

Conducting an Inventory

Description

Information from an inventory can be a great tool to ensure you have enough resources for your students and help guide your purchasing decisions. With Destiny, you can conduct an inventory and record your resources' condition and availability at any time. Learn how to start, conduct and finalize an inventory.

Objectives

- Start an inventory.
- Conduct an inventory.
- Finalize an inventory.

Activities

- Plan your inventory.
- Set up an inventory.
- Enter barcodes into the inventory.

Notes

Plan

- 1. How do you currently conduct an inventory of resources at your school? At your district?

- 2. Use the following table to document who is responsible for confirming the location and condition of your school’s resources during an inventory. Use the blank spaces to fill in any additional resources you track.

Resource	Person Responsible
Textbooks	
Tablets	
Desktops/laptops	
Athletic equipment	

Large empty rectangular area for taking notes.

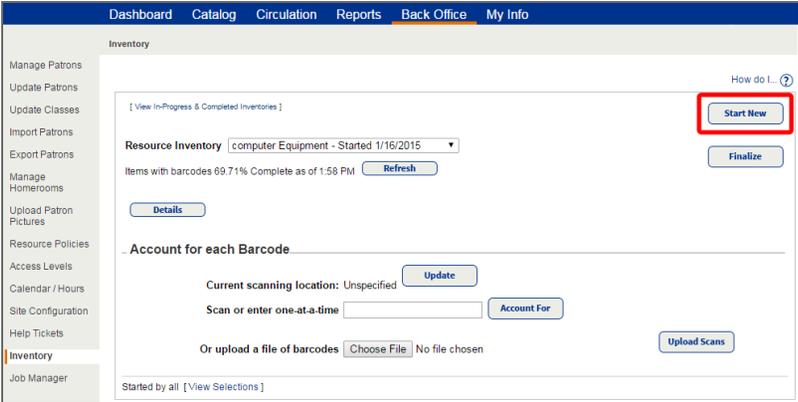
Apply

Starting an Inventory

The first step to an inventory is to set up the information. An inventory can be limited to a department, person responsible or resource type(s).

Follow the steps below to start an inventory:

- 1. Select **Back Office > Inventory > Start New.**



- 2. In the **Inventory Name** field, type a unique name for your inventory.
Note: If you are logged in to the district, use the **For** drop-down to select which schools in your district will conduct the inventory.



Notes

Inventory > Start Inventory

Specify the resources to be inventoried...

Inventory Name

For RM and LM District

Limited to Unlimited

Resource Types All Resource Types

Purchase Price Greater than or equal to

Include Items with barcodes
 Items without barcodes
 Consumables

Handling checked out items - I want to...

Include items that are checked out. Make these items unaccounted for.
 Check in currently checked out items when scanned into inventory.

All items meeting the above criteria will be set to "unaccounted for..."
Except for items that have been seen on or after 1/14/2018

During this inventory, if the location of an item does not match the currently specified location...
Do nothing

3. From the **Limited to** drop-down, select how to limit the resources to include in your inventory, and then click **Update** to select the specific home locations, departments or custodians.
4. To limit your inventory to specific types of resources, click **Update** next to **Resource Types**, and then select the resource types you want.
5. To limit the inventory to resources with a particular purchase price, select the range from the **Purchase Price** drop-down, and then type the amount in the field. Leaving the field blank includes resources of any purchase price.
6. To include barcoded items, unbarcoded items or consumable resources, select the appropriate checkboxes.
7. To include items that are currently checked out, select the **Include items...unaccounted for** checkbox.
Note: If you select this option, all items retain their checkout status when you scan them into the inventory.
8. Select the **Check in...into inventory** checkbox to have Destiny check in any checked-out items when scanned during your inventory.
9. To exclude items that have been reviewed recently (such as circulated, updated or transferred) from being unaccounted for (meaning they appear as accounted for – you don't have to scan them again), type a date in the **Except for items that have been seen on or after** field.

- From the **During this inventory...currently specified location...** drop-down, select how you want Destiny to handle items not in the location specified in their item record. You can have Destiny do nothing, alert you, prompt you to change the item's location or automatically change the item's location.
- Click **OK**, and then click **Yes** in the confirmation message to begin the inventory.

Conducting an Inventory

Now that the inventory is set up, it is time to account for the resources by scanning barcodes, uploading a barcode file or counting items and entering the quantity.

Follow the steps below to conduct an inventory by scanning barcodes:

- Select **Back Office > Inventory**.
- Select the appropriate named inventory from the list, if applicable.

The screenshot shows the 'Inventory' page in the Destiny Back Office. The navigation menu includes Dashboard, Catalog, Circulation, Reports, Back Office, and My Info. The main content area is titled 'Inventory' and contains a sidebar with options like Manage Patrons, Update Patrons, Update Classes, Import Patrons, Export Patrons, Manage Homerooms, Upload Patron Pictures, Resource Policies, Access Levels, Calendar / Hours, Site Configuration, Help Tickets, Inventory, and Job Manager. The main area displays a 'Resource Inventory' for 'Technology Lab Inventory - Started 2/19/2015'. It shows 'Items with barcodes 15.69% Complete as of 9:11 AM' and includes buttons for 'Start New', 'Finalize', 'Refresh', and 'Details'. Below this is the 'Account for each Barcode' section, which has a 'Current scanning location: Unspecified' with an 'Update' button, a 'Scan or enter one-at-a-time' input field with an 'Account For' button, and an 'Or upload a file of barcodes' section with a 'Choose File' button and 'No file chosen' text, plus an 'Upload Scans' button. At the bottom, it says 'Started by all [View Selections]'.

- In the "Account for each Barcode" section, to have Destiny confirm you are entering barcodes in resource's designated location, click **Update**, and then select your current scanning location.
- In the **Scan or enter one-at-a-time** field, type or scan each barcode. Once you enter a barcode, the item appears in the Most Recently Accounted For section.

When you scan or enter unaccounted for barcodes, Resource Manager changes the item's inventory status to "Accounted for".

Notes

Note: Based on how you configure **Back Office > Site Configuration > Circulation > Resource Options**, "Lost" textbook resources must be returned in a timely fashion to generate a refund. Resource Manager does the following:

- Changes the status of a lost item to Available and deletes any fine charged to a patron for the lost resource.
- Creates a refund if the fine was paid.

When the inventory is complete, it can be finalized.

Notes

Assess

In the following table, use checkmarks to self-assess your level of understanding of the learning outcomes covered in this session.

	I can...
	Start an inventory.
	Conduct an inventory.
	View an in-progress inventory.
	Finalize an inventory.

If you need more help, go to:

- Resource Center (resources.follettlearning.com) for how to's, videos and training tools
- Destiny Help for feature information and step-by-step instructions
- FollettCommunity.com for blogs and forums

For the most recent product updates, make sure to check out the *What's New in Destiny* document, available in all three locations.