To get ready for the new school year there are a few processes you need to be sure you complete to assure your TIPWeb-IM data is accurate.

**Inventory > Audits > Audit Management > New Audits**
Create campus audits within TIPWeb-IM for all district tracked ISBNs for which the campus is accountable. Part of the audit process requires a submission deadline to be set. It is suggested you use TIPWeb-IM’s Application Notification (Tools > District Preferences > Application Notifications) to display the established audit due date(s) on every user’s TIPWeb-IM’s Home page.

**Inventory > Adjustments > Campus Adjustment**
AND/OR
**Inventory > Audits > Create Audit Adjustments and Finalize**
As a part of the end of year audit process, create campus paid adjustments for all ISBNs for which the campus inventory audit count is less than the TIPWeb-IM inventory count. Found adjustments should also be created for items reported as a surplus on a campus. Items on campus paid adjustments should be posted when payments are received.

**Inventory > Adjustments > Inventory**
After all campus paid adjustments have been posted, you will create a district inventory adjustment to remove those payments from the district’s overall inventory. It is recommended to export the “Textbook Details Report” to excel and filter the report by “paid.” You can then use this document to create the end of year district inventory adjustment. Depending on your district’s internal policies, post the inventory adjustment when all campus payments are received or when instructional materials have been replaced.

**Tools > Closing**

- **Remove/Archive Consumables**
  This process zeros out all distributions to campuses as well as zeroing out all inventory at the campus level.

- **Consolidate Campus Transactions**
  This removes all requisition and adjustment transactions from the prior year. Campus data will reflect one row of data for each issued title displaying the consolidation date. It is suggested you open the Campus Transaction Report prior to completing this task and save the .pdf to a “year end” textbook folder, on your computer.
✓ Textbooks > Details > Courses

To accomplish the tasks below, you will need to coordinate with fellow district level employees. To identify new courses for the upcoming school year, it is suggested you speak with your district’s PEIMS clerk and/or curriculum expert. Once you have new course names and course ID numbers (used in your district’s student management system), complete the following:

✓ Assign any new courses to current instructional materials
✓ Assign existing courses to new instructional materials

✓ Tools > Transfer Book-Course Relationships

This allows you to set campus eligibility quotas for all instructional materials and their identified courses for all campuses. This “push” of book-course relationships to all campuses helps the campuses with certain campus specific reports. It also helps the district, as eligibility counts for ISBNs are calculated using these quotas (eligibility counts are displayed in multiple screens within TIPWeb-IM’s campus view and district view).

✓ Tools > Reset Course Enrollments >
Reset All Current Enrollments for All Courses at All Campuses
AND/OR
Reset All Max Enrollments for All Courses at All Campuses

This should be done after the course schedules have been updated in the student management system for the new school year. This process removes all current course enrollment totals. The automated data update (EZ Import/EVA/SIF) will bring in the new school year totals in the overnight update process. Max enrollments are displayed on the District Analysis of Need Max Enrollment report and the Other Data > Courses page.

✓ Remind Campuses to go through Closing

It is best practice to remind your campuses to go through the TIPWeb-IM campus closing processes. If you and/or your campuses have any questions on the TIPWeb-IM campus closing procedures, please contact us at 800-495-5993. We will gladly explain the process and/or provide documentation.
End of Year Checklist

☐ Create TIPWeb-IM Audits
   (for all or specified district tracked items at specified campuses)

☐ Enable an Application Reminder
   (for Audit Due Date)

☐ Create respective Campus Paid Adjustments
   (for ISBN counts below the expected campus inventory quantity)

☐ Create respective Campus Found Adjustments
   (for ISBN counts above the expected campus inventory quantity)

☐ Post Campus Adjustments
   (as payments are received and/or found items are approved)

☐ Create respective Inventory Paid Adjustments
   (based on posted paid counts from the campus paid adjustments)

☐ Remove/Archive Consumables
   (for all or specified consumables)

☐ Consolidate Campus Transactions
   (all campus requisitions & campus adjustments prior to a specified date)

☐ Identify New Courses & Their Assigned Instructional Materials
   (PEIMS clerk or curriculum expert)

☐ Update all new Book-Course Relationships
   (for any new course and/or any new district tracked instructional material)

☐ Transfer Book-Course Relationships to Campuses

☐ Identify when the Student Information System will switch over
   (to the new school year’s information)

☐ Reset Course Enrollments
   (after the new school year schedules have been updated in the student information system)

☐ Enable an Application Reminder
   (Remind Campuses to go through their Closing processes and referencing the date the student information system switches over to the new school year)
Overview

Audits is the automated process by which a district requests a campus to examine, record, and officially verify their campus’ inventory counts for selected district tracked items within TIPWeb-IM.

Within the Audits section, there are two areas:

- **Audit Management**
  - create an audit
  - view the campus’ progress
  - print an audit report
  - delete an audit in the status of new

- **Create Audit Adjustments and Finalize**
  - create campus adjustments respective to overages and shortages reported on a submitted campus audit
  - finalize an audit

While an audit is being created, the district user has options available to help target the desired campus(es), material type(s), and inventory information.

The audit workflow is as follows:

1. **District creates audit**
   (identifying which campus(es) have been requested to complete the audit, all desired district tracked material type(s), and other options)

2. **Campus examines and records the inventory counts**
   (at any point during this process, district users can view the campus’ progress)

3. **Campus completes and submits the audit results to the district**
   (campuses can not edit the audit after this point)

4. **District creates automatically generated campus adjustments**
   respective to the overages and shortages reported in the audit (optional)

5. **District finalizes the audit**

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**Did you know?**

By default, the campus’ audit screen and their respective audit report will display the campus’ district tracked inventory count.

A *Blind Audit* is an optional audit feature which hides the campus’ inventory count within their audit screen and respective audit report.

This process encourages staff performing the campus audit to enter an authentic physical count rather than mimicking the displayed inventory count.
Audits: Audit Management

District Audit Management

Overview

Audit Management is the primary screen used to manage TIPWeb-IM created audits. A district user can create an audit, view its progress, print an audit report, and/or delete an audit in the status of New.

There are four audit statuses:

**New:** The district has created the audit and the respective campus has not started editing it yet.

**In Progress:** The respective campus has opened the audit in the edit screen.

**Submitted:** The respective campus has entered counts for all items within the audit and has submitted it to the district.

**Finalized:** The district has determined the audit has been concluded and all desired audit tasks are complete.

Did you know?

The Audit Management grid defaults to only display audits in the status of New, In Progress, and Submitted.

If you wish to view Finalized audits, select the Show Finalized check box in the upper right-hand corner of the Audit Management grid.

Audit Due Dates displayed in red are past due audits.
Create an Audit

1. Click on (Inventory) located on the Navigation Bar.
2. Click on Audit Management.
3. Click on (New Audit).
4. Enter the desired audit information. Audit Name and Due Date are required fields. Defaults include:
   - Materials = All
   - Blind Audit = unchecked
   - Exclude items with no campus distributions = unchecked
5. Click on (Next).
6. Search for and select the respective campus(es) to include in this audit. The selected campus(es) will be displayed in the Campuses Selected for Audit grid, located on the lower half of the screen.
   - To select more than one campus at a time, click on (Add) on the respective campus’ row.
   - To select all campuses displayed in the grid, click on (Add All) located in the blue grid header.
7. Click on (Save) to deliver this audit to the respective campuses in the status of New.

Did you know?

Inventory counts, for an audit in the status of New or In Progress, will automatically update when a respective campus requisition is received and/or a campus adjustment is posted.

Once the audit is submitted, the inventory counts and the campus’ submitted audit counts are frozen and will not change.
Overview

Create Audit Adjustments and Finalize allows a district user to finalize an audit or create campus adjustments from the overages and shortages within an audit and then finalize it.

Create Audit Adjustments and Finalize - This automatically creates campus adjustments relevant to overages and shortages reported on the respective campus audit in the status of Submitted. Overages will create Found Campus Adjustments and shortages will create Paid Campus Adjustments. These adjustments will be located in the campus adjustment screen and their campus adjustment name will include the name of the audit from which it was derived, campus ID, campus name and the word “generated.”

This process also changes the audit’s status to Finalized. By doing so, the district is indicating they have determined the audit to be complete and will process any created campus adjustments.

Finalize Only - Finalizing an audit is the process by which the district changes the audit status from Submitted to Finalized. By doing so the district is indicating they have determined the audit to be concluded and all desired audit tasks are completed.
Create Audit Adjustments and Finalized:  Step-By-Step

Create Audit Adjustments and Finalize an Audit

1. Click on 🛒 (Inventory) located on the Navigation Bar.

2. Click on Create Audit Adjustments and Finalize.

3. Search for the audit(s) for which you wish to create audit adjustments and finalize.

4. To create audit adjustments and finalize an audit one at a time, click on 🛒 (Create Adjustments and Finalize) located on the respective audit’s row within the grid.

   OR

   To create audit adjustments and finalize all audits displayed in the grid, click on 🛒 Create Adjustments and Finalize ALL Audits in Search Results Below located above the blue grid header.

5. A warning message will ask you if you wish to continue. Click Continue.

6. A processing screen will appear while the audit’s information is creating campus adjustments and the audit itself is being finalized. A success statement will appear. Click OK to return to and refresh the Create Audit Adjustments and Finalize screen.

Did you know?

Only audits in the status of Submitted will be accessible on the Create Audit Adjustments and Finalize screen.
Only Finalize an Audit

1. Click on (Inventory) located on the Navigation Bar.

2. Click on Create Audit Adjustments and Finalize.

3. Search for the audit(s) you wish to finalize.

4. To finalize an audit one at a time, click on (Finalize) located on the respective audit’s row within the grid.
   OR
   To finalize all audits displayed in the grid, click on Only Finalize ALL Audits in Search Results Below located above the blue grid header.

5. A warning message will ask you if you wish to continue. Click Continue.

6. A processing screen will appear while the audit is being finalized and then a success statement will appear. Click OK to return to and refresh the Create Audit Adjustments and Finalize screen.
Overview

Campus Adjustments are used primarily to decrease the inventory of district tracked items or instructional materials at the campus level. There is one special case where an adjustment will increase inventory.

Decreases in inventory may be due to:

- the payment of instructional materials by students/teachers,
- surplus instructional materials due to a decrease in students,
- instructional materials destroyed in a fire, flood or other natural disaster,
- instructional materials which are worn out (coming apart due to wear, not abuse).

Increases in inventory due to found instructional materials previously paid for by the campus are processed by a Found Adjustment, which is automatically created when a previously paid for (reconciled) item is returned to storage. Once the adjustment is posted, the inventory at the campus level will increase. Posting the adjustment will automatically reflect the increase at the district level as well.

There are five adjustment types:

Return Surplus: The campus has too many copies and is returning the surplus.

Destroyed: The campus is declaring an item has been destroyed.

Worn: The campus is declaring an item is worn.

Paid: The campus is correcting a shortage after a physical audit or is submitting payment for an item for which they have been paid.

Found: The campus found instructional materials, currently in adoption, for which they had previously made payment to the district. This type of adjustment can also be used to increase inventory which was never recognized by the district. (This is useful during the initial conversion to TIPWeb-IM.)

Did you know?

Adjustment requests can be named anything which has not been used before.

Most districts have naming conventions they have their campuses follow. One of the most common naming conventions is

[YY] [Campus #] [MMDD]
Show Completed check box **Show Completed:** 
allows you to view all campus adjustments with a status of “Completed”.

**Status** - indicates the overall status of the campus adjustment.
Campus Adjustments Details Screen

Call Tag  
changes the item(s) status to Call Tag.

Deny  
cancels the specific item’s full pending adjustment quantity.

Post  
applies the decrease in inventory for the respective title.

Post All  
applies the decrease in inventory for all of the titles within the campus adjustment.

Complete  
allows you to complete the transaction for the item without posting the entire quantity.
Create a Campus Adjustment

1. Click on *(Inventory)* located on the Navigation Bar.
2. Click on *Adjustments*.
3. Click on the *Campus Adjustments* tab.
4. Click on *(Add)*.
5. Search for and select the respective campus for this adjustment.
6. Select the adjustment type from the drop down menu.
7. Name the Adjustment Request.
8. Click on *(Next)*.

Continued on next page
9. If a description is desired, enter it in the Description field at the top of the page.

10. Use Search to find the item you want to adjust.

11. Click on the title. The row highlights to orange.

12. Enter a number for the amount of copies you want to adjust into the Copies to Adjust text box. The number of copies available will be displayed.

13. Click on (Add).

14. Repeat steps 9 through 13 until all items to adjust have been added.

15. When you are finished, click on (Save). (You can still edit the adjustment at this point.)
Edit a Campus Adjustment

1. Click on \textit{(Inventory)} located on the Navigation Bar.

2. Click on \textit{Adjustments}.

3. Click on the \textit{Campus Adjustments} tab.

4. Search for the campus adjustment you want to edit.

5. Click on \textit{(Edit)} in the respective row of the campus adjustment you want to edit.

6. Edit the campus adjustment.
   A. Add notes into the description field.
   B. Add items to the existing campus adjustment.
   C. Edit quantities of existing items by clicking on \textit{(Edit)} in the corresponding row.
   D. Delete existing items by clicking on \textit{(Delete)} in the corresponding row.

7. Click on \textit{(Save and Exit)}.

Questions? 800-495-5993 or support@hayessoft.com
Post a Campus Adjustment

To complete a campus adjustment, it is necessary to Post the campus adjustment. The posting process does three things:

- Changes the status of the campus adjustment from In Progress to Complete.
- Reduces the number of copies for which the campus is responsible.
- Posts the quantity at the district level under textbook details.

1. Click on 🛒 (Inventory) located on the Navigation Bar.
2. Click on Adjustments.
3. Click on the Campus Adjustments tab.
4. Search for the campus adjustment you want to post.
5. Click on 📖 (Details) in the respective row of the campus adjustment you want to post.
6. If necessary, click on ✗ (Deny) in the corresponding row to deny the quantity submitted for reduction.
   - Items can be partially posted or set to Complete. To do this:
     i. Enter the actual quantity received in the Copies column.
     ii. Click on 📥 (Post) in the corresponding row.
     iii. Click on 😊 (Complete) in the same row.
7. Click on 📥 (Post) in each row to approve the corresponding the quantity submitted for reduction.
8. Click on 🔙 (Previous Page) to return to the main Adjustments page.

Did you know?

You may post quantities greater than originally requested within a Campus Adjustment.

Questions? 800-495-5993 or support@hayessoft.com

Hayes Software Systems
Overview

An Inventory Adjustment is used to decrease the district level (warehouse) inventory. The various types of inventory adjustments used to decrease the district owned inventory are:

- **Worn** items need to be replaced due to normal wear and tear.
- **Destroyed** items destroyed in a fire, flood, or other natural disaster.
- **Shrinkage** indicates a physical count of the instructional materials in the warehouse reveals a shortage.
- **Paid** occurs when the district pays to replace lost instructional materials.
- **Return Surplus** occurs when your district received too many copies from the vendor and is returning the surplus, or your state has asked you to ship your district inventory surplus to another district.

The two statuses of an inventory adjustment are:

- **In Progress** which reflects anything from newly created and saved inventory adjustments to inventory adjustments which have some items within it in the status of posted.
- **Complete** indicates all items have been posted.

Did you know?

The term **Post** or **Posted** applies to the process which reduces the inventory of an item listed on an adjustment.

The **Complete** icon is used in the event that you do not want to post everything on the adjustment.

For example, you adjust 10 algebra books, but before you post them, one of the 10 books is found. You now want to only post 9 textbooks.

If any title is not posted as entered, such as the scenario discussed above, the adjustment status will remain **In Progress** until it is marked **Complete**.
Inventory Adjustments: Introduction

Inventory Adjustment Screen

Show Completed: This check box allows you to view all inventory adjustments with a status of “Completed”.

Description: Allows you a place to make notes to yourself and/or to your coworkers regarding the items within this inventory adjustment.

Adjustment Status: Indicates the overall status of your inventory adjustment.

Item Status: Indicates the status of the respective instructional material. Possible statuses are Pending and Posted.

Post: Applies the decrease in inventory for the respective title.

Post All: Applies the decrease in inventory for all of the titles within the inventory adjustment.

Complete: Sets the respective title to a status of complete. Use this only if you do not want to post the full adjustment quantity entered.

Deny: Cancels the specific item’s full pending adjustment quantity.

Inventory Adjustment Details

Questions? 800-495-5993 or support@hayessoft.com
Inventory Adjustments: Step-by-Step

Create a New Inventory Adjustment

1. Click on (Inventory) on the Navigation Bar.

2. Under the Adjustments subcategory, click on Adjustments.

3. Click on (Add).

4. Select an adjustment type from the Adjustment Type drop-down menu.

5. Name the Inventory Adjustment.

6. Click on (Next).

7. If a description is desired, enter it in the Description field at the top of the page.

8. Use Search to find the item you want to adjust.

9. Click on the title. The row highlights to orange.

10. Enter a number of Copies to Adjust.

11. Click on (Add).

12. Repeat steps 8 through 11 until all items to adjust have been added.

13. When finished, click on (Save). (You can still edit the adjustment at this point. After you have posted your inventory adjustment, you can no longer edit it.)

Did you know?

You can use the description box to add any notes you may have for each adjustment.

These notes are attached to the inventory adjustment and may serve as important documentation of why the inventory was reduced.

Questions? 800-495-5993 or support@hayessoft.com

Hayes Software Systems
Edit an Inventory Adjustment

Inventory adjustments in the status of In Progress can be edited. If you do not see the (Edit) icon, you are no longer able to edit this inventory adjustment.

1. Click on (Inventory) on the Navigation bar
2. Click on Adjustments, and
3. Under the Inventory Adjustments tab, use Search to find the inventory adjustment you want to edit.
4. Click on (Edit) to make changes to your inventory adjustment.
5. Make the changes or add additional items to your inventory adjustment.
6. When you are finished, click on (Save).

(You can still edit the inventory adjustment at this point. Once you have posted an item within an inventory adjustment, you can no longer edit that item.)
Post an Inventory Adjustment

The term **Post** applies to the process that reduces the inventory of a title listed on an inventory adjustment.

1. Click on (Inventory) on the Navigation bar.

2. Click on **Adjustments**.

3. Under the **Inventory** tab, use Search to find the inventory adjustment you want to post.

4. Click on (Details) for the Inventory Adjustment containing the titles you want to post.

5. Verify the item and quantity in each row and then click on (Post).

6. To post all of the verified titles and quantities, click on (Post All).

7. To set a title to **Complete**, click (Complete) in the row of the corresponding title.

8. When you are finished, click on (Previous Page) to return to the Adjustments page.
Tools > Closing: Introduction

Closing Screen

Did you know?

Any data which is consolidated or removed during closing is automatically archived.

You can view this information by clicking on View Archives, located under the Other Data category on the navigation bar.

Consolidate Campus Transactions allows you to consolidate transactions within the application and reports past campus distributions and collections.

Remove/Archive Consumables allows you to remove and archive the consumable inventory from campuses and zero out the district’s issued numbers.

Questions? 800-495-5993 or support@hayessoft.com

Hayes Software Systems
Tools > Closing: Step-by-Step

Remove and Archive Consumables

1. Click on (Tools), located on the Navigation Bar.

2. Under the Global Tools subcategory, click on (Closing).

3. Click on (Remove/Archive Consumables).

4. Click the (Next).

5. Search for and click on (Add) on the respective item’s row
   OR
   Click on (Add All) to select all consumables listed.

6. Click (Go). A success statement will be displayed when the removal and archiving process is completed.

Did you know?

If you moved a consumable to the lower grid in error...

Click on Remove in the row listing the consumable you just moved in error.

You may also remove all consumables from the lower grid by clicking on the Remove All icon found above the grid header in the bottom section of the screen.
Consolidating Campus Transactions

1. Click on (Tools), located on the Navigation Bar.

2. Under the **Global Tools** subcategory, click on (Closing).

3. Click on **Consolidate Campus Transactions**.

4. Click on **Date** tab at the top of the page.

5. Click the (Calendar) and select a date.

6. Click (Go).

7. Progress will be displayed and when the consolidation process is completed, you will receive a success message.

   *** Do not close the screen or TIPWeb-IM until it is done. ***

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**Did you know?**

When you consolidate campus transactions, all distributions and returns prior to, and including the date you specify are summed into a single transaction for each campus, for each ISBN.

Questions? 800-495-5993 or support@hayessoft.com
Assign a Course to a Title

Assigning courses to instructional materials at the District level allows the relationship to be pushed down to the campus level. **The percentages assigned on this screen calculate district wide eligibility numbers.**

1. Click on **(Textbooks)** located on the Navigation Bar.

2. **Search** for the instructional material to which you want to assign a course.

3. Click on **(Details)** in the corresponding row.

4. Click on **(Courses Tab)**.

5. Click on **(Add)**.

6. **Search** for the course you want to assign to this item.

7. Select the check box to the left of the courses that you want to assign to this textbook.

8. For student materials, enter the **District Student %** and **Campus Student %** in the fields provided.

   For teacher materials, **District Teacher %** and **Campus Teacher %** in the fields provided.

9. Click on **(Add Selected)** to assign the selected course(s) to the item.

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**Important!**

Eligibility percentages are set according to instructional material type. Teacher materials require the teacher percentages to be established for the district and campus levels. Student materials require the student percentages to be established for the district and campus levels.

**Did you Know?**

The differences between **District** and **Campus Percentages** are:

The **District Student** and **District Teacher** percentages are the percentages you are eligible to order for your entire district in respect to a particular title.

The **Campus Student** and **Campus Teacher** percentages are the percentages you allow your campuses to order in respect to a particular title.

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Questions? 800-495-5993 or support@hayessoft.com
Transfer Book-Course Relationships

1. Click on Tools, located on the Navigation Bar.

2. Under the Global Tools subcategory, click on Transfer Book-Course Relationships.

3. Enter the percentages you wish to transfer to all campuses in the campus percentage columns.

4. Click Go.

5. A warning will appear. Click OK.

6. A success statement will be displayed when the process is completed. Click OK.

Did you know?

The Transfer Book-Course Relationships feature allows you to transfer the book/course relationships that the district has setup to all campuses. This ensures that the campus settings match those of the district. Use this feature when a new campus is added to the district or to correct any errors.