



# Follett Destiny®

South Carolina Department of Education  
Destiny® Textbook Manager Guide



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# Introduction to State Textbook Manager

## Description

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

## Objectives

- Explain State Regulation of Textbooks in SC
- State Responsibility for patron and class data

## 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 statewide implementation of Destiny Textbook Manager is to ensure all students have access to the textbooks they need by providing schools and districts 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.

## State responsibility for patron and class data

Patron and class data will be brought in by the student information system. However, schools/districts are ultimately responsible for the maintenance of student data in the student information system. Changes to that system, rollover dates, etc. must be communicated by the district to the Office of Instructional Materials.

# Getting Started in Textbook Manager

## Description

Textbook Manager is organized by tabs, options, and sub-tabs – making it easy to find, edit, and print the information needed. Learn how to perform basic navigation and use available tools.

## Objectives

- Login with a User Name and Password
- Navigate Textbook Manager
- Access Destiny help
- View reports and jobs
- Find office contact information at <https://ed.sc.gov/finance/instructional-materials/>

## Login with a User Name and Password

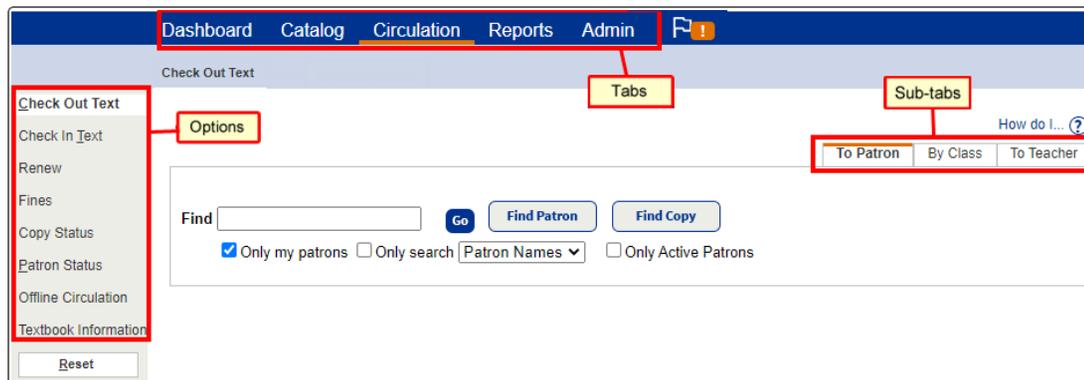
A logged-in Textbook Manager user has access to a range of features and functionality. Each user receives a unique user name and password.

1. Go to <https://sc.follettdestiny.com>.
2. Select the **District** Destiny hyperlink.
3. Select the site hyperlink. A login window appears.
4. Enter the user name and password.
5. Click **Login**. Textbook Manager appears.

## Navigate Textbook Manager

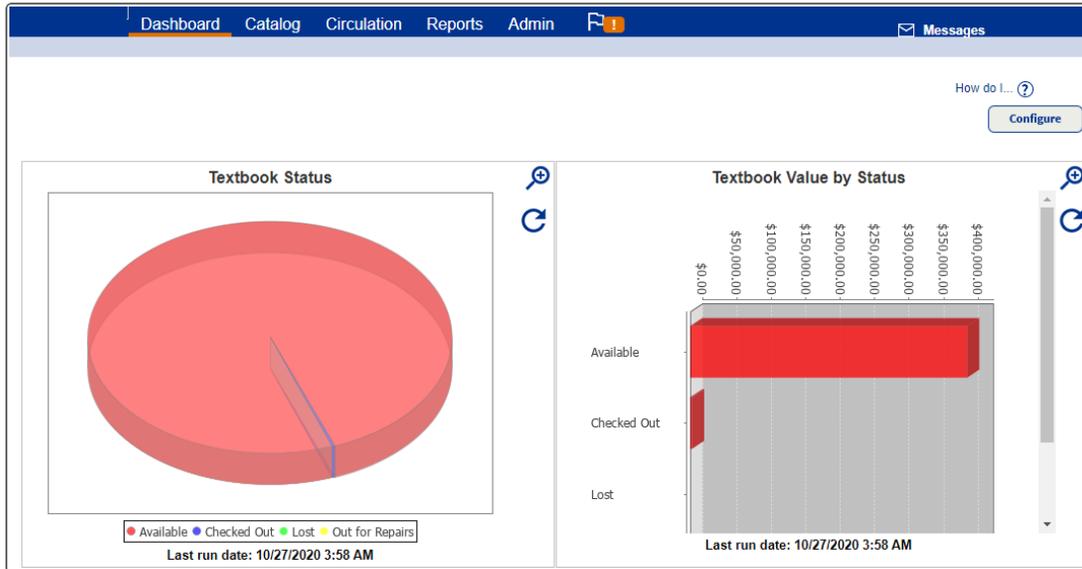
### Tabs, Options and Sub-tabs

Textbook Manager is organized by tabs, options, and sub-tabs. A user has access to the different tabs and functions based on the permissions assigned by a Destiny or site-level administrator.



## Explore the available tabs

**Dashboard:** Gives a graphical, at-a-glance view of the Textbook Manager data. For example, set up data to display material status and value.



**Catalog:** Contains tasks related to searching, such as searching for, adding or updating a title or copy record, and ordering and transferring materials.

The screenshot shows the Textbook Search interface. The top navigation bar includes Dashboard, Catalog, Circulation, Reports, Admin, and Messages. The main content area is titled "Textbook Search" and includes a sidebar with the following options:

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

The main search area includes a "Find" dropdown menu set to "ISBN", a search input field, and a "Go" button. Below the search field, there is a "Look in:" dropdown menu set to "Aiken Elementary School - 0201016". There are also three checkboxes: "Include Teachers' Editions", "Include Resource Kits", and "Include Bundles". The "Basic" tab is selected, and there is a "Copy Categories" link. A "How do I...?" help link is also present.

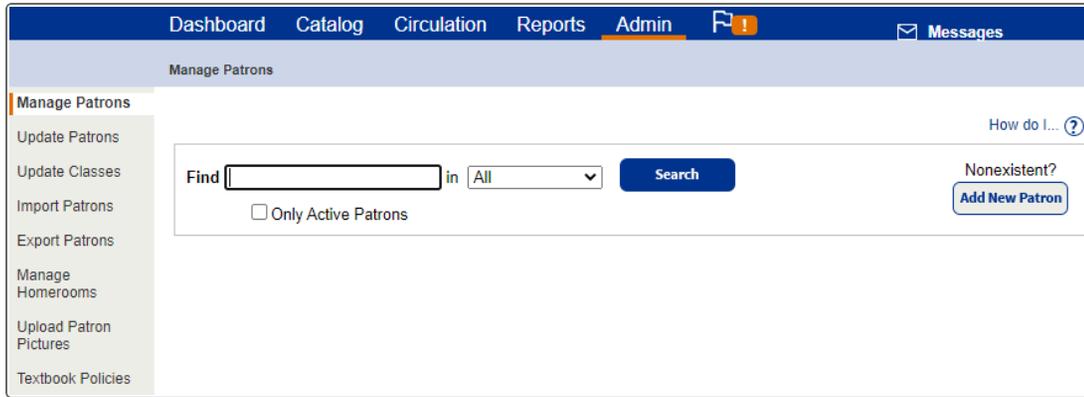
**Circulation:** Contains functions related to circulation, such as checking out and in materials, managing fines, and looking up a patron's status.

The screenshot shows the 'Circulation' module interface. The top navigation bar includes 'Dashboard', 'Catalog', 'Circulation' (highlighted), 'Reports', 'Admin', and 'Messages'. Below the navigation bar is a sub-header 'Check Out Text'. A left sidebar contains a menu with items: 'Check Out Text', 'Check In Text', 'Renew', 'Fines', 'Copy Status', 'Patron Status', 'Offline Circulation', and 'Textbook Information'. The main content area has a sub-header 'Check Out Text' and a 'How do I...?' link. Below this are three tabs: 'To Patron' (selected), 'By Class', and 'To Teacher'. A search section includes a 'Find' input field, a 'Go' button, and two buttons: 'Find Patron' and 'Find Copy'. Below the search field are checkboxes for 'Only my patrons' (checked), 'Only search Patron Names' (selected in a dropdown), and 'Only Active Patrons'. A 'Reset' button is located at the bottom left of the main content area.

**Reports:** Access a variety of pre-configured reports for the materials collection, circulation statistics, and patron information. Use the Report Builder feature to create custom reports.

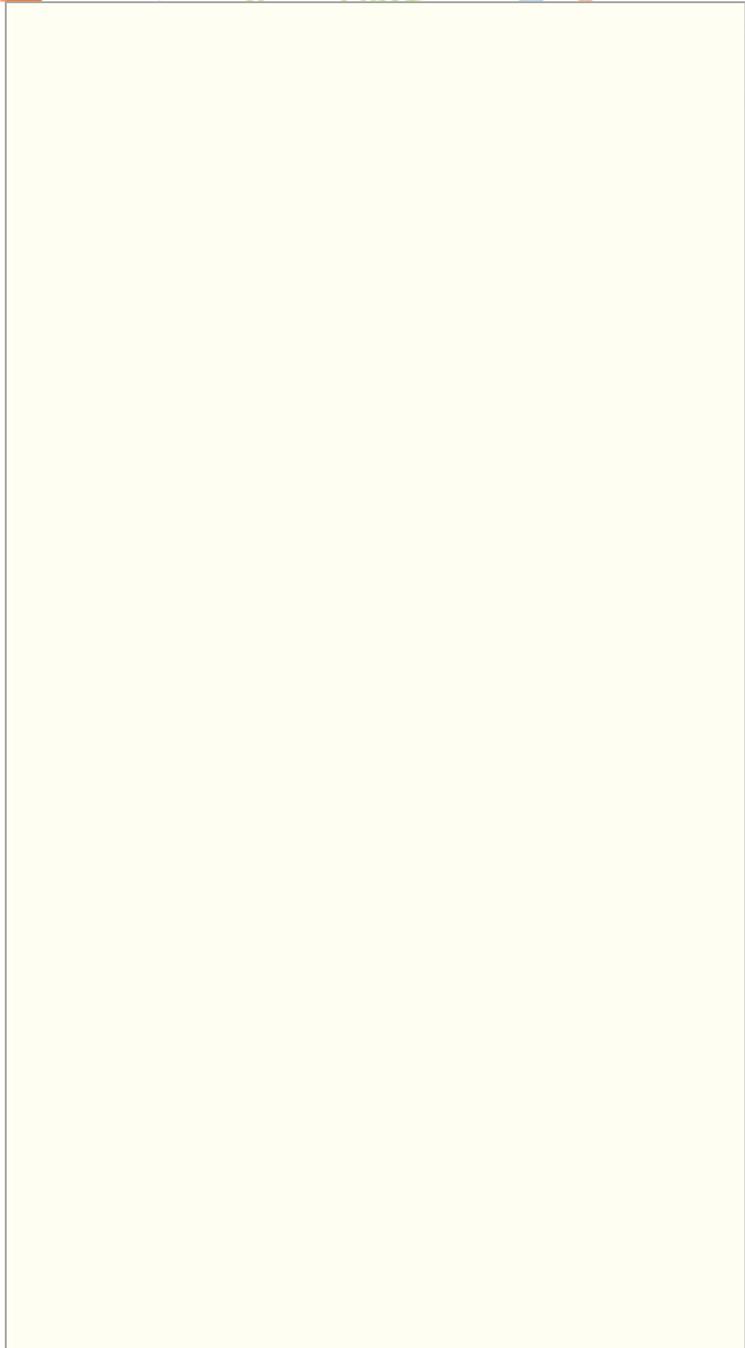
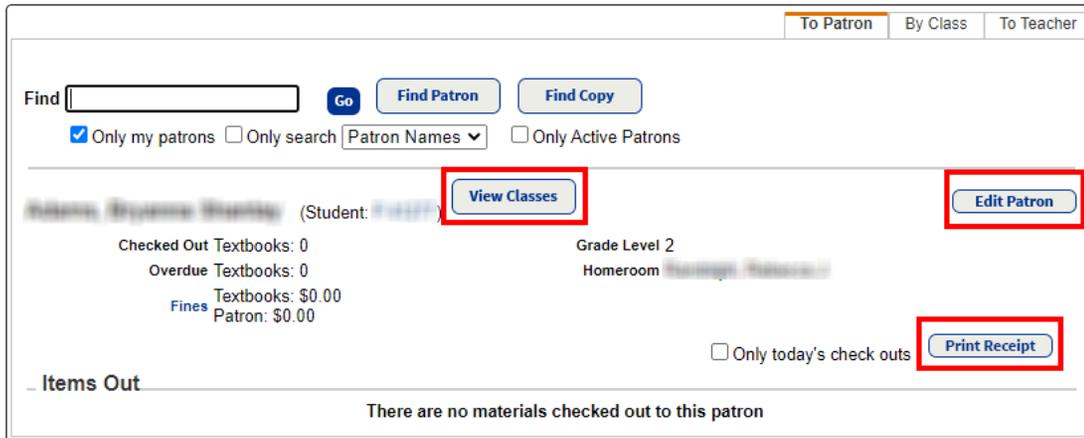
The screenshot shows the 'Reports' module interface. The top navigation bar includes 'Dashboard', 'Catalog', 'Circulation', 'Reports' (highlighted), 'Admin', and 'Messages'. Below the navigation bar is a sub-header 'Textbook Reports'. A left sidebar contains a menu with items: 'My Favorites', 'Textbook Reports' (highlighted), 'Patron Reports', 'Report Builder', and 'Report Manager'. The main content area has a sub-header 'Textbook Reports' and is divided into two sections: 'Catalog -- Titles & Copies' and 'Circulation'. Under 'Catalog -- Titles & Copies', there are seven report items, each with a 'Show More' button: 'Barcode Lists - Identify used and unused copy barcodes.', 'Lost Textbooks and Fines - Summary of lost textbooks and fine amounts.', 'Textbook Adoptions - Examine where textbooks are in the adoption schedule.', 'Textbook Condition/Status - Examine the condition or statuses of your textbooks.', 'Title & Copy List - List your textbooks with optional copy detail.', and 'Weeding Log - List copies that were weeded, deleted, or transferred.'. Under 'Circulation', there are two report items, each with a 'Show More' button: 'Class Barcodes - Print a class's barcodes for faster circulation.' and 'Class List - List class sections by teacher or student.'

**Admin:** Perform administrative tasks, such as setting instructional material policies, configuring sites, running inventory, and managing patrons.



### Buttons

Buttons typically appear on the right of the screen. For example, the action buttons (**Edit Patron**, **View Classes**, **Print Receipt**) are all located on the right of the screen.



## Breadcrumbs

Because Destiny is a web application, it has similar features to those in a typical browser. One example is **Breadcrumbs**.



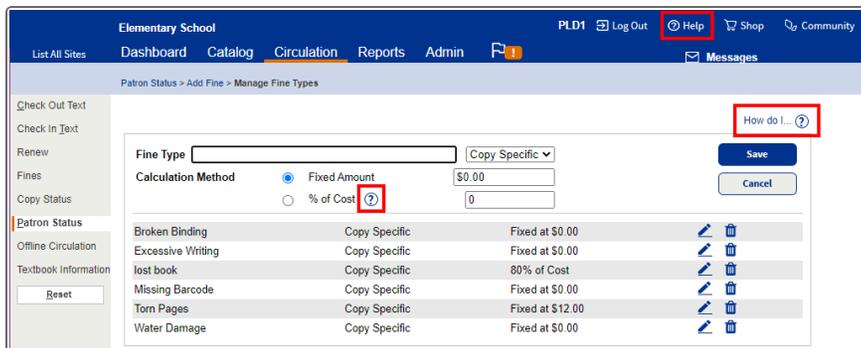
Use breadcrumbs to navigate to different areas in Textbook Manager without losing information on the previous page.

Breadcrumbs should be used instead of the **Back** arrow. The **Back** arrow may cause a time out error and lost information from previous screens.

## Access Destiny Help

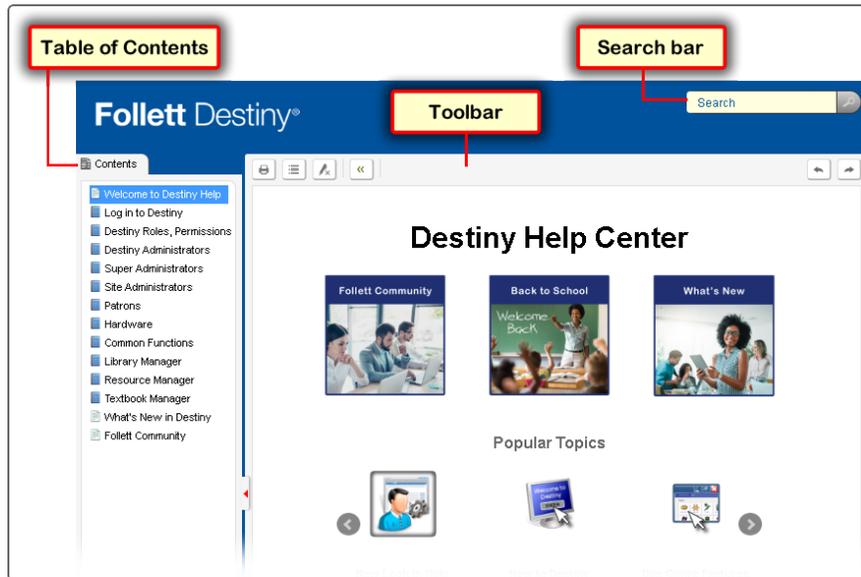
Destiny Help is a click away and is accessed the following ways:

- For information about a specific field or section of a page, click  next to its name.
- For information about all of a page's features, click the **How do I...** link at the top of the page.
- To access general Help for all of Destiny's features and functions, click the **Help** link at the top of any page.



## Destiny Help Center

The Welcome page includes links to new content, popular topics and featured products. To navigate, use the Table of Contents, Search Bar, and Toolbar. To return to the Welcome page, click the Follett Destiny logo.



### View Reports and Jobs

Two other basic components of Textbook Manager are in **Job Manager (Admin > Job Manager)** and Report Manager (**Reports > Report Manager**).

#### Job Manager

Job Manager may list report jobs, custom report jobs, inventory jobs, and/or preventative maintenance jobs. The page shows the completed reports and statuses of those jobs, until they are deleted. It also includes those created through the automated Job Scheduler.

Dashboard Catalog Circulation Reports Admin Messages

Job Manager

Manage Patrons  
Update Patrons  
Update Classes  
Import Patrons  
Export Patrons  
Manage Homerooms  
Upload Patron Pictures  
Textbook Policies  
Access Levels  
Calendar / Hours  
Forecasting  
Site Configuration  
Inventory  
Ledger  
**Job Manager**

Jobs: 1 - 4 of 4 Refresh List

<input checked="" type="checkbox"/> Job	Submitted By	Started	Status	
<input type="checkbox"/> Overdue Materials, Unpaid Fines.	PLS (10/26/2020 8:28 PM)	10/26/2020 8:28 PM	Completed (10/26/2020 8:29 PM)	View
<input type="checkbox"/> Used Barcode List (Textbook Copies)	Anthony, Nicole Barnes (10/13/2020 10:58 AM)	10/13/2020 10:58 AM	Completed (10/13/2020 10:58 AM)	View
<input type="checkbox"/> Textbook Title & Copy List	Destiny Administrator (10/1/2020 8:56 AM)	10/1/2020 8:56 AM	Completed (10/1/2020 8:56 AM)	View
<input type="checkbox"/> Rebuild Keywords	Destiny Administrator (10/1/2020 8:54 AM)	10/1/2020 8:54 AM	Completed (10/1/2020 9:31 AM)	View

Jobs: 1 - 4 of 4 Refresh List

Delete Jobs... Delete

All Selected (on this page)  
 Based on Date Started  
 Started on or before

= Select All  = Clear All



## Report Manager

Report Manager lists all reports whether preconfigured or custom. Reports appear with the most current at the top.

The screenshot shows the Report Manager interface. At the top, there is a navigation bar with links for Dashboard, Catalog, Circulation, Reports (highlighted), Admin, and Messages. Below the navigation bar, the page title is "Report Manager". On the left side, there is a sidebar with "My Favorites" and a list of report categories: Textbook Reports, Patron Reports, Report Builder, and Report Manager (highlighted). The main content area displays two sections of jobs. The first section, titled "Jobs: 1 - 2 of 2", includes a "Refresh List" link and a table with columns for Job, Status, and actions. The table contains two rows: "Overdue Materials, Unpaid Fines." (Completed 10/26/2020 8:29 PM) and "Textbook Title & Copy List" (Completed 10/1/2020 8:56 AM). The second section, also titled "Jobs: 1 - 2 of 2", includes a "Delete Jobs..." section with a "Delete" button. Below this, there are radio buttons for "All Selected (on this page)" and "Based on" (selected), with a dropdown menu set to "Date Started". A date input field shows "Started on or before" with a calendar icon set to "31". At the bottom, there are checkboxes for "Select All" and "Clear All".

After starting an import, export or create a large report, instead of waiting for it to finish—just check back later to view the summary, print the report or download the file.

**Note:** Adobe Reader® version 5.05 or above is needed to view the reports in pdf format. Adobe Reader is available as a free download. Contact the school's or district's Information Technology department for assistance.

## Office of Instructional Materials Contact Information

The SCDE Office of Instructional Materials contact information can be found at this website: <https://ed.sc.gov/finance/instructional-materials/>.

# Searching for Instructional Materials



## Description

Whether a teacher needs to check out materials or finds materials in the hallway, the site manager may search Textbook Manager to find information about the book. In this module, see how to search Textbook Manager for materials.

## Objectives

- Identify how to find materials
- Discuss available search tools

## Find Textbooks

Quickly find materials using search. To search for materials:

1. Select **Catalog > Textbook Search**.
2. If available, use the **Look in** drop-down to select the district, school type, or school.
3. Choose the checkboxes to include teacher's editions, resource kits, and/or bundles.
4. From the **Find** drop-down, select **Keyword** or **State / Textbook ID**.
5. In the next field, type or scan the applicable number.
6. Click **Go**.

The screenshot shows a web interface for textbook search. The top navigation bar includes 'Dashboard', 'Catalog', 'Circulation', 'Reports', 'Admin', and 'Messages'. The current page is 'Textbook Search > "Building Blocks of Science, Grade 2, Push Pull Go, South Carolina Edition -- Unit Kit-32"'. On the left is a sidebar with options like 'Add Textbook', 'Resource Lists', 'Import Textbooks', etc. The main content area shows the title 'Building Blocks of Science, Grade 2, Push Pull Go, South Carolina Edition -- Unit Kit-32' with a state flag icon for Carolina. It indicates 'Local copies available: 3 of 3' and 'Off-site copies available: 35 of 35'. Below this are sections for 'Publication Info' (Published by Carolina Biological Supply Company, 2016, 2nd Edition, ISBN 978-1-43501724-5), 'Additional Info' (Notes Unit Kit, Grade Level 02 to 02, Instructional Classification Kit, etc.), and 'Adoption Info' (State/Textbook ID 1630101, State Adopted 2016, Adoption Ends 2022).

All state-owned titles are included in the master title list and have a state flag icon  before the title. It is recommended to search using keyword or State Textbook ID.

Search result includes the number of available copies, publication, adoption, and additional information.

## Search Tools

There are two wildcards in Textbook Manager – the **asterisk (\*)** and the **question mark (?)**.

Not knowing a complete word, or not sure how to spell it, add an asterisk (\*) to the end of what is known. An asterisk can replace any number of letters at the end of a word. However, the \* cannot be used as a word's first or second letter or have any letters after it. For example, use psych\* to search for a book with the term psychology in it.

Use a question mark (?) to replace a single letter. Use more than one question mark in a word, but it cannot be the first or last letter. For example, use G??metry to search for Geometry.

Use Boolean operators: AND, OR, NOT. Create a search phrase from several distinct words or terms with Boolean operators between them. These operators – AND, OR, NOT – define the relationship between the words or phrases in the search term.

Make sure to type the operators using uppercase letters:

- **math AND science** gives only the titles that mention both math and science
- **math OR science** gives all the titles that mention math and science
- **math NOT science** gives only the titles about math that does not mention science

Keep in mind that AND narrows a search, giving fewer results; OR expands a search, giving more results.

Do not use OR for NOT.

# SCDE Annual State Initiated Inventory

## Description

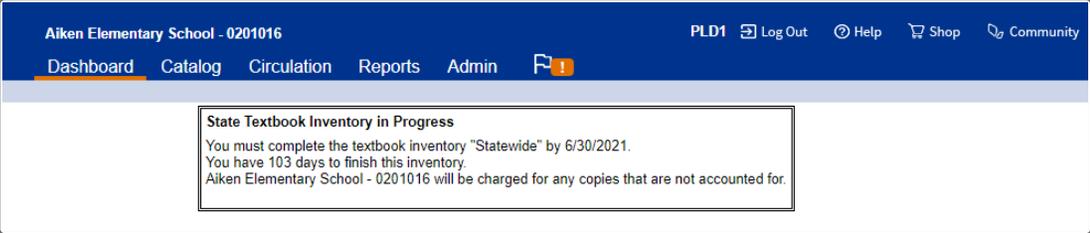
An inventory is a great tool to ensure schools have enough resources for students and help guide purchasing decisions. The Annual Statewide Inventory is initiated by the SCDE OIM and will open May 1st and close on June 30th each school year.

## Objectives

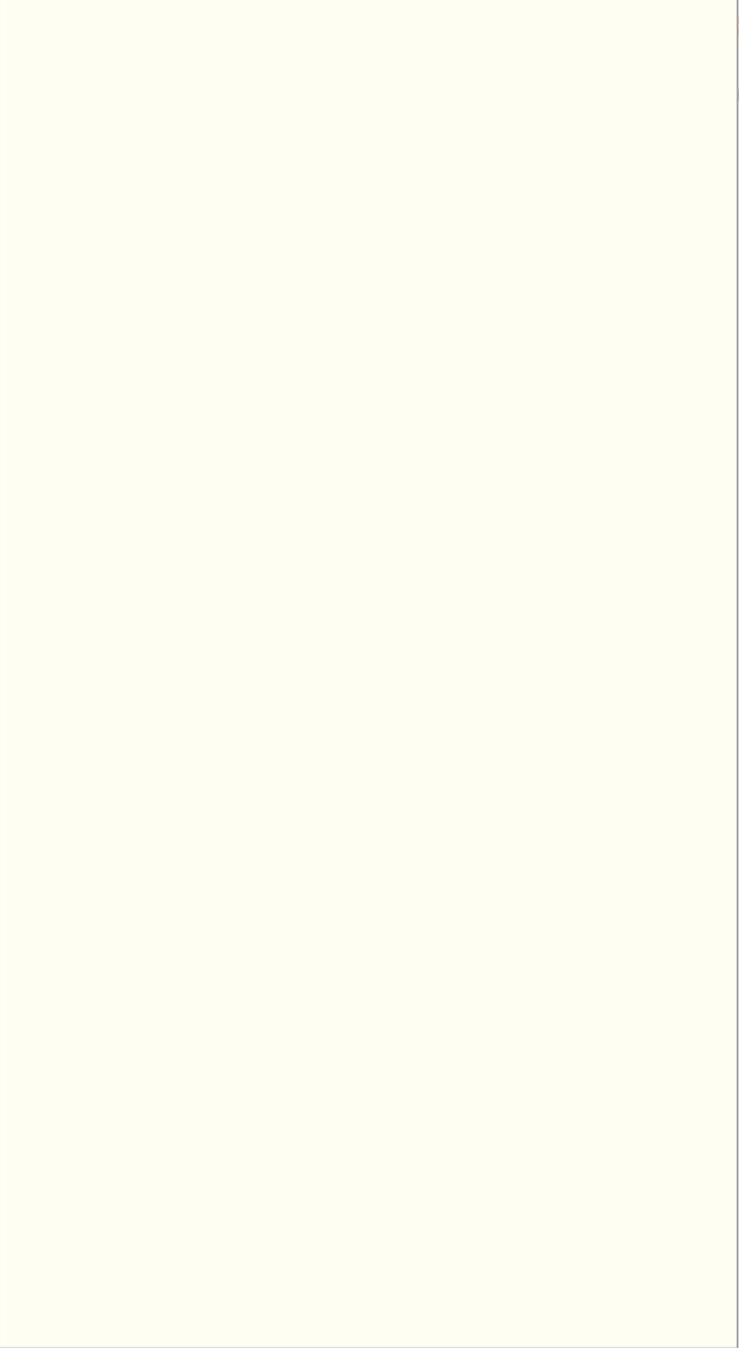
- Explain how to conduct an inventory
- Describe how to view the status of an inventory

### Before Starting the State-Initiated Inventory

Once the state starts the inventory, a reminder appears upon log in to Destiny. Destiny displays the deadline for the inventory and the number of days remaining before the deadline.



If there are pending incoming transfers, receive all incoming copies before starting to scan for inventory. For more information, see the quick reference guide: *Receive transfers from the Office of Instructional Materials*.



## Scan Materials for the Inventory

Whether the inventory includes barcoded or unbarcoded items, the goal is to account for as many items as possible. When inventorying unbarcoded and consumable items, enter a count instead of scanning barcodes.

**Important:** Unbarcoded items and consumables that are checked out are automatically accounted for. If they are checked in during inventory, they remain accounted for.

1. Select **Admin > Inventory**.
2. In the **Textbook Inventory** drop-down, ensure the correct inventory is showing.

[ View In-Progress & Completed Inventories ] Start New

**Textbook Inventory** Statewide - Started 5/1/2021 ▼

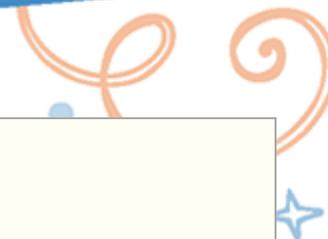
Copies with barcodes 0.04% Complete as of 12:25 PM Refresh

---

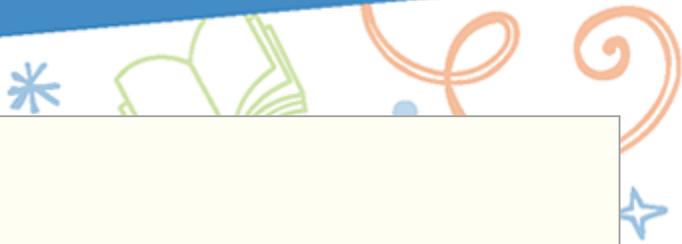
Started by Office of Instructional Materials [ View Selections ]

3. Do one of the following:

If items are...	Then...
Barcoded	<p>a. Click <b>Account for each Barcode</b>. Barcode fields appear.</p> <p>b. To have Textbook Manager confirm barcodes in the material's designated location are entered, click <b>Update</b>, and then select the site's current scanning location.</p>



If items are...	Then...
Barcoded	<p>c. In the <b>Scan or enter one-at-a-time</b> field, type or scan each barcode.</p> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>• If typing barcode numbers rather than scanning them, click <b>Account For</b> or press <b>Enter</b> after each entry.</li> <li>• When scanning or entering unaccounted-for barcodes, Textbook Manager changes the item's inventory status to <b>Accounted for</b>.</li> </ul> <p>Once a barcode is entered, the item appears in the <b>Most Recently Accounted For</b> section. The barcode links to item status.</p> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>• To view an item's status, the <i>View textbook copy status</i> permission must be enabled.</li> <li>• Based on how <b>Textbook Options</b> are configured in <b>Admin &gt; Site Configuration &gt; Circulation</b>, "Lost" textbook materials must be returned in a timely fashion to generate a refund. Textbook Manager does the following: <ul style="list-style-type: none"> <li>◦ Changes the status of a lost item to Available and deletes any fine charged to a patron for the lost textbook.</li> <li>◦ Creates a refund if the fine was paid.</li> </ul> </li> </ul> <p>d. To upload a file of barcodes scanned offline with Follett Remote or another device, next to <b>Or upload a file of barcodes</b>, click <b>Choose File</b> (or <b>Browse</b>, depending on the browser).</p>



**If items are... Then...**

Unbarcoded

a. Click **Count Items Without Barcodes**.

[ View In-Progress & Completed Inventories ] Start New

**Textbook Inventory** | Statewide - Started 5/1/2021 Finished

Copies with barcodes 0.04% Complete as of 9:07 AM Refresh

21 of 90 Titles counted Print It

Details Save

---

Account for each Barcode Count Copies Without Barcodes

**Titles 1-25 out of 90** 1 2 3 4 [Next >>] [Show All]

Title	Copy Count	Inventory Count
<b>Art Everywhere, Grade 1 -- Big Book Package</b> ISBN: 978-0-15-346269-6 Houghton Mifflin Harcourt Publishing Company 2006 State / Textbook ID: 0860845	1	<input type="text" value="1"/>
<b>Art Everywhere, Grade 2 -- Big Book Package</b> ISBN: 978-0-15-346270-2 Houghton Mifflin Harcourt Publishing Company 2006 State / Textbook ID: 0860846	1	<input type="text" value="1"/>
<b>Art Everywhere, Grade 3 -- Big Book Package</b> ISBN: 978-0-15-346271-9 Houghton Mifflin Harcourt Publishing Company 2006 State / Textbook ID: 0860848	1	<input type="text" value="1"/>

b. In the **Inventory Count** field, type the count for each resource listed.

**Note:** Follett recommends periodically clicking **Save** to retain entered amounts. Saved counts can be updated.

Large empty yellow box for notes.

### Track the Progress

An inventory can be done over several days. During an inventory, monitor the progress and conduct an audit. To do this, click **Details**.

[ View In-Progress & Completed Inventories ]

**Textbook Inventory** Statewide - Started 5/1/2021 ▾

Copies with barcodes 0.07% Complete as of 9:31 AM [Refresh](#)

21 of 90 Titles counted

[Details](#)

The Progress Details for the inventory appears. Check and verify this throughout the inventory to check on the progress.

Copies with barcodes [Run Report](#)

Copies matching selections 1,748

**Accounted for** 1,491 (Copies lost: 1 [ See Details ])

**Unaccounted for** 257 [ See Details ]

**Report on**

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

Count copies without barcodes

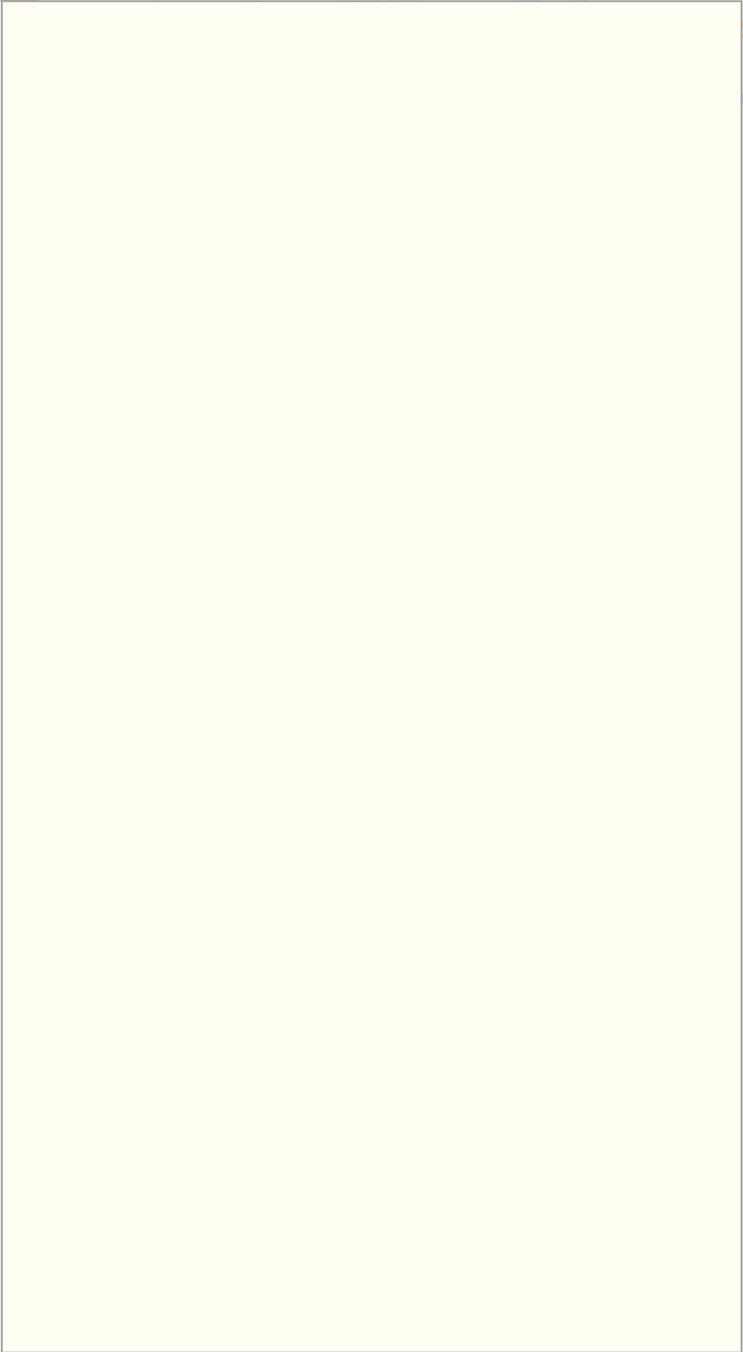
**Total Titles** 31

**Titles counted** 1

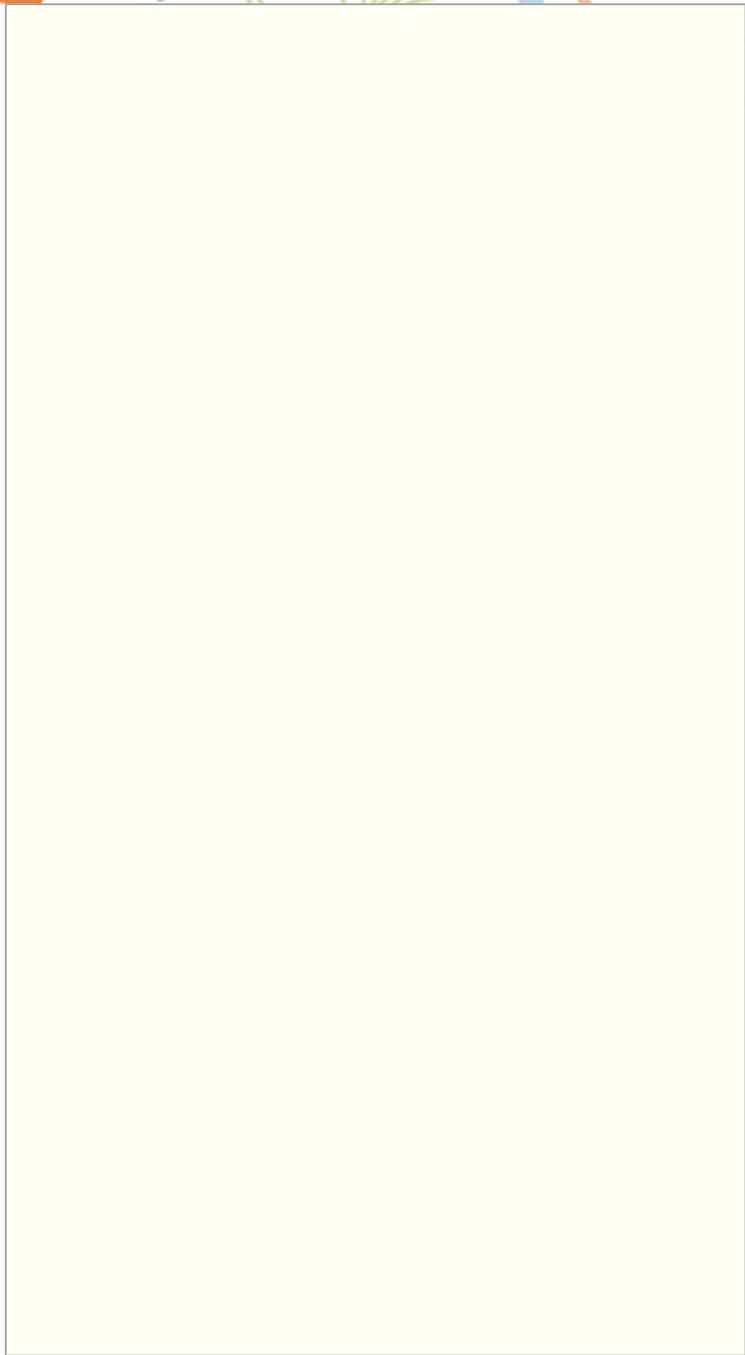
**Titles without counts** 30

To view copies that have not been entered into the inventory, click **Unaccounted for - See Details**. It is important to verify the copies in this report to ensure all copies are accounted for during the inventory.

To view copies marked lost prior to or during the inventory, click **Accounted for - See Details**.



If click...	Then...										
<p><b>Accounted for - See Details</b></p>	<p>Use the list to view copies that have been marked Lost.</p> <div data-bbox="457 293 1171 570" style="border: 1px solid gray; padding: 5px;"> <p>Copies: 1 - 1 of 1 <span style="float: right;">Printable</span></p> <p>Sort by Location <input type="button" value="Go"/></p> <p><small>To reset "lost" textbooks to "unaccounted for", use the Reset option at the end of this list. Copies without barcodes will not be reset.</small></p> <table border="1"> <thead> <tr> <th>Barcode</th> <th>Location</th> <th>Author</th> <th>Title</th> <th>Marked "Lost"</th> </tr> </thead> <tbody> <tr> <td>SDE00006277191</td> <td></td> <td>Courtney Thomas and Ian Greaves</td> <td>The South Carolina Story, Grade 3 -- Student Edition</td> <td>4/26/2021</td> </tr> </tbody> </table> <p>Copies: 1 - 1 of 1</p> <p>Reset all textbooks marked "lost" on <input type="text"/> <input type="button" value="Go"/> <input type="button" value="Reset 'Lost'"/></p> <p>Delete all textbooks marked "lost" on or before <input type="text"/> <input type="button" value="Go"/> <input type="button" value="Delete All"/></p> <p><small>State owned copies will not be deleted.</small></p> </div> <p>To reset lost copies, enter a date in the <b>Reset all textbooks marked "lost" on</b> field, and then click <b>Reset "Lost"</b>.</p> <p>To delete lost copies, enter a date in the <b>Delete all textbooks marked "lost" on or before</b> field, and then click <b>Delete All</b>.</p>	Barcode	Location	Author	Title	Marked "Lost"	SDE00006277191		Courtney Thomas and Ian Greaves	The South Carolina Story, Grade 3 -- Student Edition	4/26/2021
Barcode	Location	Author	Title	Marked "Lost"							
SDE00006277191		Courtney Thomas and Ian Greaves	The South Carolina Story, Grade 3 -- Student Edition	4/26/2021							
<p><b>Unaccounted for - See Details</b></p>	<p>Use the list to view and help locate copies that have not been entered into the inventory.</p> <div data-bbox="457 938 1171 1174" style="border: 1px solid gray; padding: 5px;"> <p>Copies: 1 - 25 of 2,668 <span style="float: right;">Printable</span></p> <p>Sort by Location <input type="button" value="Go"/> <span style="float: right;">1 2 3 4 ▶ [ Show All ]</span></p> <table border="1"> <tbody> <tr> <td>Harcourt Health and Fitness, Grade 1 -- Student Edition Barcode: SDE00000118858</td> <td>Last Seen: 6/2/2020 <input type="button" value="Mark 'Lost'"/></td> </tr> <tr> <td>Harcourt Health and Fitness, Grade 1 -- Student Edition Barcode: SDE00000516729</td> <td>Last Seen: 6/2/2020 <input type="button" value="Mark 'Lost'"/></td> </tr> <tr> <td>Harcourt Health and Fitness, Grade 1 -- Student Edition Barcode: SDE00000516814</td> <td>Last Seen: 6/2/2020 <input type="button" value="Mark 'Lost'"/></td> </tr> <tr> <td>Harcourt Health and Fitness, Grade 1 -- Student Edition Barcode: SDE00000612839</td> <td>Last Seen: 6/2/2020 <input type="button" value="Mark 'Lost'"/></td> </tr> </tbody> </table> </div> <p>If a copy is not found, click <b>Mark "Lost"</b>.</p>	Harcourt Health and Fitness, Grade 1 -- Student Edition Barcode: SDE00000118858	Last Seen: 6/2/2020 <input type="button" value="Mark 'Lost'"/>	Harcourt Health and Fitness, Grade 1 -- Student Edition Barcode: SDE00000516729	Last Seen: 6/2/2020 <input type="button" value="Mark 'Lost'"/>	Harcourt Health and Fitness, Grade 1 -- Student Edition Barcode: SDE00000516814	Last Seen: 6/2/2020 <input type="button" value="Mark 'Lost'"/>	Harcourt Health and Fitness, Grade 1 -- Student Edition Barcode: SDE00000612839	Last Seen: 6/2/2020 <input type="button" value="Mark 'Lost'"/>		
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Harcourt Health and Fitness, Grade 1 -- Student Edition Barcode: SDE00000612839	Last Seen: 6/2/2020 <input type="button" value="Mark 'Lost'"/>										



## Finish the Inventory

When the inventory is complete, click **Finished**. A confirmation pop-up appears.

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

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

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

**Note:** If the inventory is not finished by the deadline, the Office of Instructional Materials forces it to finish. In this case, Textbook Manager marks all unaccounted for copies lost, and the school is charged for each lost copy.

## Viewing a Completed Inventory

Once an inventory is finalized, click **View In- Progress & Completed Inventories** to view the results.

To view a completed inventory, select the **Completed** subtab.

# Transferring and Ordering Textbooks



## Overview

To maximize the instructional material investment, sites may transfer materials between schools in a district. For example, a school with a drop in enrollment may transfer surplus science textbooks to a school with a shortage.

When new materials are adopted or a new class is added at a school, a school may place an order with the SCDE Office of Instructional Materials. Likewise, when the adoption ends or a school no longer need a large amount of stated-owned materials, return them. In this training, learn how to use Textbook Manager to track textbook transfers, orders, and returns to minimize lost items.

## Objectives

- Explain how to transfer materials between sites
- Explain how to order materials from the SCDE Office of Instructional Materials
- Describe how to return materials to the SCDE Office of Instructional Materials

## Transfer Textbooks Between Sites

Textbook Manager allows sharing of textbooks between sites throughout the district.

### Request Textbooks

Transfer requests allows the school to get the materials the school needs from the district. Just submit a request to the district, and the district can send the request to any of its sites to be fulfilled.

**Important:** Before submitting or responding to a transfer request, an Administrator must configure the SMTP server and allow sites to make requests.

1. Select **Catalog > Transfer Textbooks > Requests** sub-tab.
2. Click **Add New Request**.
3. Use the **Find Textbook** field to enter the search term.
4. Use the **in** drop-down to select how to search.
5. Click **Go**.

**Note:** To search for a textbook that currently has no items assigned to the school, deselect the **Only my textbooks** checkbox.

6. Next to the needed textbook, click **Request**.

Find Textbook  in Title Go Close

Only my textbooks

Title	ISBN Edition	State / Textbook ID Publisher	
Advanced Language and Literature for Honors and Pre-AP English Courses -- eBook, 1-Year <span style="color: red;">[Off-site]</span>	978-1-31905536-3 1st Edition	1710008 Bedford, Freeman and Worth (Macmillan Holdings LLC, d/b/a MPS)	<span style="border: 1px solid #0056b3; padding: 2px 5px; color: #0056b3;">Request</span>
Pacemaker Basic English <span style="color: red;">[Off-site]</span>	0-13-023313-7 Third	Pearson Prentice Hall	<span style="border: 1px solid #0056b3; padding: 2px 5px; color: #0056b3;">Request</span>

7. On the New Request page, enter the **# of Copies** needed.

**Pacemaker Basic English**

\* # of Copies

\* Need by

Note

Save

Cancel

\* = Required Field = District = State

8. In the **Need by** field, type in the date needed for the materials or use the to select the date.
9. To include details about the transfer request, type a maximum of 1000 characters in the **Note** field.
10. To send the request, click **Save**.

### Process a Transfer Request at the District

After a transfer request is sent to the district, the district confirms which sites have the textbooks and forwards the request. Depending on the number of available textbooks, more than one site might need to fulfill the request.

1. Log in to the district.
2. Select **Catalog > Transfer Textbooks > Requests** sub-tab.
3. In the **Open Requests** section, find the request to view and click .

Textbook	# of Copies	Requested by	Needs By	Status
Pacemaker Basic English	25	0201051	12/18/2020	Open

4. Find the site to transfer materials from; in the **Request** field, type the number of copies the site is to send to the requesting district.

 **Pacemaker Basic English** Close

ISBN: 0-13-023313-7

Copies needed by Cyril B. Busbee Elementary School - 0201051 by 12/18/2020: 25 Completed

---

**Available Copies** Send

Send requests to one or more sites to fulfill the need at Cyril B. Busbee Elementary School - 0201051.

Sites with copies	Available copies	Request
Clearwater Elementary School - 0201024	Copies available: 84 of 100	<input style="width: 50px;" type="text"/>

[Top](#)

5. To send the request to the site with available materials, click **Send**.

**Note:** Multiple sites may receive the request and have each site fulfill only part of the request.

6. Type a note for the school receiving the request from the district, and then click **Yes**.

7. Click **Close**.

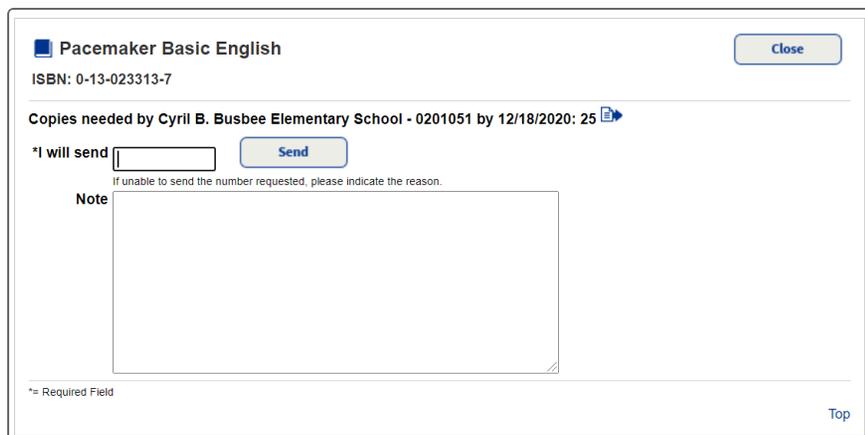
**Reply to a Transfer Request from the District**

Once the district directs a transfer request to a site with available textbooks, the site confirms if it will transfer the requested textbooks.

1. Log in to Textbook Manager.
2. Select **Catalog > Transfer Textbooks > Requests** sub-tab.



3. In the **Incoming Requests from the District** section, find the request that requires a reply, and then click .



The screenshot shows a web form for transferring textbooks. At the top, it says "Pacemaker Basic English" with a "Close" button. Below that is the ISBN: 0-13-023313-7. The main text reads "Copies needed by Cyril B. Busbee Elementary School - 0201051 by 12/18/2020: 25" with a small icon. There is a field labeled "\*I will send" with a "Send" button next to it. Below this is a "Note" section with a large text area and a small icon. At the bottom left, it says "\* = Required Field" and at the bottom right, there is a "Top" link.

4. In the **I will send** field, type the number of textbooks to transfer.
5. Type a note about the number or condition of textbooks being transferred.
6. Click **Send**. The message is sent to the district, and the Transfer Textbooks page appears.

## Upload Textbooks to Send

After a site confirms they will transfer requested materials, the sending site uploads the materials in Textbook Manager when they are ready to send them to the receiving site.

1. Select **Catalog > Transfer Textbooks > Upload** sub-tab.

The screenshot shows the 'Transfer Textbooks...' form with the following elements:

- Navigation tabs: Track, **Upload**, Requests, Returns, Notices, Archive.
- Title: **Transfer Textbooks...**
- 'To' dropdown menu: -- Select a Site --
- 'Transfer' dropdown menu: by Barcode
- 'Order #' text input field.
- 'Create a barcode list' section: a text input field, an 'Add' button, a list box containing '-- Barcodes --', and a 'Remove' button.
- 'OR...' separator.
- 'Select a barcode file' section: a 'Choose File' button and the text 'No file chosen'.
- Instructional text: Upon transfer, ownership will be immediately changed to the receiving site.
- 'Transfer Copies' button.

2. Use the **To** drop-down to select the school to transfer materials to.

3. Use the **Transfer** drop-down to select how to identify materials for transfer based on the following table:

To identify textbooks...	Then...
<b>by Barcode</b>	<ul style="list-style-type: none"> <li>To upload a barcode list already created, click <b>Browse</b> to find and select a file of barcode numbers.</li> <li>To create a list, place the cursor in the <b>Create a barcode list</b> field, scan or type the barcodes, and then click <b>Add</b>.</li> </ul>
<b>from List</b>	<ul style="list-style-type: none"> <li>If there is more than one Resource List, select the one with the textbooks the school is transferring.</li> <li>To review the contents of the list, click <b>View List</b>.</li> </ul>
<b>by Copy Category</b>	If there is more than one item category, select the one with the materials the school is transferring.
<b>by Copy Count</b> (to transfer unbarcoded copies)	To transfer a textbook by copy count, search for and select the textbook, enter the number of copies to transfer, and then click <b>Select</b> .

**Note:** Textbook Manager does not transfer resources with a status of Checked Out, Lost, Stolen, Returned to Vendor, In Use or Out for Repairs.

4. To include an order number, which appears throughout the transfer process, enter it in the **Order #** field.
5. Click **Transfer Copies**.
6. To view a Job Summary in Job Manager, click **Refresh List** to update the status, and then click **View**.

## Track Transfers

Use Textbook Manager to track textbooks loaned or reassigned to other schools in the district.

1. Select **Catalog > Transfer Textbooks > Track** sub-tab.

[Track](#) | [Upload](#) | [Requests](#) | [Returns](#) | [Notices](#) | [Archive](#)

**Track Textbooks** [\[ Customize View \]](#) Receive Barcoded Copies

— Completed Incoming Transfers (72) ▾

— Outgoing Transfers (1) ▲

To ▲	Transfer Date	Order #	Status	👁	🗑
0201051 <small>(PLD1)</small>	12/8/2020 4:01 PM	04235474	0 of 25 Received <small>Pacemaker Basic English</small>	👁	🗑

— Completed Outgoing Transfers (59) ▾

📄 = View Notes      👁 = View      🗑 = Remove

---

**Customize View**  
Use the following options to create a customized list.

Limit to transfers created: after the date ▾  31

Limit to transfers from/to: -- Select a Location -- ▾

Display:  Incoming Transfers    Completed Incoming Transfers    Discrepancies  
 Outgoing Transfers    Completed Outgoing Transfers

Update

2. In the **Customize View** section at the bottom of the page, select from the available options to update the view.
3. Click **Update**.

## Receive a Transfer

Notification of incoming transfers is with the Processing Needed icon  that appears at the top of any page in Textbook Manager.



**Note:** To receive transfers, the *Transfer/Receive textbooks* permission is needed.

### To receive a transfer of barcoded items:

1. Click  to see a list of items needing processing, and then click **View** next to a Transfers message to open the Transfer Textbooks page.

**Note:** Also access the Transfer Textbooks page from **Catalog > Transfer Textbooks > Track** sub-tab.

2. Next to the shipment, click .
3. Click **Receive**.
4. Use one of the following methods to receive the items:

To...	Then...
Receive the entire shipment electronically	<ol style="list-style-type: none"> <li>5. Click <b>Receive All</b>. The Job Manager appears.</li> <li>6. To update the job status, click <b>Refresh List</b>.</li> <li>7. Once the status is Completed, click <b>View</b> to see the Job Summary.</li> </ol> <p><b>Note:</b> This is the only option that generates a Job Summary.</p>

To...	Then...
Receive individual items electronically	5. Click <b>Receive</b> next to a copy.
Receive items manually	5. In the <b>Scan or enter items one-at-a-time</b> field, scan or type one barcode at a time, and then click <b>Receive</b> .

### To receive a transfer of unbarcoded items:

**Note:** To do this, the *Receive textbook copies without barcodes* permission is needed.

1. Select **Catalog > Transfer Textbooks**, or click  and then **View** next to an item to open the Transfer Textbooks page.
2. Next to the shipment, click .
3. To receive the transfer, click **Receive**.
5. In the **Copies to Receive** field, type the number of items being received.
6. To assign barcodes to the items, use the **Barcodes** drop-down.
7. To add barcodes to the items, do one of the following:
  - Type the starting barcode.
  - To have Textbook Manager assign the next available barcodes, select **Assign next barcode**.
8. Click **Receive**. The transfer's status is completed.

## Order Textbooks From the Office of Instructional Materials

Ordering textbooks from the SCDE OIM follows this general process:

- A school orders materials.
- The order is approved, denied or revived.
- If the order is approved, the materials are prepared to be sent, the order is updated in Textbook Manager and the materials are shipped.
- The materials are sent to the receiving school.
- The receiving school enters the materials into Textbook Manager.

### Create an Order

1. Select **Catalog > Order Textbooks > Track** sub-tab.
2. Click **Add New Order**.

**New Order**

---

<b>* Name</b> <input type="text"/>	Email <input type="text"/>		<input type="button" value="Save &amp; Send"/>
<b>* Phone Number</b> <input type="text"/>	Ship After <input type="text" value="31"/>		<input type="button" value="Save"/>
<b>* Fax</b> <input type="text"/>	Note <input type="text"/>		<input type="button" value="Cancel"/>

\* = Required

---

**Select Titles to Order**

	State ID	Quantity	
<input type="button" value="Create List"/> <input type="button" value="v"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/>

3. Type the contact person's **Name**, **Phone Number**, and **Fax**.
4. Enter an **Email** and **Note**, if desired.
5. If the materials should be shipped after a certain date, use the **Ship After** field to enter or choose the date from the calendar.
6. From the first drop-down in the **Select Titles to Order** section, select **Create List** to enter the State ID or **Search for Title** to enter a name.
7. Type the search term in the next field, if Search for Title was selected, otherwise enter the State ID.

- 8. Use the **in** drop-down to select how to search or the quantity needed.
- 9. Click **Go**.
- 10. Next to the resource, type the number needed in the **Site Requested** field, and then click **Select**.
- 11. Save and send the order.
- 12. Submit the PowerSchool enrollment to [textbookorder@ed.sc.gov](mailto:textbookorder@ed.sc.gov).

**Receive Order**

The site receives the materials, either with or without barcodes.

**To receive the shipment at a site:**

- 1. Select **Catalog > Order Textbooks > Track** sub-tab, or click .
- 2. In the **Shipped** section, find the order to receive.
- 3. Next to the order, click  or , and then click **Shipments**.
- 4. Click **Show More**.
- 5. Do one of the following:

If the textbooks are...	Then...
<b>Barcoded</b>	<ul style="list-style-type: none"> <li>a. To receive the items one at a time, scan each barcode into the <b>Scan...one-at-a-time</b> field, and then click <b>Receive</b>.</li> <li>b. To receive all the items at once, click <b>Receive All</b>.</li> <li>c. To only receive some of the items, click <b>Show More</b>, and then click <b>Receive</b> next to each item.</li> </ul>

Large empty yellow box for notes.



If the textbooks are...	Then...
<b>Not barcoded</b>	<ol style="list-style-type: none"><li>a. In the <b>Copies to Receive</b> field, type the number of textbooks the school is accepting.</li><li>b. Use the <b>Barcodes</b> drop-down to select if the school wants to add barcodes to the items.</li><li>c. If adding barcodes, type the starting barcode, or select <b>Assign next barcode</b> to have Textbook Manager assign the next available barcodes to the items.</li></ol> <ol style="list-style-type: none"><li>a. Click <b>Receive</b>.</li></ol>

## Return Materials to the Office of Instructional Materials

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” or “actual enrollment less than projected”.

1. Select **Catalog > Transfer Textbooks > Returns** sub-tab.

The screenshot shows a web application interface for managing textbook returns. At the top, there is a navigation bar with tabs for Dashboard, Catalog, Circulation, Reports, Admin, and Messages. Below this is a sub-header for 'Returns'. On the left side, there is a sidebar menu with options like Textbook Search, Add Textbook, Resource Lists, Import Textbooks, Export Textbooks, Order Textbooks, Transfer Textbooks (highlighted), Update Titles, and Update Copies. The main content area has a 'Printable' button and a sub-tab for 'Returns' (highlighted). Below the sub-tab, there is a 'Textbook Copy Returns' section with a 'New Return' button. The main content area displays the message 'There are no returns to report.' and a 'Customize View' section with options to filter returns by date and display type. The 'View Returns created' dropdown is set to 'after the date' with a date field containing '31'. The 'Display' section has six checkboxes, all of which are checked: Unsent Returns, Submitted Returns, Denied Returns, Approved Returns, In Warehouse Returns, and Completed Returns. An 'Update' button is located below the display options.

2. Click **New Return**.



**New Return**

\* Name

\* Phone Number

\* Fax

Email

\* Reason for Return

\* # Boxes

\* = Required to send

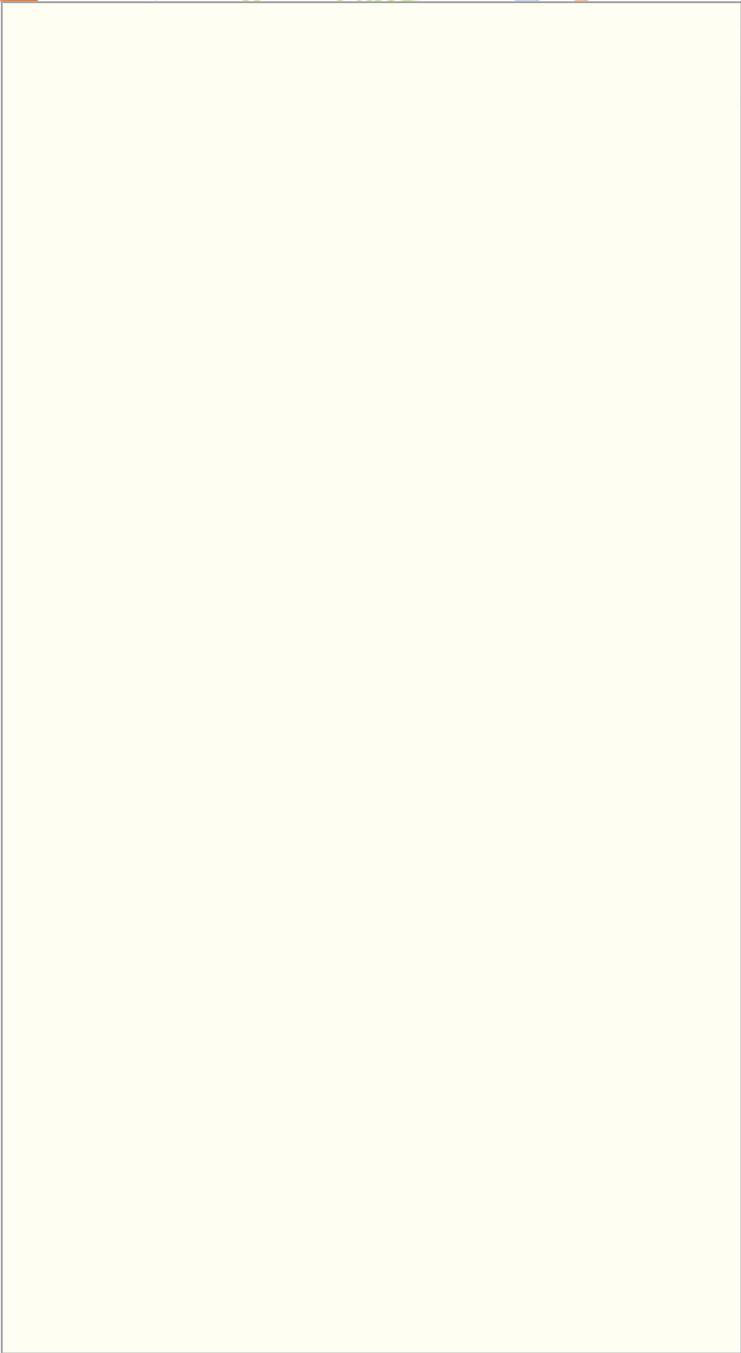
This is the number of boxes that the shipper can expect to pick up. Do not put in the number of copies.

— **Select Titles to Return**

in

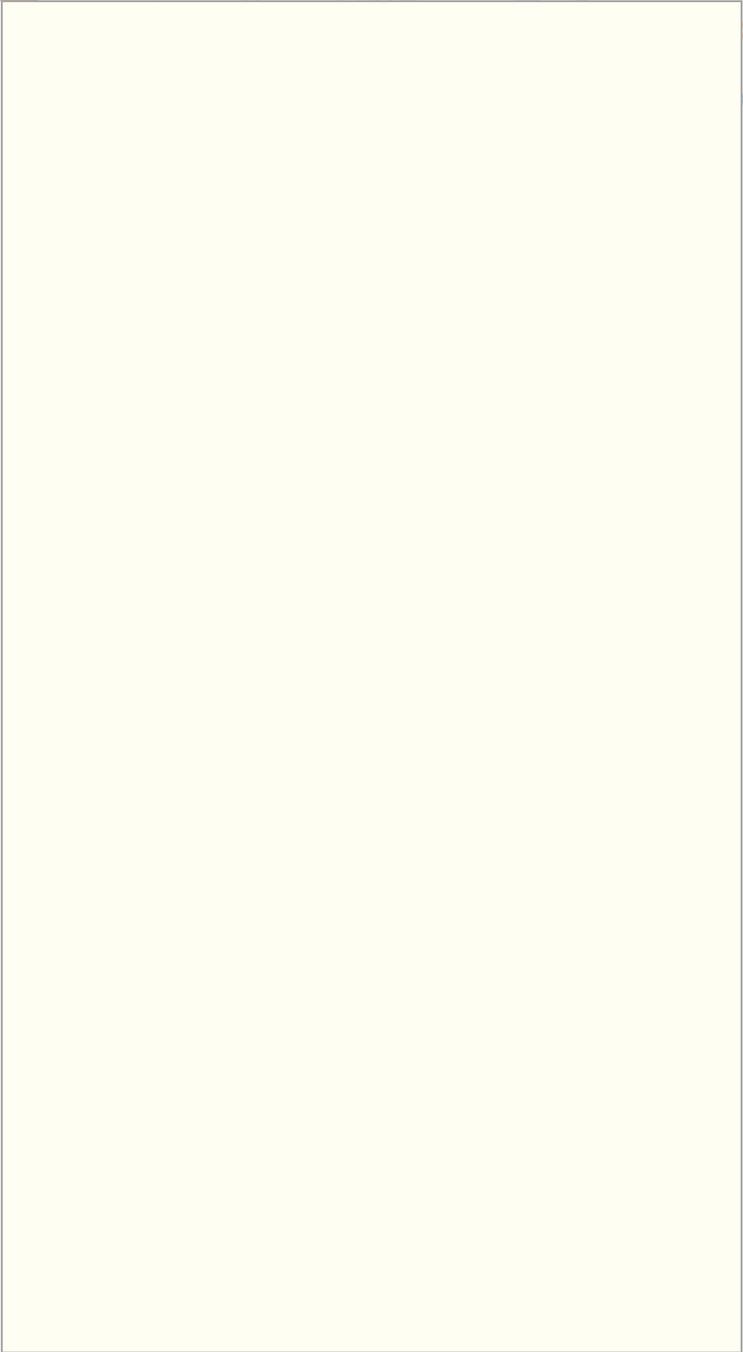
3. Type the contact person's **Name**, **Phone Number** and **Fax**.
4. Enter an **Email** address.
5. Enter the **Reason for Return** and **# Boxes**.
6. From the first drop-down in the **Select Titles to Return** section, select **Search for Titles** or **Upload Barcodes**.
7. Do one of the following:

If chose...	Then...																																		
<p><b>Search for Titles</b></p>	<p>a. Type the search term in the <b>Find</b> field.</p> <p>b. Select the field to search from the <b>in</b> drop-down.</p> <p>c. Click <b>Go</b>.</p> <p>d. If a list appears, click <b>Select</b> next to the title being returned.</p> <div data-bbox="432 399 1207 797" data-label="Form"> <p>— Select Titles to Return</p> <p>Search for Titles <input type="text"/> Find <input type="text"/> in <input type="text"/> All <input type="button" value="Go"/></p> <p>Searched All for "science"</p> <table border="1"> <thead> <tr> <th>Title</th> <th>ISBN Edition</th> <th>State / Textbook ID Publisher</th> <th>Available Copies</th> </tr> </thead> <tbody> <tr> <td>Building Blocks of Science, Grade 2, Push Pull Go, South Carolina Edition -- Unit Kit-32</td> <td>978-1-43501724-5 2nd Edition</td> <td>1630101 Carolina Biological Supply Company</td> <td>3 <input type="button" value="Select"/></td> </tr> <tr> <td>Full Option Science System (FOSS), Grade 1, Sound and Light (NG) -- Kit-64</td> <td>978-1-62571-272-1</td> <td>1630110 Delta Education, LLC</td> <td>2 <input type="button" value="Select"/></td> </tr> <tr> <td>Full Option Science System (FOSS), Grade 3, Energy and Electromagnetism -- Kit-64</td> <td>978-1-60902-011-8 3rd Edition</td> <td>1630112 Delta Education, LLC</td> <td>2 <input type="button" value="Select"/></td> </tr> <tr> <td>Pearson Interactive Science -- 2nd Year Write-In Student Edition</td> <td>978-0-328-85867-5</td> <td>8890493 Pearson, Scott Foresman</td> <td>225 <input type="button" value="Select"/></td> </tr> <tr> <td>Pearson Interactive Science, Grade 1 -- 2nd Year Write-In Student Edition</td> <td>978-0-328-86333-4</td> <td>8890494 Pearson, Scott Foresman</td> <td>222 <input type="button" value="Select"/></td> </tr> <tr> <td>Pearson Interactive Science, Grade 1 -- Student Edition Print + Digital License</td> <td>978-0-328-90755-7</td> <td>1630148 Pearson, Scott Foresman</td> <td>275 <input type="button" value="Select"/></td> </tr> </tbody> </table> </div> <p>e. Scan the barcodes or enter the number of unbarcoded copies.</p> <div data-bbox="432 902 1207 1156" data-label="Form"> <p>Identify Copies <input type="button" value="OK"/></p> <p> Building Blocks of Science, Grade 2, Push Pull Go, South Carolina Edition -- Unit Kit-32 ISBN: 978-1-43501724-5 State/Textbook ID: 1630101</p> <table border="1"> <thead> <tr> <th></th> <th>Available</th> </tr> </thead> <tbody> <tr> <td>Scan or enter barcodes <input type="text"/> <input type="button" value="Go"/></td> <td>0</td> </tr> <tr> <td>Copies without barcodes <input type="text"/></td> <td>3</td> </tr> </tbody> </table> </div> <p>f. Click <b>OK</b>.</p>	Title	ISBN Edition	State / Textbook ID Publisher	Available Copies	Building Blocks of Science, Grade 2, Push Pull Go, South Carolina Edition -- Unit Kit-32	978-1-43501724-5 2nd Edition	1630101 Carolina Biological Supply Company	3 <input type="button" value="Select"/>	Full Option Science System (FOSS), Grade 1, Sound and Light (NG) -- Kit-64	978-1-62571-272-1	1630110 Delta Education, LLC	2 <input type="button" value="Select"/>	Full Option Science System (FOSS), Grade 3, Energy and Electromagnetism -- Kit-64	978-1-60902-011-8 3rd Edition	1630112 Delta Education, LLC	2 <input type="button" value="Select"/>	Pearson Interactive Science -- 2nd Year Write-In Student Edition	978-0-328-85867-5	8890493 Pearson, Scott Foresman	225 <input type="button" value="Select"/>	Pearson Interactive Science, Grade 1 -- 2nd Year Write-In Student Edition	978-0-328-86333-4	8890494 Pearson, Scott Foresman	222 <input type="button" value="Select"/>	Pearson Interactive Science, Grade 1 -- Student Edition Print + Digital License	978-0-328-90755-7	1630148 Pearson, Scott Foresman	275 <input type="button" value="Select"/>		Available	Scan or enter barcodes <input type="text"/> <input type="button" value="Go"/>	0	Copies without barcodes <input type="text"/>	3
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Scan or enter barcodes <input type="text"/> <input type="button" value="Go"/>	0																																		
Copies without barcodes <input type="text"/>	3																																		



If chose...	Then...
<b>Upload Barcodes</b>	<p>a. To scan barcodes, use the <b>Create a barcode list</b> field. Or, to upload a file of barcodes scanned offline with Follett Remote or another device, from the <b>Select a barcode file</b> section, click <b>Choose File</b> (or <b>Browse</b>, depending on the browser).</p> <div data-bbox="432 415 1169 763"><p>Select Titles to Return</p><p>Upload Barcodes <small>Maximum 500 barcodes per each list/file uploaded</small></p><p>Create a barcode list <input type="text"/> <b>Add</b></p><p>-- Barcodes --</p><p><b>Remove</b></p><p>OR...</p><p>Select a barcode file <input type="button" value="Choose File"/> No file chosen</p><p><b>Upload Scans</b></p></div> <p>b. Click <b>Upload Scans</b>.</p>

8. To submit the return immediately, click **Save & Send**; otherwise, to make changes and submit later, click **Save**.



# Viewing Reports for Textbook Transactions



## Description

Textbook Manager has many reports to help track material usage including surpluses and shortages and patron obligations. Learn how to report on textbook transactions.

## Objectives

- Create a Student to Textbook Report
- Generate and analyze Textbook Checkout Summary
- Generate Outstanding Textbook Obligations
- Describe how to create a Class List Report

## Student to Textbook Statistics Report

The Student to Textbook Statistics report helps determine if the school or district as a whole has sufficient quantities of materials for all students enrolled in classes. It also identifies the sites with surpluses and shortages, which facilitates transferring materials between sites.

This report is useful at the beginning of each term or session, prior to or during distribution of materials. It can also be used to budget for new materials or when ordering replacement materials.

1. Log in to the district or specific site.
2. Select **Reports > Textbook Reports**.
3. Under **Circulation**, select **Student to Textbook Statistics**.

The screenshot shows a web interface for configuring a report. At the top right, there are two tabs: 'Create New Report' (highlighted in orange) and 'Saved Reports'. Below the tabs is the title 'List Student to Textbook Statistics...'. The main form area contains the following elements:

- For:** A dropdown menu with 'Aiken County School District' selected.
- Department:** A dropdown menu with 'All' selected.
- Select:** A dropdown menu with 'All' selected.
- Class starting on or after:** A text input field with a calendar icon to its right.
- to:** A text input field with a calendar icon to its right.

At the bottom of the form, there are two blue buttons: 'Save Setup' and 'Run Report'.

4. If running the report at the district, click **For** to limit the report to a site type or a specific school.
5. Use **Department** to select whether to include classes from all or one department.
6. Use the **Select** drop-down to choose **by Title** or **by ISBN** to choose a particular item, such as math materials.
7. Use the **Class starting on or after** and **to** fields to enter the dates a class starts and ends. Note the following:

- To include all classes, leave both fields blank.
  - To include all classes starting on or after a certain date, enter a date in the **on or after** field only.
  - If the leave the **on or after** field is left blank and the site enters a date in the **to** field, it includes all classes that are up to and including that date.
8. Click **Run Report**. Report Manager displays the report at the top of the list. The status automatically updates.
  9. When the status of the job is **Completed**, click **View** to see the report.

Student to Textbook Statistics		Clearwater Elementary School - 0201024			
<b>Displayable Name/Title: 1-2-3 math ISBN: 0-911019-52-9</b>					
Undefined					
American History (HIS-201) Enrollment: 8					
Total Items*	Incoming Transfers	Total Enrollment	Extra Items**	(Items Needed)	
0	0	8	0	(8)	
<b>Displayable Name/Title: 50 American biographies ISBN: 0-15-371590-1</b>					
Undefined					
Biographies (REA-401) Enrollment: 6					
Total Items*	Incoming Transfers	Total Enrollment	Extra Items**		
6	0	6	0		
<b>Displayable Name/Title: ABC in American Sign Language ISBN: 0-932666-43-4</b>					
Default Budget Category: Foreign Language					
Undefined					
American Sign Language (FOR-101) Enrollment: 7					
Total Items*	Incoming Transfers	Total Enrollment	Extra Items**		
7	0	7	0		

## Textbook Checkout Summary

The Textbook Checkout Summary report helps determine the number and percentage of students who do not have the required materials for their current classes. Textbook Manager considers a student to be without materials if they are missing at least one of the assigned resources for a class.

A site may run this report for all schools or a single school. To generate the report for a single school, it can also include a list of the students who do not have the materials.

This report is useful during or after distribution of textbooks.

1. Log in to the district or a site.
2. Select **Reports > Textbook Reports**.
3. Under **Circulation**, select **Textbook Checkout Summary**.

List textbook checkouts...

For Clearwater Elementary School - 0201024

Current Classes English [20100000]

Limit by

From  to

Sort by

Include  Names of Students without Textbooks

Teacher

Period

Course ID

Off-site titles associated with the class

Page Break

Signature Line

4. If running the report from the district, use the **For** drop-down to choose the district, site type or a particular site.

**Note:** If running the report for the entire district or multiple schools, this is the only option.

5. Use **Current Classes** to select whether to include all classes or one class.
6. Use **Limit by** to select **Class ID**, **Class Name**, **Teacher** or **Course ID**.
7. In the **from** and **to** fields, do one of the following:
  - To include all class IDs, names or teachers, leave both fields blank.
  - To limit the report to one name or number, type or select the same name or number in both fields. For example, the site might choose to run the report for one teacher – **to Smith from Smith**.
  - If the site leaves the **from** field blank and types a name or number in the **to** field, it includes all those up to and including the name or number in that field.
  - If the site types a name or number in the **from** field and leaves the **to** field blank, it includes that name or number and all those after it.
8. Choose **Sort by** to sort the report by **Class ID**, **Class Name**, **Teacher** or **Course ID**.
9. From the **Include** section, select the information for the report.
10. Click **Run Report**. Report Manager displays the report at the top of the list. The status automatically updates.

11. When the status of the job is **Completed**, select **View** to see the report.

### Textbook Checkout Summary Clearwater Elementary School -

**Class:** 20100000 - English

**Section:** A123

**Period:** 3

**Enrollment:** 17

**Teacher:** Asher, Elli Reena

**Title:** Pacemaker Basic English

**Students with textbooks:** 10

**Students without textbooks:** 7

1. Asher, Chris Scarlett (P 43590)
2. Backus, Scarlett Ellis (P 71498)
3. Banjo, Florida Yen (P 45103)
4. Bannerman, Sam Doretta (P 71469)
5. Barclay, Cleta Cleta (P 42935) - Inactive
6. Boyd, James Shakira (P 27775) - Inactive
7. Bush, Shella Florida (P 42425) - Inactive

## Outstanding Textbook Obligations

The Outstanding Textbook Obligations report shows all the students who have materials checked out that are not needed for the current schedule, materials lost by students with no fine assessed, and materials lost by students with unpaid fines.

This report is best used at end of term after textbook collection or beginning of term prior to textbook distribution.

1. Log in as a district user with site access or a site user.
2. Select **Reports > Textbook Reports**.

3. Under **Circulation**, select **Outstanding Textbook Obligations**.

**Outstanding Textbook Obligations...**

**Show**  Books not needed for current schedule <sup>?</sup>  
 Lost books with no fine assessed  
 Lost books with unpaid fines

**Select by**  **From**  **to**

**Sorted by**  Patron Name  
  and then by

---

**Limit the results to...**

**My Patrons**  All Patron Types   
 Graduating in

**Status**  Active  
 Inactive  
 Restricted

---

**Format**

4. In the **Show** section, choose what to include in the report.

**Note:** "Books not needed for current schedule" includes textbooks checked out to patrons who do not need them for their current classes. Use this option to find patrons who were enrolled in a class and checked out a textbook, then dropped the class.

5. Use **Select by** to choose a method for identifying the range of patrons to include.
6. In the **From** and **to** fields, do one of the following:
- Leave both boxes blank (for Homeroom, "Any Homeroom") to include all patrons.
  - Leave the **From** box blank and enter a name or number in the **to** box, it includes all those up to and including the name or number in the **to** box.
  - Enter a name or number in the **From** box and leave the **to** box blank, it includes that name or number and all those after it.
  - Enter the same name or number in both boxes, it is limited to that one name or number.

7. Use the **Sorted by** section to decide how to sort the report. Choose Patron Name, Grade Level, Homeroom or one of the User-Defined fields. Sites may also sub-sort the copies by a second field.
8. In the **Limit the results to...** section, select the patron types and statuses to include.
9. In the **Graduating in** field, enter a year to limit by a graduation year.
10. From the **Format** drop-down, choose either PDF or Microsoft Excel.
11. Click **Run Report**. Report Manager displays the report at the top of the list. The status automatically updates.
12. When the status of the job is **Completed**, click **View** to see the report, notices or status of the email notices.

Outstanding Textbook Obligations		George Washington High School		
<small>Showing books not needed for current schedule, Selecting by Patron Name, Sorting by Patron Name, Limiting results to all patron types, With status active</small>				
<b>ADAMS, JAMES C (Faculty: P 317019)</b>		Grade:	Homeroom:	
<i>Title</i>	<i>ISBN</i>	<i>Item Barcode</i>	<i>Item Status</i>	<i>Due Date</i>
The Algebra	0-7854-3568-9	50000100000521	Checked Out: 12/8/2017	Due: 6/1/2018
The Algebra	0-7854-3568-9	50000100000522	Checked Out: 12/8/2017	Due: 6/1/2018
The Algebra	0-7854-3568-9	50000100000525	Checked Out: 12/8/2017	Due: 6/1/2018
The Algebra	0-7854-3568-9	50000100000526	Checked Out: 12/8/2017	Due: 6/1/2018
District Count Test			Checked Out: 10/30/2017	Consumable
<b>Albert, Kyle (Student: P 8)</b>		Grade:	Homeroom: 201	
<i>Title</i>	<i>ISBN</i>	<i>Item Barcode</i>	<i>Item Status</i>	<i>Due Date</i>
Math.	0-15-315517-5	300100000045	Checked Out: 8/17/2017	Due: 6/1/2018
<b>Ali, Lazor (Student: P 223344)</b>		Grade:	Homeroom:	
<i>Title</i>	<i>ISBN</i>	<i>Item Barcode</i>	<i>Item Status</i>	<i>Due Date</i>
Tablet		00000021	Checked Out: 9/27/2017	Due: 6/1/2018

## Class List Report

The **Class List** report creates a list of teachers and their classes including due dates. It also allows sites to view any materials that have been checked out or overdue by teachers or students.

1. Go to **Reports > Textbook Reports**.
2. Under **Circulation**, select **Class List**.

List classes...

---

For

---

Select & Sort by

From  to

Start a new page for each

---

Additional options Include

Only class periods from  to

Show  Teachers and their classes only

Teachers, students and any  resources

---

Output as

---

3. Use the following table to complete the report options:

To...	Then...
Run a class list for teachers	<p>a. From the <b>For</b> drop-down, select <b>Teachers</b>.</p> <p>b. To run the report for a range of teachers, type the range in the <b>From</b> and <b>to</b> fields under <b>Select and Sort by Teacher Name</b>.</p> <p><b>Note:</b> To create lists for all teachers, leave both fields blank. To create a list for one teacher, type the same name in both fields.</p> <p>c. Select <b>Start a new page for each</b> and either <b>Teacher</b> or <b>section/class period</b>.</p> <p>d. Complete the <b>Additional options</b> fields as needed.</p>
Run a class list for students	<p>a. From the <b>For</b> drop-down, select <b>Students</b>.</p> <p>b. In the <b>Sections starting</b> fields, type a range of dates for the sections. Textbook Manager includes only sections that have starting dates within the range defined.</p> <p><b>Note:</b> When limiting by the section starting date, the <b>Checkouts Start &lt;&gt;days before class starts</b> date is used to defined in the loan period for each section. If this date has not been defined for the loan period, Textbook Manager uses the <b>Class Starts</b> date.</p> <p>c. Complete the <b>Select by</b> and <b>Sort by</b> fields as needed.</p>

- Next to **Output as**, choose **PDF** or **Excel**.
- Click **Run Report**. Report Manager appears.
- When the status is Completed, click the **View** link to open the report.

# Circulating Textbooks

## Description

An efficient method of distributing materials saves time and ensures inventory accuracy. Learn about Textbook Manager's circulation features that will help to quickly and efficiently check out and check in materials by patron, class, and teacher.

## Objectives

- Circulate items using To Patron
- Circulate items using By Class
- Circulate items using To Teacher
- Check in textbooks
- View the Copy and Patron Status pages

## Circulate To Patron

The To Patron checkout option is ideal for when students or teachers are checking out resources for their own use.

The quickest way to check out is to use a scanner attached to a computer to scan the patron barcode then to scan the copy barcode. The steps to check out materials depend on whether it is barcoded or not. Or, check out barcoded and unbarcoded items to a patron in the same session.

### Use the following steps to check out textbooks to a patron:

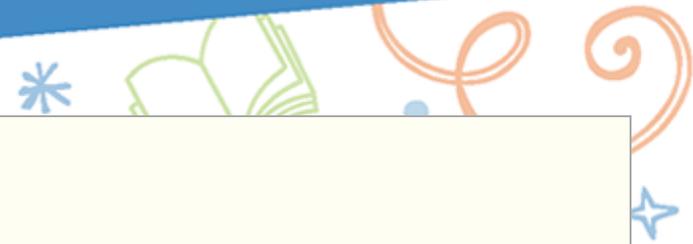
1. Select **Circulation > Check Out Text > To Patron** sub-tab.
2. In the **Find** field, scan or type the patron's barcode. Type the barcode, click **Find Patron**, and then select the patron from the search results.

**Note:** If the patron barcode is not available, type in the patron's name, state ID, grade level, etc.

3. Deselect the **Only my patrons** checkbox to search all sites' patrons.
4. Select the **Only search** checkbox, and select an option from the drop-down to narrow the search based on a patron's first, middle or last name, grade level, homeroom, etc.

5. To complete the task for active patrons, select the **Only Active Patrons** checkbox.
6. Use the following table to complete the task:

To check out...	Then...
A barcoded textbook	<ol style="list-style-type: none"> <li>a. In the <b>Find</b> field, scan the textbook's barcode or ISBN.</li> <li>b. Click <b>Find Copy</b>.</li> <li>c. Find the item, and then click <b>Check Out</b>.           <div data-bbox="632 472 1190 678" style="background-color: #e0ffff; padding: 5px; margin: 5px 0;"> <p><b>Note:</b> If a patron has fines or overdue items, a blocked transaction message will appear. Users with the <i>Override textbook blocks</i> permission can bypass the block.</p> </div> </li> <li>d. To edit the due date for the item in the <b>Checked Out</b> section, click <b>Change Date</b>. Select the new due date and whether it is for this item, this patron or until logout.           <div data-bbox="632 834 1190 1019" style="background-color: #e0ffff; padding: 5px; margin: 5px 0;"> <p><b>Note:</b> A special due date can be set at the time of checkout for that item. Once the item is checked out to a patron, a special due date can no longer set .</p> </div> </li> </ol>



To check out...	Then...
<p>Unbarcoded textbook or consumable</p> <p><b>Note:</b> Consumables do not have to be checked in at the end of the period. A nightly job deletes them automatically. Consumables can be checked in early; they are added back to the inventory with an Available status.</p>	<ol style="list-style-type: none"> <li>In the <b>Find</b> field, type a keyword or scan the ISBN for the resource to check out.</li> <li>Click <b>Find Item</b>.</li> <li>Do one of the following:                             <ul style="list-style-type: none"> <li>Find the item to check out, and then click <b>Check Out</b>.</li> <li>Next to the item, type a <b>Quantity</b>, and then click <b>Check Out</b>. A confirmation message shows the number of items to be checked out and the due date. Click <b>Yes</b> to confirm, or click <b>No</b> to change the quantity.</li> </ul> </li> </ol>

Dashboard Catalog Circulation Reports Admin

Check Out Text

Check Out Text

How do I... ?

To Patron
By Class
To Teacher

Find 
Go
Find Patron
Find Copy

Only my patrons
  Only search
 Patron Names
 Only Active Patrons

**Ard, Nathanael Susanne** (Student: P 19197)

Checked Out Textbooks: 1

Overdue Textbooks: 0

Textbooks: \$0.00

Fines Patron: \$0.00

Grade Level 7

Homeroom Schweickert, Allison

View Classes

Edit Patron

Only today's check outs
 Print Receipt

**Checked Out**

Glencoe Math Accelerated -- Student Edition (Copy: SDE00004776989)

Due 6/1/2021

Change Date

**Items Out**

- To print a receipt that includes current checkouts and outstanding fines, click **Print Receipt**. To print a receipt that includes only today's checkouts, select the **Only today's check outs** checkbox before clicking **Print Receipt**.
- Click **Reset** to clear the completed checkout and begin checking out a new patron.

## Circulate By Class

The By Class checkout option makes it easy to check out materials to all students in a class without re-entering the teacher or class information.

### To check out materials to a class:

- Select **Circulation > Check Out Text > By Class** sub-tab.
- In the **Find** field, enter the teacher's name and click **Find Teacher**, or scan the teacher's barcode.
- From the **Class** drop-down, select the appropriate class section.

The screenshot shows a web interface for checking out materials. At the top, there are three tabs: 'To Patron', 'By Class' (which is selected), and 'To Teacher'. Below the tabs is a search bar with a 'Go' button and three buttons: 'Find Teacher', 'Find Student', and 'Find Item'. There are also three checkboxes: 'Only my patrons' (checked), 'Only search Patron Names' (unchecked), and 'Only Active Patrons' (unchecked). Below the search bar, the name 'COON, TERESA (Faculty: P 1062)' is displayed, followed by a 'Class List' button. A dropdown menu shows 'Class 2 (M-W) Biology (Due: 5/30/2018)'. Below the dropdown, the 'Student?' field is empty, and the 'Items Out' section shows 'There are no items checked out to this patron'.

- Do one of the following:
  - In the **Find** field, enter or scan the student's barcode.
  - Click **Class List** to select the appropriate student from the list.
- In the **Find** field, scan the first item's barcode. The item appears in the **Checked Out** section. Scanning a second item moves the first item to the **Items Out** section.

**Note:** If a patron has fines or overdue items, a blocked transaction message will appear. Users with the *Override textbook blocks* permission can bypass the block.

6. To edit the due date for the resource item in the **Checked Out** section, click **Change Date**. Select the new due date and whether it is for this item, this location or the rest of this session.
7. To check out resources to a different location, click **Reset**.

## Circulate To Teacher

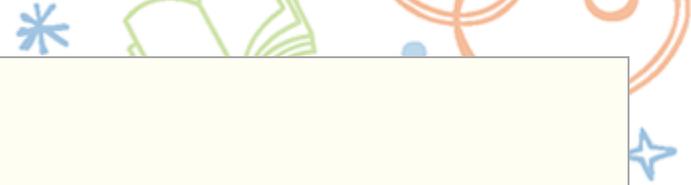
If materials are used in a classroom, the materials may be checked out to the teacher and remain the teacher's responsibility, or the teacher can reassign the textbooks to students. To reassign textbooks, enable the *Reassign textbooks* permission, which also requires the *Check out textbooks* permission.

### To check out a textbook to a teacher:

1. Select **Circulation > Check Out Text > To Teacher** sub-tab.
2. In the **Find** field, enter the teacher's name and click **Find Teacher**, or scan the teacher's barcode.
3. In the **Find** field, scan the first item's barcode. The item appears in the **Checked Out** section. Scanning a second item moves the first item to the **Items Out** section.

#### Notes:

- If checking out a kit with components, verify the number of components.
- If a patron has fines or overdue items, a blocked transaction message will appear. Users with the *Override textbook blocks* permission can bypass the block.



		To Patron	By Class	To Teacher
Find	<input type="text"/>	<input type="button" value="Go"/>	<input type="button" value="Find Teacher"/>	<input type="button" value="Find Copy"/>
<input type="checkbox"/>	Only search	<input type="button" value="Patron Names"/>	<input type="checkbox"/>	Only Active Patrons
<b>Asher, Elli Reena</b> (Faculty: F5423)				<input type="button" value="Edit Patron"/>
Class <input type="text" value="3 (M-F) English (Due: 6/1/2021)"/>				
<b>Items Out</b>				<input type="button" value="Reassign"/>
Due Date	Title	Price		Checked Out
6/1/2021	<b>Pacemaker Basic English</b> (Copy: X 2) Class: English 20100000/Section: A123; Period: 3 (Elli Asher)	\$39.95	11/18/2020	<input type="button" value="Renew"/> <input type="button" value="Lost"/>
6/1/2021	<b>Pacemaker Basic English</b> (Copy: X 3) Class: English 20100000/Section: DEF130441; Period: 0 (Elli Asher)	\$39.95	11/18/2020	<input type="button" value="Renew"/> <input type="button" value="Lost"/>
6/1/2021	<b>Pacemaker Basic English</b> (Copy: X 4) Class: English 20100000/Section: DEF130441; Period: 0 (Elli Asher)	\$39.95	11/18/2020	<input type="button" value="Renew"/> <input type="button" value="Lost"/>

- To edit the due date for the item in the **Checked Out** section, click **Change Date**. Select the new due date and whether it is for this item, this location or the rest of this session.
- To check out textbooks to a different teacher, click **Reset**.

#### To reassign textbooks to a student:

- Select **Circulation > Check Out Text > To Teacher**.
- Next to **Items Out**, click **Reassign**.
- Scan or enter the student's barcode.

4. Next to the textbook to be reassigned to that student, click **Assign**.

Teacher: Asher, Elli Reena (Faculty: F5423) Class: 3 (M-F) English (Due: 6/1/2021)

Find

Only search Patron Names  Only Active Patrons

Allen, Bryanna Susanne (Student: P 72116)

Checked Out Textbooks: 0 Grade Level K  
Overdue Textbooks: 0 Homeroom  
Fines Textbooks: \$0.00  
Patron: \$0.00

– To Be Assigned

Due Date	Title	Price	Checked Out	
6/1/2021	 Pacemaker Basic English (Copy: X 2)	\$39.95	11/18/2020	<input type="button" value="Assign"/>

5. Repeat steps 3 and 4 to reassign textbooks to other students.

## Check In Textbooks

Properly check in textbooks to track materials and assess any necessary fines.

1. Select **Circulation > Check In Text**.
2. In the **Find Item** field, scan or type the barcode number of an item.
3. Type the barcode, click **Go** or press **Enter**.

Check In Text

How do I... ?

Find Copy

– Most Recently Checked In

 South Carolina Journeys, Grade 1 -- Student Edition, Volume 6 (Copy: SDE00006266184) **Past Due** 6/1/2020

Checked out 3/20/2020 to ~~Thomas, Neal Allen~~ (Student: P 45072) **Condition**

Textbook copies still checked out: 1

4. Use the **Condition** drop-down to select a condition.
5. To create a fine, click **Create Fine**.

## View Copy Status and Patron Status

### Copy Status

View information about a specific copy, including current checkouts, fines, holds, contact information, and circulation statistics on the Copy Status page.

1. Select **Circulation > Copy Status**.
2. Scan or type the copy barcode in the **Find Copy** field.

**Note:** If the copy barcode is not available, search the collection by entering a keyword from the title (or part of a word, followed by \*) in the **Find Copy** field. If a list appears, select the correct barcode.

3. Click **Go**.

Find Copy  Go

How do I... [?](#)

**South Carolina Journeys, Grade 1 -- Student Edition, Volume 6** [🔍](#)

Author Baumann, et al Location

Barcode SDE00006266184	Status Available <a href="#">?</a>
Replacement Price \$33.05	Budget Category
Date Acquired 7/31/2012	Vendor
Condition New	Publisher Houghton Mifflin Harcourt Publishing Company
ISBN 978-0-547-48915-5	

Edit Copy

Mark Lost

View History

**Current Checkout**

None

**Previous Checkout**  
(Returned: 11/19/2020)

Patron Teamer, Neal Afton [Student]

Barcode P 45072

Grade Level 2

Homeroom Osborne, Mistie L.

Notes Add Note

There are no notes for this copy

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

## Patron Status

View information about a patron, including current checkouts, fines, holds, contact information, and circulation statistics on their Patron Status page.

1. Select **Circulation > Patron Status**.
2. Either:
  - Scan the patron's barcode in the **Find Patron** field.
  - Type the **Barcode** and click **Go**, or press **Enter**.

**Notes:** If the patron's barcode is not available, try entering the patron's first, middle, or last name, nickname, grade level, homeroom, user name, a value in one of the User Defined fields, or a District ID.

If the whole name or word is not available, enter part of it, followed by \*.

3. To expand the search to other schools in the district, deselect the **Only my patrons** checkbox.
4. To speed the search, select the **Only search** checkbox and then a field from the drop-down.
5. To search for only active patrons, select the **Only Active Patrons** checkbox.
6. Click **Go**.

# Fines

## Description

It's important to handle textbook fines in a simple and organized way. Textbook Manager streamlines fine management by automatically calculating overdue and lost fines. This module will explore how to create fine types, assess fines and manage fines.

## Objectives

- Explain how to create a fine type
- Identify how to assess a fine for lost items
- Discuss how to pay, waive and delete fines
- Describe reports for fines

## Create a Fine Type

Textbook Manager refers to any charges to patrons as fines, although the charges for some items and services are not penalties (for example, fees for using a printer or copy machine). Fines for overdue, lost, or damaged items, including missing barcodes and torn pages, are classified as Copy Specific. To assess a Copy Specific fine, a copy barcode or name is required.

Charges unrelated to materials are classified as Patron Only, such as for supplies or vandalism. A copy is not required to assess this type of fine.

The default Fine Types are represented by these icons:

	Damaged		Refund
	Lost		Broken Binding Excessive Writing Missing Barcode Missing Component Torn Pages Water Damage User-defined
	Overdue		Fine Note exists. Click the edit icon to view the contents of a note.
	Patron Only Vandalism		

If the default fine types do not meet the needs, create new ones.

**Note:** While it is necessary to access a patron record to create a new fine type, it is not necessary to assess a fine to create a new Fine Type.

**To create a fine type:**

1. Select **Circulation > Fines**.
2. In the **Find Patron** field, scan or type a patron barcode or type a patron name. If a barcode is scanned, the Fines page opens automatically. If the barcode or name is typed, press **Enter** or click **Go**. If a list of patrons appears, select one.
3. Click **Add Fine**. The Add Fine page appears.
4. Next to the **Reason** drop-down, click **Other**. The Manage Fine Types page appears.

Fine Type		Copy Specific ▾	Save
Calculation Method		\$0.00	Cancel
<input checked="" type="radio"/>	Fixed Amount		
<input type="radio"/>	% of Cost	0	
Broken Binding	Copy Specific	Fixed at \$0.00	
Excessive Writing	Copy Specific	Fixed at \$0.00	
Missing Barcode	Copy Specific	Fixed at \$0.00	
Prints	Patron Only		
Torn Pages	Copy Specific	Fixed at \$0.00	
Water Damage	Copy Specific	Fixed at \$0.00	

5. In the **Fine Type** field, type a descriptor for the fine type.
6. Click the **Copy Specific** drop-down to select how to calculate the fine type:
  - **Copy Specific** fine types are associated with a specific copy:
    - **Fixed Amount:** Type an amount for the fine.
    - **% of Cost:** Type a percentage for the fine.
  - **Patron Only** fine types are only associated with a patron and not associated with a copy. The fee amount is entered at the time it is applied.
7. Click **Save**.
8. On the Add Fine page, do one of the following:
  - To assess a fine for this patron, complete the remaining fields, and click **Save**.
  - If the school does not want to assess a fine for this patron, click **Cancel**.

## Assess Fines for Lost Items

Mark items **Lost** on the **Copy Status** or **Patron Status** page. Textbook Manager will automatically prompt sites to assess a fine for the lost item. The amount is calculated from the replacement price, which is in the title record and based on state policies for depreciation. The amount can be adjusted.

### To assess a fine:

1. Select **Circulation > Copy Status** or **Patron Status**.
2. Do one of the following:

To use...	Then...
Copy Status	<ol style="list-style-type: none"> <li>Scan or type the copy barcode.</li> <li>If the barcode is typed, click <b>Go</b>.</li> <li>Click <b>Mark Lost</b>.</li> </ol>
Patron Status	<ol style="list-style-type: none"> <li>Scan or type the patron barcode.</li> <li>If the barcode is typed, click <b>Go</b>.</li> <li>In the <b>Items Out</b> section, next to the textbook, click <b>Lost</b>.</li> </ol>

**[Student]** [Edit Patron](#)

Barcode P 69681 [Print Label](#) Nickname

Status Active Grade Level 4

Gender Female Homeroom

Card Expires

Grad Year 2024

Birthdate 8/11/2011

District ID 69681

Acceptable Use Policy on File? No

**Items Out** [View History](#)

Textbooks

Due Date	Title	Price	Checked Out	
6/1/2020	South Carolina Journeys, Grade 3 -- Student Edition, Volume 2 (Copy: SDE00006272804)	\$57.15	1/9/2020	<a href="#">Renew</a> <a href="#">Lost</a> <a href="#">Renew All</a>

**Fines** [Add Fine](#) [View History](#)

There are no fines for this patron

3. A message appears. To override the price and specify an amount up to the full contract price, enter it into the field.

 The copy will be marked as lost.  
Valeria Alecia Brandon (Barcode: P 69681) will be charged a fine of . According to the state fine schedule, a percentage of 25.00% was applied to the original price of \$57.15 based on inventory year 2020. If you do not want to assess a fine, set the fine amount to zero.

4. Click the **OK** button to complete the transaction.

## Pay, Waive, and Delete Fines

Textbook Manager lets patrons apply fine payments to the combined balance of all fines the patron owes or to an individual fine. When the patron asks to apply a payment to a combined balance, Textbook Manager does so in date-incurred order – oldest to newest. If the patron has local and off-site fines, Textbook Manager pays the local fines first.

### To enter a payment:

1. Select **Circulation > Fines**.
2. In the **Find Patron** field, scan or type a patron barcode or type a patron name.
  - If a barcode is scanned, the Fines page opens automatically.
  - If the barcode or name is typed, press **Enter** or click **Go**. If a list of patrons appears, select the one wanted.
3. In the **Pay** field, enter a payment amount.
4. To print a receipt for the payment, select the **Print Receipt** checkbox.

**Note:** To print a receipt without entering a payment, click **Print It**. If the patron has outstanding fines, there is an option to apply the refund to them.

(Student: P 42316) Edit Patron

Checked Out Textbooks: 0  
Overdue Textbooks: 0  
Fines Textbooks: \$20.65  
Patron: \$3.45

Grade Level 5  
Homeroom

**Fines** Add Fine View History Print It

Reason ?	Amount	Payable ?	
TB South Carolina Journeys, Grade 4 -- Student Edition (Copy: SDE00006272221)	\$20.65	<input checked="" type="checkbox"/>	
Copy Machine	\$3.45	<input checked="" type="checkbox"/>	

Amount Payable  
\$24.10 Local

Pay

Print Receipt Update

5. Click **Update**.

**Note:** When choosing to print a receipt, the printable page appears.

With the *Waive textbook fines* permission, a **Waive** field appears if is clicked next to a fine. To waive the fine, enter an amount in the **Waive** field, and then click **Save**.

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

## Current Checkouts/Fines Report

Textbook Manager's Current Checkouts/Fines report helps identify or send notices to students with checkouts, overdues and/or fines.

To set up the Current Checkouts/Fines report, use the following steps:

Select **Reports > Textbook Reports > Current Checkouts/Fines**.

### Step 1. Format

The screenshot shows the '1. Format' tab of the report setup. It includes sections for 'Show' and 'Format'. The 'Show' section has four radio button options: 'Checked Out/Overdue Materials' (checked), 'All that are currently overdue' (selected), 'That are overdue by 1 to days', and 'That are due from 12/1/2020 to 12/1/2020'. The 'Format' section has two radio button options: 'Report -- Output PDF' (selected) and 'Notices -- Language: English'. A 'Continue' button is located at the bottom of the form.

1. Select the information to include:
  - All that are currently overdue
  - Those overdue by a specific range of days (such as 2–5 days) or due in a specific number of days (such as 2 days)
  - Those due during a specific date range
  - All checked-out materials
  - Textbook or patron fines
2. Choose a format:
  - **Report** (PDF or Excel): This is a good option to have a report of all overdues/fines for the school to refer to or a list of materials that are due soon.

- **Notices:** Choose this option to mail or email students and/or parents to notify them of overdues, fines or checkouts that are due soon.

3. Click **Continue**.

## Step 2: Limit

1. Format
2. Limit
3. Details

Overdue Materials & Unpaid Fines Report

---

**Limit the results to...**

**My Patrons** All Patron Types Update

Graduating in

**Also Include**  Patrons of other sites that have my materials and/or that owe fines to Clearwater Elementary School - 0201024. [?](#)

**Status**  Active

Inactive

Restricted

---

**Also Include**  The materials my patrons have and/or the fines they owe that belong to other sites in the district. [?](#)

Continue

1. By default, the report includes all active patrons. To limit patrons by the following:
  - To exclude specific patron types, click **Update**, and then deselect the appropriate checkboxes. Click **Save**.
  - To include only a specific graduating class, select **Graduating in**, and then type the year.
  - To allow students from other schools in the district to check out materials, choose to include those patrons.
  - If students check out materials from other schools in the district, choose to include materials checked out from other schools.
2. Click **Continue**.

### Step 3: Details

The instructions for this step vary depending on the format selected in Step 1.

#### Chose Report:

1. In the "Select & Sort by" section, select a method for identifying patrons to include from the drop-down.

1. Format
2. Limit
3. Details

Overdue Materials & Unpaid Fines Report

---

Select & Sort by Patron Name ▾ from  to

Start a new page for each group

---

Also Display...

*Title Info*  Title for library materials Select All

Price of checked out/overdue materials Clear All

*Patron Info*  Barcode

Phone number

Subtotal items/fines for each patron

Grade Level ▾

Homeroom ▾

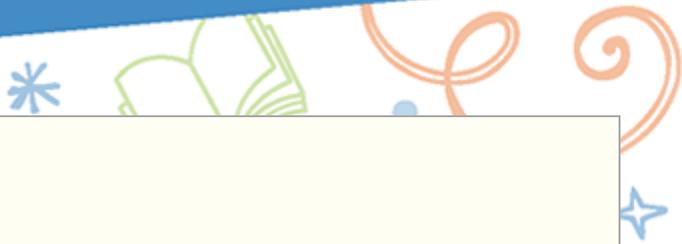
---

Save Setup
Run Report

2. In the **from** and **to** fields, do one of the following:
  - To include all patrons, leave both fields blank.

**Note:** If Homeroom was selected, select **Any Homeroom** from both drop-downs to include all.

- To limit the report to one name or number (such as a specific patron or all 8th graders), type or select the same name or number in both fields. For example, choose to run the report for one patron (**to Smith from Smith**) or one grade level (**to 8 from 8**).
- Leave the **from** field blank and type a name or number in the **to** field, to include all those up to and including the name or number in that field.



- Type a name or number in the **from** field and leave the **to** field blank, to include that name or number and all those after it.
3. To run a PDF report, select to "Start a new page for each group" in the report.
  4. From the "Also Display..." section, select or deselect the title and patron info to include in the report.

**Chose Notices:**

1. In the "Select & Sort by" section, select a method for identifying patrons to include from the drop-down.

1. Format
2. Limit
3. Details

Overdue Materials & Unpaid Fines/Notices

---

Select & Sort by Patron Name from   to  

---

**Distributed**  Internally ?  
 Mailed

**Page layout** Print 1 notice per page ▾

**Message** Dear Patron's Name:  

The following items are overdue. Please return them as soon as possible.

---

**Address Label**  To the Parent or Guardian of: Patron's Name

---

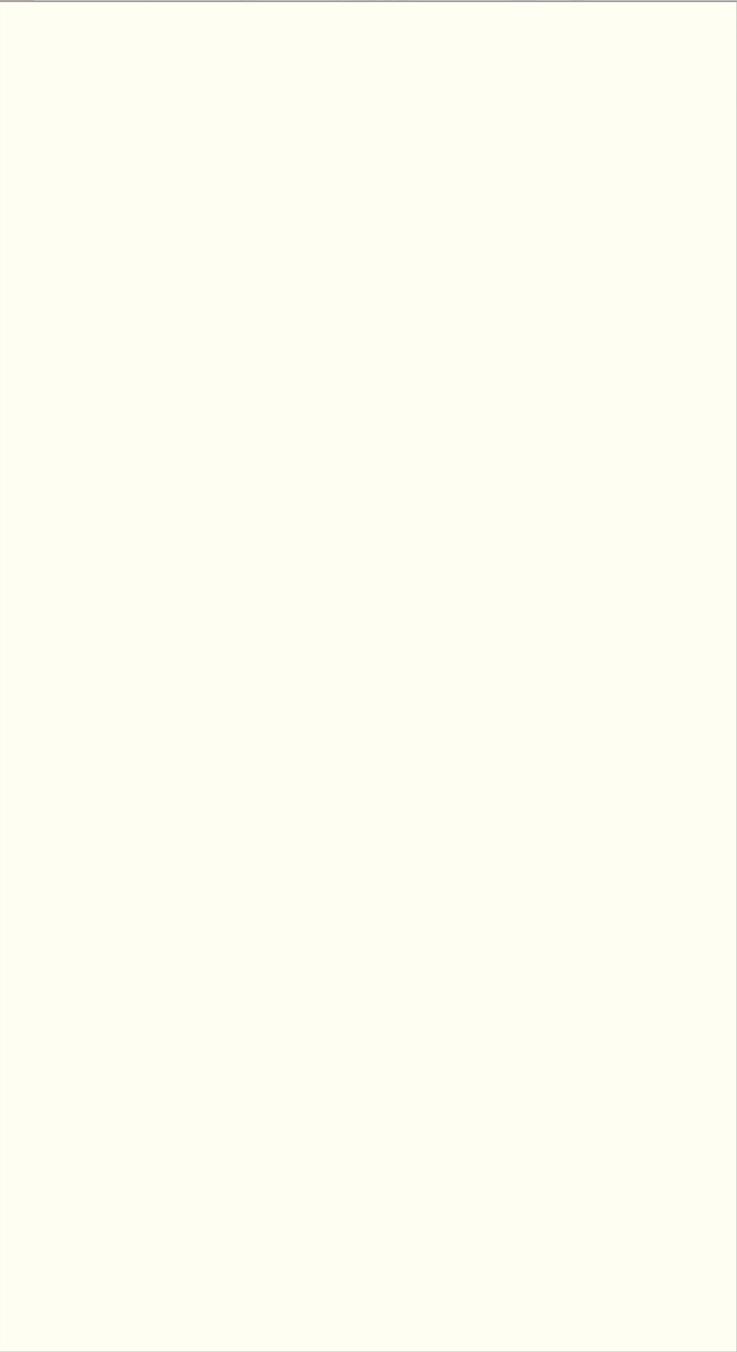
**Also Display...**

*Title Info*  Title for library materials Select All  
 Price of checked out/overdue materials Clear All

*Patron Info*  Barcode  
 Phone number  
 Grade Level ▾  
 Homeroom ▾

---

Save Setup
Run Notices



2. In the **from** and **to** fields, do one of the following:
  - To include all patrons, leave both fields blank.

**Note:** If selected Homeroom, select **Any Homeroom** from both drop-downs to include all.

- To limit the report to one name or number (such as a specific patron or all 8th graders), type or select the same name or number in both fields. For example, to run the report for one patron (**to** Smith **from** Smith) or one grade level (**to** 8 **from** 8).
  - Leave the **from** field blank and type a name or number in the **to** field, to include all those up to and including the name or number in that field.
  - Type a name or number in the **from** field and leave the **to** field blank, to include that name or number and all those after it.
3. Select how to distribute notices: **internally**, **mailed** (includes address) or **email**.
  4. If **internally** or **mailed** was selected, use the **Page layout** drop-down to select the number of notices to print on each page.
  5. In the **Message** fields, customize the salutation before the patron's name and the text of the message.
  6. To include parent or guardian name, select the **Address Label** checkbox.
  7. From the "Also Display..." section, select or deselect the title or patron info to include.

#### Step 4: Save & Run

Ready to save and/or run the report.

#### To run a report or notices that will not be saved for later use:

1. Click **Run Notices**. Report Manager displays the report at the top of the list. The status automatically updates.
2. Click the **View** link to see the report, notices or status of the email notices.

**To save the report or notices to run again or schedule it to run automatically:**

1. Click **Save Setup**.

Overdue / Assigned Materials & Unpaid Fines Report

Save As

Enter a unique and descriptive name for your report or notice setup;  
e.g., "1st Notice (5 to 10 days overdue)."

Schedule Report

2. In the **Save As** field, type a name for the report or notices.
3. From the **Schedule Report** drop-down, select **Do Not Schedule** to not run the report automatically. To schedule the report to run on a daily or weekly basis, select accordingly, and then select the day and/or time to run them.

**Note:** To not run the report or notices on closed days, select the **Do not run on closed days (Closed: Sunday, Saturday)** checkbox.

4. Click **Save Setup** or **Save & Run**.
5. If **Save & Run** was selected, Report Manager displays the report at the top of the list. The status automatically updates.
6. Click the **View** link to see the report, notices or status of the email notices.

The saved report or notice setup appears on the Format page, in the **Saved Report/Notices** list at the top.

## Fine History Report

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

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

This report includes only fines on which a payment (partial or full) or refund has been made. It includes payments and refunds made here for off-site fines, if any.

After setting up a report, a site can save it. When a report setup is saved, it appears on the Saved Reports sub-tab. From there, a site can run it later, edit it, duplicate it or delete it. Each time the report is run, the results reflect the current contents of the site's collection.

1. Select **Reports > Patron Reports**.
2. Under **Circulation**, click **Fine History**.

The screenshot shows a web interface for setting up a fine history report. At the top right, there are two tabs: 'Create New Report' (active) and 'Saved Reports'. The main heading is 'Show fine history - cash flow...'. Below this, there are several sections:

- Include fines for:** A list of four categories with checkboxes: 'Library Materials' (checked), 'Textbooks' (checked), 'Resources' (checked), and 'Patron Specific' (checked).
- For transactions occurring:** A radio button for 'Today' (selected) and a 'From' date field followed by 'to' and another date field.
- Sort by:** A dropdown menu currently set to 'Date'.

At the bottom of the form, there are two blue buttons: 'Save Setup' and 'Run Report'.

3. To limit the report to certain types of fines, deselect the checkboxes next to **Include fines for**.
  - **Textbooks** includes all fine types that are copy-specific (system-supplied or user-defined) and were assessed for materials.
  - **Patron Specific** includes all user-defined fine types that are Patron Only.

4. Next to **For transactions occurring**, either select **Today**, or select **From** and enter a date range for the transactions. To select from a calendar, click the calendar icon. When specifying a range:
  - Leave both fields blank to include **all** fine transactions.
  - Leave the **From** field blank and enter a date in the **to** field to include all fine transactions up to and including the date in the **to** field.
  - Enter a date in the **From** field and leave the **to** field blank to include fine transactions from that date onward.
  - Enter the same date in both fields to see fine transactions for one day.
5. Use the **Sort by** drop-down to select one of the following:
  - **Date**
  - **Patron:** The patron name
  - **Reason:** The reason for the fine
  - **Performed By:** The user name of the person who collected the money or paid the refund
6. To run the report now, click **Run Report**. Report Manager appears.
7. (Optional) To save the setup, click **Save Setup**.
  - a. On the Save Report page, enter a name for the report.

**Note:** The site must choose a name that is unique for the school's report.
  - b. Either:
    - Click **Save** to save the report
    - Click **Save and Run** to save the report setup and run the report now.

## Find Materials and Delete Fines After a Site District Move

When a site is moved from one district to another, all patron information and materials with a status of Available are moved to the new site. A site can still access the closed/old school. Instead of maintaining two logins, consider creating a main user at the old school who can access materials with a status of Lost, Checked Out or otherwise unavailable materials or history when needed.

For example, if a textbook was marked lost prior to the site move, when the barcode is scanned at the new site, no results will appear. If the student that lost the textbook is the person who found it, check the patron's record. Fines for lost textbooks will appear as a Migrated Fine.

**Abbasi, Hasan** (Student: 50100286) [Edit Patron](#)

Checked Out Textbooks: 0 Grade Level  
 Overdue Textbooks: 0 Homeroom  
 Fines Textbooks: \$0.00  
 Patron: \$97.50

---

**Fines** [Add Fine](#) [View History](#) [Print It](#)

Reason <span style="font-size: small;">?</span>	Amount	Payable <span style="font-size: small;">?</span>	
Migrated Fine	\$97.50	<input checked="" type="checkbox"/>	

**Amount Payable**  
\$97.50 Local

The Fine Note shows the patron fine is copy-specific, and lists the barcode associated with the copy.

**Abbasi, Hasan** (Student: 50100286) [Edit Patron](#)

**Reason** Migrated Fine

<b>Fine Assessed</b> 1/26/2021	<b>Fined</b> \$97.50	<b>Amount Due</b>	\$97.50
	<b>Waived</b> \$0.00	<b>Waive</b>	<input type="text" value="\$0.00"/>
	<b>Paid</b> \$0.00	<b>Pay</b>	<input type="text" value="\$0.00"/>

**Fine Note**

Copy specific fine or refund converted to patron specific. Fine Type: Lost. Title: Physics AP® -- Student Edition. Barcode: SDE0009017597

Print Receipt [Save](#) [Cancel](#)

If someone other than the student finds the lost textbook and there are no results, log in to the old school and scan the textbook. A message will say the copy was found, and the fine can be deleted. The copy record will show the patron that had the textbook, and the fine would then need to be managed in the patron's record at the new site.

For a list of all lost materials in the old site, run the Lost Textbooks and Fines report:

1. Log in to the old site.
2. Select **Reports > Textbooks**.
3. In the **Catalog – Titles & Copies** section, click **Lost Textbooks and Fines**.
4. Next to **Copies** or **Total**, click the hyperlink.
5. To produce the report in Excel, use the **Lost Textbooks and Fines** breadcrumb, and then click **Run Report**.

**Lost Textbooks and Fines from 8/1/2020** [Printable](#)

<p><b>Lost Textbooks</b></p> <ul style="list-style-type: none"> <li>• <b>Copies: 38</b></li> <li>• Replacement Value: \$2,184.10</li> </ul>	<p><b>Total Assessed Fines</b></p> <ul style="list-style-type: none"> <li>• <b>Total: \$522.00</b></li> </ul>
<p><b>Lost Fines</b></p> <ul style="list-style-type: none"> <li>• Fines: 37               <ul style="list-style-type: none"> <li>◦ Paid: \$0.00</li> <li>◦ Waived: \$0.00</li> <li>◦ Outstanding: \$522.00</li> </ul> </li> </ul>	<p><b>Damaged Fines</b></p> <ul style="list-style-type: none"> <li>• Fines: 0               <ul style="list-style-type: none"> <li>◦ Paid: \$0.00</li> <li>◦ Waived: \$0.00</li> <li>◦ Outstanding: \$0.00</li> </ul> </li> </ul>

**Lost Textbooks and Fines...**

from   to   [Update](#)

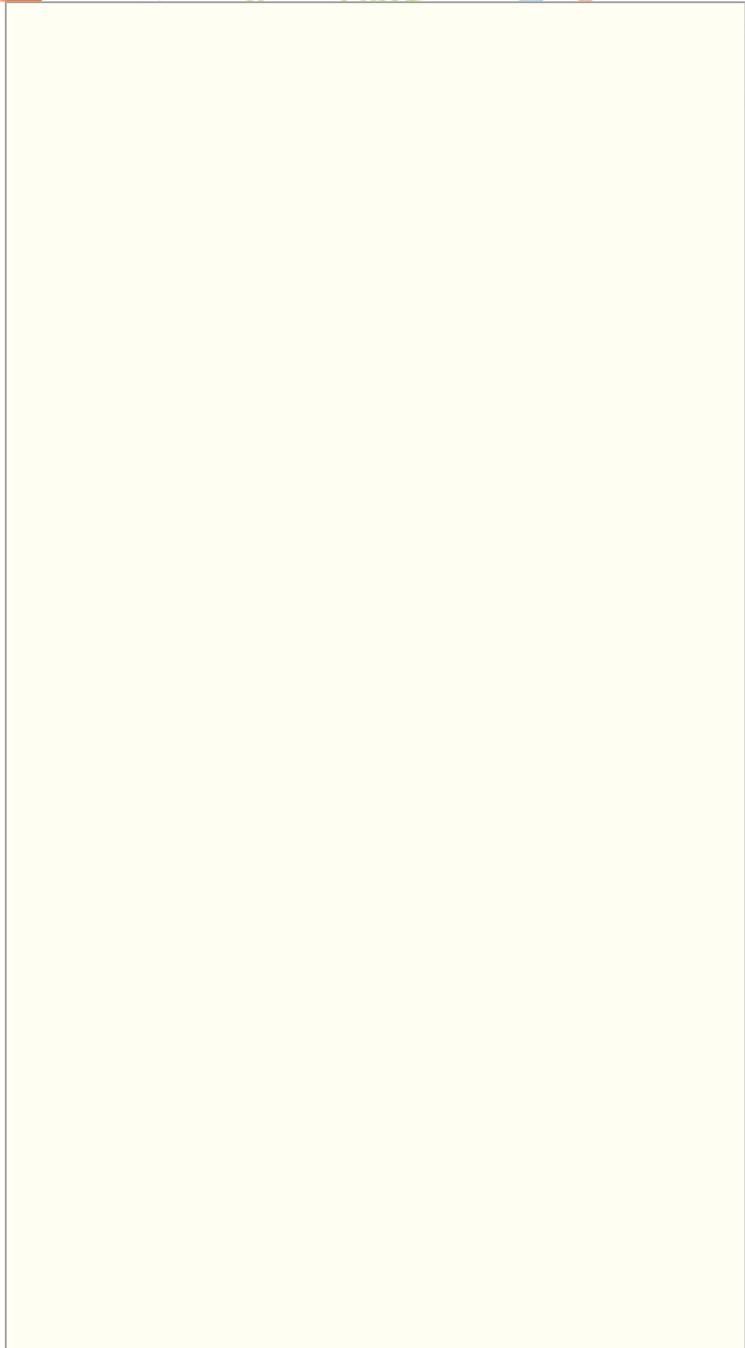
[Run Report](#)  Limit to textbooks currently in lost status

\*This report will not include damaged fines

The lost materials, patron, and fine information appears.

List All Sites   Dashboard   Catalog   Reports   Admin      New Message(s)						
Textbook Reports > District Lost Textbooks and Fines > Lost Textbooks Detail for East Aiken School of the Arts - 0201027						
My Favorites						
Textbook Reports						
Lost Copies for East Aiken School of the Arts - 0201027 from 8/1/2020 <span style="float: right;">Printable</span>						
South Carolina Journeys, Grade 1 -- Student Edition, Volume 5 ISBN: 978-0-547-48913-1 (\$33.05)						
Fine Date	Copy Barcode	Fine Amount	Paid	Waived	Outstanding	
8/6/2020	SDE00006281843	\$8.00	\$0.00	\$0.00	\$8.00	
	Lost by Jones, Anthony Catrice (Barcode: P 45102) on 8/6/2020					
8/6/2020	SDE00006281856	\$8.00	\$0.00	\$0.00	\$8.00	
	Lost by McIlrath, Scarlett Latina (Barcode: P 43586) on 8/6/2020					
8/6/2020	SDE00006282516	\$8.00	\$0.00	\$0.00	\$8.00	
	Lost by Peebles, Yen Leida (Barcode: P 45164) on 8/6/2020					
8/6/2020	SDE00006282525	\$8.00	\$0.00	\$0.00	\$8.00	
	Lost by Avant, Halina Larae (Barcode: P 68039) on 8/6/2020					
8/6/2020	SDE00006282532	\$8.00	\$0.00	\$0.00	\$8.00	
	Lost by Casteel, Kera Clyde (Barcode: P 41786) on 8/6/2020					
8/6/2020	SDE00006282539	\$8.00	\$0.00	\$0.00	\$8.00	
	Lost by Casler, Lottie Christiana (Barcode: P 70305) on 8/6/2020					
8/6/2020	SDE00006282570	\$8.00	\$0.00	\$0.00	\$8.00	
	Lost by Goetz, Terina Jung (Barcode: P 43612) on 8/6/2020					

Notes



# Using Class Schedules

## Description

To be successful, students need all the required materials for their courses. Adding class schedules to Textbook Manager and assigning materials, students, and teachers to them makes it easy to ensure every student has the needed materials.

Districts and schools may compare available inventory with classroom needs, forecast material needs, and prepare accurate reports. Learn the benefits of importing class schedules, students, and teachers and how to associate materials to a class or section.

## Objectives

- Define the terms used in Textbook Manager.
- Associate materials to a class or section.
- State the reports that require class schedule information.

## Terms and Definitions

There are several benefits of having class schedules and materials associated in Textbook Manager:

- Ensure consistency across the district
- Discover shortages and surpluses at each school
- Forecast future needs

To run the following reports, load class schedules and associate materials:

- Student to Textbook Statistics
- Textbook Checkout Summary
- Outstanding Textbook Obligations

Terms for class schedule-related features used in Textbook Manager are:

Term	Definition	Managed by
Class	A course taught within the district (for example, Algebra 1)	District
Section	An occurrence of a class taught at a specific school, by a specific teacher, at a specific time	School

Term	Definition	Managed by
Class/textbook associations	<ul style="list-style-type: none"> <li>Identifies a resource(s) used in a class</li> <li>Defined for a class at the district level</li> <li>Defined for a section at the school level</li> </ul> <p><b>Note:</b> This information is usually not available in the SIS; however, the data can be uploaded to Textbook Manager from a separate class schedule data feed.</p>	District
Schedule	Identifies which students are attending a specific class section	School
Loan periods	<ul style="list-style-type: none"> <li>Dates defined to support checkout</li> <li>Dates that define the start and end of a section</li> </ul>	School

When class schedule data is uploaded:

- Class schedule information for students is available when checking out in **Circulation > Check Out Text > To Patron sub-tab**.
- Class information for teachers is available when checking out in **Circulation > Check Out Text > By Class sub-tab**.
- Reports are available that list students assigned to each class section.

If class/textbook association data are also uploaded:

- The required textbook(s) for each class appear before checking out ( **Circulation > Check Out Text > To Patrons sub-tab > View Classes** ).
- Forecasting functions are available to project needs for materials based on enrollment.
- Reports identify shortages or overages of materials on hand vs. enrollment and which students do not have the required materials.

## Associate Textbooks with a Class

It is strongly suggested that classes and class/textbook associations be added and maintained at the district level. In most cases, districts will automate the loading of class, section, and schedule information, leaving only the textbook association to be manually entered at the district level. The *Update class information* permission is needed to manually add classes and sections, and associate textbooks.

Follett recommends that textbook associations are made at the district level. If associated at the site level, the association is only for that one particular section.

For example, if there are three sections of Algebra, the site has to make the association for all three. If associations are made at the district, they can choose to assign a textbook to all existing sections. This also sets the textbook as a default, meaning future sections are automatically configured to use that textbook until an update is made.

### To associate materials with a class:

1. Select **Admin > Update Classes > Class Setup**.
2. Next to the class the school will want to assign materials to, click .
3. Click **Update Textbooks**.

English Composition (ENG 101) OK

---

Assign textbooks to class  individually (each title is required)  
 as part of a group (only one title in the group is required)

Find Textbook  in Title

\* = Default textbook

4. Choose to assign materials individually (all textbooks are required for the class) or as a group (any textbook can be used).

5. Choose one of the following:

To update...	Then...
Textbooks separately	<ol style="list-style-type: none"><li>Select <b>individually</b>.</li><li>Type in a search term.</li><li>From the <b>Find Textbook</b> drop-down, select the type of search to conduct.</li><li>Click <b>Go</b>.</li><li>To assign a resource, click <b>Assign to Class</b>.</li><li>Click <b>OK</b>.</li></ol>
Textbooks as part of a group	<ol style="list-style-type: none"><li>Select <b>as part of a group</b>.</li><li>Type in a group name.</li><li>Click <b>Add Group</b>.</li><li>Follow the steps above to check</li><li>Type in a search term.</li><li>From the <b>Find Textbook</b> drop-down, select the type of search to conduct.</li><li>Click <b>Go</b>.</li><li>To assign a resource, click <b>Assign to Group</b>.</li><li>Click <b>OK</b>.</li></ol>

6. Click **Save**.

## Class Schedule Reports

Class schedule information must be loaded, and class/materials associations must be defined for the following reports to be meaningful:

- Textbook Checkout Summary  
View which schools have students who haven't received the materials they need, based on their schedules.
- Student to Textbook Statistics  
View if more items are needed to support enrollment and where additional items are available at the district.
- Outstanding Textbook Obligations  
View which students have materials but are not enrolled in sections which use that textbook.

# Patron Records and Reports

## Description

Up-to-date patron records are essential for circulation, assessing, and collecting fines, and generating patron reports. Textbook Manager creates and edits individual or multiple patron records quickly and easily. Sites will explore how to create patron records and patron reports.

## Objectives

- Find a patron record
- Create a **Patron Name List** report
- Generate patron reports

## Find a Patron Record

Each user is considered a patron and must have a patron record that associates them with the materials they check out, fines they incur, and any patron transactions.

### To search for a patron:

1. Select **Admin > Manage Patrons**.
2. In the **Find** field, scan or type the patron's barcode number, or type a keyword (such as a patron's name).
3. To search for patrons at other sites, select the **Search across the district** checkbox, if available.
4. To complete the task for active patrons, select the **Only Active Patrons** checkbox.
5. Press **Enter** or click **Search**.
6. Next to the patron, click **Edit**.

**Note:** District users see an **+Add Additional Site** button. When a patron is associated with more than one site, the **Site Information** section lists all the sites. A site may edit, transfer or remove site associations.

**Site Information**

	Abraham Lincoln Elementary School (P 1340001) Faculty	<input type="button" value="Edit"/>	<input type="button" value="Transfer Patrons"/>	<input type="button" value="Remove"/>
	Andrew Jackson High School (P 5372407) Faculty	<input type="button" value="Edit"/>	<input type="button" value="Transfer Patrons"/>	<input type="button" value="Remove"/>

---

Print Label on Save

7. To print a label, select the **Print Label on Save** checkbox.
8. When completed, click **Save**.

## Patron Name List

Patron Names creates customized lists of patrons. Coordinators may provide staff members with a list of patrons in certain homerooms or grade levels, or those who are restricted, inactive or have expired cards.

Coordinators may also generate lists of patrons based on graduation years or Patron Types. Use a Follett wireless handheld device or PHD Dolphin+ to generate attendance lists.

### Generate a Patron Name List

1. Select **Reports > Patron Reports**
2. Under **Patron Lists**, select **Patron Names**.
3. A district user with the *Manage Patrons for the District* permission can select a single site from the list in the **For** field.
4. Complete the fields in the **Select by** section.

**Note:** There may be up to five User Defined options in the **Select by** drop-down. The table below defines the system-defined options.



Field	Definition
<b>Name</b>	<p>To specify the names that appear on the list, use the <b>From</b> and <b>to</b> fields. Enter a full name in either or both fields, or enter one or more letters in either or both fields to control what appears.</p> <ul style="list-style-type: none"> <li>• To include all patron names, leave both fields blank.</li> <li>• To include all patron names up to and including a patron name, leave the <b>From</b> field blank and enter a name or letters in the <b>to</b> field.</li> <li>• To include all patrons from one name or letter to all names that follow, enter a name or letters in the <b>From</b> field and leave the <b>to</b> field blank.</li> <li>• To include only one name, enter the same name in both fields.</li> </ul>
<b>Acceptable Use Policy</b>	<p>Select <b>Yes</b> or <b>No</b> to control which patrons appear on the list based on whether they have an Acceptable Use Policy (select <b>Yes</b>) or not (select <b>No</b>).</p>
<b>Grade Level</b>	<p>To display patron names based on a particular grade level or range, enter the grade level(s) in the <b>From</b> and <b>To</b> fields.</p> <ul style="list-style-type: none"> <li>• To include all grade levels, leave both fields blank.</li> <li>• To include all grade levels up to and including a grade level, leave the <b>From</b> field blank and enter a grade level in the <b>to</b> field.</li> <li>• To include all grade levels from one grade to all grade levels that follow, enter a grade level in the <b>From</b> field and leave the <b>to</b> field blank.</li> <li>• To include only one grade level, enter the same grade level in both fields.</li> </ul>



Field	Definition
<b>Homeroom</b>	<p>A list of homerooms appears. Only homerooms to which patrons are currently assigned appear in the lists. To specify the list of homerooms:</p> <ul style="list-style-type: none"> <li>• To include all homerooms, leave <b>Any Homeroom</b> in both fields.</li> <li>• To include all homerooms up to and including a homeroom, leave the <b>From</b> field blank and enter a homeroom in the <b>to</b> field.</li> <li>• To include all homerooms from one homeroom to all homerooms that follow, enter a homeroom in the <b>From</b> field and leave the <b>to</b> field blank.</li> <li>• To include only one homeroom, enter the same homeroom in both fields.</li> </ul>
<b>Barcode List</b>	<p>A site may include patron names on the report based on the patrons' barcodes. To specify the barcodes, create a list or upload a barcode file.</p> <p>To create a barcode list, enter the barcodes in the <b>Create a barcode list</b> field, and click <b>Add</b>.</p> <p>To upload a barcode file, create the barcode file, then click <b>Browse</b>, find and open the file. The file name appears on the Patron Names page.</p> <p>To remove a barcode number from the list, select it and click <b>Remove</b>.</p>

5. Complete the remaining fields on the Patron Names page
6. Click **Run Report**.
7. When Report Manager opens, click **View** to open the report.

## Patron Barcodes Report

Textbook Manager prints patron barcodes as labels – either individually, as a sheet, or as a list.

### Print a Single Patron Barcode Label

1. Print an individual label in one of the following ways:

If selected...	Then...
<b>Admin &gt; Manage Patrons</b>	<ol style="list-style-type: none"> <li>a. Search for a patron.</li> <li>b. Click <b>Edit</b> next to the patron record.</li> <li>c. At the bottom of the page, select the <b>Print Label on Save</b> checkbox.</li> <li>d. Click <b>Save</b>.</li> </ol>
<b>Circulation &gt; Patron Status</b>	<ol style="list-style-type: none"> <li>a. Search for a patron.</li> <li>b. If a list of patrons appears, click the patron's name.</li> <li>c. Click <b>Print Label</b>.</li> </ol>

2. When the Print Patron Barcodes page appears, if a site does *not* want the eye-readable number on the label, deselect the **Barcode number** checkbox.
3. Choose to output the report as **Export to Excel®** or **Use label stock**. If a site chooses Export to Excel, continue with step 5.
4. If a site chose labels, use the drop-down to choose one of the preloaded label stocks:
  - a. Enter the number of the next available label in the **Start on label** field.

**Note:** With Textbook Manager continue using previously-used label sheets so schools do not waste any labels.

- b. If a page needs to be moved left or right (horizontal) or up or down (vertical), enter the appropriate setting in **Printer offset**.
5. Click **Run Report**. Report Manager opens.
  6. When the status changes to Completed, click **View**.

7. After positioning the label stock in the printer, use Adobe Reader's Print option to print the labels.

### Print Several Patron Barcode Labels or a List of Barcodes

A site may print an entire group of barcode labels, a list of barcodes for existing patrons or new barcode labels that have not been assigned to patrons yet.

### Print Used (Assigned) Patron Barcodes

1. Select **Reports > Patron Reports**, and (under **Labels/Card**) select **Barcode Labels**.
2. Click the **Used** sub-tab.
3. A district user with the *Manage patrons for the District* permission can select a site from the **For** list.
4. From the **Select by** drop-down, select how to identify patrons to include in the report.
5. If selected **Patron Name**, **Grade Level**, **Graduation Year** or a user-defined field, select the range and do one of the following:
  - Leave both fields blank to include all of the patrons.
  - Leave the **From** field blank and enter a name or number in the **to** field. Textbook Manager includes all those up to and including the name in the **to** field.
  - Enter a name or number in the **From** field and leave the **to** field blank. Textbook Manager includes that name or number and all those after it.
  - Enter the same name or number in both fields. Textbook Manager includes only that one name or number.

**Note:** Textbook Manager does not support the use of wildcards (?, \*) in ranges.

If a site selected **Homeroom**, only homerooms to which patrons are *currently* assigned appear in the **From** and **to** lists.

If a site selected **List of Patrons**, click **Update** to build a list by searching for and retrieving patrons.

If a site selected **Date Patron Added**, select a phrase from the list, and then enter or select a date. Click the calendar icon for a calendar.

If a site selected **Barcode List**, either browse to an existing file, or create a list:

- To create a list, place the cursor in the **Create a barcode list** field and scan the barcodes, or type the barcodes and click **Add**. To remove a barcode number from the list, select it and click **Remove**.
  - To select and find an existing file, click **Browse**.
6. Choose from the **Sorted by** options to define how to sort the barcodes: **Patron Name**, **Grade Level**, **Homeroom** or one of the User-Defined fields.

**Note:** If a site chooses a field other than **Patron Name**, then, sub-sort the barcodes by another of the fields listed in the step. Within each group, the barcodes print in patron name order.

7. Use the **Limited to patrons** option to select the patron types and statuses to include.
8. If a site does *not* want the eye-readable number on the label, deselect the **Barcode number** checkbox.
9. From the **Formatted for** options, choose from the following: (Lists are not available in Media Manager.)

To...	Then...
Print labels	<p>a. Select <b>Barcode labels</b>.</p> <p>b. Choose to output the report as <b>Export to Excel®</b> or <b>Use label stock</b>.</p> <p>c. If a site chose labels, use the drop-down to choose one of the preloaded label stocks:</p> <ul style="list-style-type: none"> <li>• Enter the number of the next available label in the <b>Start on label</b> field.</li> </ul> <p><b>Note:</b> With Textbook Manager, a site may continue using previously-used label sheets as to not waste any of the labels.</p> <ul style="list-style-type: none"> <li>• If the page needs to be moved left or right (horizontal) or up or down (vertical), enter the appropriate setting in <b>Printer offset</b>.</li> </ul>



To...	Then...
Print a list	<ol style="list-style-type: none"> <li>Select <b>Use at the circulation desk</b>.</li> <li>To start a new page whenever the <b>Sorted by</b> field changes (and if a site chose to sub-sort the list, whenever the second <b>Sorted by</b> field changes, select the <b>Start a new page for each group</b> checkbox.</li> </ol> <p><b>Note:</b> If a site chose to sort by <b>Patron Name</b>, a site cannot include page breaks.</p> <ol style="list-style-type: none"> <li>To print command barcodes at the bottom of each page, select <b>Include Circulation command barcodes</b>.</li> </ol>

- Click **Run Report**. Report Manager opens.
- Click **View** to open the label report.
- After positioning the label stock in the printer, use Adobe Reader's Print option to print the labels.

**Important:** If printing labels, make sure to set **Page Scaling** to **None** on Adobe's Print pop-up. If printing a list with command barcodes, set *Page Scaling* to **Fit to Printable Area**.

### Print Unused (Unassigned) Patron Barcodes

- Select **Reports > Patron Reports**, and (under **Labels/Cards**) select **Barcode Labels**.
- Click the **Unused** sub-tab.
- A district user with the *Manage patrons for the District* permission can select a site from the **For** list.
- In the **Number of Barcodes** field, enter the quantity of labels needed.
- In the **Starting Barcode** field, enter the starting barcode number.

#### Notes:

A site may enter the highest barcode, or, to fill gaps in the number sequence, enter a lower number. Textbook Manager prints only barcode numbers that are not in use; it skips any used barcode numbers.

To identify (and copy, if desired) the next available barcode number, click the symbology name next to **Starting Barcode** field.

If the barcode number entered is more than 7 characters, its symbology must match the symbology that appears in brackets. If it does not, change the symbology in **Admin > Site Configuration** before generating the labels.

6. Choose to output the report as **Export to Excel**<sup>®</sup> or **Use label stock**.
7. If the site choose labels, use the drop-down to choose one of the preloaded label stocks:
  - a. Enter the number of the next available label in the **Start on label** field.
 

**Note:** With Textbook Manager, a site may continue using previously-used label sheets as to not waste any of the labels.
  - b. If pages need to be moved left or right (horizontal) or up or down (vertical), enter the appropriate setting in **Printer offset**.
8. Click **Run Report**.
9. Report Manager opens. When the status changes to Completed, click **View**.
10. After positioning the label stock in the printer, use Adobe Reader's Print option to print the labels.

## Patron Statistics Summary Report

The Patron Statistics - Summary report lets sites examine the circulation statistics of patrons for the current day, month, and year, and the totals since Textbook Manager was installed.

1. Select **Reports > Patron Reports** under **Statistics**, select **Patron Statistics - Summary**.

Patrons		Textbook Circulations			Total
		Today	This Month	This Year	
Faculty	189	0 [0.00%]	0 [0.00%]	7 [100.00%]	2,977 [61.08%]
Student	642	0 [0.00%]	0 [0.00%]	0 [0.00%]	1,897 [38.92%]
	<b>831</b>	<b>0</b>	<b>0</b>	<b>7</b>	<b>4,874</b>

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

2. How to use the Patron Statistics. Refer to the following table for more information:

If you are a...	Then...
Site user	To display a detailed view of patrons in alphabetical order and their individual statistics, click an entry in the <b>Patrons</b> (left-most) column.
District user	<ul style="list-style-type: none"> <li>To display a list of the schools for district patrons managers, click an entry in the <b>Patrons</b> column. The Patron Type page appears.</li> <li>To group the schools by type, click the <b>Group sites by type</b> checkbox at the top of the section.</li> <li>To include schools that have no circulation statistics, select the <b>Show all sites</b> checkbox at the top of the section.</li> <li>To display a list of the school's patrons in alphabetical order and their individual statistics, click an entry in the left-most column. A list of that school's patrons in alphabetical order and their individual statistics appears.</li> </ul>

3. Limit the report to certain patrons by customizing the summary.

### Use the Report

The Patron Statistics - Summary may provide information for several purposes:

- Collect circulation data for district reports.
- Monitor the circulation habits of each patron type.
- Measure the impact of reading programs on circulation.
- Discover the circulation statistics of a particular segment of patrons.

For example, if a site groups by Grade Level and then by Homeroom, the site may view a report that shows the circulation statistics for each homeroom grouped within grade levels.

## Customize the Report

Initially, the report shows the patrons grouped by Patron Type. The site may change the grouping, and limit the patrons that are included.

Use the following options to customize this summary.

Group by  and then by

**Only include the following:**

Patron Types	Statuses
<input checked="" type="checkbox"/> Faculty	<input checked="" type="checkbox"/> Active
<input checked="" type="checkbox"/> Student	<input checked="" type="checkbox"/> Restricted
	<input checked="" type="checkbox"/> Inactive

**To group the patrons by Patron Type, Patron Status, Grade Level, Homeroom or user defined field:**

1. Select the **Group by** field for grouping the patrons and optionally, a second field for sub-grouping.
2. To exclude any of the Patron Types or Statuses from the report, deselect any checkboxes listed below.
3. To view the reconfigured summary, click **Update**.

Any patrons who do not have information in the **Group by** field appear under the heading **Other** on the Summary.

## Patron Statistics - Historical Report

A Patron Statistics – Historical report can provide information for several purposes:

- To collect circulation data for district reports.
- To monitor the circulation habits of each patron type.
- To measure the impact of reading programs on circulation.
- To discover the circulation statistics of a particular patron type.

For example, if a site groups by Grade Level and then by Homeroom, view a report that shows the circulation statistics for each homeroom grouped within the grade levels.

**Note:** A district may limit the time and days when certain reports and tasks are performed. If the report does not run, inform the Textbook Manager Administrator.

### Generate the Report

1. Select **Reports > Patron Reports**.
2. Under **Statistics**, click **Patron Statistics - Historical**.
3. A district user with the *Manage Patrons for the District* permission can select a site from the list in the **For** field.
4. Next to **For patron activity**, click the calendar icon or enter the date range wanted. Do one of the following:
  - Leave both fields blank to include all circulations.
  - Leave the **From** field blank and enter a date in the **to** field to include all circulations before and on the date in the **to** field.
  - Enter a date in the **From** field and leave the **to** field blank to include circulations on that date and all those after it.
  - Enter the same date in both fields and the report is limited to circulations on that one date.
5. From the **Show** drop-down, select how to display this report. Select **Summary Only** for statistical data. Select **Details** from the drop-down to produce a more detailed report listing all patrons and their total number of circulations during the report's date range.
  - A summary includes a list of each grouping, the number of patrons in that group, and its circulation totals.

- A details report adds each patron's name, barcode number, and number of circulations.
6. Select how to group the information. Choose **Patron Type**, **Patron Status**, **Grade Level**, **Homerom** or one of the User Defined fields.  
A site may select up to four levels of grouping. Within the lowest grouping on a details report, the patrons are listed in name order. Patrons that do not have information in a **Group by** field are listed under **Other**.
  7. To include only certain **Patron Types** or **Statuses**, deselect the checkboxes for the patrons to exclude.
  8. To generate the report, click **Run Report**.

**Note:** This report does not include deleted patrons.

# Site-Level Inventory

## Description

With Textbook Manager, schools may conduct a full or partial inventory at any time. Learn how to start, conduct, and finalize an inventory

## Objectives

- Explain how to start an inventory
- Explain how to conduct an inventory
- Describe how to view the status of an inventory

### Start an Inventory (Not for the Annual Statewide Inventory)

To start an inventory, the *Start new/finalize textbook inventory* permission is needed.

- 1. Select **Admin > Inventory**.
- 2. Click **Start New**.

[ View In-Progress & Completed Inventories ] Start New

**Textbook Inventory** Inventory 2019-2020 CES - Started 5/6/2020 Finalize

Copies with barcodes 85.24% Complete as of 2:04 PM Refresh

0 of 31 Titles counted

Details

---

Account for each Barcode Count Copies Without Barcodes

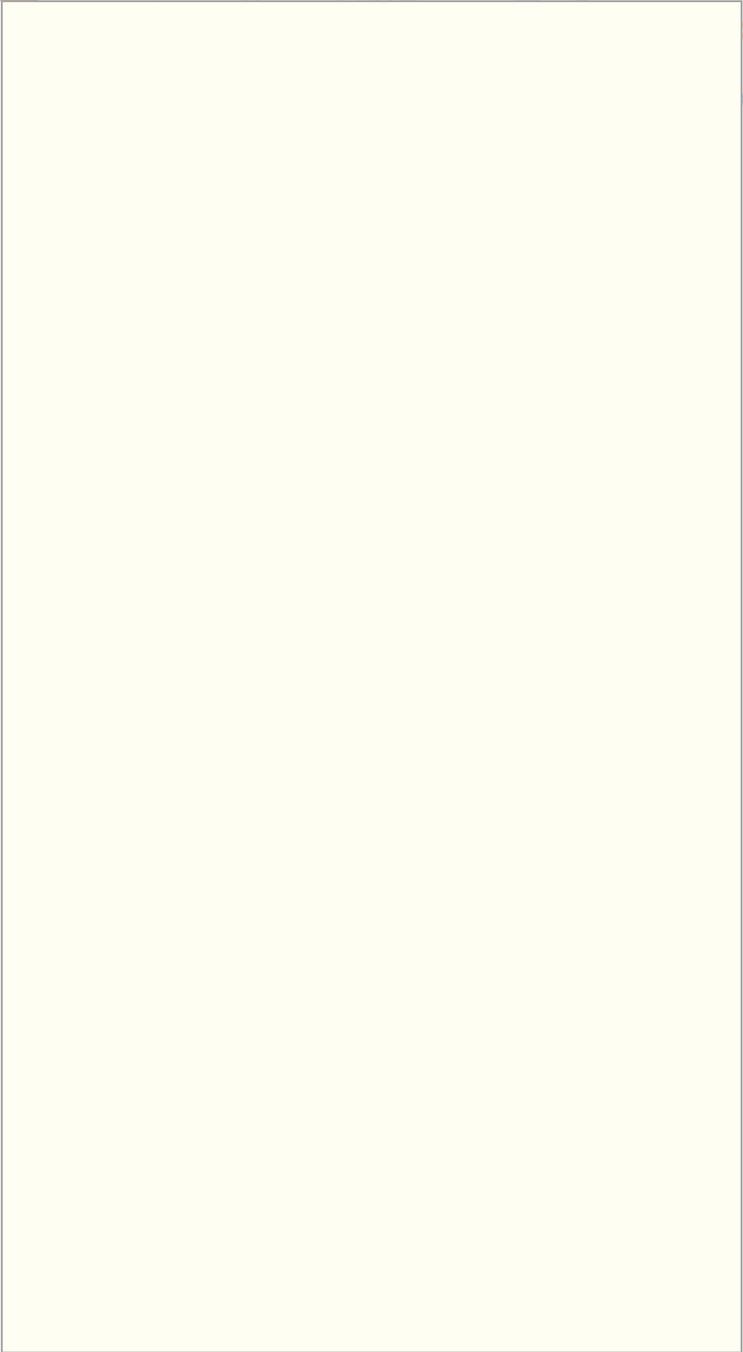
Current scanning location: Unspecified Update

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

Or upload a file of barcodes  No file chosen Upload Scans

---

Started by 0201024b [ View Selections ]



3. Complete the information for the following fields:

**Specify the copies to be inventoried...**

Inventory Name

Limit Inventory to

Locations All Locations

Additional Options Adoption End from  to

Include  Copies with barcodes  
 Copies without barcodes  
 Consumables

Handling checked out copies -- I want to...  
 Make these copies unaccounted for.  
 Check in currently checked out copies when scanned into inventory.

Copies with barcodes that have been seen on or after   don't need to be scanned. Make them "accounted for".

Verify Copy Location  
 During this inventory, you can specify your current scanning location. If the location assigned to the copy does not match your current location...



Field	Description
Inventory Name	Type a unique name for the inventory.  <b>Note:</b> If logged in to the district, use the <b>For</b> drop-down to select which schools in the district that will conduct the inventory.
Limited to	From the <b>Limit Inventory to</b> drop-down, select whether to limit the textbooks to state or district owned.



Field	Description
<b>Additional Options</b> Adoption End	A school may limit the inventory for an adoption period ending in a particular year. Enter the year in the <b>from</b> field. For a span of multiple years, also enter an ending year in the <b>to</b> field.
<b>Include</b>	Select one or more of these checkboxes to specify the copies to count: <ul style="list-style-type: none"> <li>• <b>Copies with barcodes</b></li> <li>• <b>Copies without barcodes</b></li> <li>• <b>Consumables</b></li> </ul> <div style="background-color: #e0f7fa; padding: 5px; margin-top: 10px;"> <p><b>Note:</b> Unbarcoded items and consumables that are checked out are automatically accounted for. If they are checked in during inventory, they remain accounted for.</p> </div>
<b>Handling checked out copies -- I want to...</b>	Select how to handle checked out items: <ul style="list-style-type: none"> <li>• <b>Make these copies unaccounted for:</b> All copies retain their checkout status when scanned into inventory.</li> <li>• <b>Check in currently checked out copies when scanned into inventory:</b> Check in any currently checked-out copies when scanned, and upload a barcode file with checked-out copies, those copies will be counted in the inventory, but will remain checked out.</li> </ul>

Field	Description
<b>Copies with barcodes that have been seen on or after, make “unaccounted for”...</b>	<p>If there are copies that have been reviewed recently, such as circulated, updated or transferred, a site may exclude them from being set as unaccounted-for by typing or selecting a date.</p> <p>They will appear as accounted-for, and do not have to be scanned again.</p>
<b>During this inventory, specify your current scanning location. If the location assigned to the copy does not match your current location...</b>	<p>Select how to handle copies not in the location specified in the copy record:</p> <ul style="list-style-type: none"> <li>• <b>Do nothing</b></li> <li>• <b>Alert but do nothing</b></li> <li>• <b>Prompt for the change</b></li> <li>• <b>Automatically change location</b></li> </ul> <p><b>Note:</b> To use this option, select the <b>Current scanning location</b> in Textbook Manager when conducting an inventory.</p>

4. Click **OK**, and then click **Yes** in the confirmation message to begin the inventory.

 **Please note...**

- Any checked out item that is scanned into inventory will be checked in.

**Are you sure you want to start this inventory?**

## Conduct an Inventory

Whether the inventory includes barcoded or unbarcoded items, the goal is to account for as many items as possible. A site may confirm the status and location of all resources by conducting an inventory. When inventorying unbarcoded and consumable items, enter a count instead of scanning barcodes.

**Important:** Unbarcoded items and consumables that are checked out are automatically accounted for. If they are checked in during inventory, they remain accounted for.

1. Start an inventory that includes barcoded, unbarcoded and/or consumable resources.
2. Select **Admin > Inventory**.
3. In the **Textbook Inventory** drop-down, ensure the correct inventory is showing.
4. Do one of the following:
  - Inventory barcoded items
    - a. Click **Account for each Barcode**. Barcode fields appear.

Barcode	Location	Author	Title
SDE0000272303		Baumann, et al	South Carolina Journeys, Grade 1 – Student Edition, Volume 2
SDE0000272302		Baumann, et al	South Carolina Journeys, Grade 1 – Student Edition, Volume 2

- b. To have Textbook Manager confirm barcodes entered are in the material's designated location, click **Update**, and then select the site's current scanning location.
- c. In the **Scan or enter one-at-a-time** field, type or scan each barcode. Once a barcode is entered, the item appears in the **Most Recently Accounted For** section. The barcode links to item status.
- d. To upload a file of barcodes scanned offline with Follett Remote or another device, next to **Or upload a file of barcodes**, click **Choose File** (or **Browse**,

- depending on the browser).
- Inventory Unbarcoded Items
    - a. Click **Count Items Without Barcodes**. A Resource table appears.
    - b. In the **Inventory Count** field, type the count for each resource listed.

**Note:** Follett recommends periodically clicking **Save** to retain entered amounts. Saved counts can be updated.

5. When completed, click **Finalize**. A confirmation pop-up appears.
6. Select accordingly, and then click **Yes**.

## View the Status of an Inventory

During an inventory, monitor the progress and conduct an audit. To do this, click **Details**. The overall status of the inventory appears. Check and verify this throughout the inventory to check on the progress of the inventory.

**Inventory 2019-2020 CES - Started 5/6/2020** Close

---

Copies with barcodes Run Report

**Copies matching selections** 1,748

**Accounted for** 1,491 (Copies lost: 1 [ See Details ])

**Unaccounted for** 257 [ See Details ]

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

---

Count copies without barcodes

**Total Titles** 31

**Titles counted** 1

**Titles without counts** 30

To see copies marked as lost prior to this inventory, click **Accounted for - See Details**.

## Notes

To see copies that have not been entered into the inventory, click **Unaccounted for - See Details**. It is important to verify the copies in this report to insure that all copies have been accounted for during inventory.

Once a site has completed its inventory, click **Finalize** on the inventory page.

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

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

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

# Barcoding Materials

## Description

Properly barcoding helps to properly track materials while ensuring efficient circulation and inventory. This module will teach the basics of barcoding.

## Objectives

- Explain how to implement a textbook barcoding project
- Explain state barcoding requirements
- Discuss best practices and lessons learned

## Implement a Textbook Barcoding Project

The best time to barcode textbooks is during the summer when most textbooks are stored and not in use. Sometimes it is necessary to barcode materials while schools are in session.

Timing is a major factor for a successful barcoding project. The timing elements that should come together when scheduling are:

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

### Worker Readiness

Experience with Textbook Manager to enter materials into the database. The skills required for 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
- Able to follow instruction/direction
- Reliability
- Some ability to work unsupervised for short periods of time (2-3 hours)

### Site Readiness

The Instructional Materials Coordinator needs passwords for the network and Textbook Manager.

The Instructional Materials Coordinator will need unrestricted access to the internet and the LAN or WAN. Provide carts for moving books from the shelves to the workstations. If using laptops, check for spare batteries or electrical outlets and network receptacles.

Consider bringing the materials to a central location (school lunchroom or gym).

## State Barcoding Requirements

### Barcoding Textbooks

#### Textbooks that require a barcode:

- Student editions in the Textbook Manager state-owned title file
- Big books
- Titles going out of adoption the next school year, i.e., K-8 Science

#### Textbooks that do not require a barcode:

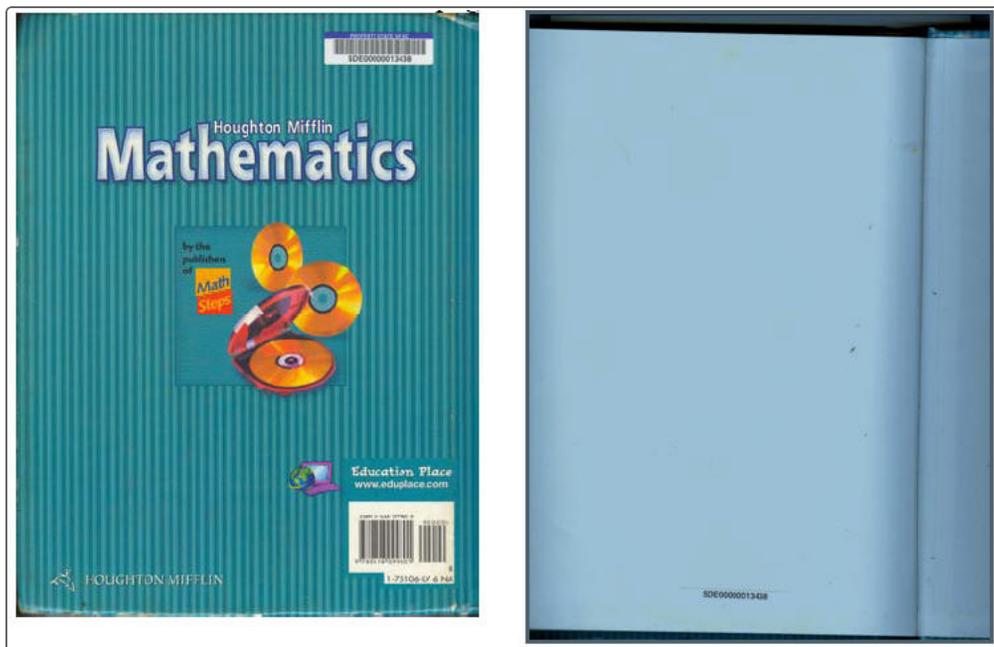
- Teacher editions (barcodes are required for state adoptions prior to 2017)
- Student editions on CD
- Kits of any kind (optional)
- Consumables
- Materials purchased by the district or school

### Barcode Symbology:

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

### Mandatory Barcode Placement

The barcode label is affixed on the back of the textbook and the identity label is placed on the back inside cover at the bottom:



**Note:** Barcodes must be applied at least  $\frac{1}{4}$  inch from the spine.

The exact placement of the barcode label is important. Barcode labels include the actual label and an identity strip. Both of these ensure the identification of the materials if the barcode is removed. The identity strip should be placed on the bottom center of the end page. If using label protectors (optional), be sure to allow for overlap.

## Best Practices and Lessons Learned

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

### Best Practices

1. ORGANIZATION and SUPERVISION are the keys to a successful implementation.
2. Supplies and resources needed: internet access, barcodes, scissors for cutting out barcodes, internet-ready computer, scanner, pens, paper, sticky notes, and a copy of the Destiny Textbook Manager Training Workbook for quick reference.
3. Conduct inventory based on guidance provided by Office of Instructional Material.
4. 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.
5. If using a team of temporary help to apply barcodes make sure the team is adequately trained and supervised.
6. Run a title and copy list and compare it to the site's physical state-owned inventory to make sure all titles are barcoded and the number of textbooks on the state-owned physical inventory and Textbook Manager match. If they do not, find the missing textbooks or mark them as lost on the next state-owned physical inventory.

### Lessons Learned

1. Count textbooks carefully before beginning the cataloging and barcoding process.
2. Use the state physical inventory to determine which materials must be barcoded.
3. Verify beginning and ending barcode numbers before applying barcodes. Do not apply the barcodes prior to completing the steps to catalog.
4. Supervise staff applying barcodes.
5. Make sure the barcodes are in order.

# Adding District-Owned Resources



## Description

Title records include general information about a textbook, such as ISBN, publisher, author, and subject. They ensure that textbooks are properly cataloged and easy to find. Learn how to add title records along with teacher's editions and resource kits) to Textbook Manager.

## Objectives

- Identify state versus district textbooks
- Discuss how to add district titles
- Explain how to manually add a textbook title
- Explain how to generate and analyze a Weeding Log report

## Identify State Versus District Textbooks

Districts and schools will use Textbook Manager primarily to track state-owned materials; however, district-owned materials may also be tracked. Barcode symbology helps to differentiate ownership.

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

Searched keywords for "english". [Printable](#)

[Not what you're looking for? Refine your search] Selected List: My Personal List [Add Page](#)

Titles: 1 - 25 of 383 Sort By: [Relevance] [Go](#) 1 2 3 4 6 11 16 [\[ Show All \]](#)

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**Advanced Language and Literature for Honors and Pre-AP English Courses -- eBook, 1-Year** [Details](#) 67 of 67 available

 Renee Shea ISBN: 978-1-31905536-3 \$45.04 [Add to This List](#)

Bedford, Freeman and Worth (Macmillan Holdings LLC, d/b/a MPS) 2015 1st Edition  
State / Textbook ID:1710008 Grades:09-12

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**Pacemaker Basic English** [Details](#) 84 of 100 available

 ISBN: 0-13-023313-7 \$39.95 [Add to This List](#)

Pearson Prentice Hall Third

If districts and schools choose to use Textbook Manager to track district-owned textbooks, they will have to purchase district barcodes that are compatible with Textbook Manager.

The state provides limited training to districts and schools to use Textbook Manager to track district-owned textbooks. Please contact Follett School Solutions, Inc. to purchase additional training.

## Add District Titles and Copies

Properly cataloged textbooks ensure teachers can easily find what they need for their students. Easily add title records with Textbook Manager.

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.

1. Select **Catalog > Add Textbook**.
2. Use the **Find** drop-down to select the material type to search for.
3. Use the **with** drop-down to select the type of search to conduct.

**Note:** Follett recommends searching by ISBN to ensure no duplication of records.

4. Type in the search term.

5. Click **Go**.

 **Books with the Title "biology"**

Titles: 1 - 25 of 145      Sort by        1 2 3 4 6 ▶ [ Show All ]

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**Biology**

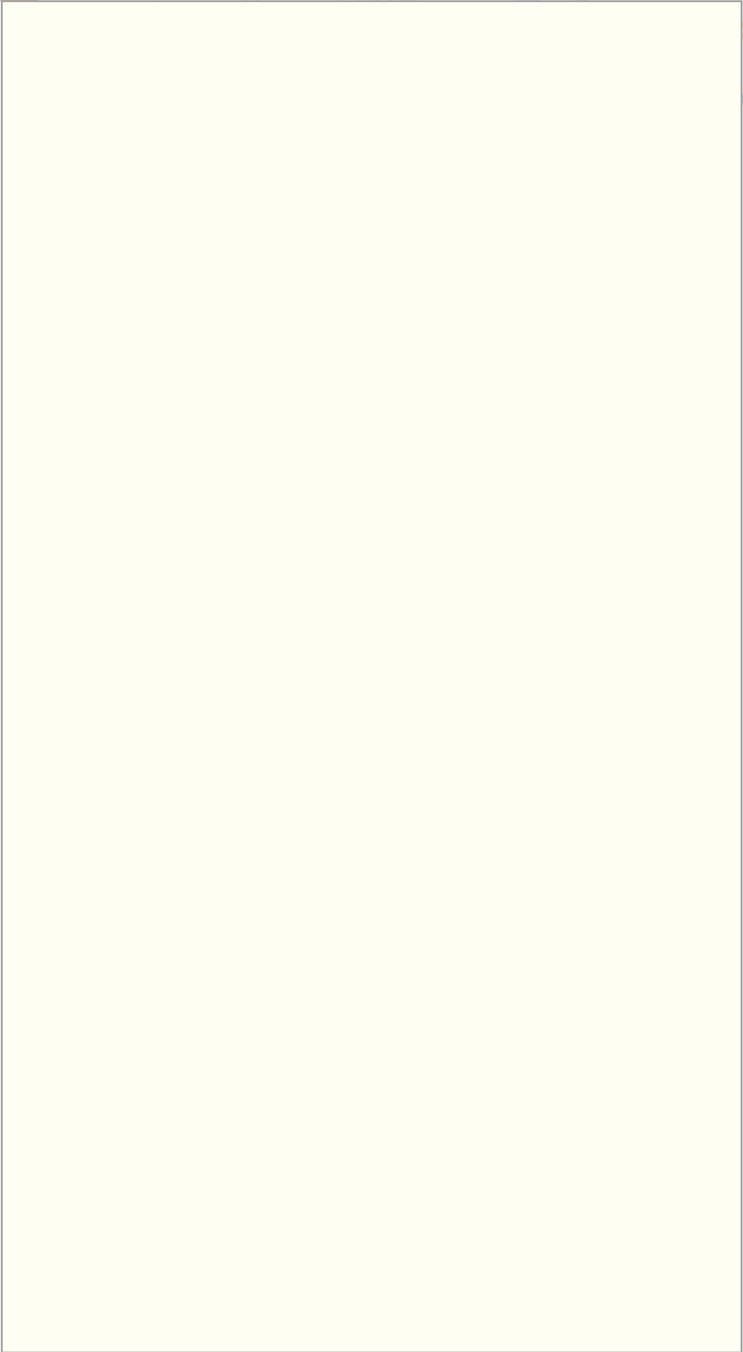
 Mader      ISBN: 978-0-07-330113-6      \$112.00  
GLENCOE 2007. 09  
State Adopted: 2008      Adoption Ends: 2014  
Grades: AP-AP

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**Biology**

 ISBN: 978-0-07-249937-7      \$103.00  
GLENCOE 2002.  
Grades: AP-AP  
Grades: 09-12

**Note:** If search results show a red schoolhouse, the title is in the district and the coordinator may add copies to that title. Otherwise, the coordinator may add a title that is in Follett School Solutions, Inc. T2 (Textbook Title) database.



6. Next to the title, click **Details**.

**T<sup>2</sup>Textbook**  
Titles  
provided by  
Follett

**Biology**

Show Less ▲

Publication Info | Additional Info

**Publication Info**

Published GLENCOE : 2002  
ISBN 978-0-07-249937-7  
0-07-249937-0

**Additional Info**

Grade Level AP to AP  
Subject SCIE

Top

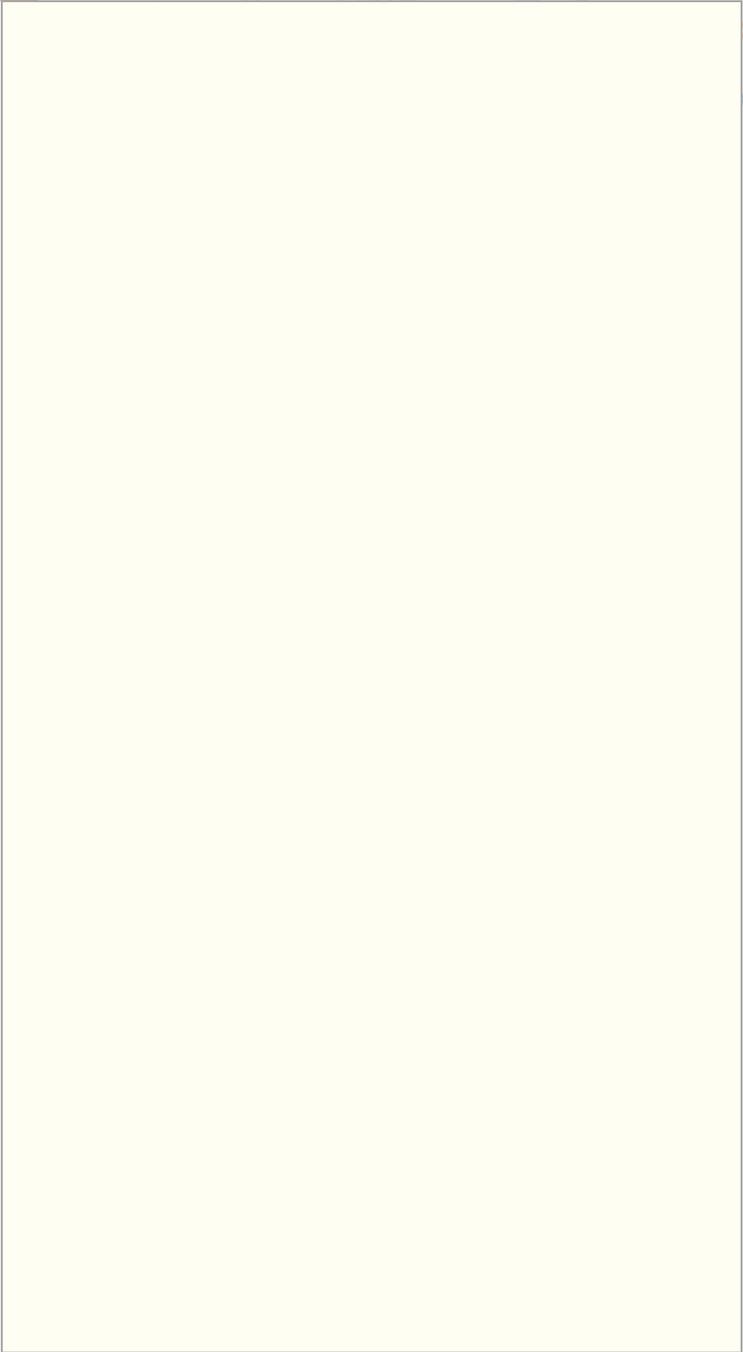
**Title Details**

**Save Title**

**Class Info**

7. If the title is correct, click **Save Title**.

8. To update the title record, click **Edit Title**.



9. On the **Text Info** sub-tab, enter information about the title's authors, instructional classification, budget category, and any other available information.

Text Info
Adoption Info

**Title** Biology

\* Title  ?

Authors  ?

Edition  ?

Copyright  ?

ISBN

ISBN  Add ISBN

Instructional Classification -- Undefined -- Other ?

Subject SCIE Other ?

Material Type Book ?

Default Budget Category -- Undefined -- Other ?

Course ID

Grade Level Custom AP to Custom

?

Additional Information  ?

---

Publisher Name GLENCOE Other ?

Catalog #  ?

---

Vendor Name -- Undefined -- Other ?

Catalog #  ?

Replacement Price  ?

10. On the **Adoption Info** sub-tab, enter the textbook ID, when the state or district adopted the materials, and when the adoption ends.

The screenshot shows a web interface for managing a title record. At the top, there are tabs for 'Brief Title', 'Series/Notes', 'Subjects', 'Resources', and 'Added Entries'. The 'Subjects' tab is active. Below the tabs, the title 'the feels' is displayed. To the right of the title is a button labeled 'Use MARC Editor'. Underneath, there is a section for 'Subjects' with a question mark icon. It contains four rows, each with a dropdown menu and an input field. The first row has 'Topical Heading' selected in the dropdown, and the other three rows have 'General' selected. To the right of these rows are two buttons: 'Update' and 'Find Heading'. At the bottom of the section, a message reads 'There are no subjects for this title'.

11. Click **Save Title**.

### Manually Add a Textbook Title

If a site is not using the T2 database or cannot find a title, add a textbook title manually. It is recommended to try to search for the title before manually adding a new title record.

1. Select **Catalog > Add Textbook**.
2. After searching and not finding a record, click **Add the Title**.
3. On the **Text Info** sub-tab, enter information about the title's authors, instructional classification, budget category, and any other available information.
4. On the **Adoption Info** sub-tab, enter the textbook ID, when the state or district adopted the textbook, and when the adoption ends.
5. Click **Save Title**.

## Generate and Analyze a Weeding Log report

To cull obsolete or worn-out materials from a collection, or transfer surplus materials to another school, information is stored and collected about those copies.

The Weeding Log gives a list of those copies, grouped by the date the materials were weeded, deleted or transferred.

### Generate the report

1. Select **Reports > Textbook Reports**
2. Under **Catalog -- Titles & Copies**, click **Weeding Log**.

**Weeding Log**

---

**List Textbook Copies Removed**

From  31 to  31

For  ▼

---

Output as  ▼

---

[Run Report](#)

3. Select the range of dates that the copies were removed. Click  for a calendar.
  - Leave both fields blank to include all copies removed.
  - Or leave the **From** field blank and select a date in the **to** field, the report includes all those removed on or before the date in the **to** field.
  - Or enter a date in the **From** field and leave the **to** field blank, the report includes copies removed from that date until today.
  - Or enter the same date in both fields, the report is limited to copies removed on that one date.
4. If running the report at the district, use the For drop-down to select the district, a group of sites, or an individual site.
5. From the **Output as** drop-down, select **PDF** or **Microsoft Excel**.

6. To generate the report, click **Run Report**.
7. When Report Manager opens, click **View** to open the report.

### Generate and Analyze a Title & Copy List Report

The Title & Copy List creates collection reports based on all of the titles that are available in the database, as well as all copies, including teacher's editions, resource kits, or specific copy status. These reports show all the lost copies, checked out copies, and copies needing barcodes.

The reported information can be broad or narrow. It can include just a list of titles, or all the titles and copies.

### Create a New Report

1. Select **Reports > Textbook Reports**.
2. In the **Catalog -- Titles & Copies** section, click **Title & Copy List**.
3. Log into the district, select either the district or an individual school from the **For** drop-down.

**Note:** If the district is selected, the report is limited to the first 10,000 qualifying titles and copies.

4. Click the **Select & sort by** drop-down, and select a method for identifying the titles to include in the list.

Create New Report | Saved Reports

List textbook titles & copies....

Select & sort by Title from  to

Include Teachers' Editions  
 Include Resource Kits  
 Include Bundles

Show Titles With "lost" copies

Include Conditions  New  Good  Fair  Poor  Unusable

Include the following information  Default Budget Category  
 Grade Level  
 Instructional Classification

Save Setup Run Report

- Select **Title**, **Publisher** or **Vendor**, enter a range in the **from** and **to** fields and next to the **Select By** drop-down.

#### Notes:

- Leave both fields blank, the report includes all titles.
  - Or leave the **from** field blank and enter a name in the **to** field, the report includes all those up to and including the title entered.
  - Or enter a name in the **from** field and leave the **to** field blank, the report includes that name and all those after it.
  - Or enter the same name in both fields, the report is limited to that one name.
  - Ranges cannot use wild cards (?, \*).
  - If running a report on a specific title in Textbook Manager, enter the name of the primary textbook, not the supplement.
- Select a **Category** or **Subject**, select from the drop-down.
    - For **Categories**, the report includes copy information for only those copies assigned to those categories.

**Note:** If running the report by category for the district, note that the **Include**

list is limited to district-only categories. For a school report, the list is limited to categories specific to the school.

5. Choose to include teacher's editions, resource kits, bundles.
6. To include itemized copy information in the list, select one of the options with copies in the **Show Titles** drop-down. Then, choose which conditions to include in the report.
7. Choose one, two or all three checkboxes from the **Include the following information** section.
8. To run the report now, click **Run Report**.  
To save the setup, click **Save Setup**. A Save Report page appears:
  - Enter a unique name.
  - To save the report, click **Save**. To save the report and run it now, click **Save and Run**.
9. If selected **Save & Run** in the previous step, Report Manager opens and displays the report at the top of the list and automatically updates its status.

When the status is **Completed**, do one of the following:

- To view the job summary, select **View**.
- To open or save a spreadsheet file in Excel, select **Excel®**.

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**52057A 6/21**

*Published date: 6/1/2021*