Training Guide

Textbook Storage System

Version 2.0
# Table of Contents

1.0 Introduction .................................................................................................................. 3

2.0 Accessing the System ..................................................................................................... 4

3.0 Application Menu ............................................................................................................ 5

4.0 School Selection .............................................................................................................. 6

5.0 Main Menu ...................................................................................................................... 7

6.0 Storage Location Management ....................................................................................... 8

7.0 Book Management: Entering Textbooks ........................................................................ 9

8.0 Book Management: Viewing & Updating Inventory ...................................................... 11

9.0 Book Management: Book Inventory .............................................................................. 13

10.0 Book Management: Moving books from one storage location to another .............. 15

11.0 Book Management: Designating Books as Lost/Stolen or Unusable ......................... 16

12.0 Book Management: Moving Books into Circulation .................................................... 17

13.0 Academic Division / Administrative Reports ............................................................. 18

14.0 School Reports .............................................................................................................. 19

15.0 Logout ............................................................................................................................ 20
1.0 Introduction

Annual textbook costs for the School District are significant, and it is important that each school be a good steward of these important assets by properly accounting for and getting maximum usage of their textbooks.

The Textbook Storage System can help manage these assets by providing schools with the ability to accurately document the quantity and storage location for each textbook throughout the school year, as well as record how the books were distributed from storage. Various categories are available to indicate how the books were distributed.

Books can be issued for classroom use or to students for home use. Schools can track how many books were lost, stolen or deemed unusable due to poor condition. The system produces reports to help schools manage the storage and distribution of their textbooks.

An additional feature allows schools to ‘re-allocate’ unused books to other schools. This will help reduce costs by eliminating the need to purchase unnecessary additional books.

Academic Division level staff has the ability to access the system and view information on any of their schools. Central administrative level users can access the system and view information on any school across the district. Separate reports are available for the Academic Division and Administrative level users.
2.0 Accessing the System

2.1 Log in to the Employee Portal by going to www.philasd.org/login
2.2 Enter your School District E-Mail User Name and Password in the Employees box. Click Login.

Figure 1 – Login Screen

Note: Enter the user name in the E-Mail User Name field, NOT the entire E-Mail address, i.e. jsmith, not jsmith@philasd.org.
Note: For E-Mail problems, contact the Information Technology Help Desk at 215-400-5555.
3.0 Application Menu

3.1 Click the question mark to access the online training guide and to view an instructional Textbook Storage System training video.

3.2 Click the textbook icon to launch the application.

![Application Menu Image](image)

**Figure 2 – Application Menu**

Note: Several applications may be listed. Click Launch under Textbook Inventory Storage System to open the application in a new browser window.
4.0 School Selection

4.1 The school selection screen will be displayed for all Academic Division and Administration users who have access to multiple school locations.

4.2 Please refer to the Reports section for more information regarding the reports available on this screen.

4.3 The listing of schools available to the user can be selected from a listing organized by school number or alphabetically by school name.

4.4 Click on the drop-down menu, scroll down and click on the preferred school. Click the associated Select button.

Figure 3 – School Selection

Note: The school listed will be determined based on the User’s School, Academic Division and Administrative designated levels.
5.0 Main Menu

5.1 The Textbook Inventory Storage System Main Menu page displays the selected school and principal’s name.

5.2 Access into the Storage Location Management and Book Inventory Management sections is completed through the Main Menu screen.

5.3 School level Reports are also accessed through the Main Menu screen. Please refer to the Reports section for more information regarding the reports available on this screen.

5.4 Academic Division and Administration users will have the functionality to return to the school selection page in order to view a different school.

5.5 The first step of the Textbook Inventory Storage System is to create the storage locations for your school. This feature allows you to add and/or change storage locations within your school.

Figure 4 – Main Menu

Note: Storage locations must first be entered into the system in order to record individual book inventory information.
6.0 Storage Location Management

6.1 Each storage location must be entered separately. Enter a unique name for each of your school’s designated storage locations. Click the ADD button.

6.2 The page will automatically be updated to display the View/Update Storage Locations drop-down Storage Location Management

6.3 Each storage location must be entered separately. Enter a unique name for each of your school’s designated storage locations. Click the ADD button.

6.4 The page will automatically be updated to display the View/Update Storage Locations drop-down menu, once the first storage location has been entered into the system.

6.5 The system will allow you to change the name of any storage location. Simply select the storage location name from the drop-down list and click the Select to Update button.

6.6 The page will again automatically be updated to display the Update Name section of the screen.

6.7 Enter the corrected name for the location in the To: Box and click Update.

6.8 The page will display the following message to confirm the update: Selection Location is Successfully Updated

---

Figure 5 – Storage Location Management

Note: Storage location is a free-form field; you can enter any combination of number, letters and/or characters. Check the listing of already entered storage locations before you enter a new location. The system will allow you to enter duplicate storage location names.

Note: The system has three navigational links at the top of each page that can be utilized to move from the Main Menu, Book Menu and Location Management.
7.0 Book Management: Entering Textbooks

7.1 Once the storage locations have been entered into the system, books and book quantities can now be associated with any of the locations.

7.2 You can access the Book Management screen through the Book Inventory Management Link or the Book Menu Link at the top of the screen.

Figure 6 – Book Management

7.3 To add a textbook into your school’s inventory enter the ISBN number of a textbook in the ISBN number field and click Add/Update.

Figure 7 – Book Management: Entering Textbooks
7.4 The system will search internal and external databases to find the information associated with the entered ISBN number.
7.5 Verify the book information to insure the correct book has been located.
7.6 Some ISBN numbers are associated with specific types of media or editions (teacher’s editions, CD-ROM’s etc.). If the book title does not include this information, you can utilizing the drop-down menu to select one of the Media Types.
7.7 Utilizing the drop-down menu, select the Storage Location where you will be storing these textbooks.
7.8 Utilizing the drop-down menu, select Course/Subject associated with the textbook.
7.9 Utilizing the drop-down menu, select the Media Type associated with the ISBN. Only textbooks are required to be entered into the system. Additional media types (i.e. workbook, CD) can also be entered into the system, if desired, as long as the ISBN number can be properly identified by the system’s databases.
7.10 Enter the number of this textbook that will be stored at the chosen Location.
7.11 Click Add to store the information into the systems database.

Figure 8 – Book Management: Entering Textbooks (con’t)

Note: If the system cannot locate information on the ISBN number you have entered into the system; fax a copy of the textbook’s copyright page to the Information Technology Help Desk (215-400-5556), along with your contact information, so that the ISBN number and textbook information can be manually added to the database.
8.0 Book Management: Viewing & Updating Inventory

8.1 The system provides each school with the ability to view and edit their existing textbook inventory. Two separate views are provided: By Storage Location and By Textbook Title.

8.2 Academic Division users will only be able to view school level information.

Figure 9 – Book Management: Viewing Inventory

8.3 By Storage Location: This view will provide a listing of all textbooks that are stored in each location.
   8.3.1 The system will automatically display the first location from the school’s location listing.
   8.3.2 An alternate storage location can be selected from the drop-down menu and clicking the select button.
   8.3.3 Textbooks will be listed in ISBN number order, along with the Textbook Title, and the total quantity of each textbook that is stored in the selected location.

8.4 By Title: This view will provide a listing of all textbooks based on the Textbook Title.
   8.4.1 The system will display all Titles that begin with the letter “A”.
   8.4.2 An alternate beginning letter can be selected from the drop-down menu and clicking the select button.
   8.4.3 Textbook Title will list textbooks in alphabetical order, along with the ISBN number and the total quantity of each textbook that is stored at the school.

8.5 By clicking on the View/Update Book Info button next to a book on either the Textbook Title view or the Storage Location view will display the detailed storage information associated with the selected textbook.
Figure 10 – Book Management: Viewing Inventory (con’t)

Figure 11 – Book Management: Viewing Inventory (con’t)
9.0 Book Management: Book Inventory

9.1 Once a school has entered their initial textbook inventory quantities into their identified locations, designated quantities of textbooks can be moved from storage location(s) into circulation, lost/stolen/usable or reallocated status.

9.2 The Update Book Inventory screen contains a great deal of information pertaining to the textbook, while also providing the ability to modify storage, circulation and reallocation information.

9.3 The screen has several different areas of data.

- Textbook Information
- Storage Locations
- Circulation Information
- Lost/Stolen/Unusable
- Reallocation Information
- Quantity Totals

![Textbook Storage System]

**Figure 12 – Book Management: Updating Inventory**
9.4 Textbook Information: (i.e. ISBN, Title, Author) The Course/Subject and Media Type designations can be modified by utilizing the drop-down menu, selecting a new value and clicking Update.

9.5 Storage Locations: listing of all storage locations that contain at least one of the selected textbooks, along with the quantity of books stored in each location.

9.6 Circulation Information: number of books which have been designated as being utilized within a classroom or have been given to students to use at home. The number of books designated as Lost/Stolen/Unusable can also be identified in the circulation section. The unusable designation should be utilized to identify books with can no longer be utilized due to damage or changes in the curriculum that make the book no longer a valid option. A comments field is available where additional information pertaining to the reallocation transaction can be entered.

9.7 Reallocation Information: the ability to record books that a school is giving to another school. Quantity and school location need to be entered into the system. A comments field is available where additional information pertaining to the reallocation transaction can be entered.

9.8 Quantity Totals: the system will automatically calculate various totals pertaining to the storage, circulation, lost/stolen/unusable and reallocation quantities.

   9.8.1 Lifetime Total: the total number of the designated textbook the school has had over time. The Lifetime Total adds quantities from all of the listed categories.

   9.8.2 Calculated Total: the total of all storage locations for the designated textbook plus the total number of books in circulation.

9.9 The Quantity numbers listed on the screen are generated by the system and will be automatically re-calculated as “change” numbers are entered.

9.10 As quantity numbers are entered into various change columns and categories the system will automatically adjust the calculation numbers. A difference number will also be calculated to assist the user in making sure that the appropriate quantities are balanced during the quantity changes.

Note: The system will alert the user with an error message whenever an update is requested that will result in an increase to the inventory numbers. The user will need to approve the action in order for the quantity calculations to be completed.

BE VERY CAREFUL!
INCREASES TO INVENTORY NUMBERS CAN NOT BE REVERSED WITHOUT PROPER AUTHORIZATION
10.0 Book Management: Moving books from one storage location to another.

10.1 Under the Book Menu, select the appropriate textbook by either entering the ISBN, or selecting the book from either the storage location or the textbook title listing.

10.2 All storage locations that contain the designated book will be listed along with the quantity of books being stored at each location.

10.3 In order to move books from one storage location to another, you must first subtract the number of books that are going to be removed from the selected storage location and then enter the same number of books that will be now moved and stored at a different location.

10.4 Screenshot Example:

10.4.1 100 books are being stored in Basement – Room 101
10.4.2 100 books are being stored in Basement – Room 102
10.4.3 You want to move 50 books from Room 101 to Room 102.
10.4.4 Enter -50 in the change box next to Basement – Room 101.
10.4.5 Enter 50 in the change box next to Basement – Room 102.
10.4.6 The difference amount should be listed as “0”

10.4.7 Click Update. The system will automatically re-calculate totals.

10.5 An additional storage location can be selected by utilizing the drop-down menu, clicking on the storage location and entering in the change quantity amount.

Figure 13 – Book Management: Moving Inventory
11.0 Book Management: Designating Books as Lost/Stolen or Unusable.

11.1 Under the Book Menu, select the appropriate textbook by either entering the ISBN, or selecting the book from either the storage location or the textbook title listing.

11.2 All storage locations that contain the designated book will be listed along with the quantity of books being stored at each location.

11.3 If the books that are now being recorded as lost/stolen/unusable were originally part of the inventory for a storage location, you must first subtract the number of books from the selected storage location and then enter the equivalent number in the lost/stolen and/or unusable categories in the Manage Circulation section.

11.4 If the books were not counted in the original inventory quantities, you can add the appropriate quantities in the lost/stolen and/or unusable categories. When you click update the system will ask the user to confirm the additional quantities to the inventory.

11.5 The Comments field is a free-form text box that you can utilize to enter information about this transaction. For example: Books unusable due to water damage.

11.6 Screenshot Example:

11.6.1 100 books are being stored in Basement – Room 101
11.6.2 100 books are being stored in Basement – Room 102
11.6.3 You want to designate 3 books from Basement – Room 101 as Lost/Stolen and 2 books as Unusable.
11.6.4 Enter -5 in the change box next to Basement – Room 101.
11.6.5 Enter 3 in the change box next to Lost/Stolen,
11.6.6 Enter 2 in the change box next to Unusable.
11.6.7 The difference amount should be listed as “0”
11.6.8 Click Update. The system will automatically re-calculate totals.

Figure 14 – Book Management: Moving Inventory

Note: The system provides the flexibility to enter each quantity change separately or enter multiple textbook quantity changes in one transaction. When doing multiple changes, the difference number will provide assistance in maintaining accurate calculations.
12.0 Book Management: Moving Books into Circulation

12.1 Under the Book Menu, select the appropriate textbook by either entering the ISBN, or selecting the book from either the storage location or the textbook title listing.

12.2 All storage locations that contain the designated book will be listed along with the quantity of books being stored at each location.

12.3 At the start of the school year and/or the start of a course, books will be removed from storage locations and be utilized for Classroom/Student use.

12.4 In order to move books from one or more storage locations into circulation, you must first subtract the number of books that are going to be removed from the selected storage location(s) and then enter the same number of books that will now be designated as Assigned for Classroom use or Assigned to Home/Student.

12.5 Screenshot Example:

12.5.1 100 books are being stored in Basement – Room 101
12.5.2 100 books are being stored in Basement – Room 102
12.5.3 You want to move all books from Basement – Room 101 and 20 books from Basement – Room 102 into circulation.

12.5.4 Enter -100 in the change box next to Basement – Room 101.
12.5.5 Enter -20 in the change box next to Basement – Room 102.
12.5.6 Enter 3 in the change box next to Assigned to Home/Student.
12.5.7 Enter 115 in the change box next to Assigned for Classroom Use. The difference number is calculated for assistance.

12.5.8 The difference amount should be listed as “0”
12.5.9 Click Update. The system will automatically re-calculate totals.

Figure 15 – Book Management: Manage Circulation

Note: Freeform comments field is available which can be utilized to capture additional information related to the individual textbook.
13.0 Academic Division / Administrative Reports

13.1 Academic Division users will have access to reports that will provide information on all schools associated with only their Academic Area.

13.2 Administrative users will have access to reports for all Academic Areas & Schools.

13.3 Textbook Inventory Grouped by ISBN: This report provides a listing of each school that has the designated textbook (ISBN) stored within the Textbook Storage System.

13.4 Textbook Inventory Group by Course/Subject: This report provides a listing of each school’s textbooks as they have categorized them by Course/Subject. The report will list all textbooks stored within the Textbook Storage System by their associated Course/Subject.

13.5 Textbook Inventory Group by School: This report provides a listing of all textbooks stored within the Textbook Storage System for each school, sorted by ISBN.

13.6 Textbook Reallocation Inventory: This report provides a listing of all textbooks each school has reallocated to another school. The report will list the book/ISBN, the school number and name where the books are being reallocated along with the quantity of books and the date of the reallocation.

13.7 Textbook Inventory Group by Course/Subject: This report provides a listing of each school’s textbooks as they have categorized them by Course/Subject. The report will list all textbooks stored within the Textbook Storage System by their associated Course/Subject.

Note: All reports, except for the Reallocated Report will provide the quantity breakdown for each category (i.e. onsite, assigned at home, assigned to classroom, lost/stolen, unusable and reallocated.
14.0 School Reports

14.1 School level users will only have access to their designated school’s reports.
14.2 Textbook Inventory by ISBN: This report provides a school with a listing of all of the locations an individual textbook is being stored, along with the quantity of books in each location.
14.3 Textbook Inventory by Storage Location: This report provides a school with a listing of all books that are being stored in each location, along with the quantity of each book.
14.4 Textbook Inventory: This report provides a school with a listing of all books that have been entered into the Textbook Storage System, sorted by ISBN.
14.5 Textbook Inventory in Title Sequence: This report provides a school with a listing of all books that have been entered into the system, sorted by Title.
14.6 Textbook Inventory by Course/Subject: This report provides a school with a listing of each school’s textbooks as they have categorized them by Course/Subject.
14.7 Textbook Reallocation Inventory: This report provides a listing of all textbooks that the school has reallocated to another school. The report will list the book/ISBN, the school number and name where the books are being reallocated along with the quantity of books and the date of the reallocation.

![Textbook Storage System](image)

**Figure 17 – School Level Reports**

Note: All reports, except for the Reallocated Report will provide the quantity breakdown for each category (i.e. onsite, assigned at home, assigned to classroom, lost/stolen, unusable and reallocated.)
15.0 Logout

15.1 Click Logout to exit the system and return to the Application Menu.

Figure 18 – Logout