

## Workflow Checklist 8.0 (Return to Project Management)

Refer to the Booktracks Workflow document for more details about the tasks listed below. Use this list to mark each task as completed and sign at the bottom.

### Check each task below as it applies to your school:

- Conduct overview meetings to decide policies for workflow and textbook management.
- Establish circulation policies and report and circulation classes for your records. The Setting Up Your Database document is available on the Downloads form in Booktracks or refer to Booktracks' online Help files for more information.
- Decide what staff members will use Booktracks for any tasks.
- Determine how textbook and/or equipment records will be loaded or entered into Booktracks.
- Determine how patron records will be loaded or entered into Booktracks.
- Determine if course information will be loaded or entered into Booktracks.
- Order barcodes and scanner if needed.

The following is a list of tasks that you will need to perform during distribution and collection.

- Distribute textbooks. The Distributing Textbooks document is available on the Downloads form, or refer to Booktracks' online Help files for more information.
- Circulate equipment. This may be done at the beginning of the school term or throughout the term depending on what type of equipment you check out to whom (to students for a whole year, to teachers for a particular unit lesson, etc.).
- Make teachers, students, and parents aware of the cost of the textbooks and policies regarding lost textbooks.
- Use reports at any time during the process to track circulation or find useful information about your textbooks and patrons.
- Collect textbooks. See the Collecting Textbooks document available on the Downloads form or refer to Booktracks' online Help files for more information.
- Notify parents and students of lost textbooks and the replacement cost.
- Update database to mark items lost.

---

**Signature and Date**