN) type 'C' (change) and enter

7/16/03 FY 00 DEMONSTRATION SCHOOL DISTRICT 12:08:08 QPADEV0002  
SMS Textbooks by Code and Sequence Ref: TXB.101X.02  
Position to: 006 030

"X"	Textbook	Sequence	STAT	Description	SCH
-	ARC1234567	9	OUT	BOOK A	030
-	ARC1234567	10	OUT	BOOK A	030
-	ARC1234567	11	OUT	BOOK A	030
-	ARC1234567	12	OUT	BOOK A	030
C	ARC1234567	13	IN	INTRODUCTION TO CALCULUS	030
█	ARC1234567	14	IN	BOOK A	030
-	ARC1234567	29	IN	BOOK A	030
-	ARC1234567	900	IN	BOOK A	030
-	ARC1234567	901	IN	BOOK A	030
-	ARC1234567	902	IN	BOOK A	030
-	ARC1234567	903	IN	BOOK A	030
-	MATH9	9001	IN	MATHEMATICS FOR GRADE 9	030
-	102508	31	IN	MATHEMATICS 9	030
-	102508	32	IN	MATHEMATICS 9	030
-	102508	36	IN	MATHEMATICS 9	030
-	102508	37	IN	MATHEMATICS 9	030
-	102508	38	IN	MATHEMATICS 9	030
-	102508	39	IN	MATHEMATICS 9	030
-	111	21	IN	TEST TEXTBOOK 1	0 +

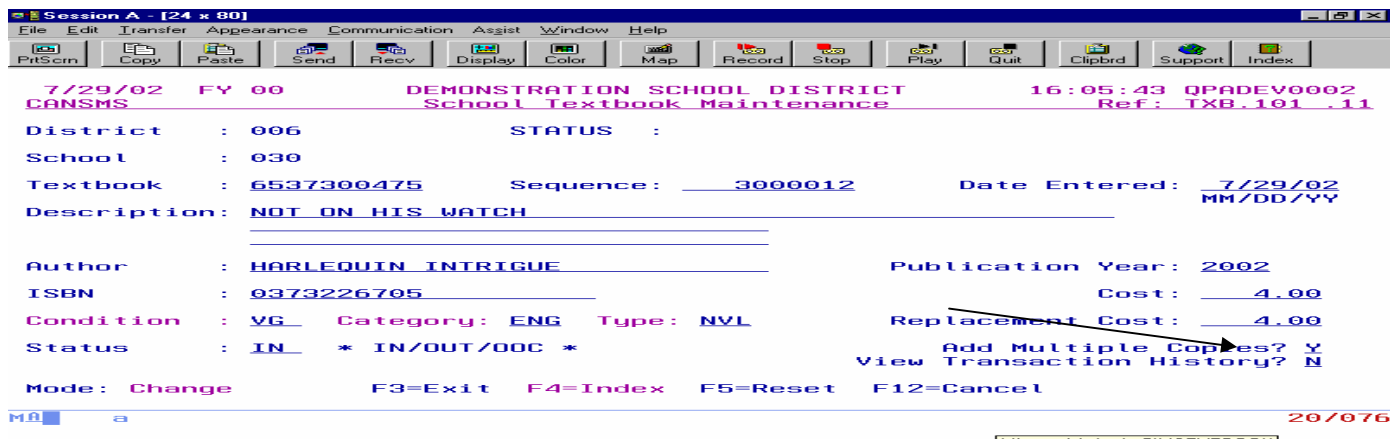
MB a 10/003

In the above example, a 'C' has been placed by sequence #13 as its status is IN and the description etc. look good!

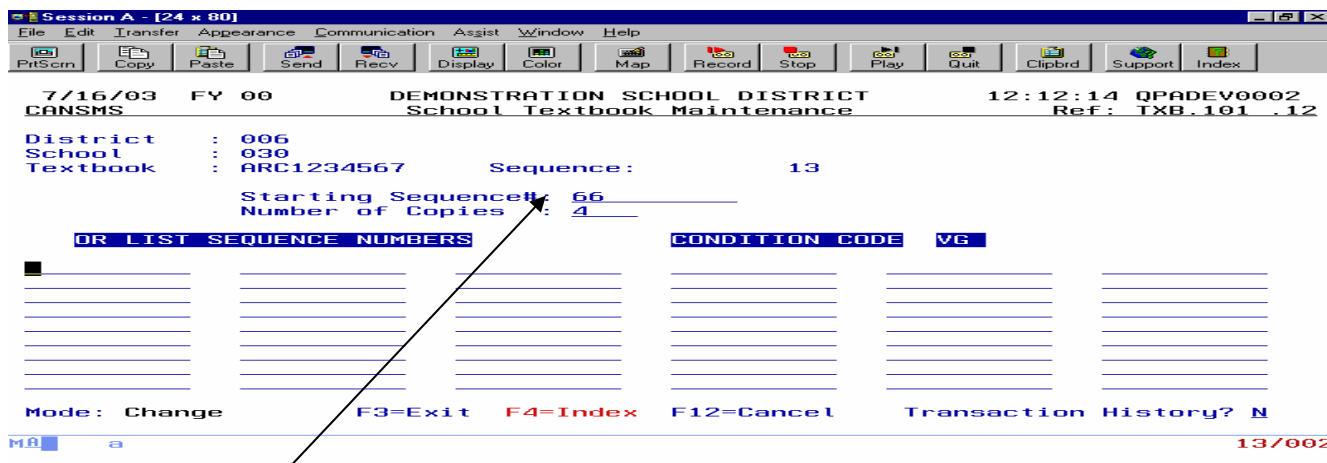
On the subsequent screen confirm that the information looks GOOD, ie:

- a) Description, author, year, grade level information are correct
- b) Purchase and replacement costs are accurate
- c) VERY IMPORTANT, condition code is appropriate!!!
- d) VERY IMPORTANT, status code is IN

In order to record multiple copies for this text, ensure that 'Add Multiple Copies' says 'Y'



It doesn't matter which sequence/volume you select to copy. You should select a more current copy of the textbook in case cost or year has changed. The status of the text must be IN and condition code appropriate as each copy of the new text will have the same condition and status codes.



Select the next available barcode

Indicate how many copies to add to Inventory

OR

If your inventory already exists and you have a wack of these texts all non-sequential numbers - then scan the barcodes (up to 54 at a time) to get those textbooks inventoried. Look for an audit report that will indicate if sequence numbers could not be added (they already exist onfile).

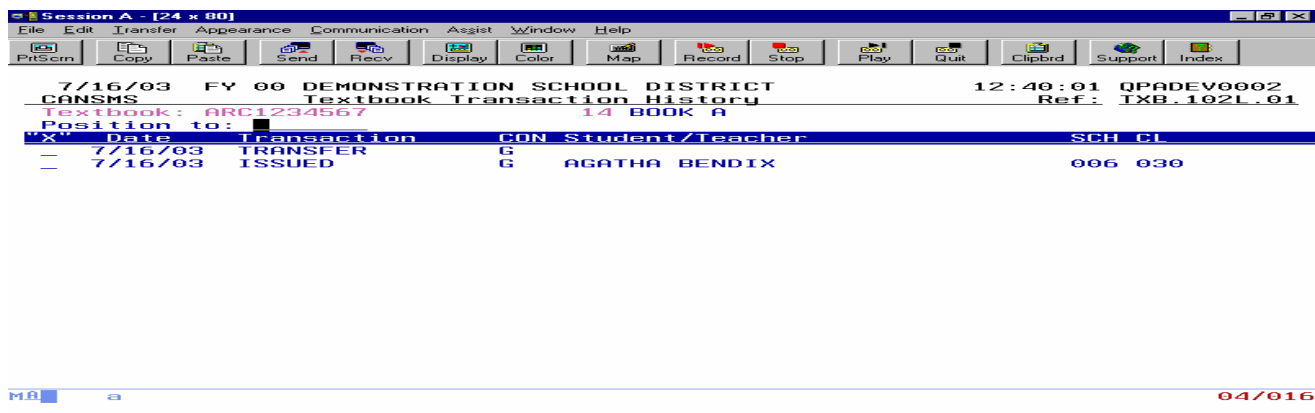
The system will automatically add the copies. If any problems exist regarding duplicate numbers, an error report will be produced. Make sure to check your output queue for errors.

### Mass Change Textbook Replacement Cost TXB.710

Replacement cost shows on many screen and reports to students to make them aware of the value of books. Plus if you are posting to school fees, it is critical to have replacement cost on all books. When the value of a book changes or the total value for an ISBN needs adjusting use this program to update ALL books easily.

### Viewing Transaction History

From within Textbook maintenance, there is an item to 'View Transaction History'. Use this 'Y' to see an all years history of all issues and returns for this book regardless of whether the student is still at your location or not. The list is in date order. The most recent activity (issue, return, lost, charge) will be shown on the first/top line of the display. This history indicates all issue to student/teacher activity as well as book transfers between locations.



### Textbook Inventory Reporting (TXB.501)

Use TXB.501 to:

- Report on what textbooks exist - how many, how many by status "textbook inventory"
- Search for particular subject texts or by ISBN all schools to find textbooks
- Report by textbook in detail all current activity
- Report on books currently out of commission
- Report on outstanding books (books still issued)
- Report on available textbooks

Use the selection criteria to match what you are trying to report on. Make sure to answer 'Y'es to detail if you wish to see the student details on activity for textbooks; else summary 'Y' to report on numbers only.

### Mass Change Replacement Value for a Text (TXB.710)

Replacement cost is critical if you will utilize CIMS to auto-create assessment from outstanding textbooks. The system will look to the replacement value of the text to assign student fees. If you have forgotten to input an amount OR book values change significantly, use this option to mass change groups of texts.

## Assign Textbooks to the Master Schedule

This is an optional feature. If you do assign textbooks to course and section (SCH.320 master schedule) or TXB.320 quick entry of textbook, then:

- You can auto-fill required textbooks when assigning textbooks to a student (TXB.410)
- You can include textbook lists on student schedules (SCH.581)
- You can utilize the required textbook list (TXB.510) to report on required textbooks for students.

### Assign Textbook to Master Schedule (SCH.320) or Quick Entry TXB.320

Use SCH.320 (Master schedule) in order to input what textbook(s) are required by course and section. This works similar to ministry course definitions (High Schools) where you MUST indicate what textbooks are required for every course and section.

Note If you utilize TXB.320 instead of SCH.320 the above screen is omitted and the only screen that is shown to the inputter is the screen below:

Use the 'Comm' (Comments and Textbook) 'Y' to access the textbook screen. Each time you enter this screen the Comm field will be 'N' (to prevent you from having to ALWAYS page past this screen). If textbook information is on file the field will be coloured (as shown above). When Comm is coloured, you know that textbook information does exist. Use 'Y' to access that additional screen.

Input the textbooks associated with the course and section. The Textbook must already exist. Use F4 to list available textbooks. Use Report TXB.505 to list your master schedule and textbook details.

## Textbook - Issues and Returns

Once inventory exists, you can issue textbooks by:

- Student - with an auto-fill for schools using a master schedule
- Course and Section
- Homeroom
- To Teachers
- Option strictly for students to sign out their own textbooks by sequence#

Return options are similar. You can return textbooks by:

- Student - input Student Number, issue list appears.. identify which have been returned
- Course and Section
- Homeroom
- 'Mass' - Input Textbook numbers. CIMS will provide a list of errors.
- Upload textbook numbers from a file.
- Return books issued to teachers

Students do not have to be enrolled in your school to receive a textbook. Textbook issues and returns for course and section **MUST** be completed as best as possible before rollover. It is the decision of each school to charge students at yearend at render the textbook OCC (which means no carryover) or leave the status of the book as OUT which means it will be carried to the new year.

### Textbook Issue by Student (TXB.410)

Issue and Return programs are two different items. Bar Code readers can be used to speed up the process. If you issue books by course and section or homeroom, the process can be largely automated based on sequence number. Use issue by student when dealing with the **WHOLE** student instead of having to bring up each course separately or when a student has left the school to access their records.

The screenshot shows a software window titled "Session B - [24 x 80]" with a menu bar (File, Edit, Transfer, Appearance, Communication, Assigt, Window, Help) and a toolbar with icons for Print, Copy, Paste, Send, Recv, Display, Color, Map, Record, Stop, Play, Quit, Clipbrd, Support, and Index.

Header information:

- 1/12/04 FY 00 DEMONSTRATION SCHOOL DISTRICT 13:16:06 QPADEV0003
- SMS Textbook Issues by Student Ref: TXB.410 .11
- Student CHRISTOPHER BECKETT 11 DUE FEES 31.50
- Current 030 DEMO SCHOOL AK TEXTBOOKS 17.50

Textbook	CON	Issued	RLC	Return	Seq	CON	Closed
ARC1234567		1	BOOK A		7/21/02	R	1 VG 7/21/02
ARC1234567		4	BOOK A		5/20/03	R	4 5/20/03
ARC1234567		5	BOOK A	VG	7/25/02	R	5 VG 7/30/02
ARC1234567		5	BOOK A		5/20/03	R	5 G 5/20/03
ARC1234567		12	BOOK A	P	7/15/03	L	7/16/03
ARC1234567		14	BOOK A	G	7/16/03	C	P 7/16/03
ARC1234567		29	BOOK A		11/04/02	R	29 G 11/04/02
ARC1234567		900	BOOK A	P	7/16/03		0/00/00
MATH9		9001	MATHEMATICS	G	7/16/03		0/00/00
102508		31	MATHEMATIC	P	7/25/02	R	31 G 7/15/03
102508		31	MATHEMATIC	G	7/15/03	R	31 7/15/03
102508		32	MATHEMATIC		11/04/02		0/00/00
111		24	TEST TEXTB		7/30/02	R	24 VG 7/30/02
6537300475		3000001	NOT ON HIS	VG	7/21/02	R	3000001 VG 7/21/02
					0/00/00		0/00/ +

Footer information:

- F2=Stu Sch F6=Req Txt F4=Index F12=Cancel F19=AutoFill
- MA b 07/003

To record a new book, on the next available line, input ONLY the sequence number that the student is taking. Condition code is optional/required based on textbook setup (TXB.100). The system will automatically fill-in the textbook ISBN for you.

Use F6 to view a list of required textbooks and/or F19 to autofill required textbooks based on a student's master schedule. Note that this option will only work if textbook requirements have been entered into the master schedule. The auto-fill does not take into consideration books already issued. Review the auto-fill to confirm you do not duplicate issues/books for the student. If you expect to be able to run listings indicating by course what books are outstanding and be able to assess fees accordingly it is CRITICAL that you use the <F19 autofill> option and then input the sequence number. If you don't use F19 then the system will not associate your textbook with a course.

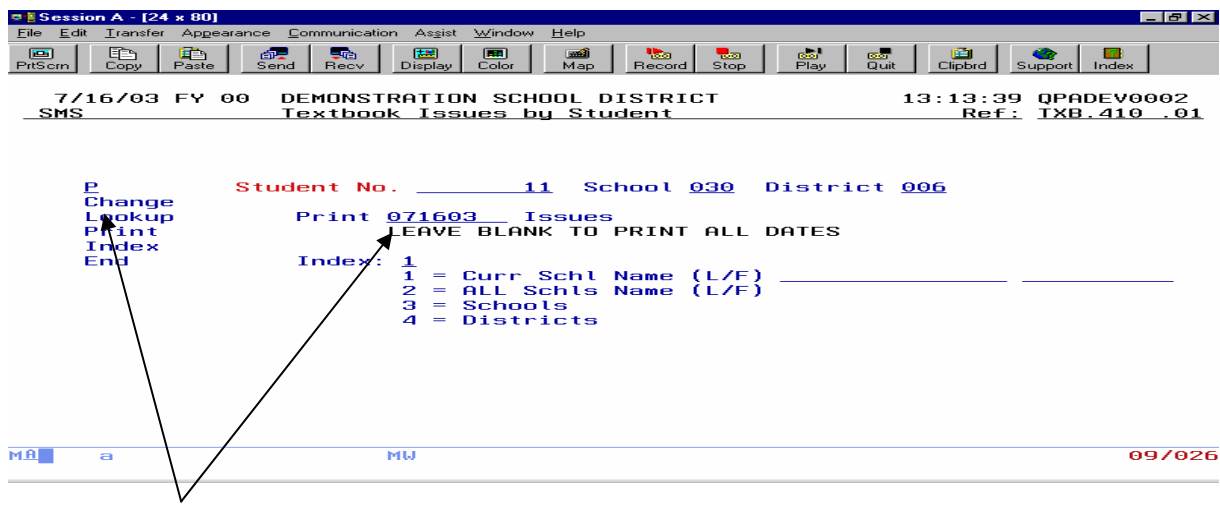
Use F4 to view textbooks by description. This will assist in finding a text if the number is not handy

Use F2 to view the student timetable.. assist in assessing appropriate textbooks.

The system will not allow you to issue a textbook that is already issued or is out of commission. The textbook must have a current status of IN in order to be eligible for issue.

The system will not allow you to edit records more than a day old, i.e.: if you issued a book yesterday, you cannot remove the issue.. you must return the book in order to put it back into circulation.

Once you press ENTER and all information is verified and correct, you will return to the student option. You can produce a copy of activity to be included with the books for the student.



Leave the Print Date as Today to print just issued performed today, else wipe the date out to print all issue activity. This profile does not go on hold.

### **Textbook Returns by Student (TXB.411, TXB.520 = Reporting)**

Returns by student are done based on issues. When you access the return screen all current year issues and returns are displayed.



## Textbook Issues by Course/Section (TXB.415, TXB.522)

Schools must review how textbooks are distributed at year start. Depending on the order of your textbooks and the process that you use to hand textbooks out, the effort can be reduced significantly. The goal will be to auto-assign numbers as much as possible and then provide clear instructions and lists to teachers for distribution. In manual models, teachers tend to be the one's assigning sequence numbers. If they are not online with CIMS, we suggest that they not be the one's to assign the numbers. If the system assigns the numbers, and lists are provided it can save hours of input.

The user inputs what course/section to deal with as well as what textbook to assign. A class list is presented showing all students currently enrolled in the course. If a student does not appear on the list, the student is not scheduled in course requests (SCH.410) . NOTE: The system will display if there are currently \*FEES owing or \*TXTO outstanding textbooks (by definition outstanding textbook means that books are outstanding for terms that have already finished) or \*FE/T both fees and outstanding textbooks.

Student Name	Book Seq#	CON	Issued	RLC Return Seq	CON	Closed
IODKUR, PHILIP L.	15	G	9/08/03			0/00/00
IBBUR, BRETT	9	G	7/14/03			0/00/00
LUBB, THOMAS			0/00/00			0/00/00
SCENRIPU, CGIVEN C.	29		1/12/04			0/00/00
UCENRIPU, EGIVEN E.	901		1/12/04			0/00/00
HOBB, BRENDA	902		1/12/04			0/00/00
HEXDILBU, THEODORE M	903		1/12/04			0/00/00
KURTIIBB, OLIVIA M.	444444		1/12/04			0/00/00
PIRSECA, ROBERT L.			0/00/00			0/00/00
AEOPUBD, NELSON			0/00/00			0/00/00
AEOPUBD, WINNIFRED			0/00/00			0/00/00
CIERTUNC, BRUCE Y.			0/00/00			0/00/00
CPODH, PETE			0/00/00			0/00/00
CECCLEIUN, SHAUN			0/00/00			0/00/00
CYBUNORG, HEATHER K.			0/00/00			0/00 +

F4=Index                      F12=Cancel      F19=AutoAsgn

MA b 07/024

### Entry Methods:

- Enter the appropriate sequence numbers for each student
- Input the first sequence number on the top student, then F19 to autofill. The system will provide sequence numbers starting with the one you inputted for each student. If a student already has an assigned book, the autofill will skip that record. The Auto-fill is smart enough to include only sequence numbers that show a status of IN.
- With the top student sequence blank, press F19 to autofill. The system will provide sequence numbers starting with the first sequence number of IN that it finds. If a student already has an assigned book, the autofill will skip that record. The Auto-fill is smart enough to include only sequence numbers that show a status of IN.



The system will not allow you to edit Returned 'R' records more than a day old. It will allow you to change 'L'ost and 'C'harged entries, i.e.: if you marked a book 'L'ost yesterday and now the student shows up with the book, you can change the 'L'ost to 'R'eturned.

Use TXB.522 for a course listing of assigned and returned textbooks. Special Note: This report only works given you have inputted what textbooks are required per course.

Use TXB.510 to list students who are missing textbooks. This is based on entry in the master schedule. This will assist in the 'post' enrollment timeframe where textbooks have been issued, but counsellors are continuing to make course changes.

### Textbook Issues by Homeroom (TXB.405, TXB.520)

In situations where textbooks are issued to a homeroom rather than course, this option will work best! The user inputs what homeroom to deal with as well as what textbook to assign. A class list is presented showing all students currently enrolled in the homeroom.

Student Name	Book Seq#	CON	Issued	RLC	Return Seq	CON	Closed
BECKETT, CHRISTOPHER	1		7/21/02	R	1	VG	7/21/02
ALLEN, BRETT			0/00/00				0/00/00
BROWN, BONNIE			0/00/00				0/00/00
BROWN, GERRY			0/00/00				0/00/00
BRUNN, TAYLOR			0/00/00				0/00/00
BSURNAME, BGIVEN B.			0/00/00				0/00/00
CSURNAME, CGIVEN C.			0/00/00				0/00/00
ENNS, CHRISTINE			0/00/00				0/00/00
ESURNAME, EGIVEN E.			0/00/00				0/00/00
FRIESEN, PETER J.			0/00/00				0/00/00
GRABOWESKI, MARIE V.			0/00/00				0/00/00
GRABOWESKI, NETTIE			0/00/00				0/00/00
GRABOWESKI, NOLAN P.			0/00/00				0/00/00
GRISHAM, HAROLD J.			0/00/00				0/00/00
HART, EVELYN M.			0/00/00				0/00/00

#### Entry Methods:

- Enter the appropriate sequence numbers for each student
- Input the first sequence number on the top student, then F19 to autofill. The system will provide sequence numbers starting with the one you inputted for each student. If a student already has an assigned book, the autofill will skip that record. The Auto-fill is smart enough to include only sequence numbers that show a status of IN.
- With the top student sequence blank, press F19 to autofill. The system will provide sequence numbers starting with the first sequence number of IN that it finds. If a student already has an assigned book, the autofill will skip that record. The Auto-fill is smart enough to include only sequence numbers that show a status of IN.

Condition Code is optional. Further, some locations choose to use condition only when the condition of the text becomes questionable.

Use TXB.520 for a homeroom listing of assigned/returned textbooks.

## Textbook Returns by Homeroom (TXB.406, TXB.520)

There are a variety of ways to initiate returns of books. If you are working with piles of books (not course oriented, then mass return option may be more suitable). This return option is optimal if books are returned in some order OR if the homeroom teacher submits a list for you to work from.

The user inputs what homeroom to deal with as well as what textbook to return. A class list is presented showing all students currently enrolled in the homeroom.

Student Name	Book Seq#	CON	Issued	RLC	CON	Return Seq	Closed
BECKETT, CHRISTOPHER	1		7/30/02	R	VG	1	7/30/02
ALLEN, BRETT			0/00/00				0/00/00
BROWN, BONNIE	3		7/30/02				0/00/00
BROWN, GERRY	4		7/30/02				0/00/00
BRUNN, TAYLOR			0/00/00				0/00/00
BSURNAME, BGIVEN B.			0/00/00				0/00/00
CSURNAME, CGIVEN C.			0/00/00				0/00/00
ENNS, CHRISTINE			0/00/00				0/00/00
ESURNAME, EGIVEN E.			0/00/00				0/00/00
FRIESEN, PETER J.			0/00/00				0/00/00
GRABOWESKI, MARIE V.			0/00/00				0/00/00
GRABOWESKI, NETTIE			0/00/00				0/00/00
GRABOWESKI, NOLAN P.			0/00/00				0/00/00
GRISHAM, HAROLD J.			0/00/00				0/00/00
HART, EVELYN M.			0/00/00				0/00/00 +

Input a Return Code:

- R - Book Returned (Updates book status to IN)
- L - Book Lost (Does not update status, book remains OUT until handled manually or automatically during charge operation)
- C - Student is to be charged for the book (book returns to IN status meaning it can be re-issued). Charge does not mean lost. Charge means student has been charged for damage but book is still in commission. DO NOT USE 'C'arge if you wish CIMS to auto-assess fees. For book damage auto-asses, use a 'R'eturn with an appropriate condition.

Input a Condition code. If you have lost the book, condition code remains blank.

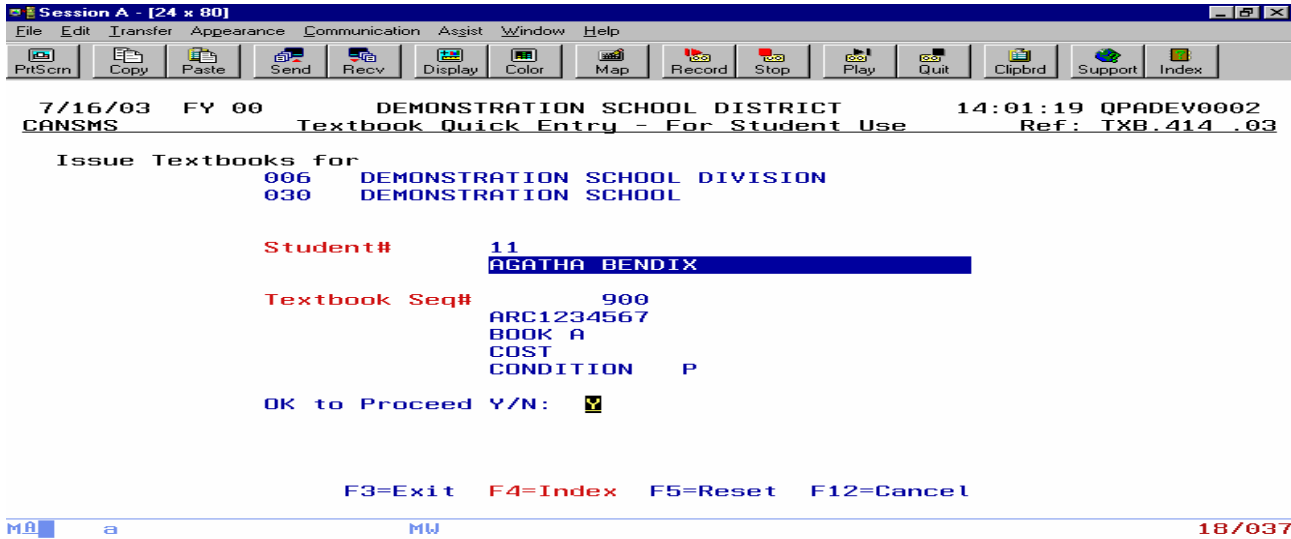
If you are mass returning, or you are using a wand, then the numbers can be scanned to confirm they match with issue (rather than for user to look at each to confirm return number is same as original sequence number. If return sequence is left blank, then the system assumes the issue# as the return sequence number.

The system will not allow you to edit Returned 'R' records more than a day old. It will allow you to change 'L'ost and 'C'harged entries, i.e.: if you marked a book 'L'ost yesterday and now the student shows up with the book, you can change the 'L'ost to 'R'eturned.

Use TXB.520 for a homeroom listing of assigned and returned textbooks

**For Student Use - Issue out their own Textbooks (TXB.414)**

District office sets up a separate ID restricted to the school and the only item that user has is TXB.414. In this fashion, a station in the library (or wherever) can be setup and on. Students may use it to issue out their own textbooks.

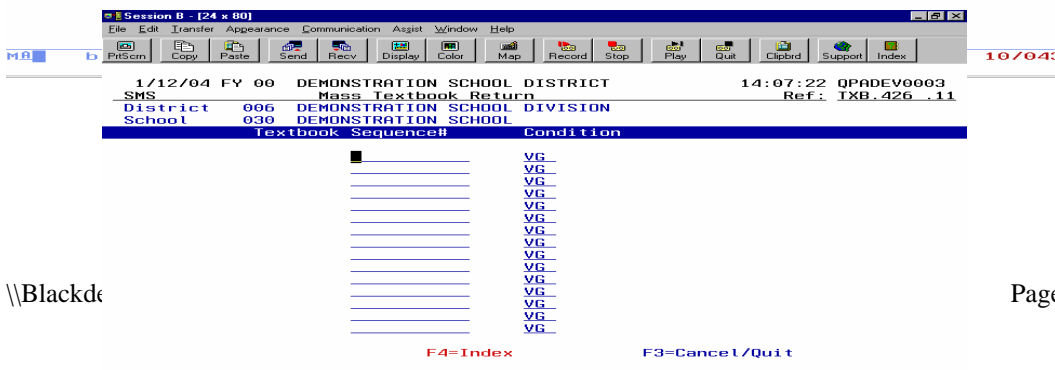
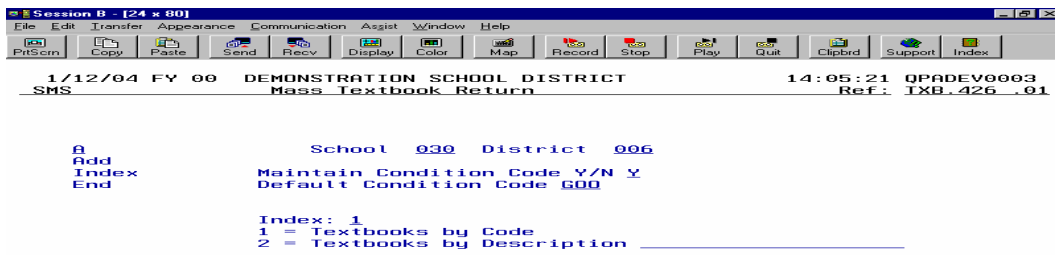


- a) Student inputs their student number of F4 to assist (ENTER) - System confirms entry
- b) Student inputs the textbook number (ENTER) - system verifies textbook is valid and has a status of IN then allows student to PROCEED

**Textbook Returns "Mass Return" (TXB.426)**

This option is ideal for mass entering returns NOT based on students. If you have a pile of textbooks and simply want to wand or key textbook numbers in not ensuring that the right student brought the right book, then this option is perfect.

The initial screen lets you utilize condition code on return and default the value. This means that you change the value ONLY if the book being returned varies MAJOR from your default.

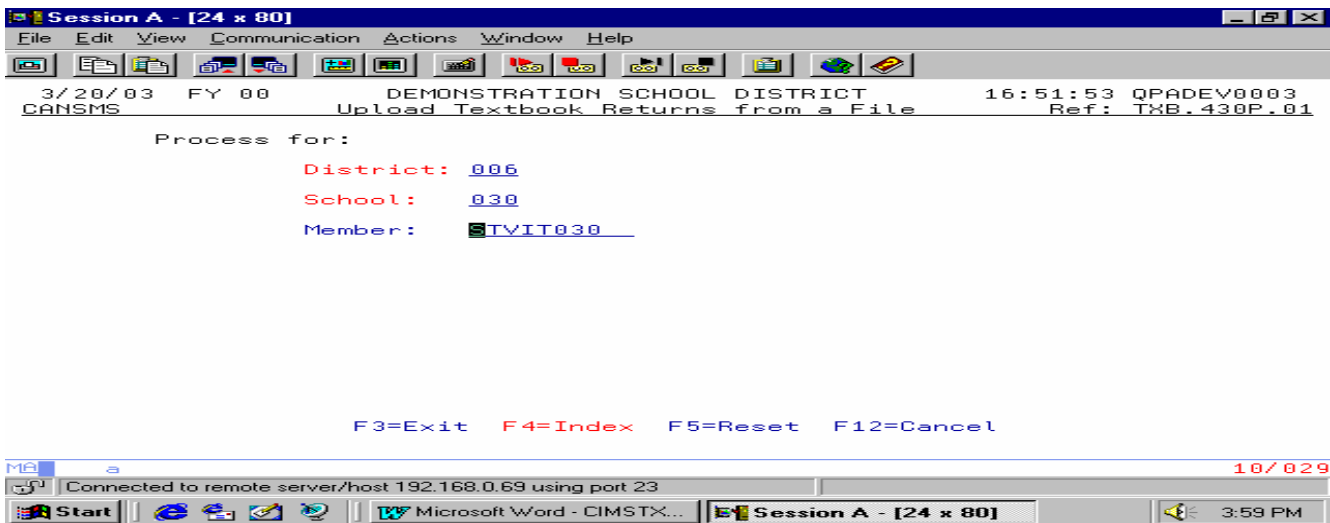


Input the sequence number and condition code (optional: when you accessed this option it indicated use condition code. If you answered 'N', the field would NOT appear making convenient for wand). Once the page is completed press ENTER to post the page. Be careful to press ENTER when the page is completed, else new entries will just overwrite existing ones.

The system provides errors for incorrect entries and you MUST correct/remove the errors in order to post the page.

**Upload Textbook Returns from a File (TXB.430)**

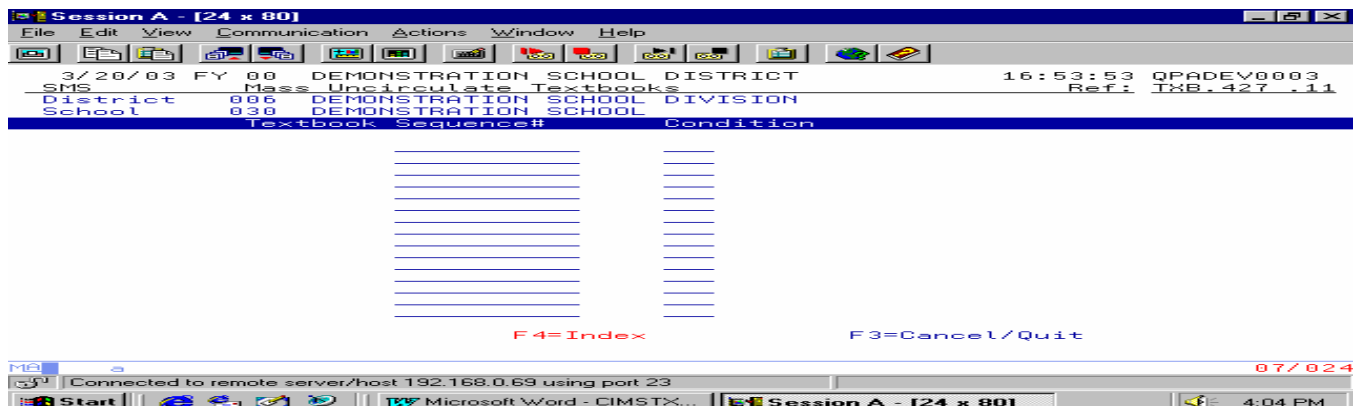
This option is ideal for mass returning textbooks that have been scanned into a flat file by an alternate system. The sequence numbers are loaded into PTXB430 in library SMSTRANS for a specified member. An error report is produced detailing any problems.



MEMBER: Specify the member of PTXB430 that contains the records to be uploaded.

**Mass Put Textbooks Out of Circulation (TXB.427)**

This option is used to mass mark textbooks as out of circulation. The sequence numbers are scanned/inputted into the screen and their status is changed to OOC. NOTE: The textbooks must be valid and currently at an IN status.





### ***Who has this book and where (TXB.571)***

Excellent onscreen option to find a student and where they are right now - based on a sequence number of a book, ie: you have a book in your hand and want to return it to a student or question the student.

### ***Audit - Confirm Textbook Status and/or condition based on transactions (TXB.535)***

This option confirms that the textbook status code (IN/OUT) matches what all the transactions add up to. It also confirms that the condition code matches the most current transaction. This report should be run occasionally to confirm that the textbook module is working appropriately in your school.

### **Posting Outstanding Textbook fees to School Fees Module TXB.601**

If you are utilizing CIMS Fees - then it is a natural progression to want to populate that module with outstanding textbooks for students. This option should only be run at semester/yearend occasions where significant efforts for collection have already occurred, ie: outstanding textbook listings were distributed to teachers, students have been badgered etc.

Once this option to 'post' has occurred:

- a) the book is marked as LOST and remains as OUT status
- b) transaction history is updated so user is aware of the posting date
- c) entries are automatically made in school fees for each textbook lost per student using the replacement cost indicated on the textbook
- d) From text module, the lost text has been stamped as 'transferred'. This means that if you re-ran TXB.601 again only NEW outstanding textbooks would be copied to assessment - no chance of duplicating charges.

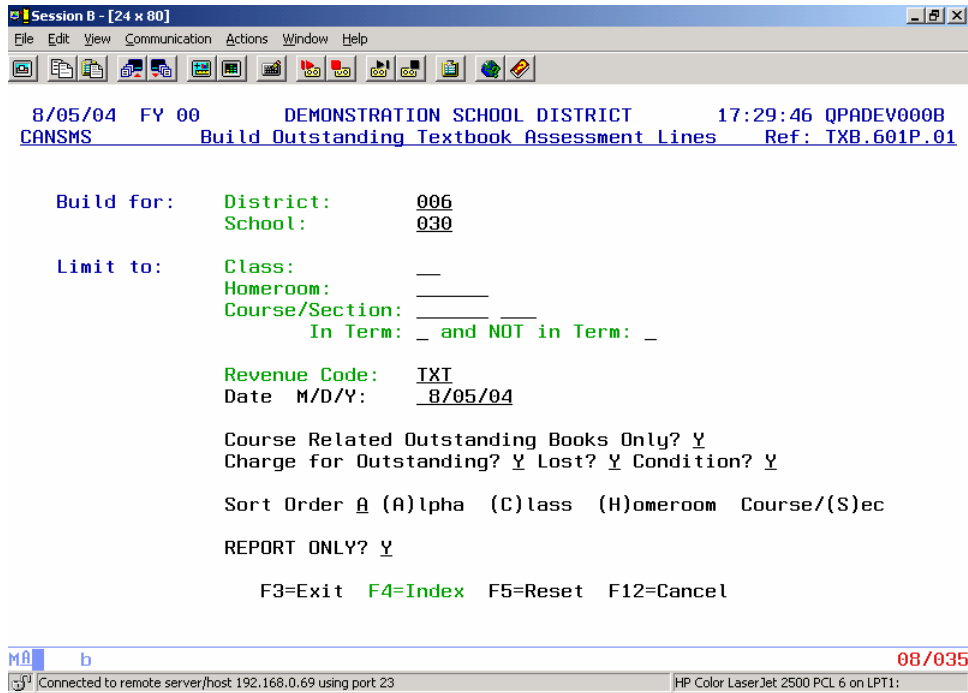
If a student returns a text that has already been posted two steps must be taken to rectify the situation, namely:

- a) access the textbook module and return the book (TXB.411, TXB.415)
- b) access the school fees module and adjust or delete the TXT assessment (SGH.410)

Pre-Requisites:

- a) ensure that there are replacement values marked for textbooks TXB.501

b) ensure that the majority of your badgering and collections measures have been executed. The only thing you want to post are those items that are pretty-sure lost.



Note: This option should always be run Report Only First to ensure the charges look appropriate and to give you a further collection list. Compare this list to your outstanding textbook report (TXB.520) to ensure that they “balance”, i.e. that all the outstanding books are being charged.

Note: This option may be run more than once and differently depending on time of year. Eg: At semester 1 you will want to charge ONLY for Sem1 related courses ... then at yearend you may run for all outstanding and then again for condition code.

TERM INFO: If you want to only post say 1<sup>st</sup> semester courses only (ie: it is January and you want to assess just first semester) the TERM details are very important. By indicating Courses taught in 1 and not in 3 you are indicating to NOT include courses that are offered in term3 or term4 (these texts would not be outstanding until yearend)

COURSE RELATED OUTSTANDING BOOKS ONLY: Textbooks may be assigned by course/section or in an Elem/Middle school environment may not. If you are a high school and you want to assess just 1<sup>st</sup> semester ensure that you run this JUST for course related (SCH.320) info. At yearend this may not be an issue as everything regardless of whether it has been assigned by course/section or not should be assessed.

### Controlling Returned Books once Fees have been posted TXB.530

Once textbooks have been posted to fees, there will be few/many occasions where students will return the book without the office knowing. This will cause unfair fees to exist for a student. Get used to running TXB.530. It will allow you to know who has returned book(s) where fees have been assessed. It can be run based on date, so remember when you last re-ran to avoid double-checking things that have already been addressed.

## Charging for Returned Text based on Condition Codes

There are returns that carry condition codes like REBIND or REALLY BAD. Each condition code can have a charge value flat fee or percentage. This will allow you to auto-generate charges for students based on the condition code entered when the book was returned.

## District Wide Utilization of Textbooks

Through daily use of the textbook module at all schools, district wide use will be available regarding textbooks, i.e.:

- What textbooks are being used and at what cost
- Turnover of textbooks, loss, inventory
- Textbook transfers and multi-school use capability

Schools can also use this module as a resource for finding out what textbooks are being used AND to search for non-utilized copies that may be shared.

## TXB.501 - Textbook Listing

This report is based on textbook first, then can provide details about the textbook, and student issues and status. Use this report for:

- Searching for a textbook all locations and to identify who may have it, how many copies, how many available copies
- Searching for a publication that other schools are using

## Yearend-Yearstart Considerations

The Inventory File is non-annual so when the new Year is operational, the inventory will be intact without any options needing to be run.

Transaction History is also non-annual meaning that we will see forever all transactions that have occurred to this textbook without having to go into previous years.

Once your master schedule is established, it will be more convenient to run TXB.925. The program will look to the previous year and match Course and Section ... If it sees the same Course and Section in the new year and there were textbooks assigned in the old year they will copy to the new year. Note: IF additional sections of a course are in the new year, textbooks will have to be added manually (SCH.320 or TXB.320)

In the New Year, there is no 'Link' between all the books with status OUT and what students have them. It is each school's decision as to whether or not to carry forward outstanding textbook details. Our recommendation is that schools NOT carry forward. In this scenario, if a kid in September returns a last year's book, you would have to go to the previous year assignment to return it. This makes things CLEARER, ie: carryforwards year after year would be a very large/unmanageable file & reports. In the current year, through textbook lookup you will always know that the book is out and who has it and from which year .... It makes sense then to reverse the charge (in fees) in the current year .. then return the book in the year it was issued. The outstanding textbook listings would pertain JUST to the current year rather than all other years combined.

For schools that have students using books for multi-year purposes, use TXB.930 to re-attach what students have the OUT books. Note that the system will only complete this carryforward for all items with no closure (Lost and charged books have closure). This will allow students to return last years textbooks.

For books that have a status of Lost or fees have been posted, there are two steps to take:

- a) manually go into TXB.101 and Force the status of the book back to IN
- b) handle assessment for that student appropriately.

### ***Handling Previous Year Textbook Returns over Summer and at School Start***

If you have already assessed the kids (June of current year) and carryforwarded their owings (New school year) AND,

If you do not carry forward outstanding books (both of which are fine!), then

- a) you want to be able to easily return the books ... and can do so using TXB.426A (mass return - allow to return books marked lost) in the previous year live year - ie: going into the frozen year student is NO GOOD or textbook, that will always show the book status as at June 30th.
- b) you want to be able to report on returned books by date so that you can go into the new year and adjust their assessment in the new year ... so report TXB.530 in the live previous year (same area that you returned the books) with prompts filled in to:
  - current students only 'N'
  - limit to date range MM/DD/YY - MM/DD/YY (Put today's date in to get today's returns)

You must have access to a Previous Year Textbook Menu that allows you to mass return, return for a kid, and report on returns ..... (TXB.411, TXB.426A, TXB.530).

## Handling Fees for Returned Books

If fees have already been assessed, returning the book is not enough! You must also handle the assessment. Our recommendation is to leave the assessment line - go and make a payment for the assessed book with a pay type of RET so you are aware that the book was returned, no cash was given.

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Session B - [24 x 80]
File Edit View Communication Actions Window Help
9/07/07 FY 05 TAKE TWO INC. 09:13:25 QPADEV000B
CANSMS Student Assessment/Payment Maintenance Ref: SGH.420L.11
Stu#: 9841312 AFINOGENOV, A.J. 105.00 STU OWE$: 50.00-
SCHL: 444 001 Paid Today .00
CMD Course Sec Tag Date Rev Descriptn Outstanding Pay Amount Userid
BEGIN 0/00/00
0001.000 4/27/07 TXT 982584 COR 60.00- DONNA
0002.000 4/27/07 YBK YEARBOOK R 70.00- 35.00 DONNA
0003.000 4/27/07 TXT 823749374 120.00 DONNA
0006.000 6/19/07 TST TEST 10.00 DONNA
0007.000 9/07/07 YBK YEARBOOK R 70.00- DONNA
0008.000 9/07/07 NSF YEARBOOK N 35.00- DONNA
-> 9/07/07 TXT 2234445 HO 55.00 DONNA

9.000 Course: Sect: Tag: User: DONNA 9/07/07
Description: 2234445 HOMER SIMPSON Dis: 444 Sch: 001
Assessed: 55.00 Owing: 55.00 Amt: 55 Type: RET
Rev: TXT Crd#: Exp: 0/00/00
F3=Exit F4=Index F5=Reset F12=Cancel Cancel? N

MA b 22/022
[902 - Session successfully started] [HP Color LaserJet 2500 PCL 6 on DOT4_001]
  
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It is critical that you do not add an additional assessment line with a negative ... In this situation you are left with two open assessment lines which will both carryforward in the new year as owing.