Library Inventories

Starting an Inventory

1. In Destiny, go to the Back Office tab, and choose Inventory from the left menu.
2. Click on the far right hand side of the screen.
3. Create a name for your inventory.
4. You may limit an inventory to a certain range of Dewey numbers or to a certain range of call number prefixes. (Please note that Destiny only looks at the prefix, not author names – so even if you enter a range from FIC AAA to FIC CZZ, it will still set up an inventory for the entire FIC call number prefix.)
5. You may also limit your inventory to certain Circulation Types (“Regular,” “Equipment,” etc.)
6. Click OK to begin the inventory.

Performing the Inventory

Once an inventory has been started, you can leave and then return to it at any time by choosing the Inventory menu item under the Back Office tab. If you have multiple inventories in progress at the same time, you will need to double-check that the correct one is chosen in the drop-down menu before you begin scanning items or uploading files.

There are several ways to inventory your items. You can switch methods at any time during the inventory and use any combination of methods to complete the inventory:

I. Laptop or Desktop Computer with Scanner

Ensure the cursor is inside the Scan or enter one-at-a-time field and begin scanning copy barcodes with a scanner connected to a laptop or desktop computer. If you use this method, you can also have Destiny check shelf order as you go. If you scan a book with a call number that is out of place, Destiny will make a warning sound and give you a specific warning on screen. This can help you find many misplaced and miscataloged items.
II. “Unaccounted for” List
Each inventory includes an “Unaccounted for” list of all items from which any item can be individually marked “Found.” To access this list:

1. Click “View In-Progress & Completed Inventories” on the inventory screen, and then click the View button (glasses icon) at the right of the inventory you wish to view. (You can also access this by clicking the “XX.XX% Complete” link for the currently active inventory.)
2. Click “See Details” to the left of the Unaccounted for statistics.
3. Click Found next to any copy that you can account for.

You could print off this list or a shelf list and pencil mark copies found on the print-off, then later search for them on this list and click them found. This could be a useful method if you have student aides or volunteers assisting with the inventory without computers or portable devices.

III. Dolphin Mobile Device
Scan copy barcodes using a Dolphin mobile device and then upload the files it creates on the Back Office > Inventory screen. Note: we have several old Dolphins that can be borrowed by schools, but we have found them to be temperamental and inconsistent in providing successful downloads of scanned barcodes.

III. Panther Mobile Device
Scan copy barcodes with the Panther mobile device. When set up with full wireless access, the Panther works with Destiny in real time and does not require downloads/uploads. However, if wireless is not available the Panther can run Follett Remote and the files can be downloaded and then uploaded into Destiny, much like the Dolphin. Note: Our department has two Panther devices that can be borrowed by your school. If you wish to use them, please plan ahead and schedule with us, because the setup is extensive and not at all intuitive. A district specialist will need to come to your library to set them up and show you how to configure and use them.
Finalizing an Inventory

Before finalizing an inventory, be sure that you have scanned all the materials within the inventory range you set up at the beginning of the inventory. Once you have finalized the inventory, materials that were not accounted for in the inventory will have their circulation status changed from “Available” to “Lost.” The concluding stage of the inventory process will be to more thoroughly search for these lost items and delete those that cannot be found.

1. To finalize an inventory, go to the Back Office > Inventory screen and click the button. (Be sure you have the correct inventory selected in the pull-down list.)

2. Choose to mark all unaccounted for copies as “lost.” (The only reason you would want to ignore the unaccounted for items is if you are finalizing an inventory that is old, unfinished, or had incorrectly set parameters, so that you can then delete it.)

Choosing to mark the unaccounted for items “Lost” will make your records more accurate and will prevent you and library patrons from wasting time looking for items that are not actually available on the shelves. It allows you the opportunity to make additional investigations into the whereabouts of these items before you delete them.

After the Inventory

Once you have finalized the inventory, your last step will be to more thoroughly investigate and search for lost items or delete them from your catalog. To view/print your list of lost items:

1. Go to the Back Office tab and choose Inventory from the left menu.
2. Click on the View “Lost” button on the right of the screen. This will bring up a detailed list of all items that were marked as “Lost.”
3. Print out or refer to this list to identify the items for which you will need to search.
4. When you find an item, click Found to remove it from this list. (You can also mark items as “found” by checking them in under the Circulation tab.)
5. When you have searched thoroughly for an item without success and you are sure that the item is gone, click Delete.