

Destiny® Library Manager™

Inventory Basics

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Starting an Inventory

1. Login to your Destiny Library Manager site
2. Click on **Back Office | Inventory**

Beginning or Finalizing

1. Check to see if an inventory is already in progress
2. Determine whether to *Start New* or *Finalize*
3. Click on **Check View In-Progress & Completed Inventories** to view current or finished inventories.

4. Before you plan to *Start New*, proceed to *Preparing for Inventory*. To *Finalize*, proceed to *Finalizing an Inventory*.

Preparing for Inventory

1. If you choose not to *Check shelf order*, skip to *Starting a new Inventory*.
2. Click on **Back Office | Site Configuration | Catalog**
3. Click on and select the correct pull-down choice for **During library inventories, check shelf order based on**.
4. Click on and select the correct pull-down for **Also check for differences between Dewey numbers greater than**
5. Click on the *Check shelf order* box in the **Back Office | Inventory** option

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New Inventory

1. Click on **Start New**
2. Type in **Inventory Name**
3. Enter the start of your call number range in the *Call Numbers from* field and the end of your range in the *to* field if you are doing a partial inventory, or leave the field blank if performing full inventory

Specify the copies to be inventoried...

Inventory Name

Call Numbers from to

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 Update

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

Except for copies that have been seen on or after 8/23/2006

OK Cancel

4. If All Circulation Types are desired, skip step 5.
5. If you do not wish to include all circulation types, click on **Update**.
 - A. Check the boxes that you wish to include as circulation type(s). You may click on **Select All** or **Clear All** to make this process easier.
 - B. Click on **OK** once you have checked the appropriate boxes.

Select Circulation Type(s)...

☒ Overnight ☒ Video Select All

☒ Regular Clear All

OK

6. Enter in a date or click on the calendar icon to choose the date for *All copies meeting the above criteria will be set to "unaccounted for".... Except for copies that have been seen on or after.*

Specify the copies to be inventoried...

Inventory Name

Call Numbers from to

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 Update

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

Except for copies that have been seen on or after 4/7/2008

OK Cancel

7. Click on **OK** to begin inventory
8. Click on **Yes** to start this inventory

Working with your Inventory

1. To inventory an item, scan or type a barcode number in the *Scan or enter one-at-a-time* field and select **Account For** after each entry. If scanning the number, clicking *Account For* is not needed.
2. The barcode will appear under the *Most Recently Accounted For* heading.

[View In-Progress & Completed Inventories]

Start New Finalize

Library Inventory End of Year 2008 - Started 4/15/2008

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 3526	E FRY	Fry, Sonali.	Clifford the big red dog : thank you, Clifford

Started by admin707 [View Selections] 04.85% Complete as of 8:01 AM [View Details]

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- Another way to account for books is to upload a barcode file. For more information on creating a barcode file, go to on-page help – *How do I account for my copies?*
- Click on the **Browse** button next to *Or upload a file of barcodes* and select your file of barcodes from the *Choose file* box.
- Once selected, the field will show you the path to your file.
- Click on **Upload** for Destiny® to account for the barcodes in the file.

[View In-Progress & Completed Inventories]

Library Inventory: End of Year 2008 - Started 4/15/2008

Account For Each Barcode ☐ Check shelf order

Scan or enter one-at-a-time AccountFor

Or upload a file of barcodes Browse... Upload

Started by admin707 [View Selections] 04.85% Complete as of 7:55 AM [View Details]

- Click on **Back Office | Job Manager**
- Click on **View** for your completed job called *Library Inventory*.

Job	Submitted By	Started	Status
Checked Out/Overdue/Fines	Job Scheduler (4/28/2008 8:00 AM)	4/28/2008 8:00 AM	Completed (4/28/2008 8:00 AM) [View]
Checked Out/Overdue/Fines	Job Scheduler (4/21/2008 8:00 AM)	4/21/2008 8:00 AM	Completed (4/21/2008 8:00 AM) [View]
In-Progress Library Inventory Report	Site Administrator (4/18/2008 2:21 PM)	4/18/2008 2:21 PM	Completed (4/18/2008 2:21 PM) [View]
In-Progress Library Inventory Report	Site Administrator (4/18/2008 2:17 PM)	4/18/2008 2:17 PM	Completed (4/18/2008 2:17 PM) [View]
Library Inventory	Site Administrator (4/18/2008 1:17 PM)	4/18/2008 1:17 PM	Completed (4/18/2008 1:17 PM) [View]
Completed Library Inventory Report	Library Administrator (4/16/2008 9:19 AM)	4/16/2008 9:19 AM	Completed (4/16/2008 9:19 AM) [View]

Viewing Details of this Inventory

- Click on **View Details** for the status of this inventory.
- This screen will show you the:
 - Name of your inventory.
 - Date when it was started
 - Number of copies in this inventory (*Copies matching selections*).
 - Barcodes that have already been inventoried (*Accounted for*).
 - Barcodes that still yet to be inventoried (*Unaccounted for*).
 - Number of barcodes that you have in your site (*Copies in collection*).
- Click on the **See Details** link next to the *Accounted for* to view items currently marked lost.
- Click on the **See Details** link next to the *Unaccounted for* to view items that still need to be inventoried.

End of Year 2008 - Started 4/15/2008

Copies matching selections 2,827

Accounted for 278 (12 of which are lost [See Details])

Unaccounted for 2,549 [See Details]

Copies in collection 2,827

Searching for Lost Copies

- Click on **See Details** next to *Accounted for* (# of which are lost) to arrive at this screen.
- Click on **Printable** to print a hard copy of the list.
- Click on **Found** if you have located the item.
- Click on **Delete** if the item is no longer part of your collection.

Barcode	Call Number	Author	Title	Marked "Lost"
T 2768	635 KLI	Klingel, Cynthia Fitterer.	Pumpkins	9/14/2006 [Found] [Delete]
T 1523	696 THO	Thomas, Mark.	A day with a plumber	12/6/2006 [Found] [Delete]
T 1528	E BUN	Bunting, Eve, 1928-	A day's work	12/6/2006 [Found] [Delete]

Reset all library materials marked "lost" on [Go] [Reset "Lost"]

Delete all copies marked "lost" on or before [Go] [Delete All]

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Resetting Multiple Lost Items

1. Click on and select the pull-down box next to **Sort by** and select **Date Lost** to sort your items by date.
2. You may notice that you have a number of items that are **Marked "Lost"** for the same date. This could be the result of someone that finalized an inventory and inadvertently selected yes to the **mark the unaccounted for copies "lost"**.
3. Reset the number of items that were accidentally marked lost by typing in the exact date found in the **Marked "Lost"** column in the **Reset all library materials marked "lost" on** box, or select the calendar icon to select the date and it will appear in the field.
4. Click on **Reset "Lost"**.
5. Destiny® will bring up a screen that says: *Are you sure you want to reset these lost copies?* Click on **Yes**.

Barcode	Call Number	Author	Title	Marked "Lost"
T 1523	696 THO	Thomas, Mark.	A day with a plumber	12/6/2006 [Found] [Delete]
T 1528	E BUN	Bunting, Eve, 1928-	A day's work	12/6/2006 [Found] [Delete]
T 2768	635 KLI	Klingel, Cynthia Fitterer.	Pumpkins	9/14/2006 [Found] [Delete]

Deleting All Copies Marked "Lost"

1. Some sites feel that after a period of time, it is appropriate to delete copies that have been marked lost.
2. Type in the date or click on the calendar icon to choose the date in the **Delete all copies marked "lost" on or before** field.
3. Click on **Delete All**
4. Destiny® will state: *This process cannot be reversed. Are you sure you want to proceed?*
5. Click on **Yes**.
6. Click on **Back Office | Job Manager** and view the job called **Delete Lost Copies** to see the results.

Accounting for Missing Items

1. Click on the **See Details** option next to **Unaccounted for** to arrive at this screen.
2. Click on and select the appropriate pull-down choice next to **Sort By** and Click on **Go!**
3. Click on **Found** or **Mark "Lost"** appropriate links to account for the item(s).
4. To see more items, click on the number, **Next** or **Show All**

Sort by	Call Number	Author	Title	Barcode	Date Last Seen
			The mystery of UFOs		
		Author: Herbst, Judith.			
		Call Number: 001.9 HER			
		Barcode: T 2523			
			UFOs		
		Author: Landau, Elaine.			
		Call Number: 001.9 LAN			
		Barcode: T 3267			

Finalizing an Inventory

1. Click on **Finalize**
2. Click on **Mark unaccounted for copies "lost"** if you are sure that you can't find the remaining copies that are unaccounted for. The copy status will change to lost (which makes them accounted for). Click on **Ignore them (don't mark them "lost")**, to ensure that the status of the copy does not change. These copies will remain unaccounted for.
3. Click on **Yes** to close this inventory.

This will close this inventory.

There are 2,549 copies unaccounted for.

☒ Mark all unaccounted for copies "lost"

☐ Ignore them (don't mark them "lost")

Are you sure you want to close this inventory?

Yes No

[View In-Progress & Completed Inventories]

Library Inventory End of Year 2008 - Started 4/15/2008

Start New Finalize

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Viewing Inventory Reports

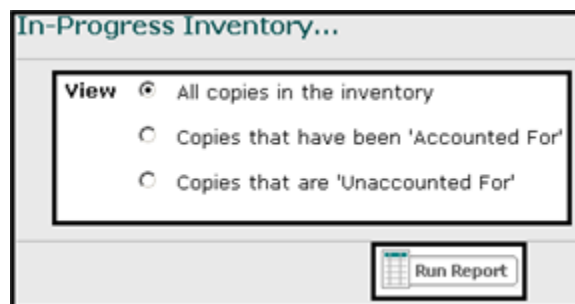
1. Click on **Back Office | Reports**
2. Click on **In-Progress & Completed Inventories**



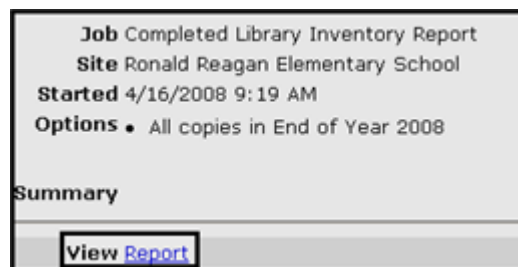
3. There are 2 tabs: *In Progress* and *Completed*

In Progress						Completed
Name	Started	Started by	Accounted for	Unaccounted for		
Spring 2008 - Full Inventory	4/7/2008	admin707	511	2,315	View	
Spring 2008	4/18/2008	admin707	277	2,549	View	
End of Year 2008	4/29/2008	admin707	277	2,549	View	

4. Click on **In-Progress** and then **View** next to the inventory to allow you to view a report
5. Click on one of the choices
 - A. **All copies in the inventory**
 - B. **Copies that have been 'Accounted For'**
 - C. **Copies that are 'Unaccounted For'**
6. Click on **Run Report**



7. Once the status is completed in the **Back Office | Job Manager**, click on **View** next to the *In-Progress Library Inventory Report*
8. Click on **Completed** and then **View** next to the inventory you wish to see and click on **Report**



9. After viewing the report, if you no longer need to information about this inventory, click on **Remove**.