



Conducting Inventory

'23 - '24

*Full Inventory
Reference Guide*

Due Date

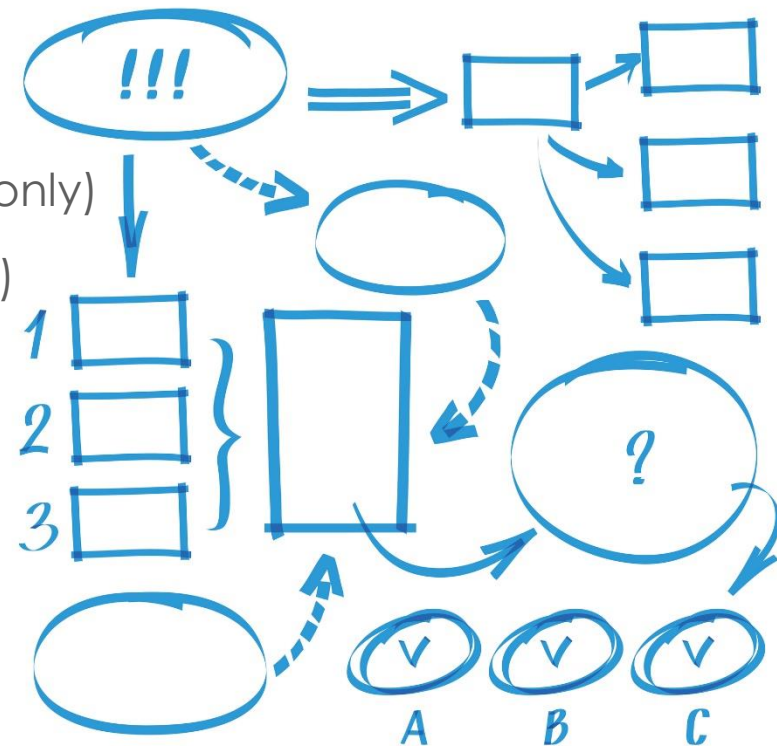
November 3, 2023

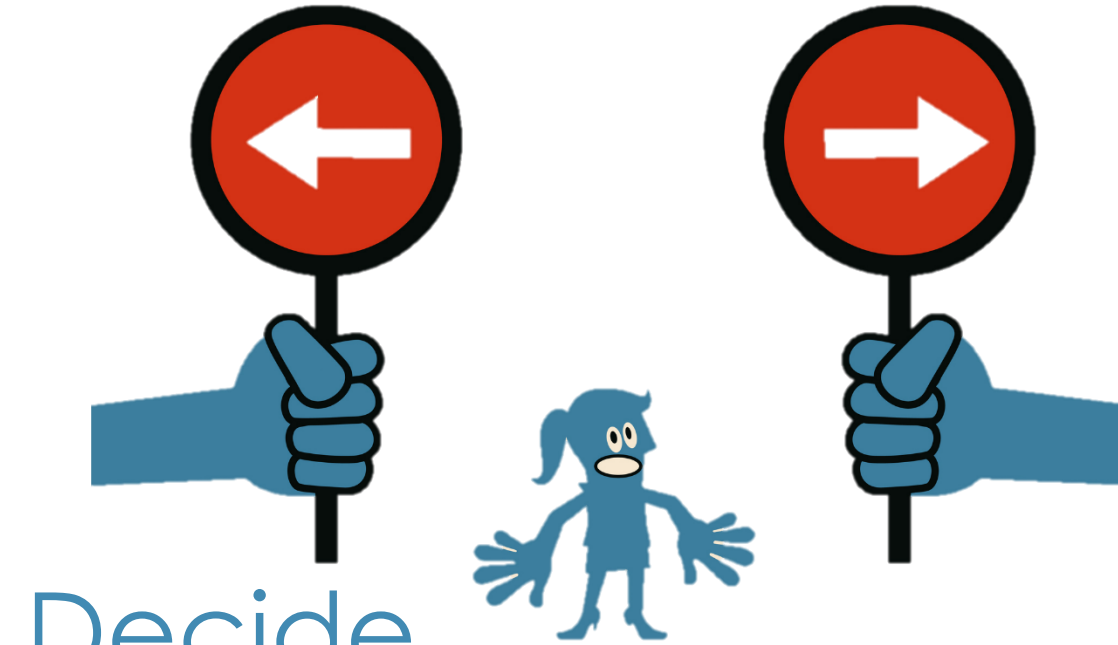


Conducting an Inventory

Process Overview

- Prepare
 - Scanners
 - Computer
 - Collection
 - Destiny
- Start a new inventory in Destiny
- Scan barcodes into Destiny (online only)
- Upload scans into Destiny Inventory (offline only)
- Check Destiny Reports for errors (offline only)
- Search for remaining unaccounted
- Delete lost materials
- Close inventories (finalize)
- Complete inventory survey report

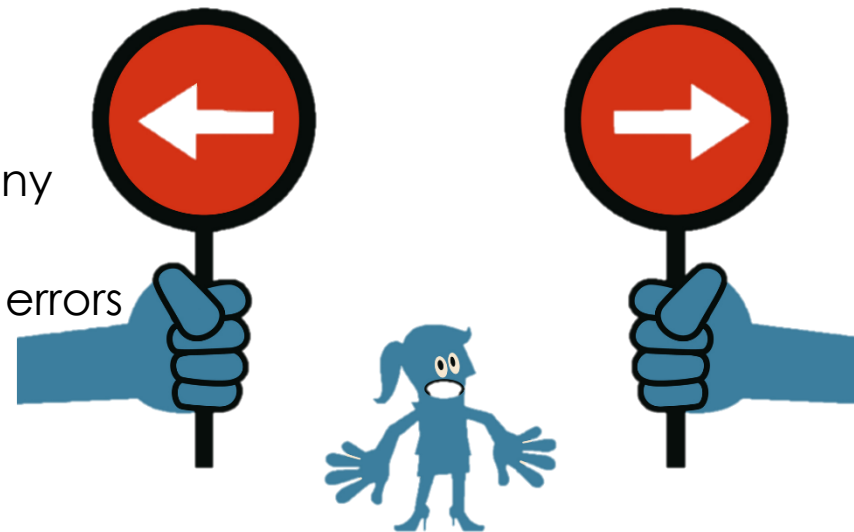




Decide

Decision points

- Online (live) or Offline (remote)
 - Online
 - Scan barcodes directly into Destiny online
 - Requires internet connection
 - Slower scanning process
 - More accurate
 - Identifies errors immediately
 - Lost previously
 - Checked out
 - Barcode not found
 - Offline
 - Scan into a text file to upload into Destiny
 - Scanning process is faster
 - Requires reviewing reports to identify errors
- Type of scanner(s) to use
 - Corded
 - Bluetooth





Prepare

Offline | Prepare Scanners



- Corded scanner
 - Laptop and cart
 - Extension cord
- Bluetooth scanner
 - Charge scanner
 - Laptop and cart
 - Extension cord

Prepare Destiny

- If any inventory is still open, close them or **“finalize”** them before proceeding
 - Mark all unaccounted for as lost



The screenshot shows the 'Inventory' section of the Destiny Back Office. The navigation tabs at the top are 'List All Sites', 'Home', 'Catalog', 'Circulation', and 'Back Office'. The 'Inventory' section is active, showing a sidebar with various options like 'Find Patron', 'Add Patron', etc. The main content area displays 'Library Inventory' with a status of 'Inventory 23-24 Started 10/3/2023' and '98.90% Complete as of 12:24 PM'. A red arrow points to the 'Finalize' button. Below this, there are options to 'Account For Each Barcode' with input fields for 'Scan or enter one-at-a-time' and 'Or upload a file of barcodes'. A 'Check shelf order' checkbox is also visible.

Starting a New Inventory



Starting a New Inventory

- If last year's inventory was finalized properly the main Destiny inventory screen will look like this
- Click the ***“Start New”*** button



A screenshot of the Destiny Inventory Management System interface. The top navigation bar includes a logo on the left, a menu with 'Home', 'Dashboard', 'Catalog', 'Circulation', 'Reports', and 'Back Office' (highlighted), and 'Logout', 'Help', and 'Shop' on the right. Below the navigation bar is a green header with 'Inventory' and a 'Messages' icon. The main content area is titled 'Library Inventory' and contains a link '[View In-Progress & Completed Inventories]' and two buttons: 'Start New' and 'View "Lost"'. A blue arrow points to the 'Start New' button. A sidebar on the left lists various management functions like 'Manage Patrons', 'Update Patrons', etc. A 'How do I...?' help icon is also visible.

Starting a New Inventory



1. Inventory name should reflect the year
2. **Do NOT enter a call number range to start a full inventory**
3. The inventory start date is automatically entered in the field labeled, “Except for copies that have been seen on or after...”

Inventory > Start Inventory Read

Manage Patrons
Update Patrons
Import Patrons
Export Patrons
Manage Homerooms
Upload Patron Pictures
Library Policies
Access Levels
Calendar / Hours
Site Configuration
Inventory
Job Manager

How do I... ?

Specify the copies to be inventoried...

Inventory Name 1

Call Numbers from to 2

To specify a call number range, enter at least the first 3 digits of each Dewey number or a complete call number prefix.

Circulation Types All Circulation Types

All copies meeting the above criteria will be set to "unaccounted for"...

Except for copies that have been seen on or after 3

If last year's inventory was not finalized, this date will default to the previous inventory's start date.

Starting a New Inventory

- Each inventory will indicate the percentage complete
 - Percentage # represents the items already accounted for when inventory started: **checkouts, lost, etc.**
 - Check regularly during inventory to help determine progress



[View In-Progress & Completed Inventories]

Start New

Library Inventory

Full Inventory 2023-2024 – Started 10/3/2023 ▼

Finalize

1.27% Complete as of 8:59 AM

Refresh

Account for each Barcode

Check shelf order

Scan or enter one-at-a-time

Account For

Or upload a file of barcodes

Choose File

No file chosen

Upload Scans

Percent Complete

- If date entered is same as day started
 - Percent complete should be relatively low
 - **If percent is high, something is wrong**



[View In-Progress & Completed Inventories]

Start New

Library Inventory Full Inventory 2023-2024 – Started 10/3/2023 ▼

Finalize

1.27% Complete as of 8:59 AM

Refresh

1.27 %
Complete

Account for each Barcode

Check shelf order

Scan or enter one-at-a-time

Account For

Or upload a file of barcodes

Choose File

No file chosen

Upload Scans

Start New Inventory

- The “**Accounted for**” copies are those that are either currently checked out or marked “lost”
 - Number should increase as inventory progresses
- The “**Unaccounted for**” copies are all those that need to be located and scanned
 - Number should decrease as inventory progresses

Copies matching selections 14,782

Accounted for 2,198

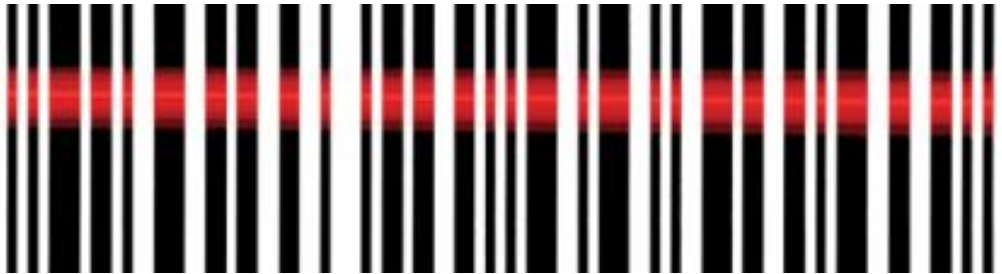
(Copies lost: 1,157 [[See Details](#)])

Unaccounted for 12,584

[[See Details](#)]

Copies in collection 14,782

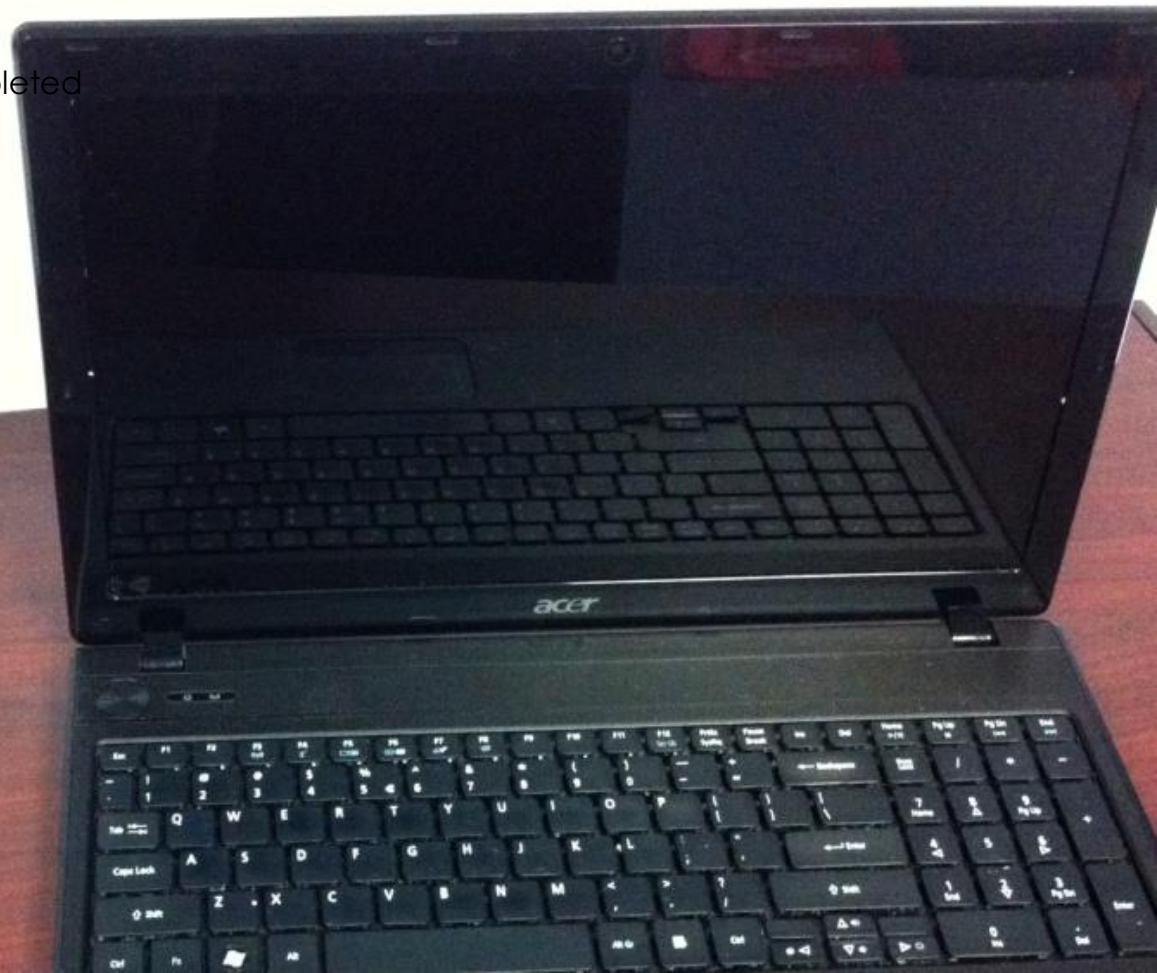
Report on Copies in the inventory



Scanning

Scanning

- **Corded scanner**
 - Online or Offline
 - Laptop or desktop on cart
 - If offline
 - Save files to a USB drive
 - Save files using section name completed
 - i.e. Fiction A-C, 92C -F, etc.



Scanning

■ Bluetooth Scanner

- Remote or Live
- If offline
 - Can scan to a Notepad file and save to a USB drive
 - Scanner can be up to 50 ft. away from base
 - Save file using section name as file name





Upload Scans

Live | Upload Scans

Step 1

- Scan barcodes directly into Destiny inventory window

The screenshot displays the Destiny inventory management interface. At the top, a navigation bar includes 'List All Sites', 'Home', 'Dashboard', 'Catalog', 'Circulation', 'Reports', and 'Back Office'. A notification bell icon shows 'New Message(s) Read'. The left sidebar lists various management tasks such as 'Manage Patrons', 'Update Patrons', 'Import Patrons', 'Export Patrons', 'Manage Homerooms', 'Upload Patron Pictures', 'Library Policies', 'Access Levels', 'Calendar / Hours', 'Site Configuration', 'Inventory', and 'Job Manager'. The main content area is titled 'Inventory' and contains a 'Library Inventory' section for 'Full Inventory 23-24- Started 10/3/2023'. It shows '1.76% Complete as of 11:26 AM' and a 'Refresh' button. Below this, there is a section for 'Account for each Barcode' with a 'Check shelf order' checkbox. Two input options are provided: 'Scan or enter one-at-a-time' with a red-bordered text box and an 'Account For' button, and 'Or upload a file of barcodes' with a 'Choose File' button and 'No file chosen' text. An 'Upload Scans' button is also present. At the bottom, it indicates 'Started by DestinyAdmin [View Selections]'. A 'How do I...?' help icon is located in the top right of the main content area.

Step 2

Live | Upload Scans

- Copy information will list at the bottom of the screen

Library Inventory Full Inventory 2016-2017 - Started 2/17/2017 ▾


1.76% Complete as of 11:26 AM Refresh

[[View In-Progress & Completed Inventories](#)]

 Start New

Library Inventory Full Inventory 23-24- Started 10/3/2023 ▾

 Finalize

[2.83% Complete](#) as of 11:15 AM  Refresh

Account for each Barcode Check shelf order

Scan or enter one-at-a-time  Account For

Or upload a file of barcodes Browse...

 Upload

Most Recently Accounted For

Barcode	Call Number	Author	Title
T 50003	92 WASHINGTON	Armentrout, David, 1962-	George Washington
T 50018	920 KRU	Krull, Kathleen.	Lives of the artists : masterpieces, messes (and what the neighbors thought)
T 50020	551.55 ALL	Allen, Jean, 1964-	Tornadoes
T 60001	028.5/5	edited by Joni Richards Bodart.	Booktalking the award winners. Young adult retrospective volume
T 1012837	027.8	American Association of School Librarians.	Information power : building partnerships for learning

Step 2

Live | Upload Scans

- Some errors will be corrected as soon as the items are scanned

Book had been marked lost during the last inventory

⚠ Please note...

- "Television production for elementary schools" (Barcode: T 20025) had been marked as lost.

[\[View In-Progress & Completed Inventories \]](#)

Library Inventory Full Inventory 2023-24 - Started 10/3/2023

1.76% Complete as of 11:26 AM [Refresh](#)

Account for each Barcode Check shelf order

Scan or enter one-at-a-time [AccountFor](#)

Or upload a file of barcodes [Browse...](#) [Upload](#)

Most Recently Accounted For

Barcode	Call Number	Author	Title
T 50003	92 WASHINGTON	Armentrout, David, 1962-	George Washington
T 50018	920 KRU	Krull, Kathleen.	Lives of the artists : masterpieces, messes (and what the neighbors thought)
T 50020	551.55 ALL	Allen, Jean, 1964-	Tornadoes
T 60001	028.5/5	edited by Joni Richards Bodart.	Booktalking the award winners. Young adult retrospective volume
T 1012837	027.8	American Association of School Librarians.	Information power : building partnerships for learning

39629000000007 EQ Barcode scanner

Step 3

Live | Upload Scans

- Some errors will be corrected as soon as the items are scanned

Book is currently checked out but on the shelf

⚠ Please note...

- Checked in "Television production for elementary schools" (Barcode: T 20025). It was checked out to Pimienta, Albert (Barcode:)

[[View In-Progress & Completed Inventories](#)]

Library Inventory

1.76% Complete as of 11:26 AM

Account for each Barcode Check shelf order

Scan or enter one-at-a-time

Or upload a file of barcodes

Most Recently Accounted For


Barcode	Call Number	Author	Title
T 20025	P 371.3 KYK	Kyker, Keith.	Television production for elementary schools
T 50003	92 WASHINGTON	Armentrout, David, 1962-	George Washington
T 50018	920 KRU	Krull, Kathleen.	Lives of the artists : masterpieces, messes (and what the neighbors thought)
T 50020	551.55 ALL	Allen, Jean, 1964-	Tornadoes
T 60001	028.5/5	edited by Joni Richards Bodart.	Booktalking the award winners. Young adult retrospective volume
T 1012837	027.8	American Association of School Librarians.	Information power : building partnerships for learning

Step 4

Live | Upload Scans

- Some errors **cannot** be corrected immediately, but the error is indicated while item is in hand.
 - Set aside for later processing

Book's barcode is not found in Destiny

 **Barcode "89712589" not found.**

[[View In-Progress & Completed Inventories](#)]

Library Inventory

1.76% Complete as of 11:26 AM

Account for each Barcode Check shelf order

Scan or enter one-at-a-time

Or upload a file of barcodes



MISSION ACCOMPLISHED

Wrapping up
the inventory
process



MISSION ACCOMPLISHED

Wrapping up Inventory

- Search for Unaccounted materials
- Delete materials lost from previous years that weren't found during this inventory

Wrapping up Inventory


Searching for unaccounted

Step 1


- After scanning everything found
 - View Unaccounted for list
 - Click on the Percentage Complete link on the main inventory page


[[View In-Progress & Completed Inventories](#)]


Library Inventory Full Inventory 2023-2024 – Started 10/3/2023 ▼


81.29% Complete as of 7:57 AM  Refresh

Account for each Barcode Check shelf order

Scan or enter one-at-a-time  Account For

Or upload a file of barcodes no file selected  Upload

 Start New

 Finalize

Wrapping up Inventory

Searching for unaccounted

Step 2

- After scanning everything found
 - View Unaccounted for list
 - Click on the “See Details” link beside the Unaccounted for

Full Inventory 2023 -2024 - Started 10/3/2023 Close

Run Report

Copies matching selections 48,952

Accounted for 39,792 (Copies lost: 1,048 [[See Details](#)])

Unaccounted for 9,160 [[See Details](#)]

Copies in collection 48,952

Report on Copies in the inventory
 Copies that have been 'Accounted For'
 Copies that are 'Unaccounted For'




Wrapping up Inventory

Searching for unaccounted

Step 3

- Look on shelves for all items listed
 - If a series of call numbers are from the same section, it may indicate that a section may not have been scanned

 [Printable](#)

Copies: 26 - 50 of 9,160 Sort by [◀ 1](#) [2](#) [3](#) [4](#) [5](#) [123](#) [244](#) [367 ▶](#) [\[Show All \]](#)

The golden fleece and the heroes who lived before Achilles Author: Colum, Padraic, 1881-1972. Call Number: 292.1 COL Barcode: T 90898	Last Seen: 5/9/2013 [Found] [Mark "Lost"]
African religion Author: Lugira, Aloysius Muzzanganda. Call Number: 299 LUG Barcode: T 56053	Last Seen: 5/9/2013 [Found] [Mark "Lost"]
Egyptian mythology Author: Nardo, Don, 1947- Call Number: 299 NAR Barcode: T 70167	Last Seen: 5/9/2013 [Found] [Mark "Lost"]
South and Meso-American mythology A to Z Author: Bingham, Ann. Call Number: 299.8 BIN Barcode: T 73908	Last Seen: 5/9/2013 [Found] [Mark "Lost"]

Wrapping up Inventory


Delete lost

Step 1


- Identify lost materials from previous years
 - Click the Percentage Complete link from the main inventory screen


[[View In-Progress & Completed Inventories](#)]

Library Inventory Full Inventory 2023-2024 - Started 10/3/2023 ▼

81.29% Complete as of 7:57 AM  Refresh

Account for each Barcode Check shelf order

Scan or enter one-at-a-time  AccountFor

Or upload a file of barcodes no file selected  Upload

Start New

Finalize

Wrapping up Inventory

Delete lost

Step 2

- Identify lost materials from previous years
 - Click the Copies lost “See Details” link on the resulting screen

Full Inventory 2023-2024 - Started 10/3/2023



Copies matching selections 48,952

Accounted for 39,792

(Copies lost: 1,048 [[See Details](#)])

Unaccounted for 9,160

[[See Details](#)]

Copies in collection 48,952

Report on Copies in the inventory

Copies that have been 'Accounted For'

Copies that are 'Unaccounted For'




Wrapping up Inventory


Delete lost



Step 3

- List lost items by year lost
 - Select "Date Lost" from the "Sort by" field
 - Click the "Go" button
 - Click the "Show All" link

Copies: 1 - 25 of 1,048

Sort by 

 To reset "lost" library materials to "unaccounted for" or to delete all "lost" copies, use the options at the end of this list.

  Printable

1 2 3 4 14 27 42 ▶ [Show All]

Barcode	Call Number	Author	Title	Marked "Lost"
T 117165	EQ		DVD player	9/19/2013 [Found] [Delete]
T 117141	EQ		DVD/VCR combination	9/19/2013 [Found] [Delete]
T 117142	EQ		DVD/VCR combination	9/19/2013 [Found] [Delete]
T 117143	EQ		DVD/VCR combination	9/19/2013 [Found] [Delete]
T 117144	EQ		DVD/VCR combination	9/19/2013 [Found] [Delete]
T 117145	EQ		DVD/VCR combination	9/19/2013 [Found] [Delete]

Wrapping up Inventory

Delete lost

Step 4

- Identify “on or before” date to delete
 - Date should mean the item was searched for through an inventory at least twice and remained lost
 - Full inventory = 2 inventories or 1 year date into “Delete all copies...” field
 - Click on the Delete All button

T 70342	158.1 ESP	Espeland, Pamela, 1951-	Succeed every day : daily readings for teens	7/28/2013	[Found] [Delete]
T 7337	158.1 TEE	compiled by Stephanie H. Meyer, John Meyer.	Teen ink : our voices, our visions	7/28/2013	[Found] [Delete]
T 66110	200 MCC	McClenon, James.	Wonderous healing : shamanism, human evolution, and the origin of religion	7/28/2013	[Found] [Delete]
T 67706	291.1 CAM	Campbell, Joseph, 1904- 1987.	The inner reaches of outer space : metaphor as myth and as religion	7/28/2013	[Found] [Delete]
T 63966	320.973 TOM	Tomaselli-Moschovitis, Valerie.	Government on file	7/28/2013	[Found] [Delete]
T 65042	341.6 CHI	Chippendale, Neil.	Crimes against humanity	7/28/2013	[Found] [Delete]

Copies: 1 - 25 of 1,048 1 2 3 4 14 27 42 ▶ [Show All]

Reset all library materials marked "lost" on   

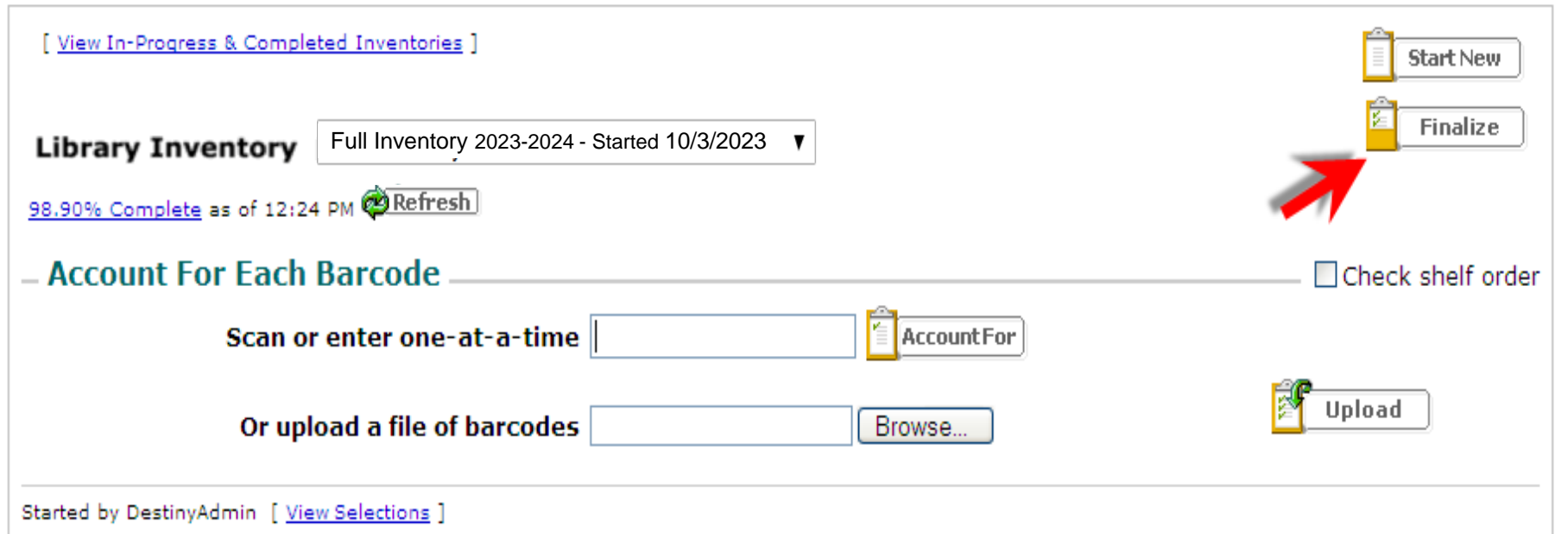
Delete all copies marked "lost" on or before     Reset "Lost"  Delete All



Finalizing Inventory in Destiny


Finalizing Inventory in Destiny

- If you've done your best looking for unaccounted for, and still have copies ***“unaccounted for,”*** let it go.
- Click on the ***“Finalize”*** button.





[[View In-Progress & Completed Inventories](#)]

Library Inventory Full Inventory 2023-2024 - Started 10/3/2023 ▼

[98.90% Complete](#) as of 12:24 PM  Refresh

Account For Each Barcode Check shelf order

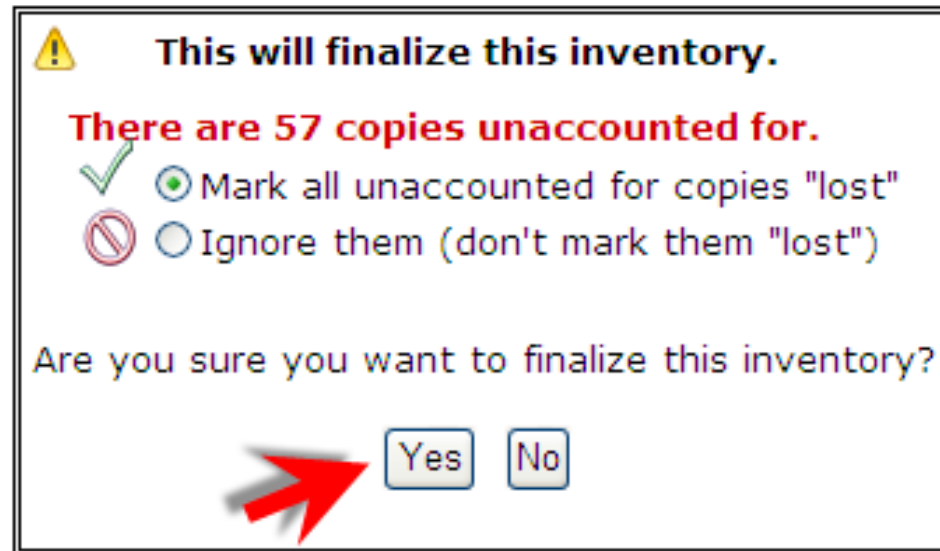
Scan or enter one-at-a-time  Account For

Or upload a file of barcodes  Upload

Started by DestinyAdmin [[View Selections](#)]

Finalizing Inventories in Destiny

- On the confirmation screen choose “**Mark all unaccounted for copies “lost”**”.
- Select “**Yes.**”



Finalizing Inventories in Destiny

- After closing, click on the “**View In-Progress & Completed Inventories**” link from the main inventory screen.



Finalizing Inventories in Destiny

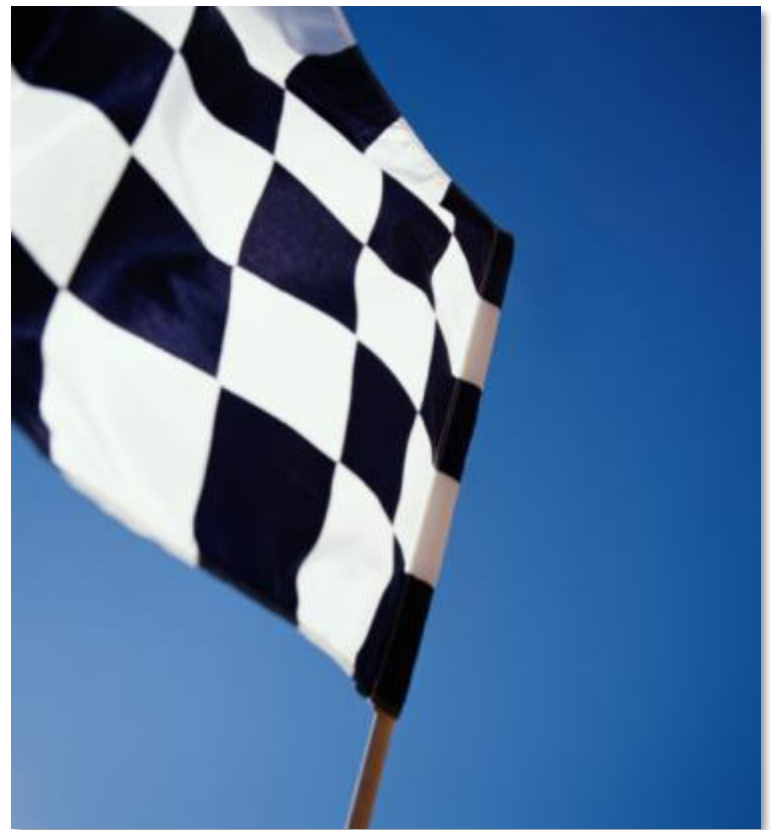


- The “Completed” inventory tab lists previously closed inventories.
- No “View” button means the report in the Job Manager has been deleted

In Progress						Completed
<u>Name</u>	<u>Completed</u> ▼	<u>Started by</u>	<u>Accounted for</u>	<u>Unaccounted for</u>		
2015-2016 Full	6/2/2015	admin@psd.com	37,659	305 (Marked "Lost")	Remove	
2014-2015 Full	6/5/2014	admin@psd.com	37,919	198 (Marked "Lost")	Remove	

Finished

- Compile your other inventory information (Attendance, lessons, books added, etc.)
- Print a copy of the online survey.
- Input information in the printed survey by hand.
- Have your principal review the survey.
- Enter the information in the online survey and submit.
- You will receive a confirmation email with a PDF copy. Print both copies; one for the media center and one for the principal.
- You are done with Destiny inventory!
- A report, which includes both the survey data and Destiny statistical data, will be sent to you and your principal.



Check your work for accuracy!

- Time consuming reviewing all inventory submissions
- Media specialists gone during summer; can't confirm information
- Staff changes hinders ability to confirm was done in previous inventory
- Report goes to principals and region offices
- If you need help you can review online resources and posted documents...
- **If you don't understand the survey questions – Ask Library Media Services!**





Completing the End of Year Annual Media Center Statistics Report



Inventory Help

Inventory Help

- From the main “Help” link on any screen
- From the “How do I” link on the main inventory screen

Logout | Help | Shop

List All Sites | Home | Dashboard | Catalog | Circulation | Reports | Back Office

Inventory

Manage Patrons
Update Patrons
Import Patrons
Export Patrons
Manage Homerooms
Upload Patron Pictures
Library Policies
Access Levels
Calendar / Hours
Site Configuration

[View In-Progress & Completed Inventories]

Library Inventory XXXX-XXXX Full Inventory

81.29% Complete as of 11:48 AM Refresh

Account for each Barcode Check shelf order

Scan or enter one-at-a-time AccountFor

Or upload a file of barcodes No file chosen

Started by [View Selections]

How do I... ?

Start New

Finalize

Inventory Help

- From LMS's Inventory page at: [innovationschoolchoice.com](https://www.innovationschoolchoice.com)
- Contact Library Media Services

The screenshot shows the Library Media Services website. At the top, there are navigation tabs: SCHOOL CHOICE, INSTRUCTIONAL TECHNOLOGY, INSTRUCTIONAL MATERIALS, and LIBRARY MEDIA SERVICES. Below the navigation is a large banner with the word "Library" and a stylized logo. Underneath the banner is a tagline: "Ensuring that school librarians create and maintain quality library programs that foster the love of reading and the effective use of ideas and information by both students and faculty." Below the tagline are four statistics cards: 1,179,400 UNIQUE TITLES, 4,556,574 COPIES, 323 LIBRARIES, and 1,749,386 TOTAL CIRCULATION. Below the statistics is a navigation bar with tabs: Collection Development, Professional Development, Resources, Support, Board Policy & Statute, and Contact. The "Support" tab is highlighted. Under "Support", there are two sections: "Forms" and "Inventory".

Forms

- The **Destiny Access Request** form allows library administrators to request administrative access to the Destiny circulation and catalog system.
- The **Destiny Mark Lost/Check-in** form allows library administrators to request Library Media Services (LMS) to mark an item lost or check it in at another site.
- The **Monthly Program Report** gives library administrators a way to provide regular status updates on their library program.
- The **MARC Record Request** allows library administrators to request titles, not currently found in the catalog, to be added to the catalog, once approved.
- The **Recap** form is an example of the form to be used whenever money is collected from students for overdue fines, lost or damaged materials, or other fines/fees.
- The **Request to Pick-up Obsolete Materials** form will help facilitate the removal of obsolete library materials and equipment. (updating)

Inventory

Maintaining a physical inventory is an important record-keeping function that establishes the status of your collection. Knowing what is currently available in our libraries is essential for our patrons as well as community members. Completing a full inventory is the only way to efficiently reconcile the electronic patron catalog with physical holdings. It also helps identify items that have been misplaced, marked lost, checked out, or are in need or be repair or weeding.

- **23-24 Full Inventory Guide**
- Annual Media Center Statistics Report

Each year, Library Media Services requires all staffed media centers to perform a full physical inventory and submit the Annual Media Center Statistics Report. The physical inventory should be performed at the beginning of the year.

Directions: Use this Online Inventory Checklist to help scan barcodes directly into the Destiny Inventory Module. In the "v" column, write Yes, No, or NA. Steps 13- 15 require a date or numerical response.

Before (Inventory Preparation)	v
1. Review inventory information, including the current Inventory Guide, located in the Inventory section of the OneNote document.	
2. Check shelf order by reading the shelves	
3. Review Inventory Guide for information on conducting an Online inventory	
4. Prepare equipment and tools needed Scanners (confirm that barcodes can be read)	
* Laptop or tablet with USB	
* Scanner (bluetooth or corded)	
* Utility Cart	
* Confirm wireless connectivity or connect directly with a 25" or longer Ethernet cable	
* Rolling chair	
* Post-It notes to tag completed shelves or columns	

During (Scanning Materials, Reviewing Reports, Correcting Issues and Searching for Unaccounted Items)	v
5. Close all open inventories from previous years; mark anything "Unaccounted for" as Lost	
6. Follow naming conventions listed in the Inventory Guide (i.e. Full 2023-2024)	
7. Record figures for Accounted For, Unaccounted For, and Lost	
8. Based on approximate scan rate of 1,000 per hour, determine approximate hours needed to complete the scanning phase	
9. Scan materials into the Destiny Inventory Module; most errors will be corrected automatically	
* Items with a Lost status will be changed to Available	
* Items currently Checked out but found on shelf will be checked in; remove fine(s) associated with items	
* Pull items identified as "Barcode Not Found" from shelf to add to Destiny later	
10. Monitor "% Complete" and number of "Unaccounted for" items;	
11. Search for "Unaccounted for" items (classrooms, offices, storage rooms, TV studio, etc.)	

After (Finalizing Inventory and Submitting Survey)	v
12. Finalize Inventory (if multiple, all open inventories need to be finalized individually)	
13. Record the date you finalized inventory	
14. Record the number of lost items from each inventory	
15. Enter the total number of items marked "Lost" during the current inventory	
16. If desired, print a copy of the Annual Media Center Statistics Report and use as a worksheet	
17. Complete the hard copy of the Annual Media Center Statistics Report and review all information, figures, calculations for possible errors	
18. Complete and submit the online Annual Media Center Statistics Report. You and your principal will receive a PDF version. Review the report with your principal. Your confirmation email will include a secure link to use if edits are required.	

Inventory Checklist

