

*Introduction to State Textbook Manager* .....3  
 Objective 1: State Regulation of Textbooks in SC .....3  
 Objective 2: Legal Mandate (2006-07 Appropriations Act).....3  
 Objective 3: School/ District responsibility for patron and class data ...4

*Getting Started in Textbook Manager* .....5  
 Objective 1: Log in with a user name and password .....5  
 Objective 2: Identify common Destiny program features and icons .....6  
 Objective 3: Identify how to use Breadcrumbs .....7  
 Objective 4: Identify where to find the online and on-page Help .....8  
 Objective 5: Use the Job Manager to view jobs ..... 10  
 Objective 6: Use the Report Manager to view Reports ..... 11  
 Objective 7: Find State Textbook Office Contact Information..... 12

*Searching the Textbook Database*..... 14  
 Objective 1: Identify how to find textbooks ..... 14  
 Objective 2: Discuss search tools such as wildcards and Boolean operators..... 15

*Barcoding Your Textbooks*..... 16  
 Objective 1: Explain how to execute a textbook barcoding project .... 16  
 Objective 2: Explain state barcoding requirements ..... 17  
 Objective 3: Discuss best practices and lessons learned..... 19

*Assigning Barcodes to State-Owned Textbooks* .....21  
 Objective 1: Discuss assigning barcodes to state-owned textbooks ..21  
 Objective 2: Editing a barcode .....24  
 Objective 3: Removing a barcode .....26  
 Objective 4: Generate and analyze a Title & Copy List report.....28

*Circulating Your Textbooks*.....30  
 Objective 1: Explain how to add a loan period .....30  
 Objective 2: Discuss how to circulate items to a patron .....31  
 Objective 3: Explain how to circulate items by class .....35  
 Objective 4: Discuss how to check in textbooks.....38  
 Objective 5: Discuss the Copy Status and Patron Status option.....39

*Transfer, Return, and Receive Textbooks*.....42  
 Objective 1: Explain how to transfer textbooks between sites.....42  
 Objective 2: Discuss how to return textbooks to the State Textbook Office.....49  
 Objective 3: Describe how to receive a transfer from another site .....52

*Textbook Pre-ordering and Ordering*.....57  
Objective 1: Discuss how to submit pre-order information .....57  
Objective 2: Discuss how to create an order .....59  
Objective 3: Explain how to track and receive an order .....62  
Objective 4: Explain how to unbundle titles .....65

*Fines* .....68  
Objective 1: Explain how to create a fine type .....68  
Objective 2: Identify how to assess a fine for a lost item.....70  
Objective 3: Discuss how to pay, waive, and delete fines .....72  
Objective 4: Discuss how to create a Current Checkouts/Fines Report. ....73  
Objective 5: Discuss the Fine History report .....75

*Patron Records and Reports*.....77  
Objective 1: Explain how to locate patron record information .....77  
Objective 2: Discuss how to create a Patron Name List report .....78  
Objective 3: Explain how to print patron barcodes by group .....79

*Inventory* .....82  
Objective 1: Discuss how to prepare for an inventory .....82  
Objective 2: Discuss how to complete a State Textbook Inventory ....83  
Objective 3: Discuss how to view the Textbook Ledger .....88  
Objective 4: Explain how to perform a textbook inventory.....89  
Objective 5: Discuss how to view the status of an inventory .....91

*Appendix A: State Board of Education, Chapter 43* .....95

*Appendix B: Viewing Reports for Textbook Transactions* .....103

*Appendix C: Adding District-Owned Resources*.....109

## *Introduction to State Textbook Manager*

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### Module Overview

This module provides an introduction to the Destiny Automated Resource Solution chosen by South Carolina to track and manage textbooks with Textbook Manager.

### Module Objectives

- Objective 1: Explain State Regulation of Textbooks in SC
- Objective 2: Discuss Legal Mandate (2006-07 Appropriations Act)
- Objective 3: School/ District responsibility for patron and class data

### Objective 1: State Regulation of Textbooks in SC

State Board Regulation R43-71 requires schools to track textbooks, assess fees, and report lost and damaged textbooks to the State Department of Education. The primary motivation behind the state-wide implementation of Destiny Textbook Manager is to ensure all students have access to the textbooks they need by providing schools and districts with a tool to help them track and circulate their state-owned textbooks.

Additionally, the state is hoping to accumulate some savings by reducing the number of lost textbooks. Schools and districts will benefit too by keeping better track of materials and recovering fees that are due. It is not just a cost issue; however, it is an equity issue. Textbook Manager will help assure that every student has equal access to quality up-to-date textbooks. Regulation R43-71 is located in the appendix of this workbook.

### Objective 2: Legal Mandate (2006-07 Appropriations Act)

The FY 2007 Appropriations Act authorized and funded the purchase of Textbook Manager. The office of the Chief Information Officer (CIO) contracted with Follett Software Company based on competitive proposals.

With Destiny Textbook Manager, the Department of Education and the South Carolina school districts have a solution that will verify that every student has a textbook. Upon full implementation in a district, the textbook management system enables a user to instantly determine this important information (full implementation requires districts to upload class associations). Ensuring students have access to the basic conditions they need to learn, such as textbooks, is not only a South Carolina concern but a national issue as evidenced by the Williams vs. California settlement.

## Williams vs. California

In 1999, several California organizations filed a school funding case, *Eliezer Williams, et. al. vs. State of California, et. al. (Williams)*, in state superior court on behalf of a class of students attending substandard schools. The complaint cited a lack of instructional materials, among other things. In August 2004, the state of California agreed to settle the *Williams* case, enabling the state to fund quality learning conditions for millions of low-income students. The case created new standards for measuring whether schools have the basic conditions students need to learn, such as textbooks.

### Objective 3: School/ District responsibility for patron and class data

Patron and class data will be brought in to Destiny Textbook Manager using either the SIF Agent or by district staff uploading a CSV file, updated on a schedule determined by the District. Schools/Districts are ultimately responsible for the maintenance of student and class data in the student information system. The district/school is responsible for verifying data is accurate and updated.

*This workbook is yours to keep. Feel free to use the expanded margin on each page to take notes.*

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## Getting Started in Textbook Manager

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### Module Overview

use some of the tools available in Destiny.

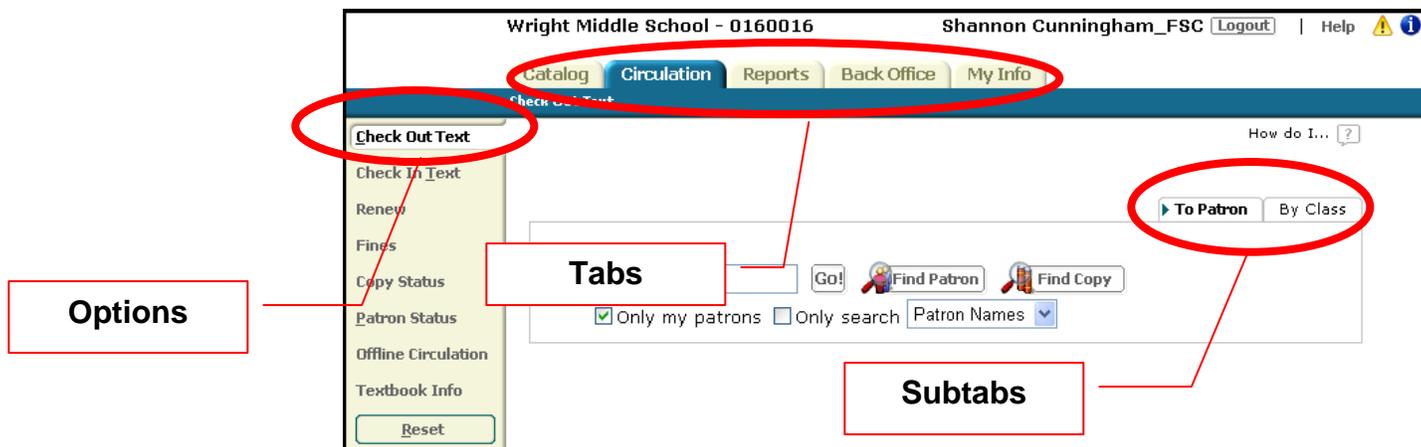
### Module Objectives

- Objective 1: Log in with a user name and password
- Objective 2: Identify common Destiny program features and icons
- Objective 3: Identify how to use Breadcrumbs
- Objective 4: Identify where to find the **online** and **on-page Help**
- Objective 5: Use **Job Manager** to view jobs
- Objective 6: Use **Report Manager** to view reports
- Objective 7: Find state textbook office contact information at <http://textbooks.ed.sc.gov>

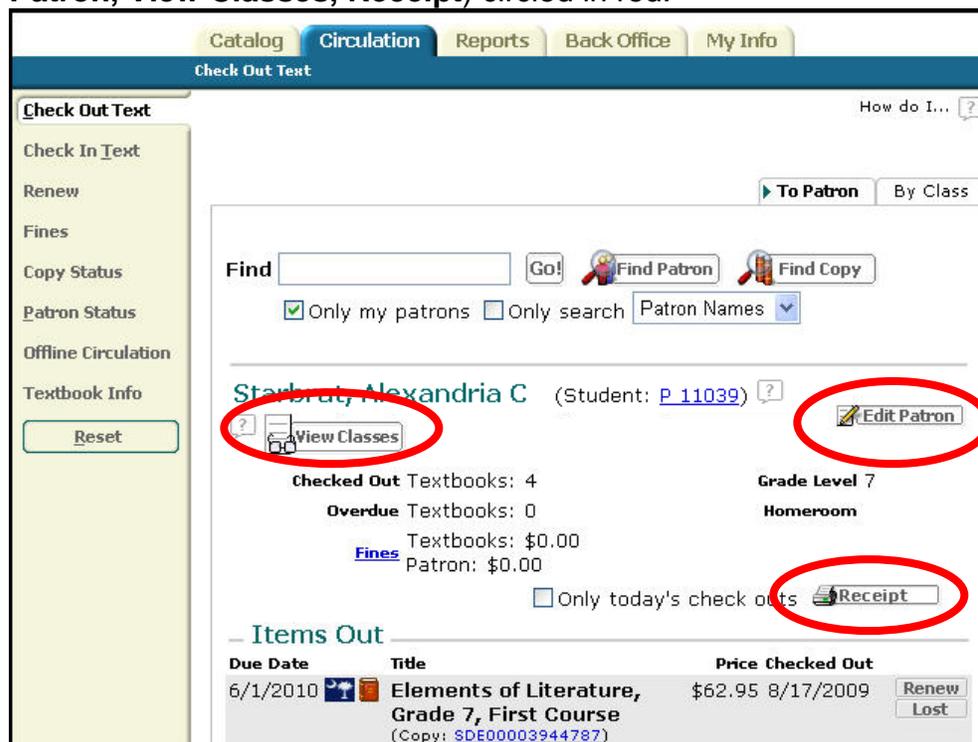
### Objective 1: Log in with a user name and password

1. Each user receives a unique user name and password.
2. Select your browser's icon on the desktop.
3. Type **http://textbooks.ed.sc.gov** in the address field.
4. Press **Enter**.
5. Select the **District** hyperlink.
6. Select the site hyperlink. A login window appears.
7. Enter your user name and password.
8. Select **Login**. Textbook Manager appears.

Objective 2: Identify common Destiny program features and icons  
 Destiny has some consistencies throughout the application that allow for easy navigation. The first of which are tabs, subtabs, and options.



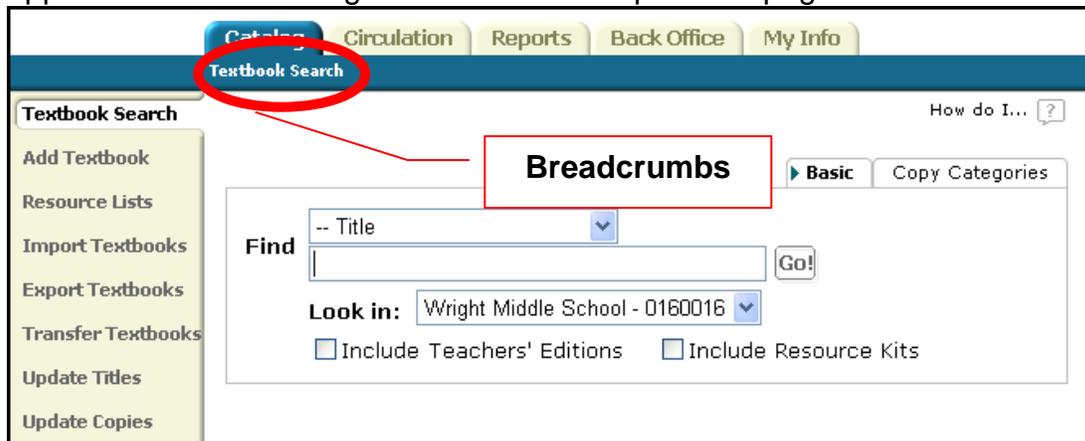
Destiny also has action buttons. These action buttons typically appear on the right of the screen. For example, you can see the action buttons (**Edit Patron, View Classes, Receipt**) circled in red.



### Objective 3: Identify how to use Breadcrumbs

Because Destiny is a web application, it has some of the same features you might find in a typical web browser. One example of this is the **Breadcrumbs**.

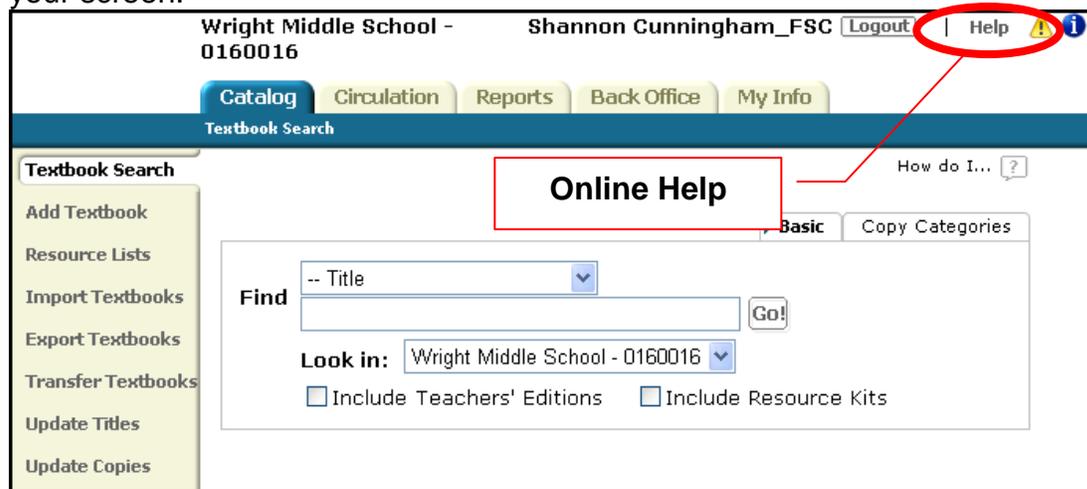
Breadcrumbs allow you to navigate to different parts of the software application without losing information on the previous page.



Breadcrumbs should be used as an alternate to the **Back** button. The **Back** button may cause you to get a time out error message and possibly lose information from the previous screens.

Objective 4: Identify where to find the **online** and **on-page Help**. Destiny offers two resources for you: **online** and **on-page Help**.

To access **online Help**, click on the **Help** icon in the upper right corner of your screen.



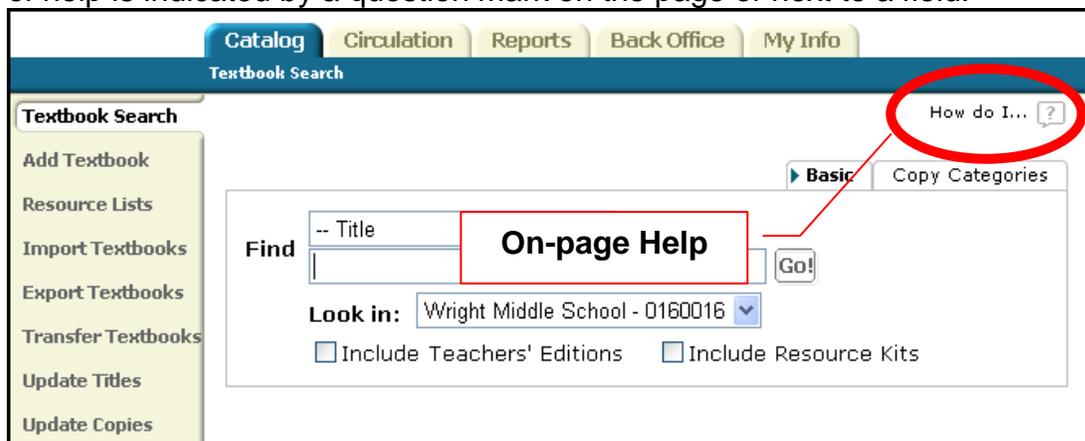
**Online Help** accesses a database at Follett Software Company through the internet. By maintaining this database in-house, Follett can add, update, or delete help topics as often as necessary. **Online Help** contains the operational instructions for Textbook Manager. The screenshot below shows the five tabs that display **online Help**.



The Trainer will demonstrate how to use each of the **online Help** tabs.

- Search (by question or keyword)
- Contents (by subject)
- Index (of terminology)
- Glossary (of terms)
- Contact us (to contact Follett Software)

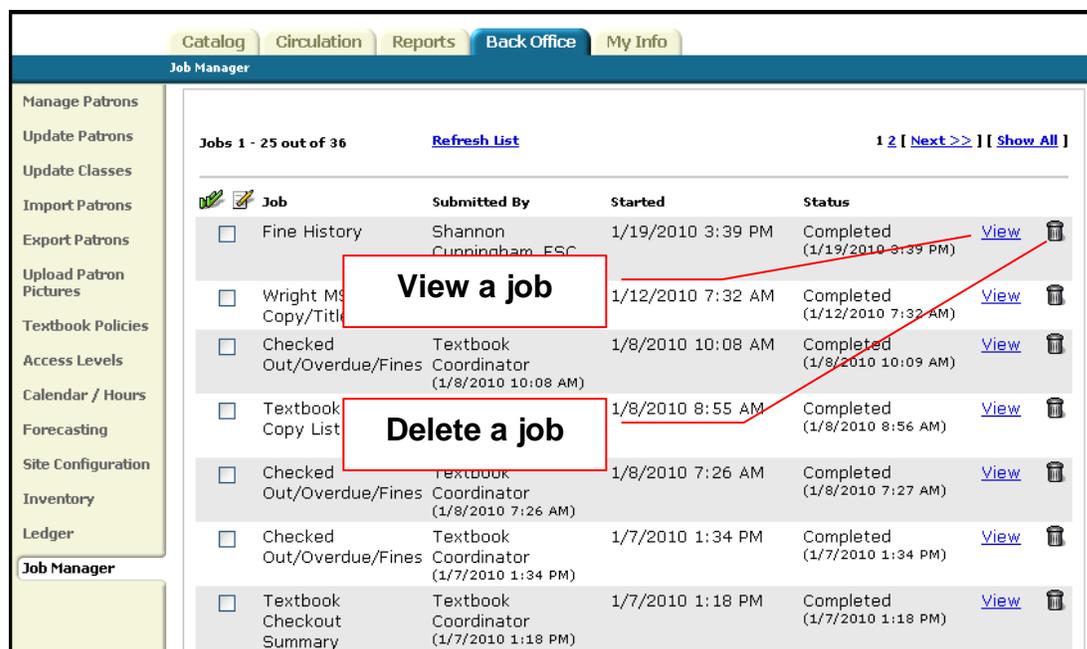
**On-page Help** does not require special access and is embedded in Destiny. Anyone who has access to Destiny has access to **On-page Help**. This type of help is indicated by a question mark on the page or next to a field.



Selecting the **Question Mark** icon will open a window giving you more detail about the features on the page. For example, clicking online Help on the **Check Out Text** screen, will give us more information on how to perform checkouts in Textbook Manager.

**Objective 5: Use the Job Manager to view jobs**

Another basic component of Destiny is the **Job Manager (Back Office tab | Job Manager option)**. This option is the behind-the-scenes "assistant" that handles lengthy tasks, allowing you to move on to other tasks. When you begin an import, export, or create a large report, you do not have to wait for it to finish—just check back later to view the summary, print the report, or download the file.



Note: You will need Adobe Reader® version 5.05 or above to view the reports in pdf format. Adobe Reader is available as a free download. You may need to contact your site's Information Technology department for assistance.

## Objective 6: Use the **Report Manager** to view Reports

The Report Manager available from the **Reports** tab makes it easier to clean up, maintain and manage your reports. It resembles the Job Manager page but lists only report entries instead of all jobs that are included in the Job Manager.

The screenshot shows the 'Report Manager' interface. At the top, there are navigation tabs: 'Catalog', 'Circulation', 'Reports' (selected), 'Back Office', and 'My Info'. Below the tabs is a 'Report Manager' header. On the left, there is a sidebar with 'My Favorites' and a list of items: 'Textbook', 'Patron', 'Report Builder', and 'Report Manager' (highlighted). The main content area displays a list of reports under the heading 'Jobs 1 - 2 out of 2' with a 'Refresh List' link. The list has columns for 'Job' and 'Status'. Two reports are listed: 'Fine History' (Completed on 1/19/2010 3:39 PM) and 'Textbook Inventory Report' (Completed on 11/3/2009 3:54 PM). Each report has a 'View' link and a trash icon. Below the list, there is a 'Delete Jobs...' section with a 'Delete' button. There are radio buttons for 'All Selected (on this page)' and 'Based on'. The 'Based on' option is selected, with a dropdown menu set to 'Date Started' and a text input field for 'Started on or before'. At the bottom, there are icons for 'Select All' and 'Clear All'.

This page provides you with a list of all the custom reports set up for your site, shows you when each was last run and allows you to run it again. From this page, you can also edit, duplicate, export and delete a setup or create a new report or import a report setup.

Objective 7: Find State Textbook Office Contact Information

**TELEPHONE AND FAX NUMBERS**

**Instructional Materials and District Auditing  
301 Greystone Blvd. Suite 150, Columbia, South Carolina 29210**

Toll Free Telephone Number 888-202-3953

Local Telephone Number 803-832-8210

Toll Free Fax Number 888-206-8330

Local Fax Number 803-253-6130

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## Searching the Textbook Database

### Module Overview

This section will teach you the basics of searching your textbook database.

### Module Objectives

- Objective 1: Identify how to find textbooks
- Objective 2: Discuss search tools such as wildcards and Boolean operators

### Objective 1: Identify how to find textbooks

Textbook Search is located in the **Catalog** tab | **Textbook Search** option. All state-owned titles are included in the master title list and can be recognized by the state flag preceding the title. It is recommended to search using ISBN or State Textbook ID.

Your search results may appear like this:

The screenshot displays a web interface for a textbook database. At the top, there are navigation tabs: Catalog, Circulation, Reports, Back Office, and My Info. Below the tabs, the breadcrumb trail reads "Textbook Search > Search Results > 'Glencoe Pre-Algebra: An Integrated Transition to Algebra and Geometry'". On the right, there is a "How do I...?" link.

The main content area shows the search results for the selected title. It includes a "Title Details" tab, "Copies" and "Supplements" buttons, and a "Class Info" icon. The title is "Glencoe Pre-Algebra: An Integrated Transition to Algebra and Geometry". Below the title, it states: "There are no local copies of this title. There are no off-site copies of this title." There is a "Selected List: My Personal List" and an "Add to this List" button.

The interface also features a "Show Less" link and three expandable sections: "Publication Info", "Additional Info", and "Adoption Info".

- Publication Info:**
  - Published Glencoe, a division of The McGraw-Hill Companies, Inc. : 2001
  - ISBN 978-0-07-822873-5
- Additional Info:**
  - Notes Student Edition
  - Audience 08 to 08
  - Instructional Classification Student Edition Printed
  - Course ID 2110
  - Additional Info Mathematics, Grades 6-8
  - Replacement Price \$0.00
- Adoption Info:**
  - State/Textbook ID 0220001
  - State Adopted 2002
  - Adoption Ends 2009

A "Top" link is located at the bottom right of the content area.

Objective 2: Discuss search tools such as wildcards and Boolean operators

You can use **wildcards** if you are unsure of a spelling. There are two wildcards in Destiny: the **asterisk (\*)** and the **question mark (?)**.

The asterisk is used to replace multiple characters to complete a search term or search string. For example, you may use psych\* to search for a book with the term psychology in it.

The question mark will replace a single character. An example of this type of search may be Geom?try.

You can also use the Boolean operators: AND, OR, and NOT. These operators must be capitalized to be recognized by Destiny.

The screenshot shows the 'Textbook Search' interface. At the top, there are navigation tabs: 'Catalog', 'Circulation', 'Reports', 'Back Office', and 'My Info'. Below these is a 'Textbook Search' header with a 'How do I...?' link. On the left, there is a vertical menu with options: 'Add Textbook', 'Resource Lists', 'Import Textbooks', 'Export Textbooks', 'Transfer Textbooks', 'Update Titles', and 'Update Copies'. The main search area has a 'Basic' search mode selected and a 'Copy Categories' button. The 'Find' dropdown is set to '-- Title'. The search input field contains 'Geom?try' and a 'Go!' button. Below the search field, the 'Look in:' dropdown is set to 'Wright Middle School - 0160016'. There are two checkboxes: 'Include Teachers' Editions' and 'Include Resource Kits', both of which are unchecked.

The screenshot shows the 'Textbook Search' interface. At the top, there are navigation tabs: 'Catalog', 'Circulation', 'Reports', 'Back Office', and 'My Info'. Below these is a 'Textbook Search' header with a 'How do I...?' link. On the left, there is a vertical menu with options: 'Add Textbook', 'Resource Lists', 'Import Textbooks', 'Export Textbooks', 'Transfer Textbooks', 'Update Titles', and 'Update Copies'. The main search area has a 'Basic' search mode selected and a 'Copy Categories' button. The 'Find' dropdown is set to '-- Title'. The search input field contains 'Geometry AND Math' and a 'Go!' button. Below the search field, the 'Look in:' dropdown is set to 'Wright Middle School - 0160016'. There are two checkboxes: 'Include Teachers' Editions' and 'Include Resource Kits', both of which are unchecked.

## *Barcoding Your Textbooks*

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### Module Overview

This section will teach you the basics of barcoding your textbooks.

### Module Objectives

- Objective 1: Explain how to execute a textbook barcoding project
- Objective 2: Explain state barcoding requirements
- Objective 3: Discuss best practices and lessons learned

### Objective 1: Explain how to execute a textbook barcoding project

Although it may seem the best time to barcode textbooks is during the summer (when most textbooks are stored and not in use), in most cases, schools have implemented Destiny Textbook Manager during the school year. Therefore, it may be necessary to barcode textbooks while school is in session.

The timing of the project is a major factor in its success. The elements of timing that have to come together when scheduling are:

- Worker availability
- Project leader availability
- Software (Textbook Manager) availability
- Labels ordered and scheduled for delivery

### Worker Readiness

You need not have experience with Textbook Manager to enter textbooks into the database. The skills required for textbook data entry are:

- Organizational skills—can alphabetize and put in numerical order
- Good keyboard skills
- Attention to detail and accuracy (more important than speed)
- Fast learner
- Ability to follow instruction/direction
- Reliability
- Some ability to work unsupervised for short periods of time (2-3 hours)

### Site Readiness

The Project Leader needs a set of passwords—for the network and for Textbook Manager.

The Project Leader will need unrestricted access to the internet and the LAN or WAN. You should provide carts for moving books from the shelves to the workstations. If you are using laptops, check for spare batteries or receptacles for plugging into power and the network.

Sometimes bringing the textbooks to a central location (school lunchroom or gym) makes the process go smoothly.

### Objective 2: Explain state barcoding requirements

#### **We bar-code:**

Textbook student editions in the Destiny Textbook Manager state-owned title file. Schools may barcode student editions on CD by placing the barcode on the back of the case and printing the barcode number on the CD.

**Note: Beginning with the 2009 adoption (K-8 Math and 9-12 ELA), teacher editions are required to be barcoded.**

#### **We do not barcode:**

- Big books (Optional)
- Classroom Library Sets
- Consumables
- Kits of any kind
- Materials purchased by the district or school (Optional using local barcodes)
- Novels
- Teacher Editions Prior to the 2009 (K-8 Math and 9-12 ELA) adoption (Optional)

#### **Barcode Symbology:**

- 14 Character, Code 39
- No Type ID, no check digit (generic)
- Location Code: SDE South Carolina Department of Education
- Inscription: Property State of SC
- Color: Royal Blue

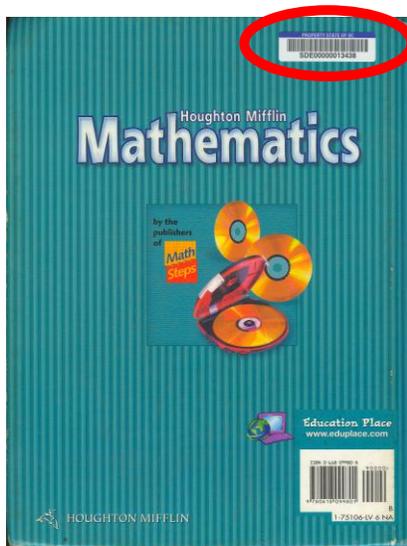
**What does the state barcode look like?**

Picture of the barcode label actual size both labels:



**Where are the barcodes affixed on the textbooks?**

The barcode label is affixed on the back, top of the textbook at least 1/4" from the spine and the security label is placed on the back, bottom of the end page:



### Objective 3: Discuss best practices and lessons learned

Here are some best practices and lessons learned that will help you conduct a smooth barcoding project.

#### **PREPARING FOR THE BARCODING PROJECT**

The following items will be needed when preparing to barcode our textbooks:

- All State-owned textbooks collected to a central location. If space is limited, textbooks may be centralized in multiple locations, i.e. by hallway, grade level, department, etc.
- Scissors
- Note Pad or sticky notes
- Pens or pencils
- Scanner
- Computer with internet access
- Destiny Textbook Manager username and password

#### **Best Practices**

- ORGANIZATION and SUPERVISION are the keys to a successful implementation.
- Supplies and resources needed: internet access, barcodes, scissors for cutting out barcodes, internet-ready computer, scanner, pens, paper, sticky notes, and a copy of your Destiny Textbook Manager Training Workbook for quick reference.
- Run a Title & Copy List report in Destiny to show titles only. This will show all materials on your inventory. Highlight the textbooks that require a barcode. If you need additional information about a title to determine if it requires a barcode, you can view the title record by searching the ISBN in Destiny under the Catalog tab, Textbook Search option.
- Collect all textbooks, if possible, to a central location. The textbooks should be organized by like ISBN and stacked upside down to facilitate the application of the barcodes. Count books by ISBN before beginning the cataloging and barcoding process and place a sheet of paper with the count and last four digits of the ISBN inside the top book. Do not barcode any new textbooks not being used.
- If using a team of temporary help to apply barcodes make sure they are adequately trained and supervised.
- After all required items have been barcoded, run Title & Copy List report to show titles with all copies. This listing will show all the barcode numbers you have assigned to textbooks and the copies without barcodes. Any title that requires a barcode should have SDE barcode numbers assigned, with the following exceptions:

- Brand new, never used. Should only be bar-coded when needed for a student.
- Copies damaged beyond use, such as water or mold damage. These copies will remain on your inventory as “Copies Without Barcodes” and should be reported as a loss on your annual physical inventory.
- Missing textbooks. These copies will remain on your inventory as “Copies Without Barcodes” and should be reported as a loss on your annual physical inventory.

### LESSONS LEARNED

- Count textbooks carefully before beginning the cataloging and barcoding process.
- Use the Title & Copy List report, and the search options for additional title information, to help determine which textbooks must be barcoded.
- Verify beginning and ending barcode numbers before applying barcodes. Do not apply the barcodes prior to completing the steps to catalog.
- Supervise staff applying barcodes.
- Make sure the barcodes are in order.

## Assigning Barcodes to State-Owned Textbooks

### Module Overview

This module will teach you how to assign textbooks to your school database, as well as ways to share your district textbook resources.

### Module Objectives

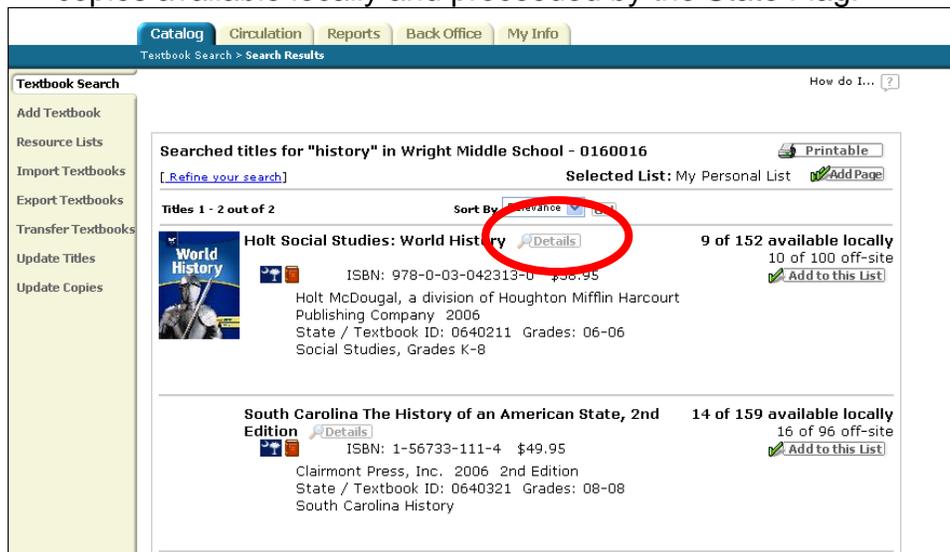
- Objective 1: Discuss assigning barcodes to state-owned textbooks
- Objective 2: Editing a barcode
- Objective 3: Removing a barcode
- Objective 4: Explain how to generate and analyze a **Title & Copy List** report

### Objective 1: Discuss assigning barcodes to state-owned textbooks

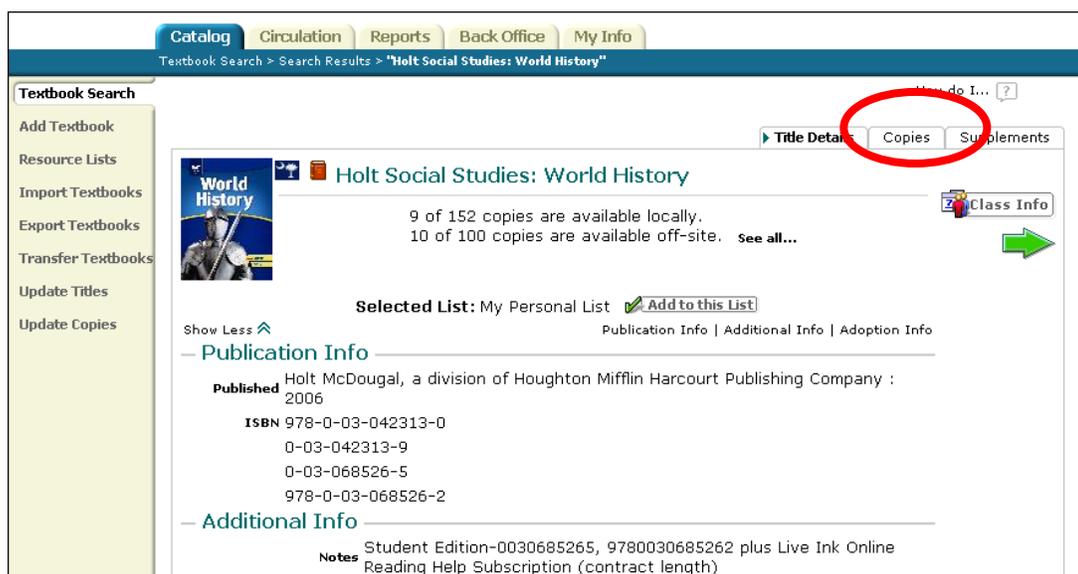
1. From the **Catalog** tab | **Textbook Search** option, select **ISBN** from the **Find** drop-down list.
2. Scan the ISBN on the textbook to which you are assigning the barcode.

The screenshot shows the Follett Textbook Search interface. At the top, there are navigation tabs: 'Catalog', 'Circulation', 'Reports', 'Back Office', and 'My Info'. The 'Catalog' tab is selected, and the 'Textbook Search' option is active. Below the navigation, there is a sidebar with options: 'Textbook Search', 'Add Textbook', 'Resource Lists', 'Import Textbooks', 'Export Textbooks', 'Transfer Textbooks', 'Update Titles', and 'Update Copies'. The main search area has a 'Find' dropdown menu set to '-- Title', a search input field, and a 'Go!' button. Below the search field, there is a 'Look in:' dropdown menu set to 'Wright Middle School - 0160016'. At the bottom of the search area, there are two checkboxes: 'Include Teachers' Editions' and 'Include Resource Kits'. A 'How do I...?' help link is visible in the top right corner.

- If multiple titles are found, click the **Details** icon next to the title with copies available locally and proceeded by the State Flag.



- Once you have selected the correct title, click on the **Copies** subtab.



5. Click on the **Show More** icon next to Available copies

Textbook Search > Search Results > "Holt Social Studies: World History"

How do I... ?

Title Details **Copies** Supplements

**Holt Social Studies: World History**

Copies at Wright Middle School - 0160016 (9 of 152 copies available)

Status	Copies	
Available	9	Show More
Checked Out	143	Show More

6. Click on the **Assign Barcodes** icon.

Textbook Search > Search Results > "South Carolina The History of an American State, 2nd Edition"

How do I... ?

Title Details **Copies** Supplements

**South Carolina The History of an American State, 2nd Edition**

Copies at Wright Middle School - 0160016 (14 of 159 copies available)

Status	Copies	
Available	14	Show Less

**Copies without barcodes**

Quantity		
5	Assign Barcodes	Lost

**Copies with barcodes** Remove Barcodes

Barcode	Status	Condition	Location
SDE00001778678	Available	Good	
SDE00001778694	Available	Good	
SDE00003945561	Available	New	
SDE00003945587	Available	New	
SDE00003945616	Available	New	
SDE00003945640	Available	New	
SDE00003945641	Available	Fair	

7. Enter a number in the **Copies to Barcode** field.

The screenshot shows the 'Barcode Copies' form for the title 'South Carolina The History of an American State, 2nd Edition'. The 'Copies without Barcodes' field contains the number 5. The 'Copies to Barcode' field contains the number 1 and is circled in red. Other fields include 'Assign Barcode(s)', 'Purchase Price', 'Assign Location' (set to '-- Undefined --'), 'Assign Budget Category' (set to '-- Undefined --'), and 'Condition' (set to 'Good'). There are 'Assign' and 'Cancel' buttons at the bottom.

8. Scan your starting barcode.
9. Click **Assign**.
10. Click the **Show More** icon to see a complete list of barcodes and to verify beginning and ending numbers before placing them on the textbooks.

Objective 2: Editing a barcode

1. From the **Circulation** tab | **Copy Status** option, enter the original barcode number.
2. Click **Go**.

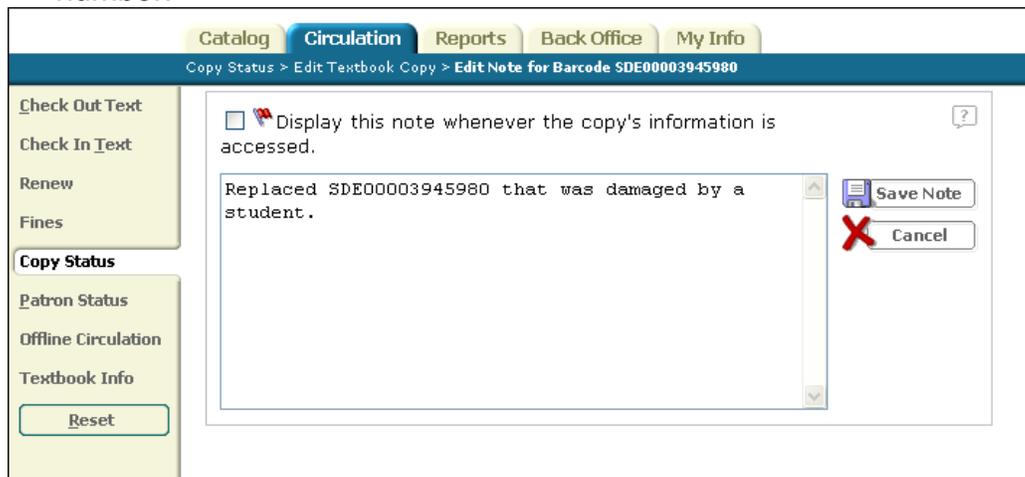
The screenshot shows the 'Copy Status' form under the 'Circulation' tab. The 'Find Copy' field contains the barcode number 'SDE00003945980' and there is a 'Go!' button next to it. The left sidebar contains options like 'Check Out Text', 'Check In Text', 'Renew', 'Fines', 'Copy Status', 'Patron Status', 'Offline Circulation', 'Textbook Info', and a 'Reset' button.

3. The **Copy Status** page will display.

4. Click on the **Edit Copy** icon.

5. Enter the new barcode number.

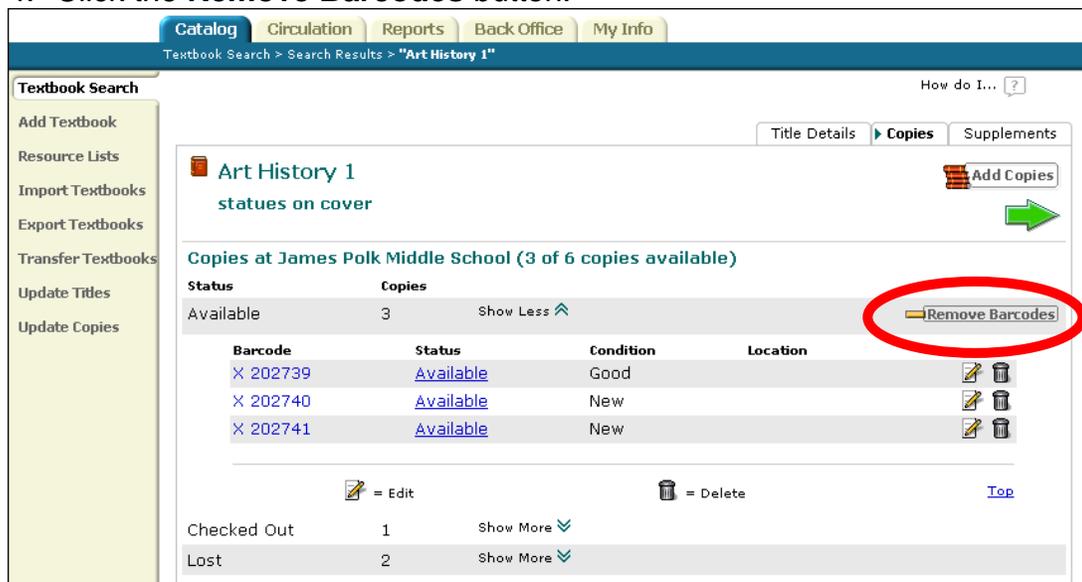
- Click **Add Note** to enter a note referencing the original barcode number.



- Click **Save Note**; the note will appear on the copy record.
- Click **Save Copy**.
- Place the replacement barcode on the textbook.

### Objective 3: Removing a barcode

- From the **Catalog** tab | **Textbook Search** page, find the title of the textbook from which to remove barcodes.
- Click on the **Details** button of the correct title.
- From the **Copies** subtab, click **Show More** to see the list of barcodes available.
- Click the **Remove Barcodes** button.



- Enter a number in the field adjacent to the Quantity to Unassign .

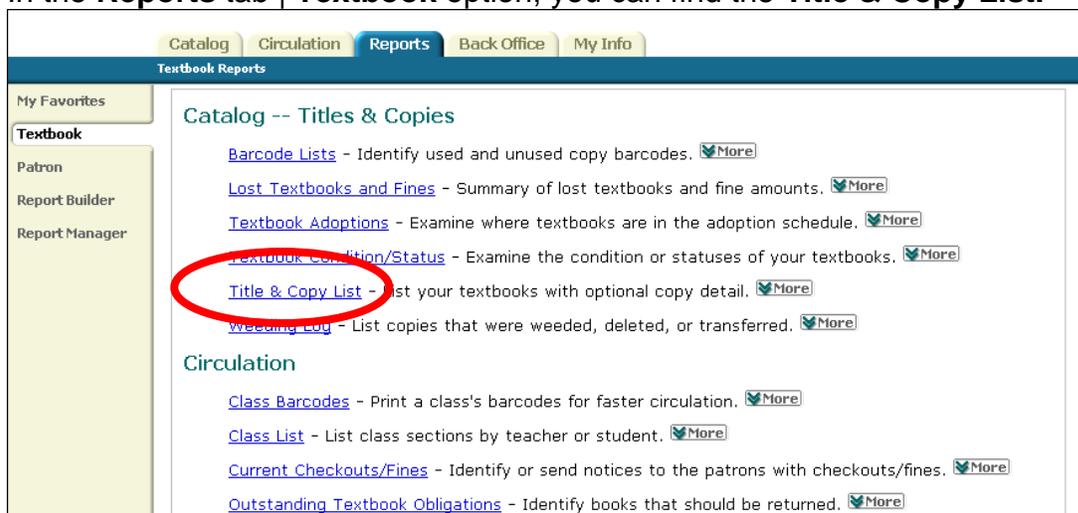
6. Enter a barcode in the field adjacent to **Starting with Barcode**. You will receive a message to confirm that you want to unassign barcodes.
7. Click **Yes** to confirm you want to unassign barcodes.

The screenshot shows a library management system interface. At the top, there are navigation tabs: Catalog, Circulation, Reports, Back Office, and My Info. Below these is a breadcrumb trail: Textbook Search > Search Results > "Art History 1". On the left is a sidebar with options like Add Textbook, Resource Lists, Import Textbooks, Export Textbooks, Transfer Textbooks, Update Titles, and Update Copies. The main content area is titled "Art History 1 statues on cover" and has tabs for Title Details, Copies, and Supplements. A yellow warning box at the top of the main area says "Unassigned 3 barcodes starting at barcode: 202739". Below this, there's a section for "Copies at James Polk Middle School (3 of 6 copies available)". A table shows the status of the copies:

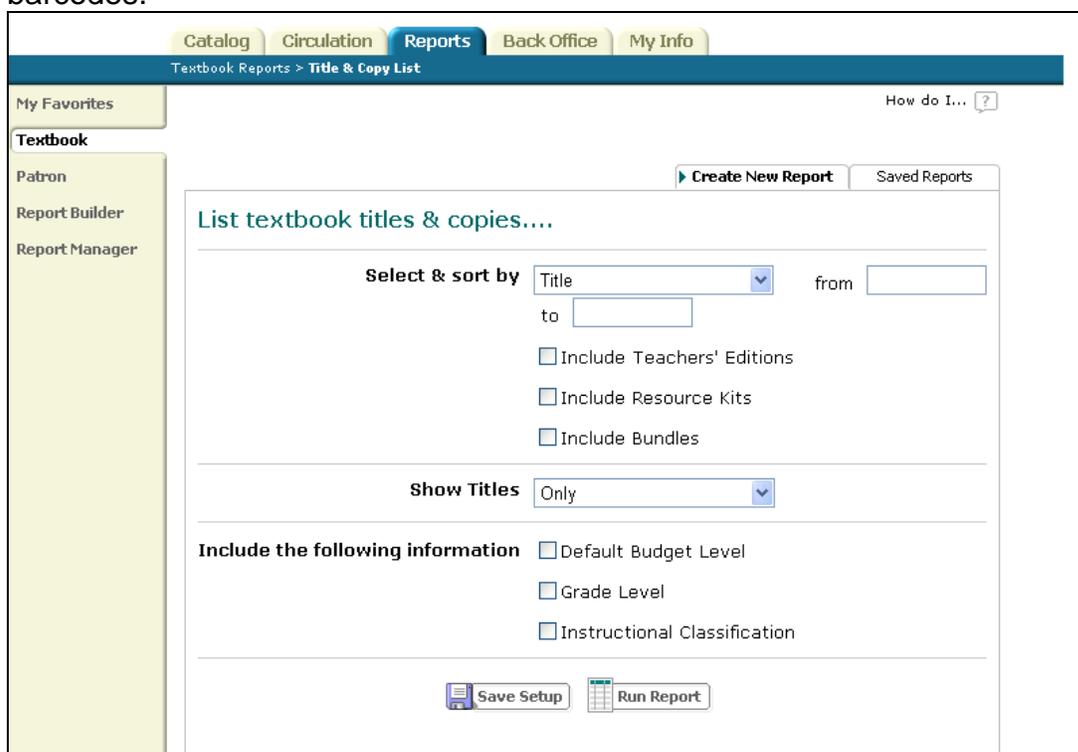
Status	Copies	Actions
Available	3	Assign Barcodes, Lost, [trash icon]
Checked Out	1	Show More
Lost	2	Show More

You will see a message letting you know you have successfully unassigned barcodes.

Objective 4: Generate and analyze a Title & Copy List report  
 In the **Reports** tab | **Textbook** option, you can find the **Title & Copy List**.



The **Title & Copy list** can give you information regarding all of the titles that are available in your database as well as copies in other locations, including teacher’s editions, resource kits, and specific copy status. You can run reports that show all the lost copies, checked out copies, and copies needing barcodes.



After you have selected your reporting options, click on **Run Report**. An example of this report is listed below.

<b>Textbook Title &amp; Copy List</b>		Including Teachers' Editions & Resource Kits							
<i>By Title - Only titles with available copies</i>									
<b>Mathematics / 2 Volume Set 1 Teachers Edition</b>		ISBN: 978-1-84700-158-0							
Grade: 02 - 02									
Replacement Price: \$33.00 (\$33.00 if Lost)									
<b>Copy Info:</b>		Total (Unbarcoded)	Available	Checked Out	Loaned Out	On Order	Out for Repairs	Incoming Transfers	Lost
		2 (2)	2	0	0	0	0	0	0
<b>Conditions:</b>									
		New	Good	Fair	Poor	Unusable			
		2	0	0	0	0			
<b>Available: 2 Copies</b>		<b>Condition</b>							
No Barcode									
No Barcode									
<b>Teacher Lesson Guide for Everyday Math Vol 1 2</b>		ISBN: 978-0-07-584464-8				Edition: 02			
Grade: 02 - 02									
Replacement Price: \$71.93 (\$71.93 if Lost)									
<b>Copy Info:</b>		Total (Unbarcoded)	Available	Checked Out	Loaned Out	On Order	Out for Repairs	Incoming Transfers	Lost
		2 (2)	2	0	0	0	0	0	0

## Circulating Your Textbooks

### Module Overview

This module describes how to check out and check in textbooks by patron, class, and teacher.

### Module Objectives

- Objective 1: Explain how to add a loan period
- Objective 2: Discuss how to circulate items to a patron
- Objective 3: Explain how to circulate items by class
- Objective 4: Discuss how to check in textbooks
- Objective 5: Discuss the Copy and Patron Status screen

### Objective 1: Explain how to add a loan period

1. Navigate to the **Back Office** tab | **Textbook Policies** option | **Loan Periods** subtab.

The screenshot shows the 'Textbook Policies' interface with the 'Back Office' tab selected. The 'Textbook Policies' subtab is active, displaying a table of loan periods. The table has columns for Description, Start, End, Due, and Status. The first row is 'Full School Year' with a status of 'Current' and a checkmark. The second row is 'New year-for forecast' with a status of 'Past'. The third row is 'Novels 1st quarter' with a status of 'Past'. The fourth row is 'sem 2 09-10' with a status of 'Current'. The fifth row is 'ss10' with a status of 'Future'. Each row has edit and delete icons. There are 'Loan Period' buttons with a plus sign and a minus sign at the top right and bottom right of the table area.

Description	Start	End	Due	Status
Full School Year	8/25/2009	6/1/2010	6/2/2010	Current <input checked="" type="checkbox"/> Default
New year-for forecast	7/1/2009	12/20/2009	12/19/2009	Past
Novels 1st quarter	11/17/2009	12/15/2009	12/15/2009	Past
sem 2 09-10	1/5/2010	6/4/2010	6/2/2010	Current
ss10	7/1/2010	8/15/2010	8/13/2010	Future

2. Click the **Loan Period** button.

The screenshot shows the 'Add Loan Period' form in the Back Office. The form has a left sidebar with navigation options: Manage Patrons, Update Patrons, Update Classes, Import Patrons, Export Patrons, Upload Patron Pictures, Textbook Policies (selected), Access Levels, Calendar / Hours, Forecasting, Site Configuration, Inventory, and Job Manager. The main form area contains the following fields and controls:

- \* Description: A text input field.
- Make this the default: A checkbox.
- \* Checkouts Start: A numeric input field with the value '0' and the text 'days before class starts'.
- \* Class Starts: A date input field with a calendar icon.
- \* Class Ends: A date input field with a calendar icon.
- \* Textbooks Due: A date input field with a calendar icon.
- \* = Required Field: A note at the bottom of the form.
- Buttons: Save and Cancel.

3. Enter a description for the loan period.
4. Choose whether this loan period is the default.
5. Enter the number of days before classes start that you permit checkouts, the date classes start, the date classes end, and the due date for the textbooks.
6. Click **Save**.

### Objective 2: Discuss how to circulate items to a patron

Destiny allows you to circulate items to a patron. This feature is located in the **Circulation** tab | **Check Out Text** option | **To Patron** subtab.

The screenshot shows the 'Check Out Text' form in the Circulation tab. The form has a left sidebar with navigation options: Check Out Text (selected), Check In Text, Renew, Fines, Copy Status, Patron Status, Offline Circulation, Textbook Info, and a Reset button. The main form area contains the following fields and controls:

- Check Out Text: A subtab header.
- How do I...?: A help link.
- To Patron / By Class: A subtab selector.
- Find: A text input field.
- Go!: A button.
- Find Patron: A button with a magnifying glass icon.
- Find Copy: A button with a magnifying glass icon.
- Only my patrons: A checked checkbox.
- Only search Patron Names: An unchecked checkbox.
- Patron Names: A dropdown menu.

## Check Out With Patron Barcodes

The quickest check out method is to use a scanner attached to a computer to scan the patron barcode and then the copy barcode.

**Note:** You can **only** set a special due date at the time of checkout for that item. Once the item is checked out to a patron, you can no longer set a special due date. Once you scan a patron barcode and then a copy barcode, you can set a special due date by following this procedure:

1. To set a special due date, click on the **Calendar** icon.

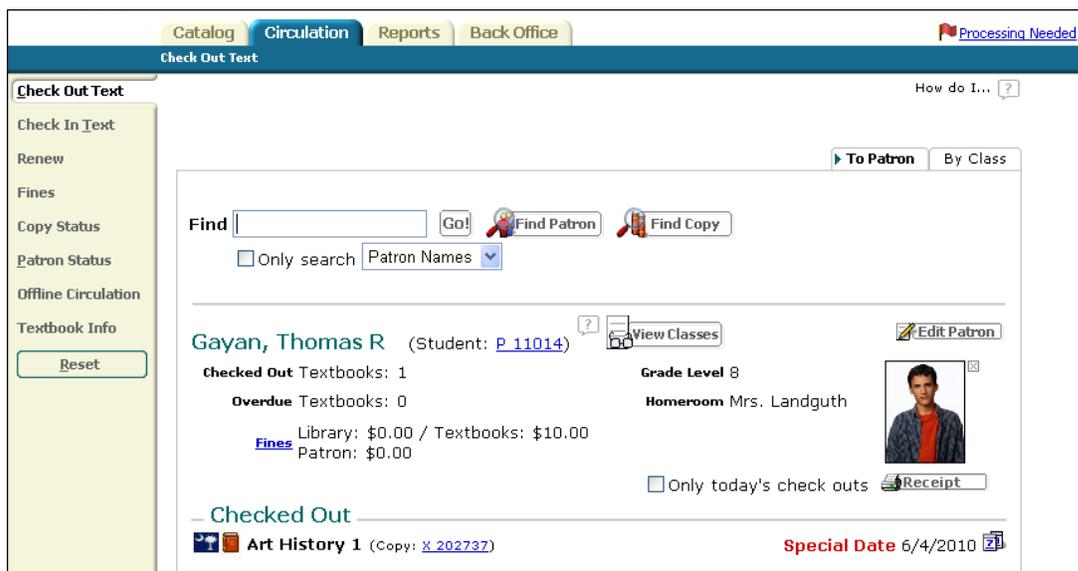
The screenshot shows the 'Check Out Text' interface. At the top, there are tabs for 'Catalog', 'Circulation', 'Reports', 'Back Office', and 'My Info'. Below the tabs, there's a 'Check Out Text' header with a 'How do I...' help icon. On the left, a vertical menu lists various actions: 'Check Out Text', 'Check In Text', 'Renew', 'Fines', 'Copy Status', 'Patron Status', 'Offline Circulation', and 'Textbook Info'. A 'Reset' button is located below the menu. The main content area is titled 'Check Out Text' and includes a search bar with a 'Find' field, a 'Go!' button, and 'Find Patron' and 'Find Copy' buttons. There's a checkbox for 'Only search Patron Names'. The profile for 'Gayan, Thomas R' (Student: P 11014) is displayed, including 'View Classes', 'Edit Patron', 'Checked Out Textbooks: 1', 'Overdue Textbooks: 0', 'Fines' (Library: \$0.00 / Textbooks: \$10.00, Patron: \$0.00), 'Grade Level 8', and 'Homeroom Mrs. Landguth'. A 'Receipt' button is present. Under the 'Checked Out' section, 'Art History 1 (Copy: X 202737)' is listed with a 'Due 6/2/2010' date circled in red. There's also an 'Items Out' section.

2. Select the **Selected date** radio button.

The screenshot shows a web interface for setting a due date. The main heading is "Change the due date for checkout to patron...". There are two radio buttons: "Selected date:" (which is selected and circled in red) and "Default date: 6/2/2010". The "Selected date:" option has a text input field containing "6/2/2010" and a dropdown menu currently showing "for this item". To the right is a calendar for June 2010. At the bottom right, there is a dropdown menu labeled "-- Select Due Date --" and an "Other..." button. In the top right corner, there are "Save" and "Cancel" buttons.

3. Enter a date or use the calendar to select the appropriate date.
6. Then, from the drop-down menu, select **until logout, for this patron, or for this item**.
  - a. If you select **until logout**, this due date will be used for every checkout you perform until you log out of the Destiny system.
  - b. If you select **for this patron**, this due date will be applied to all textbooks you check out to this patron only.
  - c. If you select **for this item**, this due date will be applied to textbook you are currently checking out only.

5. Click **Save**.



6. The new due date is noted in red text with the words **Special Date** next to it.

### Check Out Without Patron Barcodes

If you do not have the patron barcode, you can search for the patron in the **Find** field. To find a patron, enter information that is available in the patron record including:

- First, Last, middle name
- Nickname
- Grade Level
- User Name
- User Defined fields
- State ID

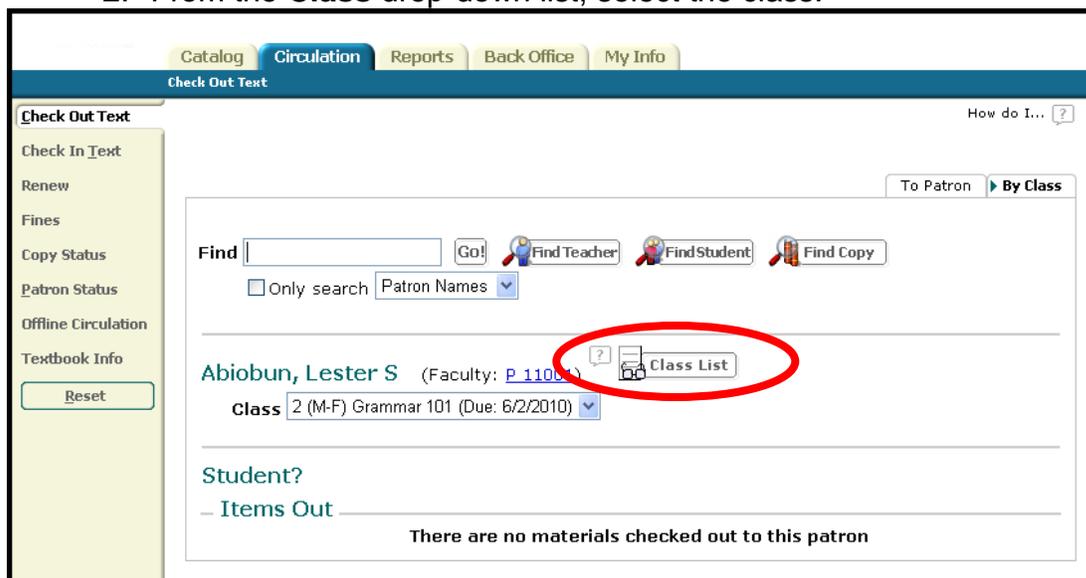
After you have entered the information, click on the **Find Patron** button. Select the patron, and then scan the copy barcode. To see a step-by-step procedure for setting special due dates for patrons, see the previous section.

Objective 3: Explain how to circulate items by class

Destiny allows you to circulate items by a class. This feature is located in the **Circulation** tab | **Check out Text** option | **By Class** subtab.

There are a few steps to this process:

1. Find the teacher. You can scan the patron barcode of the teacher or search for the name of the teacher.
2. From the **Class** drop-down list, select the class.



- a. Then, click on the **Class List** button. This will give you a list of students in the class.
- b. Select the student's name.

Catalog **Circulation** Reports Back Office My Info

Check Out Text > Class List

Check Out Text Close

Name	Barcode	Homeroom	Grade Level
<a href="#">Barker, Elijah A</a>	P 11002	Mr. Earl	5
<a href="#">Brahma, Skeet H</a>	P 11003	Mrs. Salapatas	2
<a href="#">Brooks, Stewart H</a>	21230000123586		
<a href="#">Davis, William</a>	21230000123867		
<a href="#">Garritty, Hector</a>	P 11013	Mr. Abiobun	7
<a href="#">Gaughran, JM</a>	P 11112		
<a href="#">Jackson, Talia</a>	21230000123495		
<a href="#">Jenson, Delilah</a>	P 11017	Miss Laborn	1
<a href="#">Ladecky, Joshua J</a>	P 11021	Miss Laborn	Kindergarten
<a href="#">Magrady, Iris L</a>	P 11023	Mrs. Landguth	8
<a href="#">Moss, Ryan J</a>	P 11024	Mr. Abiobun	7
<a href="#">Munter, Brandon S</a>	P 11025	Miss Laborn	1
<a href="#">Navarro, Brian A</a>	21230000123743		

Check In Text  
Renew  
Fines  
Copy Status  
Patron Status  
Offline Circulation  
Textbook Info  
Reset

3. Scan the textbook copy barcode.

Catalog **Circulation** Reports Back Office My Info

Check Out Text How do I... ?

Check Out Text To Patron **By Class**

Find  Go! Find Teacher Find Student Find Copy

Only search Patron Names

**Abiobun, Lester S** (Faculty: [P\\_11001](#)) Class List

Class **2** (M-F) Grammar 101 (Due: 6/2/2010)

**Jackson, Talia** (Student: [21230000123495](#)) Edit Patron

Checked Out Textbooks: 2  
Overdue Textbooks: 0

Fines Library: \$0.00 / Textbooks: \$32.00  
Patron: \$0.00

Grade Level  
Homeroom 

Only today's check outs Receipt

**Checked Out**

**Algebra 1 an Integrated Approach** (Copy: [X\\_2294564](#)) Due 6/2/2010

Class: Grammar 101 Grammar 101/Section: 1; Period: 2 (Lester Abiobun)

**Items Out**

Due Date	Title	Price	Checked Out
5/31/2010	<b>WRITING &amp; GRAMMAR</b> (Copy: <a href="#">X_8006</a> ) Class: Grammar 101 Grammar 101/Section: 1; Period: 2 (Lester Abiobun)	\$32.00	10/7/2009

Renew Lost Renew All

Check In Text  
Renew  
Fines  
Copy Status  
Patron Status  
Offline Circulation  
Textbook Info  
Reset

**Note:** To set a special due date, click on the Calendar icon in the bottom right corner of the screen.

4. Select the **Selected date** radio button.

Catalog **Circulation** Reports Back Office My Info

Check Out Text > Due Date

How do I... ?

**Check Out Text**

Check In Text  
Renew  
Fines  
Copy Status  
Patron Status  
Offline Circulation  
Textbook Info

Reset

Change the due date for checkout by class...

Save  
Cancel

Selected date: 6/2/2010 until logout

Default date: 6/2/2010

<< June 2010 >>

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

-- Select Due Date --

Other...

5. Enter a date or use the calendar to select the appropriate date.
6. Then, from the drop-down menu, select **until logout**, for this patron, or for this item.

- a. If you select **until logout**, this due date will be used for every checkout you perform until you log out of the Destiny system.
  - b. If you select **for this patron**, this due date will be applied to all textbooks you check out to this patron.
  - c. If you select **for this item**, this due date will be applied to textbook you are currently checking out.
7. Click on the **Save** button.

#### Objective 4: Discuss how to check in textbooks

To check in textbooks, go to the **Circulation** tab | **Check In Text** option. Then scan or type the textbook barcode into the **Find Copy** field to complete the transaction.

The screenshot shows the 'Check In Text' interface. At the top, there are tabs for 'Catalog', 'Circulation', 'Back Office', and 'My Info'. The 'Circulation' tab is active. Below the tabs, there is a 'Processing Needed' indicator. The main area is titled 'Check In Text' and contains a 'Find Copy' search field with a 'Go!' button. Below the search field, there is a section titled 'Most Recently Checked In' which lists a copy of 'America's History, 5th Edition' (Copy: SDE00000000001) with a due date of 6/12/2009. The item is checked out to 'Deihl, William (Student: P\_101)' on 1/2/2008, with a condition of 'Good'. There is a 'Create Fine' button next to the condition dropdown. A 'Reset' button is located at the bottom left of the interface.

Objective 5: Discuss the Copy Status and Patron Status option  
 Information about a particular copy, such as checkout information, barcode, status, etc. can be displayed using the **Copy Status** option. This option is located in the **Circulation** tab.

You can search for a copy by barcode. Enter the information in the **Find Copy** field. **Copy Status** will give you information including:

- Current and previous checkout
- Copy status and details
- Ability to add a Note that will appear during circulation
- Edit, View the History
- Mark copy as lost

The screenshot shows the 'Copy Status' page for a book titled 'Glencoe Algebra 1'. The page is part of a library system with tabs for 'Catalog', 'Circulation', 'Back Office', and 'My Info'. The 'Circulation' tab is active. On the left, there is a sidebar with options: 'Check Out Text', 'Check In Text', 'Renew', 'Fines', 'Copy Status', 'Patron Status', 'Offline Circulation', and 'Textbook Info'. The 'Copy Status' section is expanded, showing a 'Reset' button. The main content area has a 'Find Copy' search field with a 'Go!' button. Below the search field, the book title 'Glencoe Algebra 1' is displayed, along with 'Author' and 'Location' fields. To the right, there are 'Edit Copy' and 'Mark Lost' buttons. The book's details are listed in two columns: Barcode (SDE00000000021), Status (Due: 6/2/2008), Replacement Price (\$52.98), Budget Category, Date Acquired (1/2/2008), Vendor, Condition (Good), and ISBN (0-07-825083-8). Below this, there are two boxes: 'Current Checkout' (Due: 6/2/2008) with details like Checked Out (1/2/2008 12:13 PM), Patron (Turner, Brad S [Student]), Barcode (p 122), Grade Level (g), Homeroom (Mr. Anderson), Teacher (Strahl, William), and Class (Algebra 1A); and 'Previous Checkout' (None). At the bottom, there is a 'Notes' section with the text 'There are no notes for this copy' and an 'Add Note' button.

To replace a barcode for a state-owned textbook, click on the **Edit Copy** button and type the new barcode number in the **Barcode** field. You may add a note identifying that the original barcode was replaced.

The screenshot shows the 'Edit Textbook Copy' page for 'Glencoe Algebra 1'. The interface includes a navigation menu with 'Catalog', 'Circulation', 'Back Office', and 'My Info'. The 'Circulation' tab is active. On the left, there is a sidebar with options like 'Check Out Text', 'Check In Text', 'Renew', 'Fines', 'Copy Status', 'Patron Status', 'Offline Circulation', and 'Textbook Info'. The main area contains the following fields and controls:

- \* Barcode:** SDE00000000021
- Status:** Checked Out
- Condition:** Good
- Location:** -- Undefined -- (with an 'Other...' button)
- Date Acquired:** 1/2/2008
- Purchase Price:** (empty field)

At the bottom, there are sections for 'Copy Categories' and 'Notes'. The 'Notes' section contains the text: 'Original barcode, SDE00000000009 replaced 1/2/09.' Action buttons include 'Save Copy', 'Cancel', 'Update', and 'Add Note'. A 'Reset' button is located in the sidebar under 'Textbook Info'.

**Patron Status** will give you information including:

- Current items out
- Barcode and status
- Ability to add a Note that will appear during circulation
- Edit and view the History
- Add/view fines

You can search for a patron by keyword or the patron barcode. Enter the information in the **Find Patron** field.

The screenshot shows the 'Patron Status' page for William Deihl. The page is divided into several sections:

- Navigation:** Catalog, Circulation (selected), Back Office, My Info.
- Search:** Find Patron field with a 'Go!' button. Options:  Only my patrons,  Only search Patron Names.
- Patron Information:**
  - Name: William Deihl [Student] (with Edit Patron link)
  - Barcode: P 101 (with Print Label link)
  - Status: Active
  - Gender: Male
  - Card Expires: (blank)
  - Grad Year: 2008
  - Birthdate: 7/18/1990
  - State ID: 1554931673
  - Nickname: (blank)
  - Grade Level: 11
  - Homeroom: Mr. Strahl
  - Photo: [Portrait of William Deihl]
  - Acceptable Use Policy on File? No
- Items Out:**
  - Section: Textbooks
  - Table:

Due Date	Title	Price	Checked Out	Renew	Lost
6/12/2009	Glencoe Algebra 1 (Copy: SDE0000000025)	\$52.98	12/22/2008	Renew	Lost
  - Buttons: Renew All
- Fines:**
  - Buttons: Edit Fines, View History
  - Table:

Reason	Amount
TB Foundations of Physical Science (Copy: SDE0000000201)	\$44.95
TB Foundations of Physical Science (Copy: SDE0000000251)	\$44.95

## *Transfer, Return, and Receive Textbooks*

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### Module Overview

This module will teach you how to share your district resources.

### Module Objectives

- Objective 1: Explain how to transfer textbooks between sites
- Objective 2: Discuss how to return textbooks to the State Textbook Office
- Objective 3: Describe how to receive a transfer from the State
- Objective 4: Explain how to unbundle titles

### Objective 1: Explain how to transfer textbooks between sites

Destiny allows you to share your resources between sites throughout your district. You can do this by going to the **Catalog** tab | **Transfer Textbooks** option.

You will notice five subtabs:

- **Track** – to follow incoming, outgoing, and completed transfers.
- **Upload** – allows you to perform the transfer by specifying which copies will be transferred.
- **Returns** – allows you to track returns to the State Textbook Office.
- **Notices** – to have messages sent when transfers occur, enter in email information
- **Archive** – allows you to view all completed returns.

The screenshot displays the 'Track Textbooks' interface. At the top, there are navigation tabs: 'Catalog', 'Circulation', 'Reports', 'Back Office', and 'My Info'. Below these is a sub-tab 'Transfer Textbooks'. On the left, a vertical menu lists various actions: 'Textbook Search', 'Add Textbook', 'Resource Lists', 'Import Textbooks', 'Export Textbooks', 'Transfer Textbooks' (highlighted), 'Update Titles', and 'Update Copies'. The main content area has a 'Track' subtab selected, with other tabs 'Upload', 'Returns', 'Notices', and 'Archive'. A 'Receive' button is visible. The main message reads 'There are no transfers to report.' Below this is a 'Customize View' section with a help icon. It instructs users to 'Use the following options to create a customized transfer list.' The options include: 'View transfers created' (set to 'after the date' with a date input field), 'Limit to transfers from/to' (set to '-- Select a Location --'), and a 'Display' section with checkboxes for 'Incoming Transfers', 'Outgoing Transfers', 'Completed Incoming Transfers', 'Completed Outgoing Transfers', and 'Discrepancies'. An 'Update' button is at the bottom of the 'Display' section.

In the **Track** subtab, you can view:

- **Incoming Transfers** – transfers that are coming from another site to your site.
- **Completed Incoming Transfers** – transfers received completed at your site.
- **Discrepancies** – A transfer discrepancy occurs when the site opens the shipment and finds that the books listed in the transfer are not all in the box.
- **Outgoing Transfers** – A transfer that is going from your site to another site for receipt.
- **Completed Outgoing Transfers** – transfers from your site received complete by another site.

To review the specific details about a transfer, click on the **View** button. To remove the item from the **Track** tab, click on the **Remove** button.

The **Upload** subtab will allow you to perform the transfer.

To transfer textbooks to a site within your district:

1. Select the appropriate site from the **Select a Site** field's drop-down list.
2. Select **by Barcode** as your method of transfer from the **Transfer** field's drop-down list.
3. Scan the barcodes in the **Create a Barcode list** field or **Browse** to a barcode file.
4. Click on the **Transfer** button.

Or, you may choose to transfer by copy count.

1. Enter a search term for the textbook title you want to transfer and click **Go**. Destiny displays a list of titles that match your term along with the number of copies of each title you can transfer.  
 Note: Only titles that have copies without barcodes appear in these search results.
2. For each title, enter the number of copies you want to transfer and click **Select**. Destiny moves your selection to the Currently Selected section. To remove a selection, click **Remove**.
3. To complete the transfer, click **Transfer**.

This will then bring you to the **Job Manager** which will show if the transfer was successful.

Job Manager > Job Summary

**Job Transfer Textbooks**  
**Started** 1/14/2009 10:55 AM  
**Barcode** booklist.txt  
**File**  
**From** Ronald Reagan Elementary School  
**To** Abraham Lincoln Elementary School  
**Summary** Uploaded 3 Record(s):

- Copies in Transit - 3
- Warnings - 0
- Skipped - 0

---

**In Transit** Life Science, ISBN: 978-0-03-073173-0 (Copy: X 72568) New  
**In Transit** Life Science, ISBN: 978-0-03-073173-0 (Copy: X 72569) New  
**In Transit** Life Science, ISBN: 978-0-03-073173-0 (Copy: X 72570) New

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**Process completed** 1/14/2009 10:55 AM

The **Returns** subtab will allow you to see the status of returns to the State Textbook Office. You can see the following views:

- Unsent Returns
- Denied Returns
- Submitted Returns
- In Warehouse Returns
- Approved Returns
- Completed Returns

The screenshot shows the 'Returns' subtab interface. At the top, there are navigation tabs: Catalog, Circulation, Reports, Back Office, and My Info. Below these, the 'Returns' subtab is active, showing a 'Printable' button and subtabs for Track, Upload, Returns, Notices, and Archive. The main content area is titled 'Textbook Copy Returns [Customize View]' and shows a list of 'Completed Returns (1)'. The table below has columns for Date Created, Date Completed, RMA, Carrier, # of Titles, Total Copies, and Received. A single row is visible with the following data: Date Created: 9/1/2009, Date Completed: 9/1/2009, RMA: RA10S000155, Carrier: Other, # of Titles: 1, Total Copies: 34, Received: 34. Below the table are icons for View, Edit, and Delete. A 'Customize View' section allows users to filter returns by date and display various return statuses. The 'Display' section has checkboxes for Unsent Returns, Submitted Returns, Approved Returns, Denied Returns, In Warehouse Returns, and Completed Returns, all of which are checked. An 'Update' button is located at the bottom of the customize view section.

Date Created	Date Completed	RMA	Carrier	# of Titles	Total Copies	Received
9/1/2009	9/1/2009	RA10S000155	Other	1	34	34

The **Archive** subtab will allow you to see the status of completed returns, completed incoming transfers and completed outgoing transfers.

Catalog Circulation Reports Back Office My Info

Textbook Transfer Archive

Track Upload Returns Notices Archive

Textbook Search

Add Textbook

Resource Lists

Import Textbooks

Export Textbooks

**Transfer Textbooks**

Update Titles

Update Copies

Transfers>Returns Archive [Customize View]

Completed Incoming Transfers (10) ^

Date ▲	From	Order #	# of Titles	Copies	
11/9/2009 11:31 PM	State Textbook Office	RS09096861	1	2	<a href="#">Details</a>
10/9/2009 7:15 AM	State Textbook Office	RS09096706	1	4	<a href="#">Details</a>
9/23/2009 11:38 PM	State Textbook Office	RS09096399	1	3	<a href="#">Details</a>
9/15/2009 1:47 PM	Diamond Hill Elementary School - 0160019		1	1	<a href="#">Details</a>
9/9/2009 11:31 PM	State Textbook Office	RS09096156	1	6	<a href="#">Details</a>
8/27/2009 11:51 PM	State Textbook Office	RS09094855	1	3	<a href="#">Details</a>
8/24/2009 12:55 PM	Diamond Hill Elementary School - 0160019		1	7	<a href="#">Details</a>
8/5/2009 11:40 PM	State Textbook Office	RS09094855	2	4	<a href="#">Details</a>
7/28/2009 7:46 AM	State Textbook Office	RS09094024	3	418	<a href="#">Details</a>
7/21/2009 11:33 PM	State Textbook Office	RS09094855	6	14	<a href="#">Details</a>

Completed Returns (1) ^

Date ▲	Completed Date	From	RMA	# of Titles	Copies	
9/1/2009 3:48 PM		Wright Middle School - 0160016	RA10S000155	1	34	<a href="#">Details</a>

Customize View ?

Use the following options to create a customized transfer list.

View created: after the date [ ] [ ?]

Limit location: -- Select a Location -- [ ?]

Display:  Completed Returns  Completed Outgoing Transfers  
 Completed Incoming Transfers

[ Update ]

## Objective 2: Discuss how to return textbooks to the State Textbook Office

State textbook program regulations and policies require schools to return any state-owned materials not being used for instruction. Typical reasons for returning excess inventory include “course no longer offered” and “actual enrollment less than projected.”

To return textbooks to the State Textbook Office:

1. Navigate to the **Catalog** tab | **Transfer Textbooks** option | **Returns** subtab.

The screenshot shows the 'Returns' subtab selected in a navigation bar. Below the navigation bar, the page title is 'Textbook Copy Returns' with a link to 'Customize View'. A 'New Return' button is visible on the right side of the page.

2. Click **New Return**.

The screenshot shows the 'New Return' form. The form is titled 'New Return' and has a 'Printable' button. The form fields are as follows:

- \* Name: psellers
- \* Phone Number: 123-456-7890
- \* Fax: 123-456-0987
- Email: psellers@myschool.com
- \* Reason for Return: Overage
- \* # Boxes: 3

Buttons for 'Save & Send', 'Save', and 'Cancel' are visible on the right. A note at the bottom states: '\* = Required to send. This is the number of boxes that the shipper can expect to pick up. Do not put in the number of copies.'

3. Fill out your contact and shipping information at the top.

**Note:** The **# of Boxes** field should not be filled in until all items are scanned and boxes are packed.

4. Search for one of the titles you're returning.

— **Select Titles to Return** —

Search for Titles  Find  in  All

Searched All for "algebra"

Title	ISBN Edition	State / Textbook ID Publisher	Available Copies
<a href="#">Glencoe Pre-Algebra: An Integrated Transition to Algebra and Geometry</a>	978-0-07-822873-5	0220001 Glencoe, a division of The McGraw-Hill Companies, Inc.	0 <input checked="" type="checkbox"/> <input type="button" value="Select"/>

5. If a list appears, click the **Select** button next to the title you're returning.

Catalog Circulation Reports Back Office My Info

Returns > New Return > Identify Copies > New Return > **Identify Copies**

Textbook Search  
Add Textbook  
Resource Lists  
Import Textbooks  
Export Textbooks  
**Transfer Textbooks**  
Update Titles  
Update Copies

**Identify Copies**

**Glencoe Pre-Algebra: An Integrated Transition to Algebra and Geometry**  
ISBN: 978-0-07-822873-5  
State/Textbook ID: 0220001

	Available
Scan or enter barcodes <input type="text"/> <input type="button" value="Go!"/>	0
Copies without barcodes <input type="text"/>	0

6. Scan the barcodes or enter a quantity of new, unbarcoded copies.
7. After identifying the copies, make sure to click **OK**.
8. If you're not finished with the return request, click **Save** to keep your changes.

9. If you are finished identifying and packing all the copies, make sure the number of boxes is correct.
10. Until you Save & Send the return request to the State Textbook Office, you can:
  - a. Add more titles
  - b. Add or remove copies
  - c. Remove a textbook
11. When the request is complete, click **Save & Send**.

### Unsent Return

**\* Name**

**\* Phone Number**

**\* Fax**

**Email**

**\* Reason for Return**

**\* # Boxes**

\* = Required to send

This is the number of **boxes** that the shipper can expect to pick up. Do not put in the number of copies.

Save & Send

Save

Cancel

---

**Select Titles to Return**

Find  in All

---

**Currently Selected**

Title	ISBN Edition	State / Textbook ID Publisher	--Returning--			
			With Barcodes	Without Barcodes		
<a href="#">American Literature</a>	978-0-07-879468-1	963963 JAMESTOWN PUB	0	20		
<a href="#">Geometry</a>	978-0-07-873828-9	789789 GLENCOE	3	0		
<a href="#">Latin 1st Year</a>	978-0-8294-1026-6	321321 LOYOLA PRESS	10	0		
<b>Total</b>			<b>13</b>	<b>20</b>		

- Edit
 = Remove

Objective 3: Describe how to receive a transfer from another site  
 If a transfer request has been sent to your site, you can click on the **Processing needed** hyperlink in the upper right corner of the screen. This brings you to the **Track** subtab.

The screenshot shows the 'Track Textbooks' interface. At the top, there are navigation tabs: Catalog, Circulation, Reports, Back Office, and My Info. A 'Processing Needed' button is in the top right. The main content area is titled 'Track Textbooks [Customize View]' and shows 'Incoming Transfers (3)'. A table lists three transfers from 'LFES (destinyadmin)'. Each row includes the transfer date, order number, and status. The status for all three is '0 of X Received'. There are icons for 'View Notes', 'View', and 'Remove' at the bottom of the table.

From	Transfer Date	Order #	Status
LFES (destinyadmin)	5/5/2010 9:44 AM		0 of 1 Received Science
LFES (destinyadmin)	5/5/2010 9:48 AM		0 of 16 Received Science
LFES (destinyadmin)	5/5/2010 9:59 AM	30	0 of 30 Received Mathematics / 2 Volume Set 1

1. Click the **Receive** button to receive barcoded books without identifying the transfer.

The screenshot shows the 'View Transfer' interface. At the top, there are navigation tabs: Catalog, Circulation, Reports, Back Office, and My Info. A 'Processing Needed' button is in the top right. The main content area is titled 'Textbooks Transferred from Laddie Follett Elementary School (5/5/2010)'. There is a 'Print It!' button and an 'Add Note' link. A warning box states: 'Once you start receiving copies in this transfer, you are taking full responsibility for all of the copies. Please verify the content of the shipment before beginning.' Below this is a table titled 'Copies Sent Without Barcodes (30)'. The table has columns for Title, ISBN, Publisher, Copyright, and Copies to Receive. The first row shows 'Mathematics / 2 Volume Set 1' with ISBN 978-0-07-005781-4, published by McGraw-Hill in 1981, with 30 copies to receive. A 'Receive' button is circled in red in the 'Copies to Receive' column.

Title	ISBN	Publisher	Copyright	Copies to Receive
Mathematics / 2 Volume Set 1	978-0-07-005781-4	McGraw-Hill	1981	30

2. To receive just the books in a particular transfer, click the **View** icon.

<a href="#">From</a> ▲	<a href="#">Transfer Date</a>	<a href="#">Order #</a>	<a href="#">Status</a>
LFES (destinyadmin)	5/5/2010 9:44 AM		0 of 1 Received Science



Catalog Circulation Reports Back Office My Info Processing Needed

Transfer Textbooks > View Transfer

Textbook Search Add Textbook Resource Lists Import Textbooks Export Textbooks Order Textbooks Transfer Textbooks Update Titles Update Copies

Textbooks Transferred from Laddie Follett Elementary School (5/5/2010) [Print It!](#)

[Add Note](#)

⚠ Once you start receiving copies in this transfer, you are taking full responsibility for all of the copies. Please verify the content of the shipment before beginning.

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

Or receive selected copies below...

Copies Sent With Barcodes (1)

Title	ISBN	Publisher	Copyright	Copies	<a href="#">Receive All</a>
Science	978-0-673-62774-2	SCOTTFORESMAN	2000	1	<a href="#">Show More</a>

[Receive All](#)

**Important:** Do not delete a transfer until you've received all the copies and clicked **Completed**. Deleting a transfer before it is completed will mark any un-received copies as "Lost" at your school.

- To receive barcoded textbooks regardless of which transfer they are part of, either scan the barcodes in the **Create a barcode list** box or upload a file of barcode scans.

▶ List One-at-a-time

### Receive Textbook Copies by Barcode

---

**Create a barcode list**

-- Barcodes --

OR...

**Select a barcode file**

---

 **Receive**

- Click **Receive** to mark the copies in the transfer as received.
- Click the **View** button to see a summary of the titles and copies that were sent to you.

**Job** Receive Textbooks

**Started** 5/5/2010 10:13 AM

**From** Laddie Follett Elementary School

**To** R.D. Follett Middle School

**Summary** Processed 16 Record(s):

- Copies Received - 16
- Warnings - 0
- Skipped - 0

---

<b>Received</b> Science, ISBN: 978-0-673-62774-2 (Copy: X 1) New
<b>Received</b> Science, ISBN: 978-0-673-62774-2 (Copy: X 2) New
<b>Received</b> Science, ISBN: 978-0-673-62774-2 (Copy: X 3) New
<b>Received</b> Science, ISBN: 978-0-673-62774-2 (Copy: X 4) New
<b>Received</b> Science, ISBN: 978-0-673-62774-2 (Copy: X 5) New

To receive copies sent with barcodes:

- Barcoded items should be scanned to receive them. Destiny Textbook manager allows users to receive all without scanning, but it is not recommended.

To receive copies sent without barcodes:

- If the transfer contains consumables or other items that are not barcoded, just enter the quantity and click **Receive**.

The screenshot shows the 'Receive Copies' interface in the Destiny Textbook Manager. The breadcrumb trail is 'Transfer Textbooks > View Transfer > Receive Copies'. The left sidebar contains navigation options: Textbook Search, Add Textbook, Resource Lists, Import Textbooks, Export Textbooks, Order Textbooks, Transfer Textbooks (highlighted), Update Titles, and Update Copies. The main content area displays the following information:

- Title: **Mathematics / 2 Volume Set 1**
- ISBN: 978-0-07-005781-4
- Order #: 30
- Total Copies: 30
- Copies to Receive: 1
- Barcode(s): Receive without barcode(s)
- Buttons:

- If the transfer includes textbooks that are new, unbarcoded and you don't need them right away, just count and receive them.
  1. Enter a quantity.
  2. Select **Receive without barcodes**.
  3. Click **Receive**.
  4. Assign barcode numbers later, when you need to check them out.

Receive Items from Laddie Follett Elementary School (5/5/2010)

 **Mathematics / 2 Volume Set 1**  
ISBN: 978-0-07-005781-4  
Order #: 30

Total Copies 30

Copies to Receive

Barcode(s)  ▼

## *Textbook Pre-ordering and Ordering*

---

### Module Overview

This module covers the functions of ordering and distributing new and replacement materials from the State Textbook Office. Pre-orders are orders that are placed for new adoptions the following school year. The State Textbook Office defines the period when these orders can be placed. Schools are allowed **ONE** pre-order per period.

### Module Objectives

- Objective 1: Discuss how to submit pre-order information
- Objective 2: Discuss how to create an order
- Objective 3: Explain how to track and receive an order
- Objective 4: Explain how to unbundle titles

### Objective 1: Discuss how to submit pre-order information

Destiny displays a reminder message that the pre-order period is open upon log in as a school textbook coordinator. The message includes the date the pre-order is due and the number of days remaining in the pre-order period.

**State Textbook Pre-order period is open**

You must submit your Pre-order to the State Textbook Office by 4/30/2010.  
Days to submit your Pre-order: 22

To create a pre-order:

1. Click **Catalog | Order Textbooks.**

2. Click **Pre-order.**
3. Enter contact information.

To find a specific title, select **Search for Titles** from the **List Programs** drop-down box, enter a search term, then click **Go**.

4. Click **More** to see a list of titles in a program.

Select Titles to Order

List Programs

Program  
Elementary Mathematics - Pearson Education, Inc., publishing as AGS Globe (titles: 5) [Less](#)

Title	Grade	ISBN Edition	State/Textbook ID	Estimated Enrollment	Quantity Requested	<input type="button" value="Select"/>
<a href="#">Bundle - Mathematics {Black and White} {Ca} 1 Complete Set</a>	01-	978-1-01	84700-152-8	<input type="text"/>	<input type="text"/>	<input type="button" value="Select"/>
<a href="#">Mathematics {Black and White} {Ca} 2</a>	02-	978-1-02	84700-158-0	<input type="text"/>	<input type="text"/>	<input type="button" value="Select"/>

5. Enter quantities for enrollment and the number of copies requested.
6. Click **Select**.
7. Click **Save** to make changes and submit later, or Click **Save & Send** to submit the order.

The following message appears:

I certify that this order is in compliance with the Ordering Guidelines for the state.

## Objective 2: Discuss how to create an order

Districts and schools are required to place all orders for new and replacement materials in Destiny Textbook Manager. The titles available to order are selected by the district and the State Textbook Office.

To create an order:

1. **Catalog** tab | **Order Textbooks** option.
2. Click **New Order**.

Catalog Circulation Reports Back Office

Orders

Textbook Search  
Add Textbook  
Import Textbooks  
Export Textbooks  
**Order Textbooks**  
Transfer Textbooks  
Update Titles  
Update Copies

Track Archive

**Order Textbooks** [Customize View]

State Textbook Pre-order period is open. You must submit your Pre-order by 4/30/2010.

New Order  
Pre-order

— On Order (2) ^

Date Created	Date Approved	Order #	Titles	ORDERED Total Copies	Amount	
3/4/2010 1:35 PM	3/11/2010 2:07 PM	RS10000002	1	10	\$600.00	
3/2/2010 9:51 AM	3/5/2010 7:20 AM	RS10000000	3	85	\$1,218.65	

3. Enter contact information.
4. Enter the State ID (if unknown, follow **To Search for Titles** below).
5. Enter the quantity.
6. Click **Add**.

New Order

\* Name: Mark Mariani      Email: m.mariani@district.edu      Save & Send

\* Phone Number: 123-456-7890      Ship After: 4/28/2010      Save

\* Fax: 123-456-7891      Note: [text area]      Cancel

\* = Required

Select Titles to Order

Create List [dropdown]      State ID: 0320220      Quantity: 30      Add

Destiny displays the contents of the order under **Order Details**.

— Select Titles to Order —

State ID      Quantity

Create List   Add

Searched State ID for "0320220"

Title Price / Adoption Year	ISBN Edition	State / Textbook ID Publisher	Current Enrollment	Quantity Requested	Currently Selected
<a href="#">Algebra 1: Concepts and Skills</a> \$39.27 Adoption Year: 2003	0-618-10646-4	0320220 Houghton Mifflin Company	0	30	Currently Selected

— Order Details —

Title Price / Adoption Year	ISBN Edition	State / Textbook ID Publisher	Current Enrollment	Quantity Requested
<a href="#">Algebra 1: Concepts and Skills</a> \$39.27 Adoption Year: 2003	0-618-10646-4	0320220 Houghton Mifflin Company	0	<input type="text" value="30"/>

7. Enter a new quantity under **Quantity Requested** to change the number of copies requested at any time.
8. Click **Save**.

To search for Titles:

1. Select **Search for Titles** from the drop-down box.

— Select Titles to Order —

State ID      Quantity

Create List   Add

Create List  
Search for Titles

2. Enter a search term in the **Find** field.

— Select Titles to Order —

Search for Titles  Find  in  Go!

3. Enter the number of copies requested.

— **Select Titles to Order**

Search for Titles  Find  in  All

Searched All for "biology"

Title Price / Adoption Year	ISBN Edition	State / Textbook ID Publisher	Current Enrollment	Quantity Requested	
<a href="#">Animal Science: Biology and Technology</a> \$62.97 Adoption Year: 2007	0-13-117079-1	0780038 Pearson Prentice Hall	0	30	<input type="button" value="Select"/>
<a href="#">Biology</a> \$117.75 Adoption Year: 2008	0-495-10705-0	0830120 Brooks Cole	0		<input type="button" value="Select"/>

4. Click **Select**.

5. After selecting all titles, enter all quantities, click **Save**.

**Note:** An order can be adjusted as often as necessary while it is an unsubmitted order. Once an order has been submitted, it can no longer be adjusted by you.

6. To submit an order, click **Save & Send**.

7. Click the appropriate answer on the confirmation message.

I certify that this order is in compliance with the Ordering Guidelines for the state.

### Objective 3: Explain how to track and receive an order

Destiny displays the order in the **Submitted** section of the **Track** subtab until the State Textbook Office ships it. Once the order is shipped, Destiny moves the order to **Shipped**.

▶ Track Archive

**Order Textbooks** | [Customize View](#)

+ New Order  
✓ Receive

– **Shipped (1)** ^

Date Ordered	Order #	Total		Amount	Shipped	Canceled	Received	
		Titles	Copies					
3/29/2010 2:01 PM	RS10000007	2	60	\$3,067.20	60	0	0	

= View     = Shipped

---

**Customize View**  
 Use the following options to create a customized list.  
 Note: Select the Archive tab to view completed orders.

**View Orders created** after the date

**Display:**

<input checked="" type="checkbox"/> Unsent	<input checked="" type="checkbox"/> Submitted	<input checked="" type="checkbox"/> Denied
<input checked="" type="checkbox"/> On Order	<input checked="" type="checkbox"/> Shipped	

+ Update

To track an order

1. Click (the **View** icon) to see order details.

**Order Details**

Order #: RS10000007

[Add Note](#)

---

Name Andrew Johnson      Email a.johnson@district.edu      [Close](#)

Phone Number 123-456-7890      Ship After 8/23/2010      [Shipments](#)

Fax 123-456-7899

---

**Titles**

Title Price / Adoption Year	State / Textbook ID Publisher	Requested	Ordered	Shipped	Canceled	Received
<a href="#">Algebra 1: Concepts and Skills</a> \$39.27 Adoption Year: 2003	0320220 Houghton Mifflin Company	30	30	30	0	0
<a href="#">Animal Science: Biology and Technology</a> \$62.97 Adoption Year: 2007	0780038 Pearson Prentice Hall	30	30	30	0	0

2. Click OR [Shipments](#) to view individual shipments.

**Note:** Each order may have multiple shipments.

**Shipments**

Order #: RS10000007 [Close](#)

[Add Note](#)

---

**Shipments**

Date Shipped	Carrier	Tracking Number	Weight	Value
3/29/2010	United Parcel Service (UPS)	1Z9874533553d5453984545032467	110 lbs	\$3,067.20

**Order Total** \$3,067.20

[Show More](#)

3. Click **Show More** to see details for a particular shipment.

Title/Price	-- Shipped/Received --				Value
	Ordered	Canceled	Barcoded	Unbarcoded	
 <a href="#">Algebra 1: Concepts and Skills</a> (State ID: 0320220) \$39.27	30	0	30/0	0/0	\$1,178.10
 <a href="#">Animal Science: Biology and Technology</a> (State ID: 0780038) \$62.97	30	0	0/0	30/0	\$1,889.10
<b>Missing copies from this shipment?</b> Click Incomplete to close this shipment and record the discrepancy.					
<b>Order Total</b>					\$3,067.20

Destiny displays the value for each title, the total value for the shipment, and the total number of copies in each of the following categories:

- **Ordered,**
- **Canceled,**
- **Barcoded copies Shipped,**
- **Unbarcoded copies Shipped and Received.**

4. Click **Receive** to receive the copies.
5. Click **Incomplete** if some or all of the copies are missing.

 **This shipment has unreceived copies.**

All unreceived copies will be marked lost in your inventory and your school will be charged unless you immediately notify the State Textbook Office of the shortage.

**Are you sure you want to mark this shipment as incomplete?**

**Important:** All shipped orders must be received in the system **within 30 days** and any errors reported to RL Bryan.

#### Objective 4: Explain how to unbundle titles

A bundle is a group of textbooks packaged together. In Destiny, a bundle is a main textbook title with other (component) titles assigned to it. A bundle also specifies the quantity of copies attached to each component title.

Bundles are received at a school just like any other titles. Unbundle the component titles from the main title and add copies to each component title before circulating copies in a bundle.

To unbundle a title:

1. Navigate to the Title Details page.
2. Click **Unbundle**.

The screenshot shows a library catalog entry for 'Mathematics / 2 Volume Set 1'. The main title is circled in red. A red box on the left points to the 'Assigned Titles' section, stating that the main title has three component titles listed there. Another red box points to the 'Quantity' column in the 'Assigned Titles' table, stating that Destiny displays the quantity of copies for each component title. A third red box circles the 'Unbundle' button in the top right corner.

**Mathematics / 2 Volume Set 1**

1 of 1 copy is available locally.  
There are no off-site copies of this title. [See all...](#)

**Unbundle**

**Assigned Titles**

Title	State ID	Quantity
Mathematics / 2 Volume Set 1 <a href="#">Details</a>		15
Mathematics / 2 Volume Set 1 Teachers Edition <a href="#">Details</a>		2
Teacher Lesson Guide for Everyday Math Vol 1 2 <a href="#">Details</a>		2

The main title (Mathematics / 2 Volume Set 1) has three component titles listed under Assigned Titles.

Destiny displays the quantity of copies for each component title assigned to the bundle.

1. Enter the number of copies of the bundle.
2. Click **Unbundle**.

### Unbundle Copies

**Mathematics / 2 Volume Set 1 - Bundle**

Assigned Titles	Quantity
Mathematics / 2 Volume Set 1	15
Mathematics / 2 Volume Set 1 Teachers Edition	2
Teacher Lesson Guide for Everyday Math Vol 1 2	2

---

Copies 2

Copies to Unbundle

 Unbundle
  Cancel

For each bundle copy, Destiny adds the specified number of component copies.

Destiny displays a confirmation message specifying the total number of copies to be created:

 **Copies without barcodes will be created for each title listed below.**

Title	Quantity
Mathematics / 2 Volume Set 1	15
Mathematics / 2 Volume Set 1 Teachers Edition	2
Teacher Lesson Guide for Everyday Math Vol 1 2	2

**This process is not reversible. You will not be able to return the items as a bundle at a later date.**

**Do you want to continue?**

**Important:** You can no longer return them to the State Textbook Office once you unbundle copies.

## *Fines*

---

### Module Overview

This module reviews the basics on assessing fines, creating fine types, and managing your fines.

### Module Objectives

- Objective 1: Explain how to create a fine type
- Objective 2: Identify how to assess a fine for lost items
- Objective 3: Discuss how to pay, waive and delete fines
- Objective 4: Discuss how to create a Current Checkouts/Fines Report
- Objective 5: Discuss the Fine History report

### Objective 1: Explain how to create a fine type

All fines are associated with patrons and only some of them are associated with textbook copies. An example of a copy fine is a fine due to a damaged book, missing barcode, or torn pages. To assess this fine, a copy barcode or name is required.

A patron fine can include things that are distributed to patrons like supplies. A copy is not required to assess this type of fine.

To create a fine type:

1. Navigate to the **Circulation** tab | **Fines** option.
2. Locate a patron.
3. Click **Add Fine**, and then click the **Other** button.

4. Enter the name of your fine in the **Fine Type** field.
5. Then, select the type of fine (copy specific or patron specific) in the drop-down list.

To create a **Fine Type**, enter the fine name in this field.

Select the type of fine.

Fine Type	Calculation Method	Amount	Actions
Broken Binding	Copy Specific	Fixed at \$0.00	[Edit] [Delete]
Excessive Writing	Copy Specific	Fixed at \$0.00	[Edit] [Delete]
Missing Barcode	Copy Specific	Fixed at \$0.00	[Edit] [Delete]
Torn Pages	Copy Specific	Fixed at \$0.00	[Edit] [Delete]
Water Damage	Copy Specific	Fixed at \$0.00	[Edit] [Delete]

The Copy Specific fine will allow you to assess a fixed dollar amount by typing in the Fixed at field. Or, you can select a percentage of the cost in the copy record by selecting the **% of Cost** radio button and typing that percentage in the field provided.

6. Click **Save**.

Objective 2: Identify how to assess a fine for a lost item

When an item is marked **Lost** on the **Check Out**, **Copy Status**, or **Patron Status** page, Textbook Manager automatically prompts you to assess a fine for the lost item. The amount is calculated from the replacement price based on state policies for depreciation. The amount can be adjusted.

There are several places where you can mark an item lost. We will look at **Patron Status (Circulation tab | Patron Status option)** as an example.

The screenshot shows the 'Patron Status' page for a student named Ancrum, Lee S. The page is part of the 'Circulation' tab in the Textbook Manager interface. It displays the student's information, including their student ID (21230000123602), and provides options to view classes and edit the patron. A summary of the student's borrowing status is shown: 4 checked out textbooks, 0 overdue textbooks, and \$0.00 in fines for both textbooks and the patron. A table lists the items currently checked out, including titles like 'Elements of Literature, Grade 6, Introductory Course' and 'Glencoe Science, Grade 6: Level Red, South Carolina Edition'. Each item entry includes the due date (6/1/2010), the price checked out, and the date it was checked out (8/19/2009). There are 'Renew' and 'Lost' buttons for each item, and a 'Renew All' button at the bottom right of the table.

Due Date	Title	Price	Checked Out	Buttons
6/1/2010	Elements of Literature, Grade 6, Introductory Course (Copy: SDE00003944868)	\$62.95	8/19/2009	Renew, Lost
6/1/2010	Glencoe Science, Grade 6: Level Red, South Carolina Edition (Copy: SDE00003945444)	\$68.97	8/19/2009	Renew, Lost
6/1/2010	Holt Social Studies: World History (Copy: SDE00003945784)	\$58.95	8/19/2009	Renew, Lost
6/1/2010	Math Connects: Concepts, Skills, and Problem Solving, Course 1, South Carolina Edition (Copy: SDE00003946180)	\$44.10	8/19/2009	Renew, Lost

Once you have marked the item as lost, Destiny will display this message:

 **The copy will be marked as lost.**  
**Ancrum, Lee S (Barcode: 21230000123602) will be charged a fine of**  
. According to the state fine schedule, a percentage of 25% was applied to  
the original price of \$76.00. If you do not want to assess a fine, set the fine amount to  
zero.

The default dollar amount is the lost book charge. You can override the price and specify an amount up to the full contract price. Then, click the **OK** button to complete the transaction.

**Objective 3: Discuss how to pay, waive, and delete fines**

When paying a fine, you can select the patron by going to the **Circulation** tab | **Fines** option and typing in the patron information. The patron's fines will appear.

The screenshot shows the 'Fines' section of a library system. At the top, there are navigation tabs: Catalog, Circulation (selected), Reports, Back Office, and My Info. Below the tabs, there's a 'Find Patron' search bar with a 'Go!' button and a dropdown menu for 'Patron Names'. The main content area displays the patron's name 'Ancrum, Lee S' with a student ID '21230000123602'. It lists 'Checked Out Textbooks: 0' and 'Overdue Textbooks: 0'. Under 'Fines', it shows 'Library: \$0.00 / Textbooks: \$30.00' and 'Patron: \$0.00'. A table of fines is shown below, with one entry: 'Art History 1' (Copy: X 202738) for \$30.00. To the right of the table, there's a section for 'Amount Payable' showing '\$30.00 Local', '\$0.00 Off-site', and '\$30.00 Total Amount'. At the bottom, there's a 'Pay' field, a 'Print Receipt' checkbox, and an 'Update' button.

To pay the fine, enter the fine amount in the **Pay** field and click on the **Update** button. If the permission is turned on for you to be able to waive fines, you will see a **Waive** field underneath the **Pay** field. To waive the fine, you will click on the **Waive** field and the **Save** button.

**Note:** If you choose to waive a fine for lost or damaged textbooks, state regulations require an explanation.

### Objective 4: Discuss how to create a Current Checkouts/Fines Report.

Destiny allows you to report on fines and overdue items. This report is located in the **Reports** tab | **Textbook** option | **Current Checkouts/Fines** hyperlink.

The screenshot shows the Destiny Reports interface. At the top, there are navigation tabs: Catalog, Circulation, Reports (selected), Back Office, and My Info. Below the tabs, the breadcrumb path is 'Textbook Reports > Current Checkouts/Fines'. On the left side, there is a sidebar with 'My Favorites' and a 'Textbook' section containing 'Patron', 'Report Builder', and 'Report Manager'. The main content area is titled '1. Format' and contains the following options:

- Show**
  - Checked Out/Overdue Materials**
    - All that are currently overdue
    - That are overdue by  to  days
    - That are due from  to
    - All that are checked out
  - Unpaid Textbook Fines**
  - Unpaid Patron Fines**
- Format**
  - Report -- Output:
  - Notices -- Language:

A 'Continue' button is located at the bottom right of the main content area.

This report helps you keep track of all the unresolved transactions in your school. The reported information can be as broad or as narrow as you want it to be. It can include checkouts, overdues, and fines.

You can format the information as any of the following:

- A report to distribute to teachers and library staff.
- Notices to remind patrons of checkouts, overdue materials, or outstanding fines.
- Lists to email to homeroom teachers.

Click the **Continue** button to move to the next page.

The **Limit** page will allow you to limit the report to a patron type or patron status. Click on **Continue** to move to the next page.

The **Details** page allows you to further configure your report to include patron information or pricing. It also allows you to:

- **Save Setup** – saves all of the information created in the **Format**, **Limit** and **Details** screen so the report can be run again
- **Run Report** – allows you to run the report one time. This will not save the report to be used at a later date

If you click on the **Save Setup** button, you give the report a name, schedule it to run at a particular time, and immediately run the report or just save the set up.

The screenshot shows the 'Reports' section of the Follett system. The breadcrumb trail is 'Textbook Reports > Current Checkouts/Fines > Save This Setup'. The left sidebar has a tree view with 'Textbook' selected, and sub-items 'Patron', 'Report Builder', and 'Report Manager'. The main content area is titled 'Overdue Materials & Unpaid Fines Report'. It features a 'Save As' text input field, a 'Schedule Report' dropdown menu with options 'Do Not Schedule', 'Daily', and 'Weekly', and a 'Save & Run' button. A red box on the left contains the text 'Name the report' with a red arrow pointing to the 'Save As' field. Another red box contains the text 'Select an option' with a red arrow pointing to the 'Schedule Report' dropdown menu.

Specific sections of Regulation R43-71 require districts to remit any fines collected for lost or damaged state-owned textbooks at the end of the year to the State Office.

### Objective 5: Discuss the Fine History report

The **Fine History Report** tracks fine payment and refund transactions making it easier for you to determine the amount due to the state.

This report is located in the **Reports** tab | **Patron** option | **Fine History** hyperlink.

Once you have selected your criteria, click on the **Run Report** button. An example of the report is shown below.

Reports > Fine History > Job Manager > Job Summary

### Fine History - Cash Flow Report

Transactions sorted by Date - Limited to Textbooks Abraham Lincoln Elementary School

Date	Patron	Title	Reason	Total
9/17/2007	Acheson, Debra M (P 3000)	MATH 65 / 2ND ED (X 509)	<a href="#">Lost</a>	\$10.00
10/3/2007	Johnson, Rebecca (P 9879881)	Math {Vol 1} 3 (X 9992544)	<a href="#">Excessive Writing</a>	\$0.95
10/3/2007	Johnson, Rebecca (P 9879881)	Math {Vol 1} 3 (X 9992544)	<a href="#">Excessive Writing</a>	\$3.00
<b>Net Difference</b>				<b>\$13.95</b>

## Patron Records and Reports

### Module Overview

This module provides information on reviewing patron records and generating patron reports.

### Module Objectives

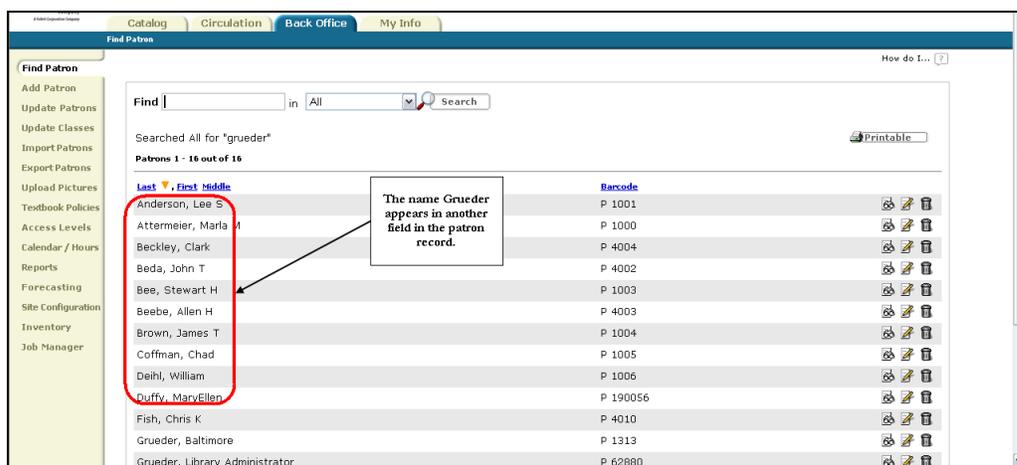
- Objective 1: Explain how to locate patron record information
- Objective 2: Discuss how to create a **Patron Name List Report**
- Objective 3: Explain how to print patron barcodes by group

### Objective 1: Explain how to locate patron record information

To locate a patron record, choose the **Back Office** tab | **Manage Patrons** option.

The screenshot shows the 'Manage Patrons' interface. At the top, there are tabs for 'Catalog', 'Circulation', 'Reports', 'Back Office', and 'My Info'. The 'Back Office' tab is selected, and the 'Manage Patrons' sub-tab is active. On the left, there is a vertical menu with options: 'Update Patrons', 'Update Classes', 'Import Patrons', 'Export Patrons', 'Upload Patron Pictures', 'Textbook Policies', 'Access Levels', 'Calendar / Hours', 'Forecasting', 'Site Configuration', 'Inventory', 'Ledger', and 'Job Manager'. The main area contains a search form with a 'Find' input field, an 'in' dropdown menu, and a 'Search' button. The dropdown menu is open, showing options: 'All', 'Patron Names', 'First Name', 'Middle Name', 'Last Name', 'Barcode', 'Nickname', 'Grade Level', 'Homeroom', 'User Name', 'User Defined 1', 'User Defined 2', 'User Defined 3', 'User Defined 4', 'User Defined 5', and 'State ID'. Three red callout boxes on the left point to the search form: 'Search all fields in the Patron Record' points to the 'Find' field and the 'All' option; 'Standard fields in the Patron Record' points to the 'Patron Names', 'First Name', 'Middle Name', and 'Last Name' options; 'User Defined Fields' points to the 'User Defined 1' through 'User Defined 5' options. There is also a 'Nonexistent? New Patron' button on the right.

The **All** option will allow you to look in all fields listed in the **In** field's drop-down list. For example, if you type **Grueder** in the **Find** field and click on the **Search** button, you will notice that the last name of Grueder does not appear. That is because **Grueder** can be found in other parts of the patron record.



**Wildcards** (\*, ?) can also be used for the patron search fields.

### Objective 2: Discuss how to create a Patron Name List report

The Patron Name List report allows you to create a list of patrons added to your database. This report is located in the **Reports** tab | **Patron** option | **Patron Names** hyperlink.

This report can be limited by patron name, type, status, graduation year, or card expiration date. After selecting your criteria, click on the **Run Report** button to generate the report. Click on the **View** hyperlink to view the report in **Job Manager**.

**Objective 3:** Explain how to print patron barcodes by group  
 Destiny allows you to print multiple patron barcodes at one time. This feature is located in the **Reports** tab | **Patron** option | **Print Patron Barcodes** hyperlink.

The screenshot shows the 'Print Patron Barcodes' configuration page. The breadcrumb trail is 'Patron Reports > Print Patron Barcodes'. The page has a sidebar with 'My Favorites', 'Textbook', 'Patron', 'Report Builder', and 'Report Manager'. The main content area is titled 'Print used patron barcodes...' and includes the following options:

- Select by:** Patron Name (dropdown), From [ ] to [ ]
- Sorted by:**  Patron Name,  Grade Level (dropdown) and then by [ ] (dropdown)
- Limited to patrons:** Of these types: All Patron Types (+ Update), with these statuses:  Active,  Restricted,  Inactive
- Include the following:**  Barcode number
- Formatted for:**  Barcode labels
- Use label stock:** Avery white address labels (style 5160) (dropdown)
- Start on label: 1
- Printer offset - Horizontal: 0, Vertical: 0
- Use at the circulation desk
- Start a new page for each group
- Include Circulation command barcodes

At the bottom, there is a note: 'In addition to adjusting your printer offsets, you must also configure Adobe Reader so that your labels are properly aligned.' with a link to 'Troubleshooting'. A 'Run Report' button is at the bottom right.

1. In the **Select by** field, choose a method for identifying the patrons to include; **Patron Name**, **Grade Level**, **Graduation Year**, **Homeroom**, one of the **User-Defined fields**, **Date Patron Added**, or **Barcode List**.
2. If you chose one of the first nine, select the range:
  - You can leave both boxes blank to include all of the patrons.
  - If you leave the **From** box blank and enter a name or number in the **to** box, Destiny includes all those up to and including the name in the **to** box.
  - If you enter a name or number in the **From** box and leave the **to** box blank, Destiny includes that name or number and all those after it.

- If you enter the same name or number in both boxes, Destiny includes only that one name or number.

If you chose **Date Patron Added**, select a phrase from the list and then enter or select a date. Click the **Calendar** icon.

To use a list of barcode numbers, select **Barcode List**. You can either browse to an existing file, or create a list.

- To select an existing file, click **Browse** to locate your file.
- To create a list, place the cursor in the **Create a barcode list** box and scan the barcodes or type them in and click **Add**. To remove a barcode number from the list, highlight it and click **Remove**.

3. **Sort by:** Choose one of the following options:
  - **Patron Name** (you can sub-sort the barcodes by another of the fields. Within each group, the barcodes print in patron name order),
  - **Grade Level**
  - **Homerom**
  - or one of the **User-Defined fields**.  
If you chose a field other than **Patron Name**,
4. **Limited to:** Select the patron types and statuses to include.
5. **Include the following:** Clear the **Barcode number** check box if you do not want the eye-readable number on the label.
6. **Formatted for:** Choose whether you want individual labels or a list.
  - For labels, select **Barcode labels**, and then your label stock and the starting label.
  - For a list, select **Use at the circulation desk** and, optionally, select either or both check boxes.
7. Click **Run Report**.
8. When the **Report Manager** opens, click **View** to open the label report.

If you circulate by homeroom, you can create the report by **Homeroom**, sort by patron name, and select the **Use at the circulation desk** radio button. This option sorts the homerooms in numerical or alphabetical order. You can also include the Circulation command barcodes.

<p>Elba, Larson S  P 16009</p>	<p>Evens, Candace S  21230000123677</p>		
<p>Fergestrom, Doreen K  21230000123792</p>	<p>Fisher, Mark L  21230000123883</p>		
 Check Out Text to Patron	 Check Out Text to Teacher	 Check In Text	 Reset

Then during circulation, you can scan the **Check Out Text to Patron** barcode, followed by the patron's barcode from this list.

## *Inventory*

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### Module Overview

This module provides information on generating and completing a textbook inventory.

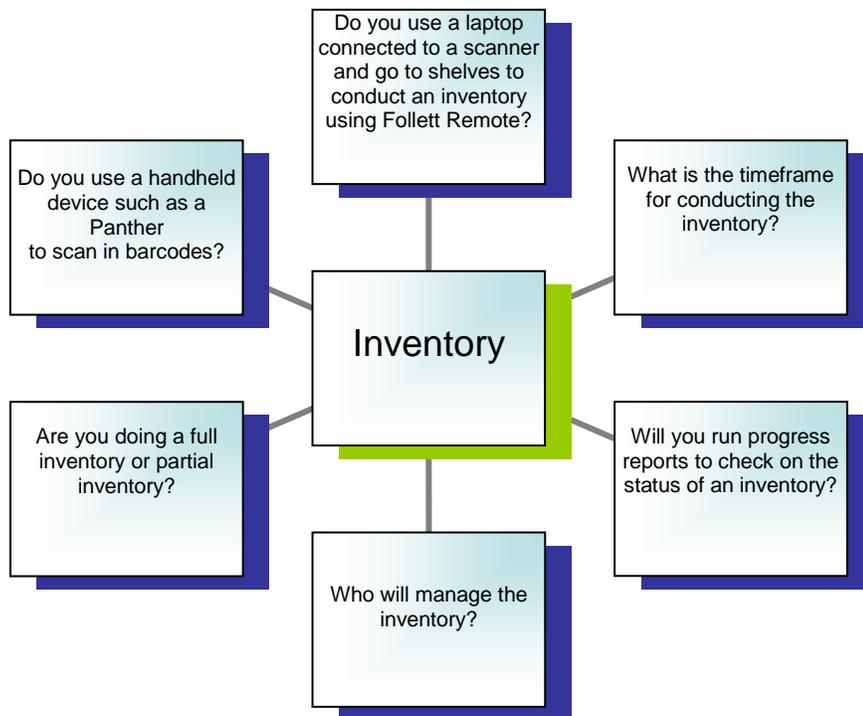
### Module Objectives

- Objective 1: Discuss how to prepare for an inventory
- Objective 2: Discuss how to perform a State-initiated inventory
- Objective 3: Discuss how to view the Textbook Ledger
- Objective 4: Explain how to perform a textbook inventory
- Objective 5: Discuss how to view the status of an inventory

### Objective 1: Discuss how to prepare for an inventory

An inventory verifies that the system accurately reflects the true statuses of the textbooks. Textbooks are accounted for by scanning all barcoded copies. Textbooks and other instructional materials that are not barcoded are required to be physically counted. Upon completion of an inventory, any item not accounted for is marked lost.

There are many things to consider before starting an inventory. The chart below outlines some of the decisions that need to be considered when preparing for an inventory.



**Objective 2: Discuss how to complete a State Textbook Inventory**

Once the State has initiated an inventory, you will see the message below after logging in:

<p>Catalog   Circulation   Reports   Back Office   My Info</p>	
<p>Textbook Search Add Textbook Resource Lists Import Textbooks Export Textbooks Transfer Textbooks Update Titles Update Copies</p>	<p><b>State Textbook Inventory in Progress</b></p> <p>You must complete the textbook inventory "State Annual Inventory 2009-10" by 8/31/2010. You have 223 day(s) to finish this inventory. Piedmont High School will be charged for any copies that are not accounted for.</p>

If you have pending incoming transfers, you need to receive all incoming copies before starting to scan for inventory.

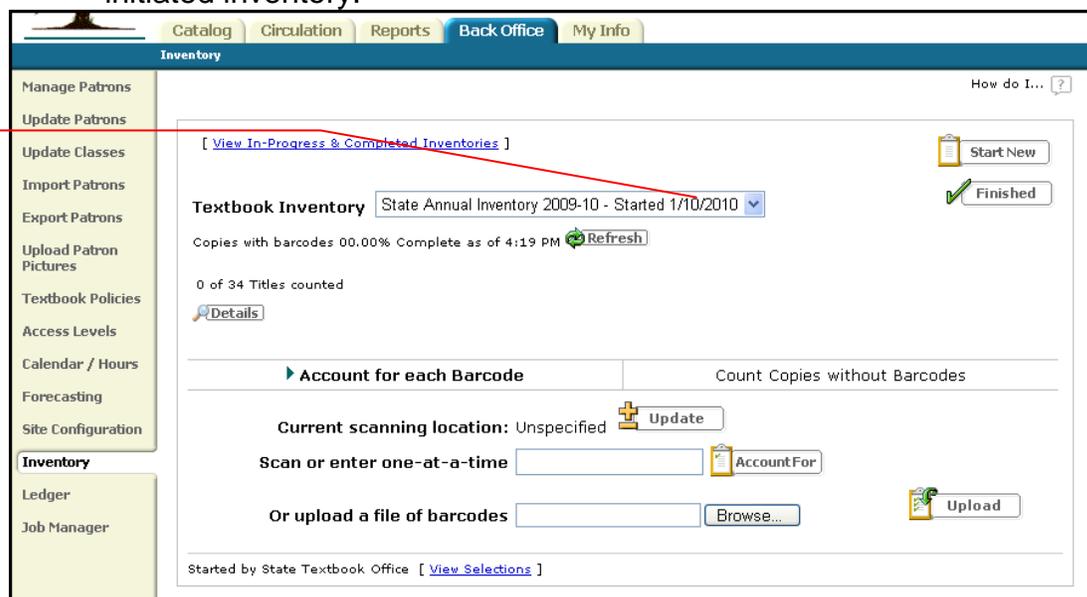
### State Textbook Inventory in Progress

You will not be able to scan or enter barcodes into inventory "2009 State Inventory" until 1 incoming transfer has been received.

To begin the state-initiated inventory:

1. Navigate to the **Back Office** tab | **Inventory** option to see the State-initiated inventory.

Choose the state inventory from the list of open inventories.



2. Scan or enter the barcodes directly into the box adjacent to **Scan or enter on-at-a-time** in the **Account for each Barcode** section.  
**OR**  
 Create a text file of barcode scans and upload them using the **Upload** button.

- To inventory copies without barcodes:  
 1. Click **Count Copies without Barcodes**.

2. Enter the number of copies on hand for each title. You can enter counts for multiple titles at one time. Make sure to enter a count for each title listed. If you are not sure what the title is, go to **Catalog** tab | **Textbook Search** option and search using the State/Textbook ID. All student editions are required to be barcoded unless they are brand new and unused.
3. Click **Save**.

When you finalize, Destiny adjusts the copy count for each title to the quantity you entered. If you enter a copy count smaller than the one listed in Destiny, the remaining copies are marked "Lost". Consumables are never marked "Lost".

To track the progress of the inventory, click the **View In-Progress & Completed Inventories** hyperlink. In **Progress Details** you can see an overview of this inventory, broken down by barcoded and unbarcoded copies. The **Accounted for - See Details** hyperlink displays items that were marked as lost prior to this inventory.

Similar to the **Accounted for details** hyperlink, the **Unaccounted for - See Details** hyperlink displays copies that have not been entered into the inventory. It is important to verify the copies in this report to ensure that all copies have been accounted for during inventory.

**State Inventory - Started 3/16/2009** Close

[barcodes](#) Run Report

Accounted for 9 (9 of which are lost [ [See Details](#) ])

Unaccounted for 43 [ [See Details](#) ]

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

**Count copies without barcodes**

Total Titles 2  
Titles counted 0  
Titles without counts 2

You can use the Unaccounted for list to help you locate remaining items. If you cannot locate a copy, click **Mark Lost**.

Copies 1 - 86 out of 86    Sort by Location    Go!    1 2 3 4 Show All

<b>Civics</b> Barcode: SDE00000000410	Last Seen: 3/13/2009 <a href="#">[ Mark "Lost" ]</a>
<b>Civics</b> Barcode: SDE00000000411	Last Seen: 3/13/2009 <a href="#">[ Mark "Lost" ]</a>

Once you're sure you've entered barcode numbers and counts for all the copies you can locate, your inventory is complete.

To close the inventory, click **Finished**.

If there are any unaccounted for copies, Destiny displays the quantity that will be marked “lost” (or adjusted, if they are Consumables) along with the amount your school will be charged for the copies.

If you don't finish the inventory by the deadline, the State Textbook Office forces it to finish. In this case, Destiny marks all unaccounted for copies lost and your school is charged for each lost copy.

**Objective 3: Discuss how to view the Textbook Ledger**

After completing your inventory, the State will finalize it. If there are charges or credits from the inventory, you can view them in the ledger.

1. Navigate to the **Back Office** tab | **Ledger** option. Each line is a separate charge or credit. Credits are displayed in parentheses.

Ledger for Piedmont High School

Description	Date	Amount	School year	Notes
2009-2010 Annual Inventory	1/7/2010	\$0.00	2010	Lost book charges for 2010
2009-10 Annual Physical Count	1/7/2010	\$0.00	2010	Lost book charges for 2010
2009-10 State Annual Inventory	1/7/2010	\$0.00	2010	Lost book charges for 2010
<b>Total</b>		<b>\$0.00</b>		

2. To view a printable invoice, click **Invoice**. You can see the total due on the last line of both the ledger and the invoice.

**INVOICE**

South Carolina Department of Education  
State Textbook Office  
301 Greystone Boulevard, Suite 150  
Columbia, SC 29210

1/22/2010 4:36 PM

**Textbook Manager**  
Piedmont High School

Charge/Credit	Year	Amount
Lost book charges for 2010	2010	\$0.00
Lost book charges for 2010	2010	\$0.00
Lost book charges for 2010	2010	\$0.00
<b>Total Due:</b>		<b>\$0.00</b>

**Note:** Please make sure the school name and BEDS code appear on the check or check apron.

**Objective 4: Explain how to perform a textbook inventory**

Inventory is located in the **Back Office** tab | **Inventory** option. To begin a new inventory, click on the **Start New** button.

The screenshot shows a web interface for starting a new inventory. The breadcrumb trail is 'Inventory > Start Inventory'. The left sidebar lists various management options, with 'Inventory' selected. The main content area is titled 'Specify the copies to be inventoried...'. It contains several sections:
 

- Inventory Name:** A text input field.
- Limit Inventory to:** A dropdown menu currently set to 'All Copies'.
- Locations:** A dropdown menu set to 'All Locations' with an 'Update' button.
- Additional Options:** 'Adoption End from' with a date input field.
- Include:** Three checkboxes: 'Copies with barcodes' (checked), 'Copies without barcodes', and 'Consumables'.
- Handling checked out copies -- I want to...:** Two checkboxes: 'Include copies that are checked out. Make these copies unaccounted for.' (unchecked) and 'Check in currently checked out copies when scanned into inventory.' (checked).
- Scanning Date:** A text field with '1/10/2010' and a help icon, with the text 'Copies with barcodes that have been seen on or after [date] don't need to be scanned. Make them "accounted for".'
- Verify Copy Location:** A dropdown menu set to 'Do nothing' with the text 'During this inventory, you can specify your current scanning location. If the location assigned to the copy does not match your current location...'
- Buttons:** 'OK' and 'Cancel' buttons at the bottom.

There are two statuses your textbooks can have during an inventory:

**Accounted for** - The textbook has been counted in your inventory. Specific statuses that are accounted for during an inventory include Checked out, In Transit, Lost, Needs Barcode, or On Order.

**Unaccounted for** – At the beginning of an inventory, the copy has a status of Available. At the end of the inventory it has not been scanned or entered and is therefore, unaccounted for.

The Inventory screen allows you to set specific parameters for your inventory. They include:

**Inventory Name** – Allows you to specify a name for your inventory, such as Math Department, to make it easily identifiable.

**Limit Inventory to** – allows you to specify exactly which items you would like to inventory (district or state-owned copies).

**Locations** – Allows you to conduct an inventory of a specific location, such as Music Room.

**Additional Options** - allows you to specify the adoption year.

**Include** – these three checkboxes allow you to further specify which copies you would like to inventory.

**Handling checked out copies – I want to...** allow you to specify whether or not to include copies that are checked out. If you make these copies unaccounted for, you will lose the association to the patron they are checked out to.

If you select the **Check in currently checked out copies when scanned into inventory** checkbox, then you can perform two tasks at once (collection and inventory of copies). Schools that perform inventory when they are collecting books will typically select this option.

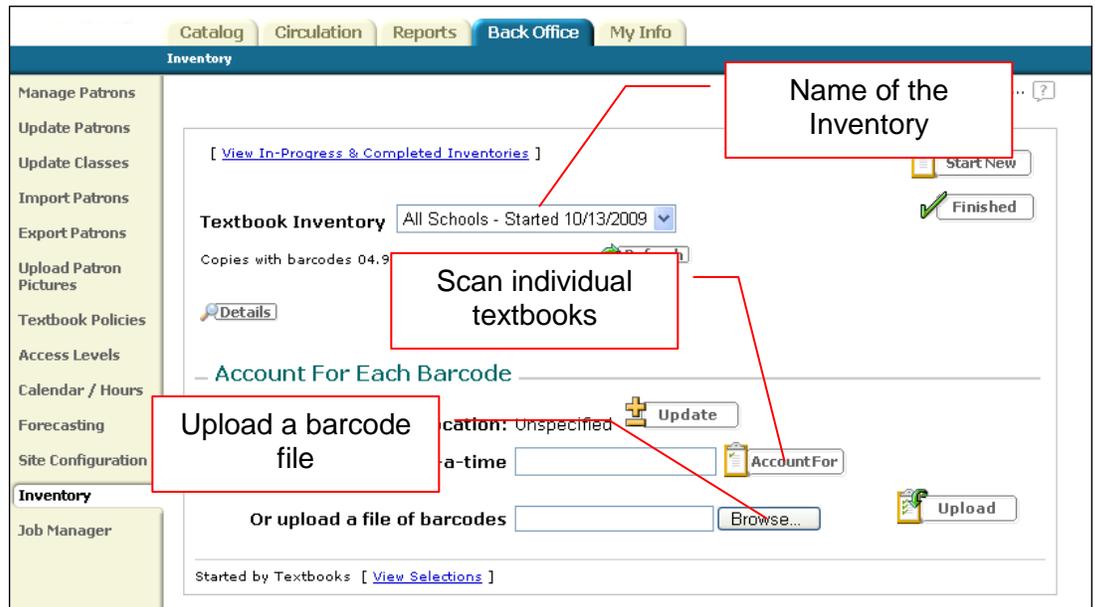
**Note:** Only use this option if you are performing an inventory at the end of a school year after all textbooks have been collected from the students to avoid confusion.

**Copies with barcodes that have been seen on or after <date> don't need to be scanned.** This field allows you to skip certain copies if you know where they are.

**Verify Copy Location**, when selected, will notify you if a copy has a location and is found somewhere else.

- **Do Nothing** – will not change the scanned textbook to the new location
- **Alert but do nothing** – creates a message in Destiny which allows you to see that the items is not in the correct location but, does not automatically change the location
- **Prompt for change** – creates a message and allows you to select or not select the new location during inventory (SUGGESTED)
- **Automatically change location** – will automatically move the item to the new location

After the parameters have been set for your inventory, click on the **OK** button to begin the inventory.



The textbook inventory page indicates the name of the inventory. You can select a specific location by click on the **Update** button or just leave it unspecified.

You also have the ability to either scan or enter individual barcodes or use a file of barcodes. To upload the file into Destiny, click on the **Upload** button.

**Objective 5: Discuss how to view the status of an inventory**

During an inventory, you may want to monitor the progress and conduct an audit. To do this, click the **View in-progress and completed** hyperlink.

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

**Textbook Inventory** All Schools - Started 10/13/2009

Copies with barcodes 05.41% Complete as of 11:23 AM [Refresh](#)

[Details](#)

– **Account For Each Barcode**

Current scanning location:

Scan or enter one-at-a-time   AccountFor

Or upload a file of barcodes

– **Most Recently Accounted For**

Barcode	Location	Author	Title
X 202860			Art of Public Speaking
X 202859			Art of Public Speaking
X 202858			Art of Public Speaking
X 202857			Art of Public Speaking
X 202856			Art of Public Speaking
X 202855			Art of Public Speaking

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

Click the **View** button adjacent to the inventory you are checking. This report shows the overall status of your inventory. This report should be checked and verified throughout the inventory to check on its progress.

In **Progress Details** you can see an overview of this inventory, broken down by barcoded and unbarcoded copies.

- To view the “Lost” Copies in this inventory, click **See Details** next to the count of lost copies.
- To view the unaccounted for barcoded items click **See Details**

The screenshot shows the 'Progress Details' page for an inventory titled 'Polk - Started 1/21/2010'. The page is divided into a sidebar on the left and a main content area. The sidebar contains various management options, with 'Inventory' highlighted. The main content area displays the following information:

- Copies matching selections:** 1,534
- Accounted for:** 80 (26 of which are lost [ [See Details](#) ])
- Unaccounted for:** 1,454 [ [See Details](#) ]
- Report on:**
  - All copies in the inventory
  - Copies that have been 'Accounted For'
  - Copies that are 'Unaccounted For'
- Count copies without barcodes:**
  - Total Titles: 4
  - Titles counted: 0
  - Titles without counts: 4

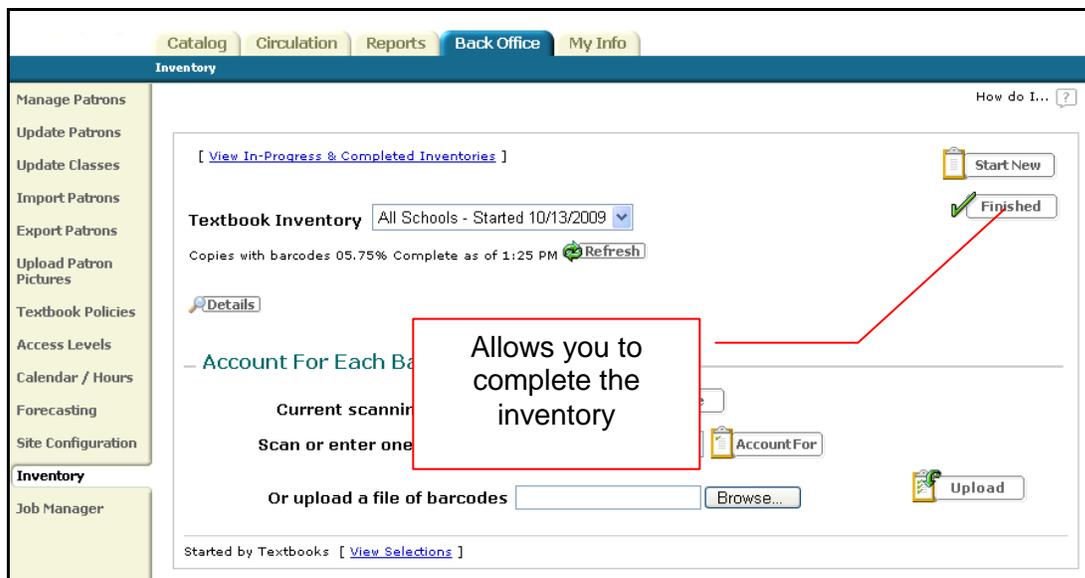
Two red callout boxes with arrows point to specific links:
 

- One box points to the [See Details](#) link next to the 'lost' count, with the text: 'Click to view the “Lost” Copies in this inventory'.
- Another box points to the [See Details](#) link next to the 'Unaccounted for' count, with the text: 'Click to view the unaccounted for barcoded items'.

The **Accounted for - See Details** hyperlink displays items that were marked as lost prior to this inventory.

Similar to the **Accounted for details** hyperlink, the **Unaccounted for - See Details** hyperlink displays copies that have not been entered into the inventory. It is important to verify the copies in this report to ensure that all copies have been accounted for during inventory.

Once you have completed your inventory, you can click on the **Finalize** button on the inventory page.



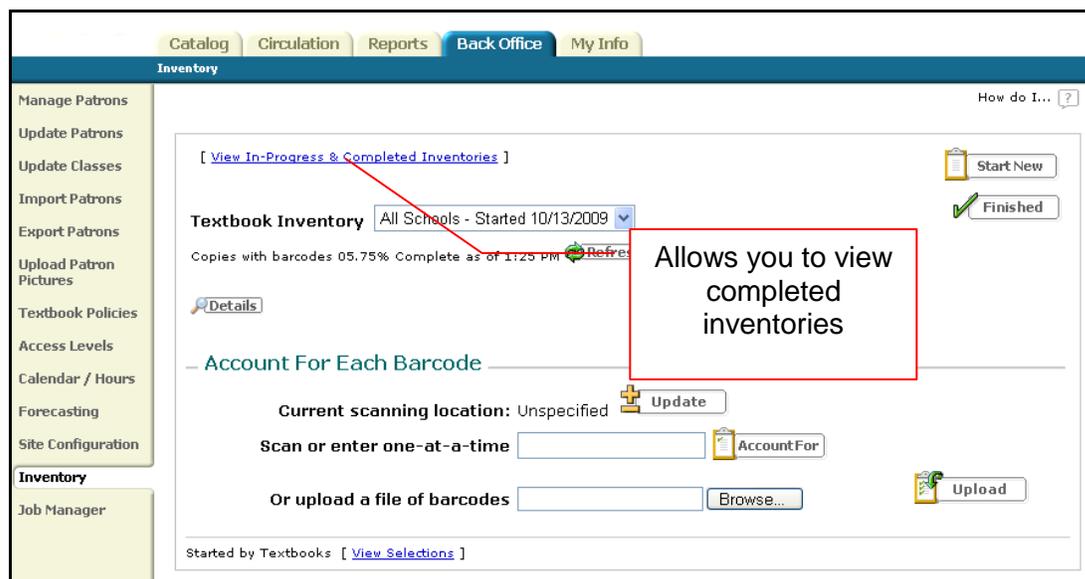
If there are any copies unaccounted for, the system will ask you to:

- Mark all unaccounted for copies as lost
- Ignore them (don't mark as lost)

Select the **Mark all unaccounted for items as lost** radio button, and then click **Yes** to confirm.

## Viewing a Completed Inventory

Once an inventory is finalized, you can view the results in the **View In-Progress & Completed Inventories** hyperlink.



To view a completed inventory, click on the **Completed** subtab.

					In Progress	Completed
Name	Started	Started by	% Scanned	Titles Counted		
All Schools	10/13/2009	Textbooks	05.75%		View	
Polk	1/21/2010	admin110	05.03%	0 of 4	View	

Click on the **View** button and then select the **Report** hyperlink to view the report. The report will list all copies that were a part of the inventory in order of:

- unaccounted for – only displays if Ignore was selected when finalizing
- accounted for
- lost – only displays if **Mark all unaccounted for copies “lost”** was selected when finalizing

Reviewing this report allows you to view the results of your inventory.

## Appendix A: State Board of Education, Chapter 43

Document No.

**STATE BOARD OF EDUCATION**  
**CHAPTER 43**

Statutory Authority: S. C. Code Ann. Sections 59-5-60 (2004), 59-31-210 (2004); 59-31-360 (2004)

R43-71. Free Textbooks

Section 1. Free Basal Textbook Enabling Act. Pursuant to Section 59-31-360 to provide "free basal textbooks" in Grades 1 through 12, S. C. State Board of Education does hereby set forth procedures for ordering instructional materials.

Section 2. Requisition for Free Instructional Materials. Requisitions for free instructional materials shall be made only to the South Carolina Department of Education (SCDE), in accordance with "Instructional Materials Management Procedures for Schools", by completing the official current order form or on internet using the ordering system on the South Carolina Instructional Materials Central Depository website.

Section 3. Provisions for Requisitioning and Distributing Free Instructional Materials.

- A. Acquisition of Free Instructional Materials on Levels of Achievement. Any pupil who is a member of any grade within the free instructional materials program may be assigned free instructional materials on the appropriate achievement level as indicated by tests and other evaluations.
- B. Allocation of Instructional Materials to Schools. The SCDE shall provide a schedule of instructional materials allocation formulas to the State Board of Education for information annually. The formulas shall be based on available funding provided by the General Assembly for the Instructional Materials program; the average cost of adopted instructional materials; and the prescribed percentage of total membership used in calculating materials allocations.
- C. Educable Mentally Handicapped (Special Education) Reading Primary classes shall be eligible for necessary reading materials not to exceed two pre-readiness readers and/or readiness programs and one beginning reading program.

Section 4. Changing to New Titles or Series. A school may change to a new title or series in a subject area only when new material on the same level is adopted by the State Board of Education. Schools shall not return materials presently on the state adopted list to be exchanged for other titles or series, except limited changes that are justified by variations in student achievements. Any books materials exchanged must be on different levels of difficulty.

Provided, that the Board shall have the authority to limit or postpone the acquisition of titles or series for such period of time as may be deemed advisable.

Section 5. Property of the State. Title to all materials issued to schools and depositories under the Free Textbook Act shall be vested in the State. (Legislative Provision).

Section 6. Responsible Parties. The district board of trustees shall be responsible for the proper custody of all materials in its schools and depositories and shall be responsible for the administration of the Instructional Materials Management Procedures for Schools in those schools and depositories.

Section 7. Distribution to Schools. The county or district board of trustees shall elect from the procedures listed below the system of distribution to be used.

- A. County Depository: A county depository may be established through which all materials in the county will be distributed.
- B. District Depository: A district depository may be established through which all materials in the district will be distributed.
- C. School Depository: A school depository may be established through which all materials in the school will be distributed.

The board of trustees may designate an agent to operate the depository, maintain adequate records and make necessary reports and remittances to the responsible office at the SCDE; however, such designation does not relieve the board of its responsibilities.

Section 8. Shipping of Instructional Materials. Each school or depository will be sent a Shipment Advisory listing the materials shipped to it. The school or depository agent shall verify the materials received with the materials listed on the Shipment Advisory. If the title(s) and number of materials received do not agree with the title(s) and number of materials on the Shipment Advisory, a report must be made promptly to the responsible office at the SCDE showing: (1) the name of the school and county, (2) the number and date of the Shipment Advisory, (3) a complete itemized list of the differences between Shipment Advisory and books received, both over and short.

Section 9. Records and Reports. Each school and depository shall maintain a separate and complete file for instructional material records, correspondence, and forms. Each school and depository shall maintain an accurate record of the number of materials on hand, materials received and materials returned. They, also, shall keep an accurate record of sales, lost materials, and damage fees and report same to the SCDE and remit all funds collected and pay promptly all amounts due. The Department will issue an official receipt covering each remittance.

Each school and depository shall furnish the responsible office at the SCDE with membership reports, anticipated membership reports, inventory reports, and other reports as may be requested. Each school shall maintain a record of materials issued to each pupil.

Section 10. Storage. Each school and depository shall provide for instructional materials adequate places of storage which are safe, clean, dry, well arranged, and free of insects. Care must be taken to see that materials do not mold while in storage. Materials should not be stored on floors and should be at least one inch from walls to allow proper ventilation and protection from termites.

Section 11. Distribution Within the School. Materials may be distributed directly to the pupils from the central bookroom or delivered from the bookroom to each teacher to be issued to the pupils. Materials as determined by the responsible office at the SCDE shall be distributed and circulated using the online state textbook manager.

Section 12. Inspection. All materials and materials records shall be subject at any time to inspection by authorized agents of the county and/or district board of trustees and the SCDE. It shall be the duty of each teacher to inspect frequently the materials issued to pupils and to emphasize the proper care and handling of materials.

Section 13. Stamping or Labeling Instructional Materials. Free Instructional materials issued to pupils shall have a barcode label properly affixed marked "Property State of SC". New materials shall not be stamped or labeled or have a barcode affixed or otherwise marked until issued to pupils.

Section 14. Issuing Used Instructional Materials. All used materials of each title shall be issued before any new materials of the same title are issued.

Section 15. Marking in Instructional Materials. Pupil's name may be written below the property stamp impression or on the property label. Pupils may appropriately mark lesson assignments, otherwise they shall not mark or write in instructional materials. Pupils shall not remove, deface, or damage barcodes on state-owned materials. (See Section 20 - Damaged Instructional Materials)

Section 16. No Deposits Charged on Instructional Materials. No board or agent thereof shall require a pupil to pay a deposit on any free materials issued by the SCDE.

Section 17. Instructional Materials to be Returned by Pupils. Materials shall be turned in to the school by the pupil, parents or guardians under the following circumstances:

- A. When appropriately requested by a teacher or school official.

- B. When the course is completed or discontinued by the school or pupil.
- C. When the pupil withdraws from school.
- D. At the end of the school year.

Section 18. Transfer Students. A school from which a pupil transfers shall make an appropriate notation on the pupil's transcript records as to whether all his or her materials were returned to the school and whether any damage or lost materials fees are unpaid. (See Sections 17, 19, and 20)

Section 19. Lost Instructional Materials. Schools may require pupils, parents or guardians to pay for instructional materials lost and the pupil, parent or guardian may be denied further benefits of the Free Instructional Materials Program until in compliance with this requirement. This requirement may be waived in instances where the judgment of the principal and/or responsible officials believe that the child is a victim of unusual circumstances. The school district shall be responsible for the cost. The report of lost instructional materials paid for and sales should be itemized by titles on an appropriate form sent to each school at the end of the school year. The schedule of charges shall be determined by the State Board of Education upon the recommendation of the SCDE. Fees collected for lost materials shall be remitted to the SCDE.

Section 20. Damaged Instructional Materials. Schools are required to collect appropriate damage fees from any pupil, parent or guardian for abuse or improper care of instructional materials and the pupil, parent or guardian may be denied further benefits of the Free Instructional Materials Program until in compliance with this requirement. This requirement may be waived in instances where the judgment of the principal and/or responsible officials believe that the child is a victim of unusual circumstances. The school or district shall be responsible for the cost. The amount to be charged in such cases shall be determined by the agent in charge of materials. In no case, shall the cost exceed the amount of charge applicable had the material been lost, provided that the pupil, parent, guardian shall have the option of paying the damage fee or purchasing the material according to the schedule in Section 19 above.

Materials on which only a damage fee is collected shall remain the property of the state and shall remain with the school for further use.

Materials damage fees collected should be reported in a lump sum in the space provided on the annual instructional materials inventory form sent to each school at the end of the school year. Fees collected for damaged materials shall be remitted to the SCDE.

Section 21. Fire Loss. Materials destroyed or damaged beyond further use by fire in school buildings or private homes shall not be charged to the individual or

school provided an official of the school furnishes the SCDE a certified list of the materials destroyed and the place and date of the fire.

Section 22. Contagious Diseases. Materials issued to a pupil having a contagious disease such as scarlet fever, diphtheria, etc., shall be burned by the local agent provided such destruction has been recommended by the physician attending the child. The local agent shall provide the SCDE with a certified list of the materials destroyed.

Section 23. Returning Instructional Materials to Central Depository. Schools or depositories shall not return used free instructional materials except when requested or authorized to do so by the SCDE. New instructional materials (materials which never have been put in use or tagged, stamped, or labeled) may be returned at any time. (See instructions below)

- A. Address all shipments to:  
Central Depository  
301 Greystone Blvd.  
Columbia, South Carolina 29210
- B. Return instructional materials by completing the Return Form.
- C. When preparing the Return Form, list the instructional materials and follow the instructions on the form.

Section 24. Defective Instructional Materials. Defective materials should be clearly marked "DEFECT" on the outside of the front cover and the defect identified on the inside of the front cover or in a visible place on the outside of a non-book item. Return the defective materials as soon as possible to the Instructional Materials Central Depository and notify the responsible office at the SCDE whether a replacement or an inventory credit is desired.

Section 25. Disposition of Out-of-Adoption Instructional Materials.

- A. Out-of-adoption instructional materials are those for which the contracts with the publishers have expired.
- B. Schools shall return all new out-of-adoption instructional materials to the Instructional Materials Central Depository promptly after the expiration of the contract.
- C. Schools may continue to use a title on which the contract has expired as long as the title is available from stock owned by the state. Schools should continue to use such materials until they have carefully evaluated all newly adopted materials and selected those best suited to their needs. Schools may continue

to use the old title for some grade sections and new titles for other grade sections if they wish.

- D. Schools which change to new titles may be requested to return all or a portion of the titles that are being discontinued. The remaining copies may be used or disposed of by the school. Maximum use should be made of these materials, such as additional text material including assignments for classroom work or consigned for home study.
- E. Out-of-adoption materials will be removed from the inventory of books charged to the school before the second year after the expiration of the contract with the publisher. Districts should attempt to dispose of out-of-adoption materials locally. Districts may dispose of those materials in any manner, including selling materials for the purpose of recycle or resale. Funds received by the sale of used materials must be used for the purchase of instructional materials or supplies.

### Section 26. Consumable Instructional Materials.

- A. The SCDE will publish annually a listing of consumable instructional materials. Any materials not on the listing shall be considered non-consumable. Schools using non-consumable materials as consumable shall be responsible for the cost of replacement.
- B. Instructional materials such as workbooks, lab manuals, and test booklets that provide space for written comments and answers shall be classified as one-year consumables and considered consumed once issued to a student and used for instruction. One-year consumable materials issued to a student and used for instruction will be removed from inventory annually.
- C. Funds to replace consumable materials will be provided annually to the extent that an Appropriation is provided by the General Assembly for instructional materials with replacement of non-consumable materials having first priority.

Section 27. Accounts Must Be Settled. Fees for lost and damaged textbooks for the prior school year are due no later than December 1 of the current school year when invoiced by the SCDE. The SCDE may withhold textbook funding from schools that have not paid lost and damaged textbook fees by the payment deadline.

Section 28. Special Adoptions. Instructional materials, textbooks, or series not currently available from the SCDE that are subsequently added as a special adoption or a district adoption under Section 59-31-45 may be purchased with the district's existing allocation. The SCDE may limit the exchange of instructional materials replaced by special and district adoptions.

Section 29. Most Favored Purchaser. Pursuant to South Carolina Code, if publishers sell materials to any other person or entity at a lower price than the price offered to South Carolina, that reduced price automatically becomes the contract price for South Carolina. At the end of each calendar year, publishers shall submit a certified list of all contracts made with other entities during the calendar year just closed on all instructional materials for which the publisher has a contract in South Carolina. That list must include the contract price for those materials. The SCDE may direct the Central Depository to withhold payment for instructional materials purchased from non-responsive publishers or assess non-responsive publishers liquidated damages in an amount equal to 5 percent of the contract price of all instructional materials under contract with the publisher, not to exceed \$5,000.

## *Appendix B: Viewing Reports for Textbook Transactions*

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### Module Overview

This module will teach you how to report on your textbook transactions. The textbook associations must be added by schools and districts and textbooks must be checked out by class to generate these reports.

### Module Objectives

- Objective 1: Discuss how to create a **Student to Textbook Report**
- Objective 2: Explain how to generate and analyze **Textbook Checkout Summary**
- Objective 3: Describe how to create a **Class List Report**

### Objective 1: Discuss how to create a Student to Textbook Statistics Report

Assigning students, teachers and textbooks to classes and sections allows you to manage your textbook inventory based on classes and enrollment. It also allows you to create reports to identify any gaps in your textbook inventory. One report, located in the **Reports** tab | **Textbooks** option is the **Student to Textbook Statistics** report. This report allows you to see if you have enough textbooks for students enrolled in your classes and sections.

**Important:** These reports are only useful if class schedules and textbooks associations have been made in Destiny.

To open the report, select the blue hyperlink stating **Student to Textbook Statistics** report.

The screenshot shows the 'Textbook Reports' interface with the following structure:

- Navigation Bar:** Catalog | Circulation | **Reports** | Back Office | My Info
- Section Header:** Textbook Reports
- Left Sidebar (My Favorites):**
  - Textbook (Active)
  - Patron
  - Report Builder
  - Report Manager
- Main Content Area:**
  - Catalog -- Titles & Copies**
    - [Barcode Lists](#) - Identify used and unused copy barcodes. [More](#)
    - [Lost Textbooks and Fines](#) - Summary of lost textbooks and fine amounts. [More](#)
    - [Textbook Adoptions](#) - Examine where textbooks are in the adoption schedule. [More](#)
    - [Textbook Condition/Status](#) - Examine the condition or statuses of your textbooks. [More](#)
    - [Title & Copy List](#) - List your textbooks with optional copy detail. [More](#)
    - [Weeding Log](#) - List copies that were weeded, deleted, or transferred. [More](#)
  - Circulation**
    - [Class Barcodes](#) - Print a class's barcodes for faster circulation. [More](#)
    - [Class List](#) - List class sections by teacher or student. [More](#)
    - [Current Checkouts/Fines](#) - Identify or send notices to the patrons with checkouts/fines. [More](#)
    - [Outstanding Textbook Obligations](#) - Identify books that should be returned. [More](#)
    - [Textbook Checkout Summary](#) - Identify the number of students without textbooks. [More](#)
  - Inventory Control**
    - [Completed Inventories](#) - View the results of completed inventories. [More](#)
    - [In-Progress Inventories](#) - Report on inventories that are in-progress. [More](#)
    - [Textbook Inventory Change Analysis](#) - Report on changes to your collection. [More](#)
  - Labels**
    - [Barcode Labels](#) - Create new or replacement copy barcode labels. [More](#)
  - Statistics**
    - [Student to Textbook Statistics](#) - Identify textbook shortages or surpluses. [More](#)
    - [Textbook Statistics](#) - view a snapshot of your collection plus statistics. [More](#)

The report can be limited by department, date range, or a specific title. To generate the report, click the **Run Report** button.

▶ Create New Report Saved Reports

### List Student to Textbook Statistics....

**Show**  department(s)

**Select**

**Class starting on or after**

**Class ending on or before**

**Show**  Site details  
 District summary

Save Setup Run Report

The report will appear in the **Job Manager**. Your results may appear like this:

Student to Textbook Statistics		Abraham Lincoln Elementary School			
<b>Title: Art Express I ISBN: 0-15-309313-7</b>					
Budget Category: Visual Arts					
Art					
Art History (ART 101) Enrollment: 27					
Total Copies*	Incoming Transfers	Total Enrollment	Extra Copies**	(Copies Needed)	
25	24	27	0	(2)	
<hr/>					
<b>Title: Art of Public Speaking ISBN: 0-07-039064-9</b>					
Budget Category: English					
Language Arts					
Mass Communications (LA 101) Enrollment: 27					
Total Copies*	Incoming Transfers	Total Enrollment	Extra Copies**		
28	28	27	1		

## Objective 2: Explain how to generate and analyze a Textbook Checkout Summary

This report will allow you to view, by class, all of the students without textbooks and a total student count per class. It is located under the **Reports** tab | **Textbooks** option| **Textbook Checkout Summary** hyperlink.

Select a class

List textbook checkouts...

**For** Wright Middle School - 0160016

**Current Classes** MUS 101 - Music

**Include Names of Students without Textbooks**



The report will show the class, section, enrollment, as well as how many students do not have textbooks (shown below).

Textbook Checkout Summary	Abraham Lincoln Elementary
<b>Class:</b> MUS 101 - Music	
<b>Section:</b> Music 101	<b>Enrollment:</b> 6
<b>Title:</b> Rhapsody and Blue	
<b>Students with textbooks:</b> 0	
<b>Students without textbooks:</b> 6	
<ol style="list-style-type: none"> <li>1. Aavang, Stella M (P 12000) [Taylor]</li> <li>2. Abano, Roxanne M (P 11000) [Polk]</li> <li>3. Abbott, Jason S (P 12001) [Taylor]</li> <li>4. Abiobun, Lester S (P 11001) [Polk]</li> <li>5. Abney, Maria M (P 10000) [Tyler]</li> <li>6. Abrahaam, Benny M (P 16000)</li> </ol>	

Objective 3: Describe how to create a Class List report

The **Class List** report allows you to create a list of teachers and their classes including due dates. It also allows you to view any textbooks that have been checked out or overdue by teachers or students. To access this report, you would go to the **Reports** tab | **Textbooks** option | **Class List** hyperlink.

▶ Create New Report
Saved Reports

---

**List classes...**

---

**For** Teachers ▼

---

**Select & Sort by** **Teacher Name**

From  to

Start a new page for each teacher

---

**Additional options** Include Current sections ▼

Only class periods from  to

**Show**  Teachers and their classes only

Teachers, students and any checked out ▼ textbooks

---

Save Setup
 Run Report

Here is a sample of this report displaying teachers, students and any checked out textbooks.

<b>Class List Current sections</b>				<b>Abraham Lincoln Elementary School</b>		
Including transactions				<b>Class Starts</b>	<b>Class Ends</b>	<b>Textbooks Due</b>
<b>Carrol, Glen (Faculty: P 16005)</b>						
Period 1	Section 1	Art History	Art	8/25/2008	5/25/2009	5/21/2009
		Abrahaam, Benny M (Student: P 16000)				
		Art Express I (Copy: X 2414715)				5/21/2009
		Brock, Cletus A (Student: P 16002)				
		Art Express I (Copy: X 2414716)				5/21/2009
		Bryce, Conway H (Student: P 16003)				
		Art Express I (Copy: X 2414717)				5/21/2009
		Buddy, Fredric T (Student: P 16004)				
		Art Express I (Copy: X 2414718)				5/21/2009
		Darwin, Lawrence (Student: P 16006)				
		Donnell, Audrey E (Student: P 16007)				
		Art Express I (Copy: X 2414720)				5/21/2009
		Elba, Larson S (Student: P 16009)				
		Francine, Estela K (Student: P 16010)				
		Frida, Mark L (Student: P 16011)				
		Art Express I (Copy: X 2414719)				5/21/2009
<b>Assigned to Teacher: 0</b>				<b>Assigned to Students: 6</b>		<b>Total Items Out: 6</b>

## *Appendix C: Adding District-Owned Resources*

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### Module Overview

This module provides information regarding adding and verifying resources (copies, teacher's editions, resource kits) to your Destiny District database.

### Module Objectives

- Objective 1: Distinguish between state-owned vs. district-owned textbooks
- Objective 2: Discuss how to add district-owned titles and copies to your database
- Objective 3: Explain how to add a textbook title manually
- Objective 4: Explain the Patron Circulation Statistics report
- Objective 5: Discuss textbook associations
- Objective 6: Describe adding your classes and sections manually
- Objective 7: Explain how to assign teachers, students, and textbooks manually
- Objective 8: Explain how to verify accuracy of patron information
- Objective 9: Explain how to generate and analyze a Weeding Log report

### Objective 1: Distinguish between state-owned vs. district-owned textbooks

Districts and schools will use Destiny Textbook Manager primarily to track state-owned textbooks; however, Textbook Manager may also be used to track district-owned textbooks. The system uses barcode symbology to differentiate ownership.

State-owned textbooks are identified in the catalog by the state flag and the textbook material type icons. District-owned textbooks are identified by the material type icon.

Districts and schools that choose to use Destiny Textbook Manager to track district-owned textbooks will have to purchase district barcodes that are compatible with the Destiny Textbook Manager system.

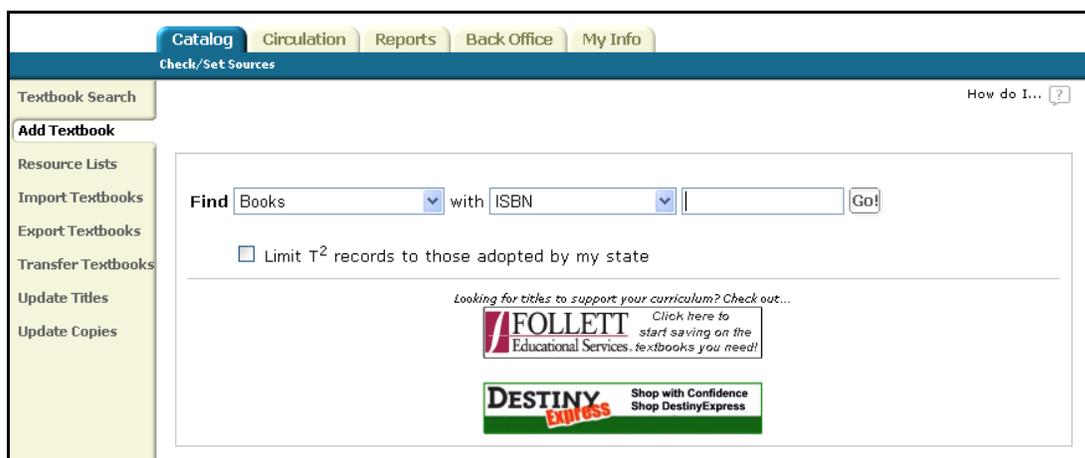
The state only provides limited training to districts and schools in the use of Destiny Textbook Manager to track district-owned textbooks. You can contact Follett Software Company to purchase additional training.

**Objective 2: Discuss how to add district-owned titles and copies to your database**

To add textbooks to your database, you will go to the **Catalog** tab | **Add Textbook** option.

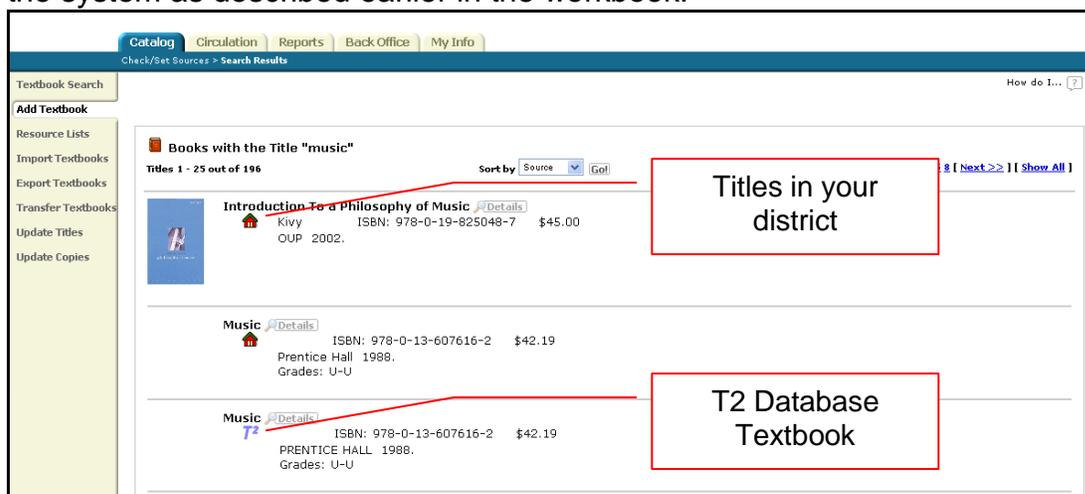
Before adding a district-owned textbook to the database, search for the title to see if it already exists. This will help prevent duplication in the database.

The quickest way to search is by ISBN. However you can also search by title, author, additional information or State / Textbook ID.



After you have entered your search criteria in the appropriate field, click **Go**. Here is how your search results may appear.

**Note:** You will not be able to edit or change state-owned textbooks. They will not appear in your search results. State-owned copies should be added to the system as described earlier in the workbook.



The **T2** icon indicates that it is a title located within the Textbook Titles database hosted at Follett Software Company.

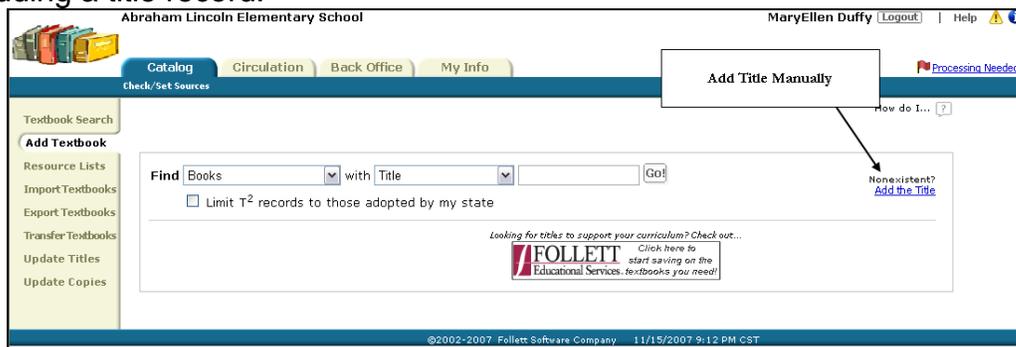
The **Red House** icon indicates that it is already in your district's database.

To research the textbook title information further, select the **Details** button to view the details of the title.

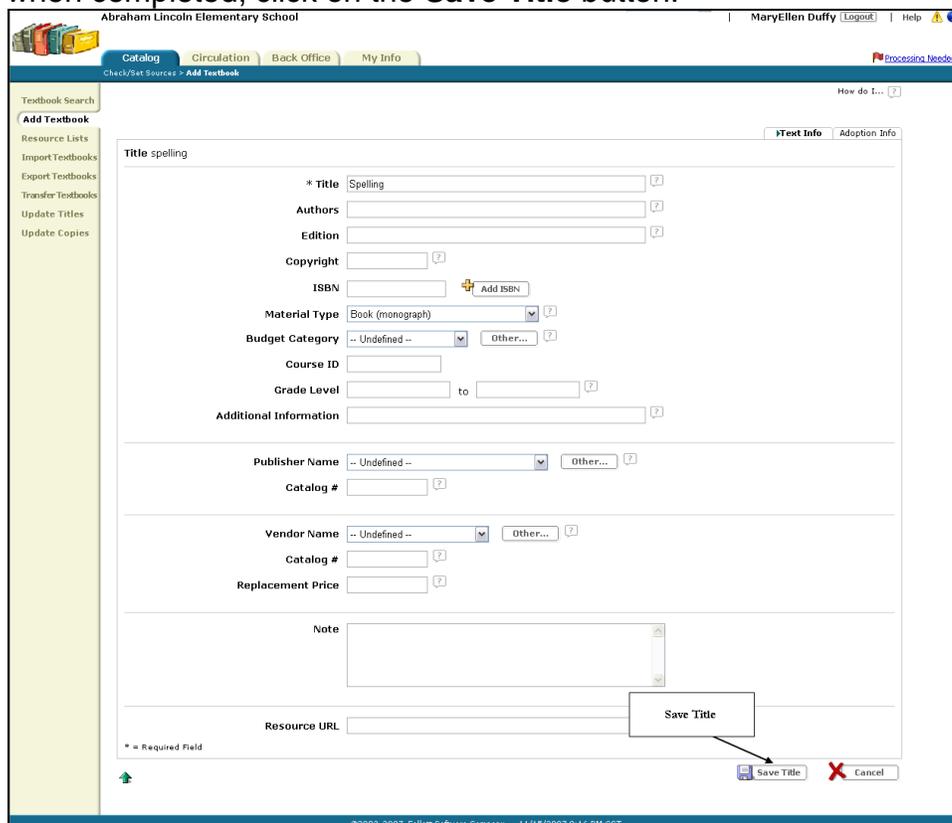
You can add the title at this point if you are selecting from the T2 database. To add the title, click **Save Title**. If you have copies to add to the system, you can also click the **Add Copies** button which will add the title and its copies to the database.

Objective 3: Explain how to add a textbook title manually

If you are not using the T2 database, you can add a textbook title manually in the **Catalog** tab | **Add Textbook** option | **Add the Title** hyperlink. It is suggested that you still perform a search for the textbook before manually adding a title record.



After this has been selected, you can then enter the appropriate information and when completed, click on the **Save Title** button.



**Objective 4: Explain the Patron Circulation Statistics report**  
 This report is located in the **Back Office** tab, **Reports** option, **Patrons** subtab, **Patron Statistics - Historical** hyperlink.

This report can be created as a summary

<b>Patron Textbook Statistics: All Circulations</b>		Abraham Lincoln Elementary School
Summary grouped by Patron Type		
		Circulations
		All Circulations
Faculty		1,563
Student		6,228
Volunteer		12
<b>Patron Types: 3</b>		<b>Textbook Circulations: 7,803</b>

or in detailed form:

<b>Patron Textbook Statistics: All Circulations</b>		Abraham Lincoln Elementary School
Detail grouped by Patron Type		
<b>Faculty</b>		Circulations
Name	Barcode	All Circulations
Adele, Larson S	P 16001	7
Administrator, Asset	P 502	6
Administrator, Library	P 501	4
Administrator, Site	SITEADMIN	1,478
Administrator, Textbook	P 500	5
Booker, Tex	P 16053	0
Carrol, Glen	P 16005	13
Duffy, MaryEllen	P 16050	3

In addition to the **Patron Statistics - Historical** report, you also have the **Patron Statistics Summary** report.

This report allows you to display circulation statistics for Today, This Month, This Year, and Total.

Patrons	Today	This Month	This Year	Total
<a href="#">Faculty</a> 16	0 [00.00%]	0 [00.00%]	5 [14.29%]	2,270 [33.64%]
<a href="#">Student</a> 91	0 [00.00%]	6 [100.00%]	30 [85.71%]	4,474 [66.30%]
<a href="#">Test pt</a> 1	0 [00.00%]	0 [00.00%]	0 [00.00%]	0 [00.00%]
<a href="#">Volunteer</a> 2	0 [00.00%]	0 [00.00%]	0 [00.00%]	4 [00.06%]
<b>110</b>	<b>0</b>	<b>6</b>	<b>35</b>	<b>6,748</b>

Note: Patrons with multiple site associations are counted only for their primary site.

Use the following options to customize this summary.

Group by  and then by

Only include the following:

**Patron Types**  Faculty  Student  Test pt  v  Volunteer

**Statuses**  Active  Restricted  Inactive

= Select All  = Clear All

### Objective 5: Discuss textbook associations

Uploading textbook associations allows you to add and remove textbook assignments for classes and/or sections, using an XML file.

**IMPORTANT:** Class/textbook associations should be made at the district level

If you are a District Textbook Coordinator:

You can upload data for any number of schools as follows:

1. Click the **Back Office** tab.
2. Click the **Update Classes** option.
3. Select **Textbook associations** from the drop-down list.
4. Browse to your XML file.
5. Click the **Update** button.

You can upload data for only your school as follows:

1. Click the **Back Office** tab.
2. Click the **Update Classes** option.
3. Click the **Upload Changes** subtab.
4. Select **Textbook associations** from the drop-down list.
5. Browse to your XML file.
6. Click the **Update** button.

For information on XML requirements, see additional **online Help topics for Uploading Textbook Associations**.

### Objective 6: Describe adding your classes and sections manually

Destiny allows you to add classes and sections to the database to manage your materials. Keep in mind, textbooks should be associated with each class at the district level. This feature allows you to assign teachers, students and textbooks to classes and sections, thus allowing you to see if you have adequate resources for your students. This feature is located in the **Back Office** tab | **Update Classes** option | **Class Setup** subtab.

To add classes, click on the **Add Class** button.

The screenshot shows the 'Add Class' form in the Destiny system. The form has a left sidebar with navigation options like 'Manage Patrons', 'Update Patrons', 'Update Classes', 'Import Patrons', 'Export Patrons', 'Upload Patron Pictures', 'Textbook Policies', 'Access Levels', 'Calendar / Hours', 'Forecasting', 'Site Configuration', 'Inventory', 'Ledger', and 'Job Manager'. The main form area has a header 'Update Classes > Add Class' and a 'How do I... ?' link. Below the header, there is a legend '\* = Required Field'. The form contains three required fields: '\* Class Name', '\* ID', and 'Department'. The 'Department' field is a dropdown menu currently showing '-- Undefined --' and an 'Add Dept' button. A red box highlights the 'Add Dept' button with the text 'To add departments not listed'. Below the form, there is a 'Sections' section with an 'Add Section' button and the message 'There are no sections for this class.'

Type in the class name, ID and select a department. If the department is not available in your list, click on the **Other** button.

Then, you can add the Section, as well as the textbooks. To add the section, click on the **Add Section** button.

The screenshot shows a web application interface for adding section information. At the top, there are navigation tabs: Catalog, Circulation, Reports, Back Office, and My Info. Below these is a breadcrumb trail: Update Classes > Add Section Info. On the right, there is a 'How do I...' help link. A left-hand sidebar contains a menu with options: Manage Patrons, Update Patrons, Update Classes (highlighted), Import Patrons, Export Patrons, Upload Patron Pictures, Textbook Policies, Access Levels, Calendar / Hours, Forecasting, Site Configuration, Inventory, Ledger, and Job Manager. The main content area is titled 'History (HIS 201)' and contains the following fields:

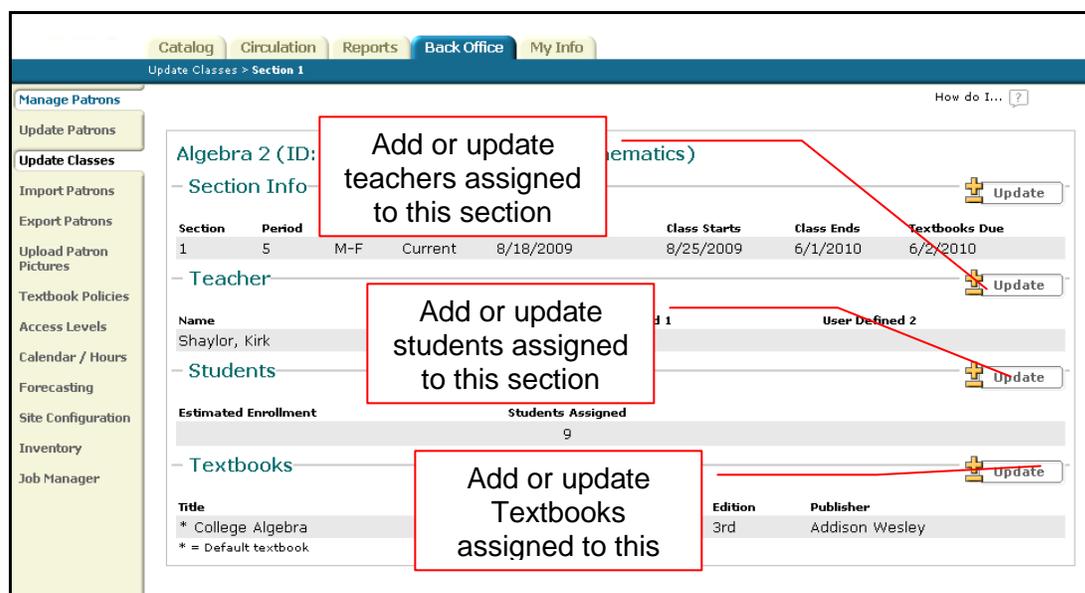
- \* Section: A text input field.
- Loan Period: A dropdown menu showing 'System Default - Due: 5/25/2010' and an 'Other...' button.
- \* Period: A text input field.
- \* Meets: A list of days with checkboxes:
  - Sunday:
  - Monday:
  - Tuesday:
  - Wednesday:
  - Thursday:
  - Friday:
  - Saturday:

At the bottom right of the form, there are two buttons: 'Save' (with a floppy disk icon) and 'Cancel' (with a red X icon).

Type in the section, loan period, period, and days the class meets. If the loan period is not listed, click on the **Other** button to add a new loan period. Select the **Save** button to save this section. The assignment screen will appear.

**Objective 7: Explain how to assign teachers, students, and textbooks manually**

After a section has been added, you can then assign students, teachers, and textbooks to the section. Click on the **Update** button to add more information to each of these sections.



Once you have selected the **Update** button search for the teacher, student or textbook that you would like to assign to the section.

**Objective 8: Explain how to verify accuracy of patron information**

To verify the accuracy of a patron download, you can use the **Patron Status** option in Destiny. This option is located in the **Circulation** tab | **Patron Status** option.



To locate a patron, you can scan their barcode or search for the patron information.

Once you have located the patron, the **Patron Status** screen allows you to view information about that patron. This information includes patron record information, the items that are checked out, outstanding fines, current transaction statistics, and contact information.

**Patron Status**

Find Patron    Only search Patron Names

**Carter L. Frederick [Student]**

Barcode p 11011  Nickname 

Status Active Grade Level 11  
 Gender Male Homeroom Mr. Shaylor

Card Expires  
 Grad Year 2008  
 Birthdate  
 District ID

Acceptable Use Policy on File? No

**Items Out**

**Textbooks**

There are no textbooks checked out for this patron.

**Fines**

There are no fines for this patron

**Current Transactions**

Checked Out	Overdue	Holds/Bookings: 0	Fines: \$0.00
Textbook: 0	Textbook: 0		

**Contact Information**

Address 1 555 Author Alley  
 McHenry, IL 60050  
 5551323 Address 2

Email 1 [CFrederick@myschool.edu](mailto:CFrederick@myschool.edu) Email 2

**Notes**

There are no notes for this patron

### Objective 9: Explain how to generate and analyze a Weeding Log report

The Weeding Log allows you to see all of the textbooks that were weeded, deleted, or transferred from your collection. This report is located in the **Back Office** tab | **Reports** option | **Textbooks** subtab | **Weeding log** hyperlink.

Select the date range you would like to report on and click the **Run Report** button. An example of the report is shown below.

Textbook Weeding Log				Abraham Lincoln Elementary School	
<b>11/15/2007 - Copies Removed: 1</b>					
<b>Art of Public Speaking (1 Removed)</b>					
		ISBN: 0-07-039064-9		Published: 1998	
Location	Barcode	Price	Condition	Acquired	Removed By
Was Available -- Transferred	X 202853	\$26.00	Fair	2/29/2000	TexBooker
<b>10/30/2007 - Copies Removed: 11</b>					
<b>Science (11 Removed)</b>					
		ISBN: 978-1-57924-912-0		Published: 2003	
Location	Barcode	Price	Condition	Acquired	Removed By
Was Available -- Deleted	X 2174620		New	10/30/2007	TexBooker
Was Available -- Deleted	X 2174621		New	10/30/2007	TexBooker
Was Available -- Deleted	X 2174622		New	10/30/2007	TexBooker
Was Available -- Deleted					