Conducting an Inventory

Description
Do you wonder how you can assess your resources? Do those resources accurately align to their records in Destiny? Conducting an inventory is the best way to ensure this is done efficiently and effectively. Additionally, the information from an inventory can be a great tool to guide your purchasing decisions. With Destiny, you can conduct an inventory and record your resources’ condition and availability at any time. In this training, you will learn how to conduct an inventory.

Participant Objectives
- Start an inventory.
- Conduct an inventory.
- View an in-progress inventory.
- Finalize an inventory.

Activities
- Answer questions about how you ensure accurate records in Destiny.
- Set up an inventory.
- Plan your next inventory.
Resources

For more information on the topics in this training guide and to complete the Plan and Apply sections, refer to following resources:

Quick Reference Guides:
- Starting an Inventory in Resource Manager
- Conducting an Inventory in Resource Manager
- Starting an Inventory in Library Manager
- Conducting an Inventory in Library Manager
- Starting an Inventory in Textbook Manager
- Conducting an Inventory in Textbook Manager
Plan

Use the space provided to record your answers to the following questions.

1. How do you currently conduct an inventory of resources at your school? At your district?

2. Use the following table to document who is responsible for confirming the location and condition of your school’s resources during an inventory. Fill in any additional resources you track in the blank spaces. Not every resource will have a responsible person at the school and district levels.

<table>
<thead>
<tr>
<th>Resource</th>
<th>Person Responsible</th>
</tr>
</thead>
<tbody>
<tr>
<td>Library books</td>
<td></td>
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<tr>
<td>Textbooks</td>
<td></td>
</tr>
<tr>
<td>Desktops/laptops</td>
<td></td>
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<tr>
<td>Athletic equipment</td>
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3. How often do you conduct an inventory of your resources?
Guided Exercises

Follow along with your Destiny trainer, or use the quick reference guides to practice the following skills. Mark the checkboxes as you complete each task to help you keep your place.

☐ 1. Explore **Back Office > Inventory**.

☐ 2. Set up a new inventory for your site or district.

☐ 3. Conduct an inventory.

☐ 4. View an in-progress inventory.

☐ 5. Finalize an inventory.
Now that you've done the guided exercises, complete the following:

1. If you have Destiny Resource Manager, set up an inventory with the following criteria:
   - Name the inventory *Spring Inventory*.
   - Include all resource types.
   - Include barcoded and unbarcoded items.
   - Account for items as they are checked in.
   - Mark items that have been handled after last Monday as *Accounted for*.
   - If an item is not in the location assigned to it in Destiny, have Destiny prompt you to change the location.

2. If you have Destiny Textbook Manager, set up an inventory with the following criteria:
   - Name the inventory *Spring Inventory*.
   - Include copies with and without barcodes.
   - Account for items as they are checked in.
   - Mark items that have been handled after last Monday as *Accounted for*.
   - If an item is not in the location assigned to it in Destiny, have Destiny prompt you to change the location.

3. If you have Destiny Library Manager, set up an inventory with the following criteria:
   - Name the inventory *Spring Inventory*.
   - Include items between the call numbers '000' and '699'.
   - Mark items that have been seen by Destiny after last Monday as *Accounted for*. 
Assess

Use the following rating scale to assess your level of understanding of the learning outcomes covered in this training.

Rating Scale:
1 - I need more help.
2 - I think I can figure it out with more practice.
3 - I am comfortable doing this on my own.
4 - I am proficient and can teach others.

<table>
<thead>
<tr>
<th>Rating (1-4)</th>
<th>Learning Outcome</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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