Follett Destiny – Transferring Materials

Contents

I. Overview ..................................................................................................................................................................... 2

II. Outgoing Transfers..................................................................................................................................................... 2

III. Tracking Transfers .................................................................................................................................................. 6

IV. Incoming Transfers ............................................................................................................................................... 8
I. Overview

Follett Destiny's **Transfer** process allows catalogued assets to be accurately tracked as they are moved between sites. Sites can transfer materials to another site, receive incoming transfers, and monitor incoming and outgoing transfers.

II. Outgoing Transfers

1. To transfer materials to another site:
   a. Select the **Catalog** tab.
   b. Select **Transfer Textbooks**.
   c. Select the **Upload** tab.

![Image of the Follett Destiny's Transfer process](image-url)
2. Textbooks and related materials can be transferred in different ways. For barcoded materials (textbooks, most teachers’ editions, etc.) you will transfer by **Barcode** (step 2a). Other materials which may not be barcoded (consumable textbooks, kits, etc.) you can transfer by **Copy Count** (step 2b).

   a. To transfer textbooks by **Barcode**:
      i. Select the site you are transferring **To** from the drop-down menu.
      ii. **Transfer by Barcode**.
      iii. Optionally, you can include an **Order #** consisting of alphanumeric characters.
      iv. **Create a barcode list** by scanning each barcode to be transferred. **NOTE:** Transfers of multiple titles are shown as “Assorted Titles” in the **Track Textbooks** list (see “Incoming Transfers”, pg. 8). Because of this lack of title detail, transfers sent this way are difficult to find when multiple transfers must be sorted through; this is further exacerbated when there are multiple “Assorted Titles” transfers. For this reason, it is **strongly** recommended that sites limit transfers to a single title.
      v. Click **Transfer** to finalize. **NOTE:** If you are transferring a copy with a barcode that already exists at another site, the copy’s barcode will be removed. Two separate transfers will then be created: One for copies that have had their barcode numbers removed, and one for copies that have maintained their barcodes.
To transfer textbooks **by Copy Count**:

i. Select the site you are transferring **To** from the drop-down menu.

ii. **Transfer by Copy Count**.

iii. Optionally, you can include an **Order #** consisting of alphanumeric characters.

iv. Choose your search type from the **Find by** drop-down menu. Search types include:
   - Textbook title: Searches titles by keyword.
   - State/Textbook ID: Searches titles by their unique State/Textbook ID.

v. Enter information relevant to your search type in the adjacent field. Searches are not case sensitive.

vi. Click **Go**.
vii. The results of your search will now be displayed. Locate the correct title from the list, enter the quantity to transfer, and click **Select**. **NOTE:** Transfers of multiple titles are shown as “Assorted Titles” in the **Track Textbooks** list (see “Incoming Transfers”, pg. 8). Because of this lack of title detail, transfers sent this way are difficult to find when multiple transfers must be sorted through; this is further exacerbated when there are multiple “Assorted Titles” transfers. For this reason, it is **strongly** recommended that you limit transfers to a single title.

![Image of search results with highlighted fields](image)

viii. Confirm that the title and quantity selection are correct and click **Transfer** to finalize.

![Image of confirmed transfer with highlighted fields](image)
III. Tracking Transfers

1. To access the **Track Textbooks** screen, where you can track both pending and complete incoming and outgoing transfers:
   a. Select the **Catalog** tab.
   b. Select **Transfer Textbooks**.
   c. Select the **Track** tab.

2. Located at the bottom of the **Track Textbooks** screen, **Customize View** allows you to determine which transfers you want displayed. **NOTE:** It is recommended you look at these settings if you are having difficulty finding a transfer.
   a. **View transfers created** after, on, or before a certain date by making selections from the drop-down menus.
   b. **Limit to transfers from/to** a certain site by making a selection from the drop-down menu.
   c. **Display** Incoming Transfers, Outgoing Transfers, Completed Incoming Transfers, or Complete Outgoing Transfers by checking the appropriate box(es).
   d. Click **Update** to apply these changes to the **Track Textbooks** screen.
3. Find the transfer you wish to track. Click on an underlined option to sort in ascending order; click again to sort in descending order. Transfers can be identified by the following information:

- Who the transfer is From or To.
- The Transfer Date.
- The Order #.
- The transfer’s Status, which includes the number of copies received out of the number transferred and the title of the transferred material. **NOTE:** Transfers with multiple titles will be shown as “Assorted Titles”.

4. Click the icon next to a transfer to either receive an incoming transfer (see “Incoming Transfers”, pg. 8, for further details) or view details on completed incoming transfers and pending and completed outgoing transfers.

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### Incoming Transfers (3)

<table>
<thead>
<tr>
<th>From</th>
<th>Transfer Date</th>
<th>Order #</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>7000 (passim)</td>
<td>7/3/2012 9:45 AM</td>
<td>0 of 1 Received</td>
<td>The Big Book of Science</td>
</tr>
<tr>
<td>7000 (passim)</td>
<td>7/25/2012 4:16 PM</td>
<td>35 of 37 Received</td>
<td>Tales of a Jovian Jupiter Vendor</td>
</tr>
<tr>
<td>7000 (passim)</td>
<td>7/24/2012 7:56 AM</td>
<td>20 of 23 Received</td>
<td>Twix &amp; You!</td>
</tr>
</tbody>
</table>

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### Outgoing Transfers (2)

<table>
<thead>
<tr>
<th>In</th>
<th>Transfer Date</th>
<th>Order #</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>7000 (intrans)</td>
<td>0/20/2012 7:57 AM</td>
<td>0 of 1 Received</td>
<td>Assorted Titles</td>
</tr>
<tr>
<td>7000 (intrans)</td>
<td>0/27/2012 8:58 AM</td>
<td>0 of 12 Received</td>
<td>Assorted Titles</td>
</tr>
</tbody>
</table>

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**View.**
IV. Incoming Transfers

1. Just as textbooks and related materials can be transferred in different ways, they can also be received in different ways. To receive **Copies sent with barcodes** (textbooks, most teachers’ editions, etc.), proceed to step 1a. To receive **Copies sent without barcodes** (consumable textbooks, kits, textbook copies which have had their barcodes removed, etc.), proceed to step 1b.

   a. To receive an incoming transfer of **Copies sent with barcodes**:
      
      i. **Scan or enter copies one-at-a-time** in the text box and click ![Receive](recommended), or...
      
      ii. ...click ![Receive All](or...)
      
      iii. ...click ![Show More](and click ![Receive] next to an individual copy.

![Screen shot of the Transferring Materials system with instructions showing how to receive copies one-at-a-time, how to receive all copies at once, and how to show more copies and receive individual copies.]

   1a-i. **Scan or enter copies one-at-a-time**, or...

   1a-ii. ...**Receive All**, or....

   1a-iii. ...**Show More**, and....

   1a-iii. ...**Receive**.
b. To receive an incoming transfer of **Copies sent without barcodes**:
   
i. Click [Receive].

   ![Image of 'Receive' button]

   **1b-i. Receive.**

   ![Image of receive page]

   ii. Enter number of **Copies to Receive**.

   iii. From the drop-down menu, select whether to assign barcodes to these materials or to receive without barcodes. **NOTE:** Barcodes should only be assigned to non-consumable materials.

   1. To assign barcodes, place cursor in the **Starting Barcode** box and scan or type the first barcode. **NOTE:** Ensure that your barcodes are sequential when barcoding multiple copies.

   iv. Click [Receive].

   ![Image of receive page with barcode entry]

   **1b-ii. Enter number of Copies to Receive.**

   **1b-iii. Assign barcodes or Receive without barcodes.**

   **1b-iii-1. Scan or type Starting Barcode.**

   **1b-iv. Receive.**