

This year schools will be required to conduct an electronic textbook inventory. These are the recommended steps for conducting that inventory.

The first step is if you started an inventory last year you need to finalize it before you begin.

Click the finalize button and start a new inventory. This can be done the same day.

This needs to be completed by third Wednesday in June along with the attached form and sent to Sue Bain

Starting a textbook inventory

When beginning an **inventory**, Destiny allows you specify the textbooks to include or exclude:

- Include only copies that are assigned to one or more specified [Locations](#) (site only). **Yes**
- ~~• Include only copies whose adoption year ends within a certain range.~~
- Include copies with barcodes. **Yes**
- ~~• Include copies without barcodes.~~
- ~~• Include Consumables.~~
- Include copies that are checked out. **Yes**
- ~~• Exclude copies that [have been seen](#) recently.~~

How do I start an inventory?

1. Open **Inventory** in the **Back Office**. If there are tabs, select Textbooks.

2. Click  **Start New**.

3. Provide a unique name of up to 30 characters for this **inventory**. This name appears in the **Textbook Inventory** list on the **Inventory** page and on all **inventory** lists and reports. **Please Name: Textbook 2009-2010**


~~4. If you are starting a district **inventory**, select the district, a group of schools, or an individual school from the **For** list.~~

5. If you are starting a school **inventory**, you can limit the inventory to copies that are currently assigned to one or more locations:

1. Click  **Update**.

2. On the **Select Location(s)** page that appears, select one or more check boxes for the locations you want to include in the **inventory**.

Selecting *Undefined* includes copies not assigned to any location.

3. When you are done, click  **OK**.

~~6. To include only copies whose adoption year ends within a certain range, enter the beginning and ending year for the range.~~

7. Select the types of copies you want to include in the **inventory**:

- Copies with barcodes
- ~~Copies without barcodes~~
- ~~Consumables~~

Important: Because Consumables and copies without barcodes do not circulate or have a location on record, the **inventory** includes all of them if you select one or both check boxes.

8. If you want to include copies that are currently checked out, select the **Make currently checked out copies "unaccounted for"** check box.


9. If you want to check in copies as you scan them, select the **Check in currently checked out copies when scanned into inventory** check box. **Depends on when you start inventory.**

When you select the check box:

If you have finished checking in your books you want to check-in copies when you scan.

- When you scan or enter a barcode for a checked-out copy, **Inventory** checks it in.
- When you upload a file containing a barcode for a checked-out copy, **Inventory** does *not* check it in; it remains checked out.

~~10. If you want to exclude copies that have been seen recently, enter an earlier date in the box next to **Except for copies....**~~

~~Click  for a calendar.~~

11. Select the action you want Destiny to take when the Location on record does not match the location in which you scanned the copy.

~~**Do nothing**~~

~~Destiny ignores the discrepancy.~~

~~**Alert but do nothing**~~

~~Destiny plays an alert sound and displays a warning message.~~

Prompt for change

Destiny plays an alert sound and displays a warning message, giving you the option to change the Location assigned to the copy. If you select Yes, Destiny changes the Location on the copy record to the location specified next to **Current scanning location** (on the main **Inventory** page).

~~**Automatically change location**~~


~~Destiny automatically changes the Location assigned to the copy to the location specified next to **Current scanning location**.~~

~~If you are uploading barcode files (not scanning one at a time), this is the only method that changes the location.~~

~~If you are uploading files of barcodes and you chose **Automatically change location**, the job summary includes information about any changes of location.~~

Tip: If you are including textbooks that are *not* assigned to a Location (*Undefined* on the **Select Location (s)** page) and need to be, choose either **Prompt for change** or **Automatically change location**.

12. When you've made your selections, click , and **Yes** on the confirmation message, to begin the **inventory** and return to the main **Inventory** page.

Important: Once you make your selections here and click , you *cannot* return and make changes. You can view these **inventory** parameters by clicking View Selections in the lower left corner of the main **Inventory** page.

Steps For Preferred Method:

How do I assign Locations to textbooks?

To conduct an inventory by location, your copy records need have a Location assigned.


- * Assign locations to textbook copies when creating the records.
- * Assign or change locations when editing the records individually.
- * Assign or change locations using a file of barcode numbers in Batch Update in Update Copies in the Catalog.
- * Assign locations to copies that do not have them during inventory by including Undefined on the Select Location(s) page and choosing either Prompt for change or Automatically change location. (See step 10 above.)
- * Change locations during inventory by choosing either Prompt for change or Automatically change location. (See step 9 above.)
- * Include a Location field in a textbook import file.

Please be sure to Finalize the textbook inventory. When you have finished scanning all of your textbooks, follow the steps below to Finalize the inventory.

Once the Unaccounted-for total on the **Progress Details** page is at or near 0 (zero), your **inventory** is complete.

Before you Finalize your inventory, you need to run a report of **Unaccounted for** textbooks.


Save this report. You can use it to compare from one year to the next which textbooks were marked **Unaccounted for**. After you have run and saved the report you are ready to Finalize the textbook inventory.

On the Inventory page, Click  **Finalize** and **Yes** on the confirmation message. If you still have any unaccounted-for copies, a message appears, asking whether Destiny should mark them Lost.

Select **Mark lost** if you are sure that you cannot find the remaining Unaccounted-for copies.

When you select **Mark lost** on the message, Destiny marks the Unaccounted-for bar-coded copies Lost. Their copy status changes to Lost, they are added to the **Lost Copies** list. If a textbook is marked lost and later found it will be added back into Destiny when the barcode is scanned.

If you're participating in a multi-school or district-wide **inventory**, click

 **Finished**, and **Yes** on the confirmation message.