



Follett Destiny®

Destiny Library Manager Webinar Training *Essentials*

Participant Edition

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Special Notes to Participants

Course Description

Welcome to the Follett Destiny® Library Manager Essentials training. This training uses a simple 'plan, apply and assess' methodology to help you incorporate Destiny into your daily routine. Each module, and supporting quick reference guides and videos, walks you step-by-step through some of the basic features. You can easily transfer the knowledge you gain and skills you develop in this training to your school or classroom. Participating in the discussions and activities is key.

During the training, please do not hesitate to ask questions. Your facilitator may take notes to respond to questions later in the training when the related topic arises.

We're delighted that you are a Follett customer, and we look forward to providing you with the training, professional development, and services you need to achieve success.

Who Should Take This?

Librarians, information technology personnel, and others assigned a role using Library Manager

Destiny Training Module Descriptions

Description	Objectives
<p>Tour of Destiny Library Manager</p> <p>From its thorough and flexible tracking of your library's resources and insightful reports, to its engaging and easy-to-use discovery interface for students, Destiny Library Manager is a complete library management system. It's accessible anywhere, 24/7, helping strengthen the bond between the library, classroom and home.</p>	<ul style="list-style-type: none"> • Log in to Library Manager • Navigate tabs, options, subtabs and breadcrumbs • Explore the administrative functions of Destiny Library Manager • Search for library resources with Destiny Discover • Explore the types of resources you can access with Destiny Discover
<p>Configuring Library Manager for Your School</p> <p>Your library's collection, loan policies and hours are customized for your students. With Destiny Library Manager, you have many options to tailor the settings to meet your library's unique needs.</p> <p>Explore how to set up your library's loan policies and site configuration options to ensure an efficient and effective library experience for students, faculty and staff.</p>	<ul style="list-style-type: none"> • Create and edit circulation types • Create and edit patron types • Identify a plan for setting up the library calendar • Describe the site configuration options • Set up Follett eBook circulation policies (if applicable)
<p>Circulating Library Materials Efficiently</p> <p>Students and teachers turn to your library for information and resources. You need an efficient way to get your patrons what they need, and accurately track each item. Explore how to use Destiny Library Manager to circulate your library resources, as well as run reports to manage overdue materials and fines.</p>	<ul style="list-style-type: none"> • Learn how to circulate library materials efficiently • Set up and run the Current Checkout/Fines (Overdue) report
<p>Building Your Catalog</p> <p>With so many teachers and students relying on your library for the most up-to-date resources, you need a quick and easy way to add new materials to your catalog. Destiny Library Manager provides multiple features to help you maintain and improve catalog records. Learn how to add title and copy records to your catalog.</p>	<ul style="list-style-type: none"> • Import titles from Titlewave and other sources • Add title and copy records from resource databases and manually

Tour of Destiny Library Manager

Description

From its thorough and flexible tracking of your library's resources and insightful reports, to its engaging and easy-to-use discovery interface for students, Destiny Library Manager is a complete library management system. It's accessible anywhere, 24/7, helping strengthen the bond between the library, classroom and home.

Objectives

- Log in to Library Manager
- Navigate tabs, options, subtabs and breadcrumbs
- Explore the librarian functions of Destiny Library Manager
- Search for library resources with Destiny Discover
- Explore the types of resources you can access with Destiny Discover

Activities

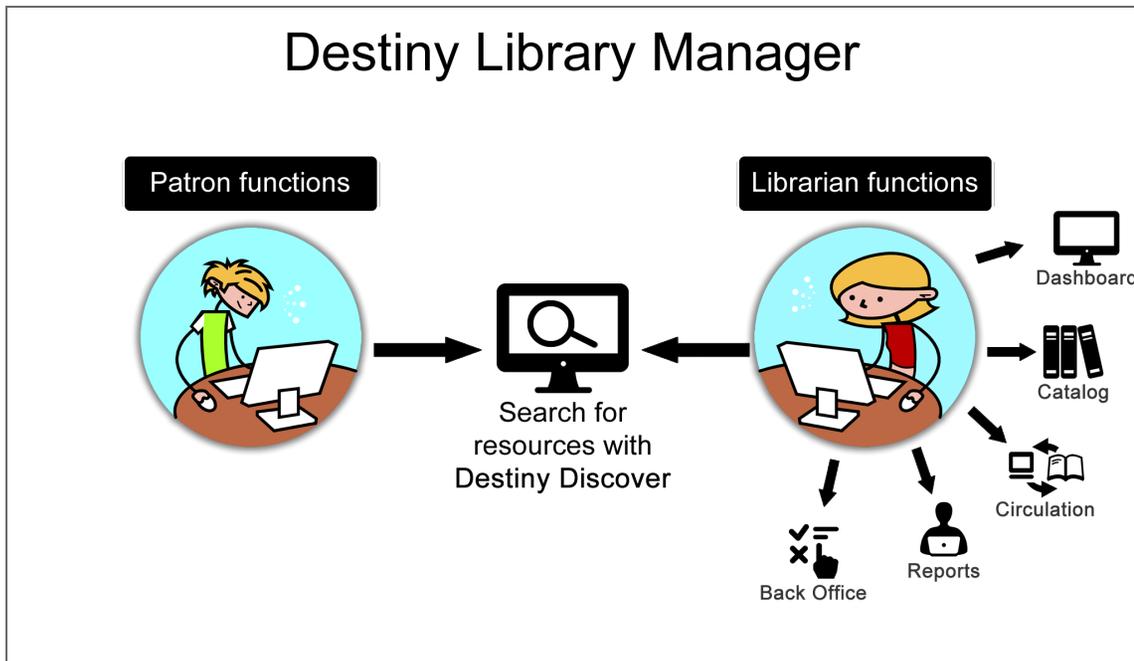
- Log in to and navigate Library Manager
- Search for library resources
- Access Follett Help and training resources
- Locate where you perform specific library tasks

Overview

Destiny Library Manager helps you efficiently complete day-to-day tasks in a way that works best for your school with:

- Quick and accurate methods of adding new materials to your catalog.
- Easy resource check out, check in and tracking.
- Several pre-configured and customizable reports to quickly gather data on outstanding fines, collection areas that need weeding and statistics information for administrators.

Library Manager's search interface, Destiny Discover, lets patrons view your library's print and digital resources. With a single search, you can find books, eBooks, audiobooks, database resources and more. Destiny Discover is available at school or on-the-go on any device via a web browser.



Log In to Destiny

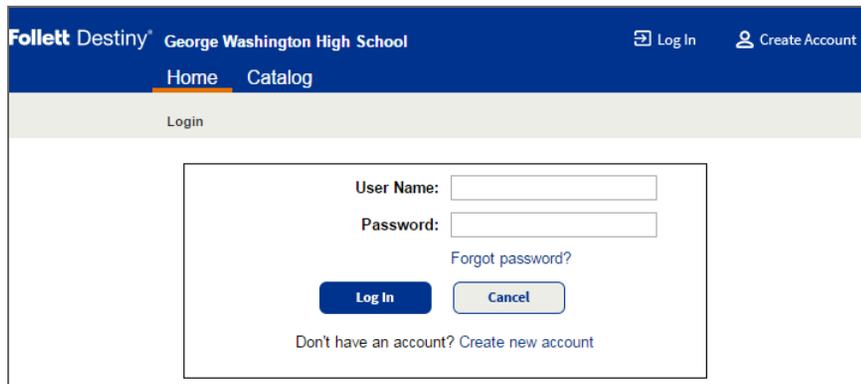
A logged-in Destiny user has access to more Destiny features and functionality.

Notes:

- Many schools set up single sign-on to Destiny with network or Google credentials.
- In addition to the login you use for most of your daily tasks, you might have a district-level login you use for specific tasks.

To log in to a specific school, use the following instructions:

1. From the district welcome page, click your school name.
2. Click **Log In**.
3. Type your **User Name** and **Password**, and then click **Log In**.

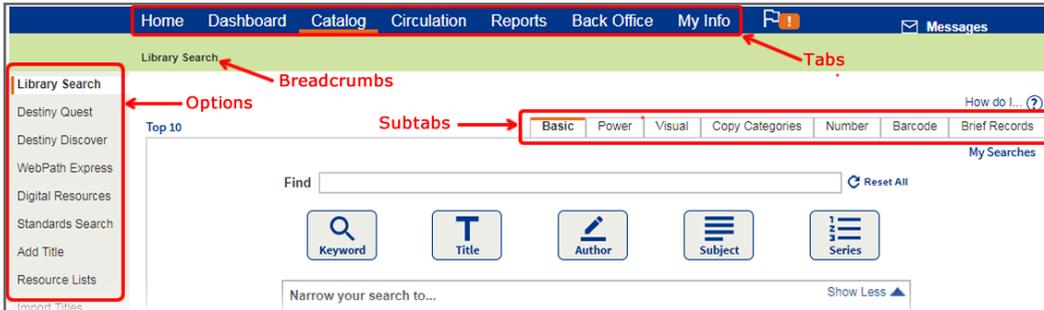


If you are logging in as a Destiny Administrator or another district-level user, use the following steps:

1. From the district welcome page, click **Log In**.
2. Type your **User Name** and **Password**, and then click **Log In**.

Tour of Circulation, Cataloging and Other Librarian Functions

Library Manager circulation, cataloging and other administrative functions are organized by tabs, options and subtabs.



On each tab, a list of options appears on the page's left side. Many options have subtabs. Orange highlights and breadcrumbs show where you are. Use them instead of your browser's back button to return to previous pages.

User access to tabs, options and subtabs is based on permissions assigned by a Destiny or site-level administrator.

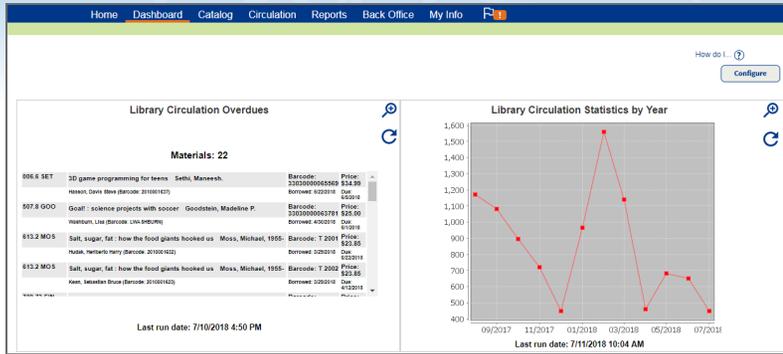
Explore the tabs available to you:

Home: First page you see when you log in to access Library Manager's administrative functions. This can be customized with text, links and images.



Notes

Dashboard: A graphical, at-a-glance view of your Destiny data. For example, you can set it up to display circulation statistics and information on overdue materials.



Catalog: Contains tasks related to adding or updating a title or copy record, as well as a way to access searching functionality.

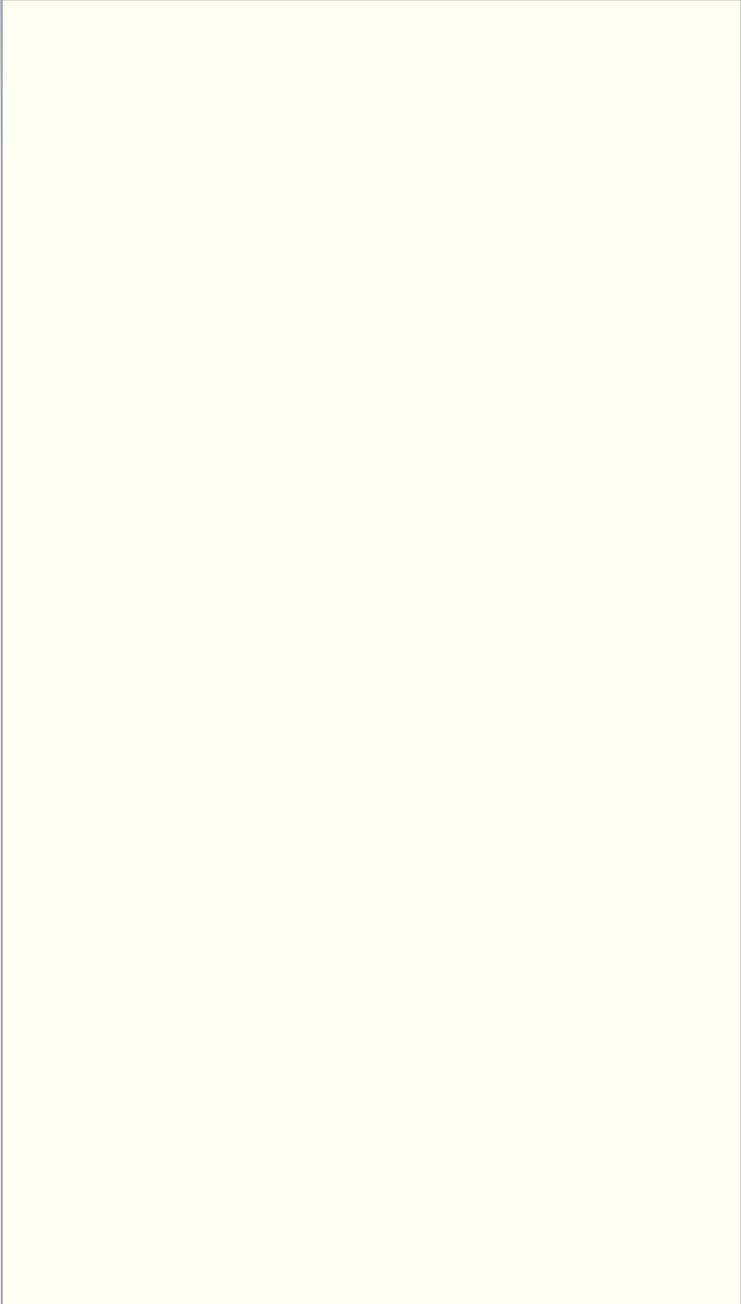
The screenshot shows the Destiny Catalog search interface. It includes a sidebar with navigation options like "Library Search", "Destiny Quest", and "Destiny Discover". The main area has a search bar and a "Find" button. Below the search bar are filters for "Location" (George Washington High School, District Media Collection), "Material Type" (Any Type), "Award Winner" (Unlimited), "Reading Level From" (to), "Interest Level From" (Unlimited to Unlimited), and "Reading Programs" (Unlimited).

Notes

Circulation: Contains functions related to circulation, such as checking out and checking in materials, managing fines and looking up a patron's status.



Reports: Let you gather data, such as patrons with overdue materials or outstanding fines and collection areas that need weeding, promotion or enhancement. Choose from pre-configured reports, or create custom reports with Report Builder.



Back Office: Used to perform administrative tasks, such as configuring your site, running inventory and managing patrons.

Dashboard Catalog Circulation Reports **Back Office** My Info

Manage Patrons

Manage Patrons

Update Patrons

Update Classes

Import Patrons

Export Patrons

Manage Homerooms

How do I...?

Find in All

Search across the district Only Active Patrons

Nonexistent?

Notes

Notes

Apply

Let's practice tasks you might encounter in your library. Write down the tab you select to perform the following:

Task	Tab
1. Check in returned books.	
2. Add a new book to your catalog.	
3. Print a barcode label.	
4. Look up who a book is checked out to.	
5. Print overdue notices.	
6. Inventory a section of your library.	
7. Adjust a loan policy.	
8. See circulation statistics for the last month.	
9. Edit your library calendar.	

Tour of the Student Search Interface: Destiny Discover

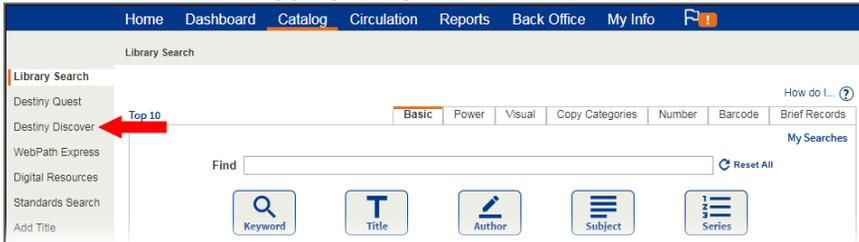
Destiny Discover makes it easy to look for resources in your library's entire catalog. With a single search, you can find everything from eBooks to print materials to websites.

Access Destiny Discover

The most common ways to give your patrons access to Destiny Discover are:

- Set it as your homepage.
- Create a desktop shortcut.
- Link to it from your school, library or class webpage.

If your daily work includes tasks like circulation or cataloging, you might find it easiest to access Destiny Discover from the Catalog tab. Switch back and forth between interfaces without logging in again.

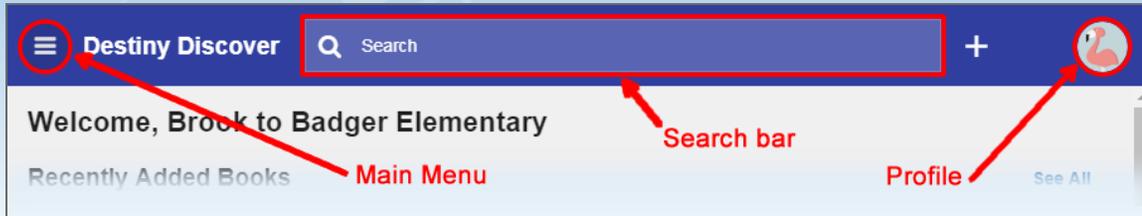


Navigate the Homepage

You can start discovering your library's resources right from the homepage.

Use the top toolbar

You can access the top toolbar from any page.

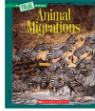


- Use the Main Menu  to access a variety of functions, Help or to log out.
- Use the Search bar to search for library resources.
- Access and edit your Profile.

Browse the ribbons

Welcome, Brook to Badger Elementary

Recently Added Books [See All](#)

 Animals helping at work	 Animal migrations	 If you were a kid surviving a	 Animal mash-ups	 Heroes on the side
--	--	--	--	---

Popular Titles [See All](#)

 The cat came back	 Dog and Bear : two friends,	 The Dog : Why Are Dog's	 Goodnight, goodnight,	 Margret & H.A. Rey's Curious
--	--	--	--	---

Browse the ribbons for a quick way to explore some of your library's featured resources. Click **See all** to access all the resources in a category.

Note: The ribbons that appear are based on the library resources your school has and how the homepage was customized.

- **Recently Added Books:** Lets you view the newest 15 books that have been added to your collection.
- **Popular Titles:** Displays the 10 most popular books read at your school.
- **Browse by Topic:** Shows topics or genres (such as fairy tales, biography, sports), which you can select to perform a predefined search.
- **eBooks:** Includes all eBooks in your collection.
- **Interactive eBooks:** Shows all interactive eBooks in your collection, including Lightbox™ titles.
- **Audiobooks:** Includes audiobooks in your collection.
- **Lightbox:** Displays all Lightbox titles in your collection.
- **Collections:** Includes groups of curated resources from that are shared with your school or district.
- **Links:** Includes links to One Search™ databases and custom links.

Search for Library Resources

With a single search, you can find print and digital resources.

To perform a keyword search of all library resources:

In the Search bar at the top of any page, type a search term, and then press **Enter** or **Return**.

To use custom search settings to narrow your search:

1. In the Search bar at the top of any page, type a search term.
2. Click .
3. Use any or all of the following drop-downs to narrow your search:
 - **Type:** Select a type of search to perform (Keyword, Title, Author, Subject or Series).
 - **Location:** Search your school, a group of schools (elementary, middle or high) or your entire district.
 - **Format:** Narrow your search to a specific format, such as eBooks.
 - **Starting and Ending Interest Level:** Narrow your search to an Interest Level range.
 - **Reading Program:** Narrow your search by a reading program range.

4. Select **Set Options**.

Search Options
✕

Type
Subject ▼

Format
eBook ▼

Starting Interest Level ▼ To Ending Interest Level ▼

Reading Programs ▼

Clear All
Set Options

5. Press **Enter** or **Return**.

Note: If the custom search icon next to the search bar appears with a white circle , that means custom search settings are applied. To clear them, click , and then **Clear All**.

If you want to...	Then...
Perform a keyword search of all library resources	Type a search term, and then press Enter or Return .
Use custom search settings to narrow your search	Press Enter or Return . Note: You can also type or edit your search term after you set the search options.

You can expand or refine your search using the following tools:

Search tool	Description	Example
Quotation marks (")	Use quotes around search terms to find a specific phrase.	<p><i>"Great Pyramid"</i> (with quotation marks) will return results that include the exact phrase in the title record.</p> <p><i>Great Pyramid</i> (without quotation marks) will return results with the words "Great" and "Pyramid" anywhere in the title record, in no specific order and not necessarily together.</p>
Asterisk (*)	Type an asterisk in the middle of or after a set of characters to let Destiny fill in the blank.	<i>hou*</i> will return results such as <i>house, Houdini, Houston, etc.</i>
Question mark	Use a question mark to replace a single character.	<i>ho?e</i> will return <i>hole, home, hose, Howe, etc.</i>
AND, OR and NOT	Use these Boolean operators between search words (must be uppercase). The AND operator is always assumed if you include two words in your search.	<i>red blue</i> is the same as <i>red AND blue</i> .

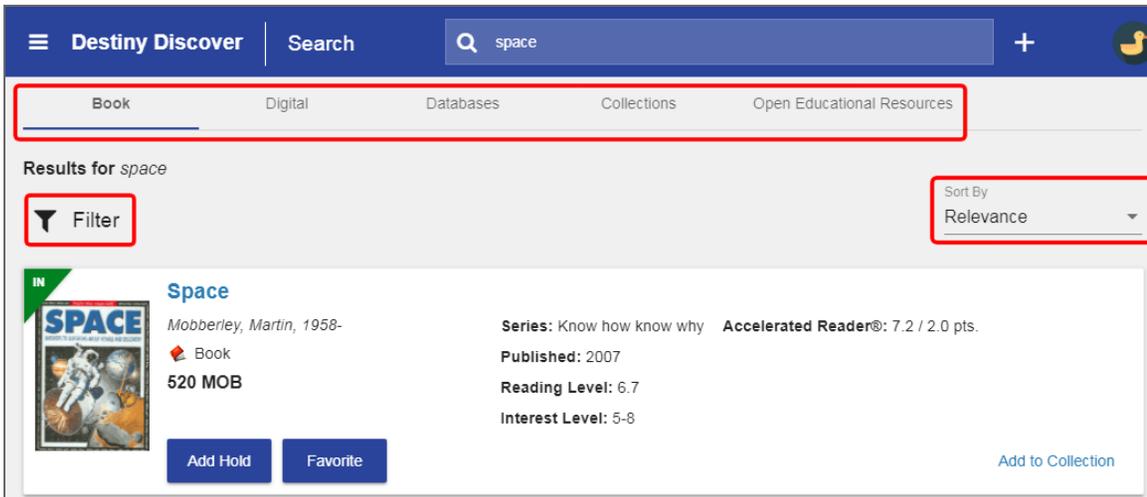
Notes

From search results, you can narrow or sort your search, see if a resource is available and more. Search results are organized by tabs that reflect the material type.

To narrow or sort your search results:

- Click  **Filter**, and then select the appropriate drop-downs.
- Use the **Sort by:** drop-down to change the sort order.

Note: To see information about a specific search result, click its title or cover image.



The screenshot shows the Destiny Discover search interface. At the top, there is a search bar with the text "space" and a search icon. Below the search bar, there are tabs for "Book", "Digital", "Databases", "Collections", and "Open Educational Resources". The "Book" tab is selected. Below the tabs, there is a "Results for space" section. On the left, there is a "Filter" button with a funnel icon. On the right, there is a "Sort By" dropdown menu set to "Relevance". Below these, there is a search result for the book "Space" by Mobberley, Martin, 1958-. The result includes a cover image, the title "Space", the author "Mobberley, Martin, 1958-", the format "Book", and the price "520 MOB". To the right of the cover, there are details: "Series: Know how know why", "Accelerated Reader®: 7.2 / 2.0 pts.", "Published: 2007", "Reading Level: 6.7", and "Interest Level: 5-8". At the bottom of the result, there are buttons for "Add Hold", "Favorite", and "Add to Collection".

Explore the search results tabs:

Books: All print books and other physical materials.

Digital: All eBooks, audiobooks, Lightbox and interactive eBooks.

What is Lightbox? Lightbox is a multimedia educational space for schools that incorporates videos, Google Maps, worksheets, audio, quizzes and more to provide a full digital learning experience for schools. To try it, go to: <http://k12.follett.com/lightbox-demo>

Next Steps:

- To learn more about Follett eBooks, sign up for the free, live Follett eBooks webinar, or access a recorded version. Sign up in Follett Community (follettcommunity.com).

Databases: Links to One Search and WebPath Express resources.

- **What is One Search?** One Search provides access to content in your school's free and subscription databases without an additional login.
- **What is WebPath Express?** WebPath Express is a subscription service that gives you and your patrons access to thousands of curated, relevant, up-to-date Internet sites.

Collections: Collections by Destiny® creates new, collaborative ways to share free and purchased resources – with anyone, at any time. Each collection can include webpages, videos, documents and much more! It's easy to share collections publicly within your district/school or with only a few people. Or, keep them just for you.

Collections is where librarians, teachers and curriculum staff save and organize resources. You can create a collection for anything, and there is no limit to how many collections you can create in a single Destiny account. Share them with Destiny and non-Destiny users.

Notes

When you go to a collection, it looks like this:

5 Items

Filter | Showing 5 of 5 items

Sort by: Custom

Blake Washburg

Geometry

George Washington High School

Grades

5th

Subjects

Mathematics

Blake Washburg

Explainer: The Basics of Geometry

Webpage
<https://www.sciencenewsforstudents.org/article/explainer-basics-geometry>

Geometry is about points, lines, angles, and surfaces. Dots are far bigger than the points they represent. Lines extend forever to connect points side-by-side, with no spaces between. Investigate the intersection of lines. Learn about shapes and solids, and the surfaces that connect points into polygons. Explore how area calculates the space of a surface and volume calculates the space in a solid. The basics of geometry form the foundations for selling carpet or land.

Geometry

Blake Washburg

Terms & labels in geometry

Webpage
<https://www.khanacademy.org/math/basic-geo/basic-geo-lines/lines-rays/v/language-and-notation-of-basic-geometry>

Learn about geometry terms like point, line, and ray. We will also learn how to label them.

Terms: geometry labels Academy

Khan

Blake Washburg

Geometry Online

Add a resource to a collection right from the search results:

Space

Moberley, Martin, 1958-

Book

520 MOB

Series: Know how know why Accelerated Reader®: 7.2 / 2.0 pts.

Published: 2007

Reading Level: 6.7

Interest Level: 5-8

Add Hold Favorite Add to Collection

Next Steps:

- To learn more about Collections, visit Follett Community to sign up for a free, regularly-scheduled, live webinar.

Open Educational Resources: Follett has partnered with the U.S. Department of Education in bringing open resources to K–12 districts through the Future Ready Schools #GoOpen initiative. This campaign is committed to supporting districts and educators as you transition to the use of high-quality, openly-licensed educational resources (OERs) in your school.

Educators can access teaching and learning resources available in the Learning Registry, a repository of trusted and vetted open educational resources, alongside print and digital library resources.

Note: To learn more about the U.S. Department of Education's Open Education initiative and the Learning Registry, visit the Office of Educational Technology website: <http://tech.ed.gov/open>

Apply

Practice searching Destiny Discover:

1. Search by entering a keyword of your choice, and then view the search results tabs.
2. Perform another search using  to narrow your search.

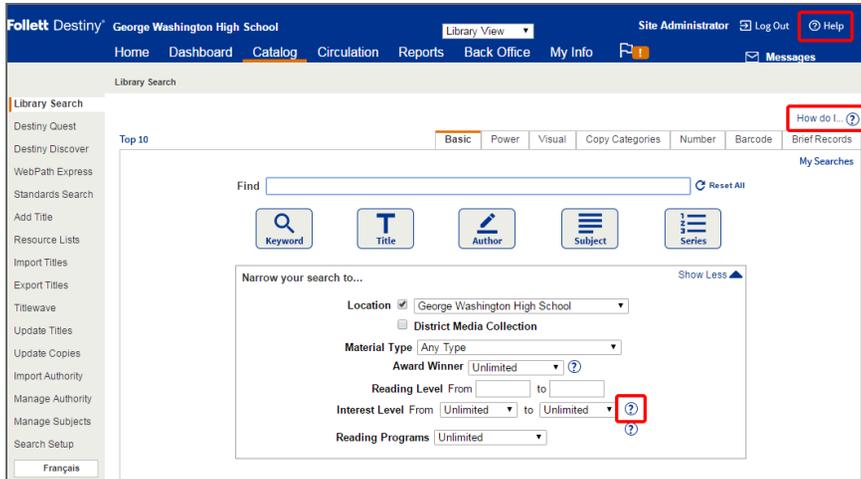
Access Follett Help and Training Resources

Destiny Help

Wherever you are in Destiny, help is just a click away.

Help is accessed the following way in the Destiny Classic interface:

- To get more information about a specific field or section of a page, click  next to a field or section name.
- To get more information about all of a page's features, click the **How do I...** link at the top of the page.
- To access general Help for all of Destiny's feature and functions, click the **Help** link at the top of any page in Destiny.



Destiny Discover Help

In Destiny Discover, click  > **Help** from the top-left corner any page.

Apply

Practice accessing Help. Note the Help topic you found for each scenario.

Scenario	Help topic
1. It's your first day using Library Manager to check out books to students, and you need a quick reminder of the steps.	
2. You want to see the updates in the latest version of Destiny.	
3. You need instructions on setting up One Search.	
4. You need instructions for printing spine labels.	

Notes

Notes

Follett Resource Center

Visit Follett's Resource Center to find videos, quick reference guides and lesson plans to refresh your memory, learn about additional topics and help you train other users.

Use the following steps to go visit the Resource Center, and practice finding a training resource:

1. Go to <https://resources.follettlearning.com>.
Tip: Bookmark it for quick access later.
2. Click on a product, and then click **How To's, Training Tools and Videos**.
3. Explore the many training resources available to you!

Notes

Assess

In the following table, use checkmarks to self-assess your level of understanding of the learning outcomes covered in this session.

	I can...
	Log in to Destiny.
	Navigate tabs, options, subtabs and breadcrumbs.
	Navigate Destiny Discover.
	Perform a single search, and find both print and digital resources.
	Describe the resources available in Destiny Discover and where to go to learn more about them.
	Access Help.
	Access training resources.

If you need more help, go to:

- Resource Center (resources.folletlearning.com) for how to's, videos and training tools
- Destiny Help for feature information and step-by-step instructions
- FollettCommunity.com for blogs and forums

For the most recent product updates, make sure to check out the *What's New in Destiny* document, available in all three locations.

Configuring Library Manager for Your School

Description

Your library's collection, loan policies and hours are customized for your students. With Destiny Library Manager, you have many options to tailor the settings to meet your library's unique needs.

Explore how to set up your library's loan policies and site configuration options to ensure an efficient and effective library experience for students, faculty and staff.

Participant Objectives

- Create and edit circulation types
- Create and edit patron types
- Identify a plan for setting up the library calendar
- Describe the site configuration options
- Set up Follett eBook circulation policies (if applicable)

Activities

- Identify Circulation Types for your library.
- Identify Patron Types for your library.
- Create or edit a Circulation Type.
- Create or edit a Patron Type.
- Identify a plan for updating the library calendar.
- Review Site Configuration options.
- Set up circulation policies for Follett eBooks (optional).
- Set up a shared Guest account for Follett eBooks (optional).

Plan

Destiny Library Manager lets you set up customized circulation types. Different loan policies can be set up for DVDs, professional development materials and the rest of your collection. You can also set up customized patron types to meet your school's needs. Maybe teachers can check out materials for longer than students.

1. Do you currently have groups of patrons that have different loan policy settings? For example, faculty might have a longer loan period than students and are able to check out professional development books. Create a list of patron groups for your school. These will be your Patron Types in Destiny.

Patron group (Destiny Patron Type)	Notes

Notes

Notes

2. Every copy in your library's collection is assigned a Circulation Type, which determines the loan policies for the copy.

Using the blank table below, create a list of Circulation Types and loan policies for the different types of materials in your collection (which in some cases might be based on Patron Type). Keep in mind that the best way to manage Circulation Types and Patron Types is to have as few as possible.

For example, if the videos in the library have the same loan policies as books, then videos and books can have the same Circulation Type. Your list might look something like this:

Circulation Type	Patron Type		
	Student	Faculty	Substitute
Regular	2 weeks	90 days	2 weeks
Overnight	1 day	2 weeks	1 day
Audiovisual	1 week	30 days	2 weeks

Circulation Type	Patron Type		
	Student	Faculty	Substitute
Regular			
Overnight			
Audiovisual			

Apply

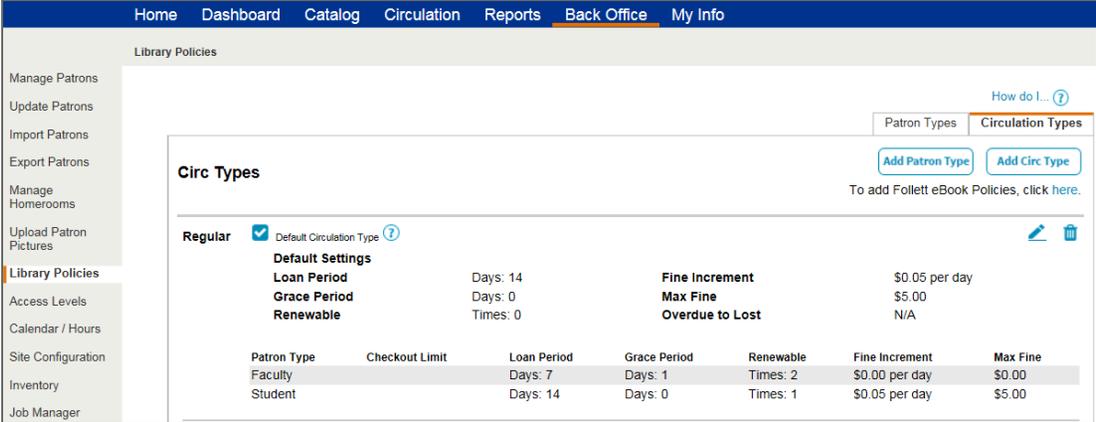
Circulation types

Library Manager is installed with the default Circulation Type "Regular." But you can set up customized circulation types for your school's collection.

Set up at least one of the Circulation Types you identified in the Plan section by editing an existing Circulation Type and/or by adding a new Circulation Type.

To add a circulation type:

1. Select **Back Office > Library Policies > Circulation Types > Add Circ. Type.**



2. In the **Circulation Type** field, enter the new type.
3. To associate call numbers, click **Call Number**, and type any call number patterns that are unique to this Circulation Type.

Note: This association lets Library Manager assign Circulation Types to copies that you import.

4. To make this the default Circulation Type when importing titles and adding copies, select the **Make this the default** checkbox.

Notes

5. To make this Circulation Type only available to patrons with the *See local hidden materials* permission, select the **Hidden** checkbox.
6. Review the Default Settings fields, and make any changes:
 - *Loan Period*: Period of time patrons can keep library materials. This period can be customized for different patron types. For example, students can check out books for 14 days, while faculty can check them out for 30 days or until the end of the school year.
 - *Grace Period*: Number of days after the due date during which checked-out materials are not yet considered overdue. An overdue fine is not assessed if the materials are returned within this period. If the library does not have a grace period, set this field to zero.
 - *Renewable*: Number of times a patron can renew an item before Library Manager blocks the transaction.
 - *Fine Increment*: Monetary amount charged for each day a checked-out item is overdue. If the library does not charge fines for overdue items, set this amount to zero. Also, go to the **Back Office** tab, **Site Configuration** option, and deselect the **Automatically calculate fines for overdue items** checkbox.
 - *Max Fine*: Maximum unpaid fine a patron can accumulate before the system displays a block message.
 - *Overdue to Lost*: Number of days an item can be overdue before the copy status changes automatically to Lost.

Note: Library staff can override any of the circulation policies during checkout if they want to waive the existing policy.

7. Click **Save**.

Notes

Circulation Type 

Make this the default 
 Hidden 

Default Settings 

Loan Period Days 
Grace Period days 
Renewable times 

Fine Increment per day 
Max Fine 
 Overdue to Lost days 

Patron Type	Checkout Limit	Loan Period	Grace Period	Renewable	Fine Increment	Max Fine
Faculty	<input type="text"/>	<input type="text" value="14"/> Days 	<input type="text" value="0"/> days 	<input type="text" value="0"/> times 	<input type="text" value="\$0.05"/> daily 	<input type="text" value="\$5.00"/> 
Student	<input type="text"/>	<input type="text" value="14"/> Days 	<input type="text" value="0"/> days 	<input type="text" value="0"/> times 	<input type="text" value="\$0.05"/> daily 	<input type="text" value="\$5.00"/> 

To edit a circulation type:

1. Select **Back Office > Library Policies > Circulation Types**.
2. Find the Circulation Type you want to edit, and click  next to it.
3. To make this the default Circulation Type when importing titles and adding copies, select the **Make this the default** checkbox.
4. To make this Circulation Type only available to patrons with the *See local hidden materials* permission, select the **Hidden** checkbox.
5. Edit any of the Default Settings fields described in step 5 of *Adding a New Circulation Type*.
6. Click **Save**.

Notes

Circulation Type

Make this the default Hidden

Default Settings

Loan Period Days Fine Increment per day

Grace Period days Max Fine

Renewable times Overdue to Lost days

Patron Type	Checkout Limit	Loan Period	Grace Period	Renewable	Fine Increment	Max Fine
Faculty	<input type="text"/>	<input type="text" value="7"/> Days <input type="checkbox"/>	<input type="text" value="1"/> days <input type="checkbox"/>	<input type="text" value="2"/> times <input type="checkbox"/>	<input type="text" value="\$0.00"/> daily <input type="checkbox"/>	<input type="text" value="\$0.00"/> <input type="checkbox"/>
Student	<input type="text"/>	<input type="text" value="14"/> Days <input type="checkbox"/>	<input type="text" value="0"/> days <input type="checkbox"/>	<input type="text" value="1"/> times <input type="checkbox"/>	<input type="text" value="\$0.05"/> daily <input type="checkbox"/>	<input type="text" value="\$5.00"/> <input type="checkbox"/>

Next Steps:

- After the training, I need to do the following to finish setting up circulation types:

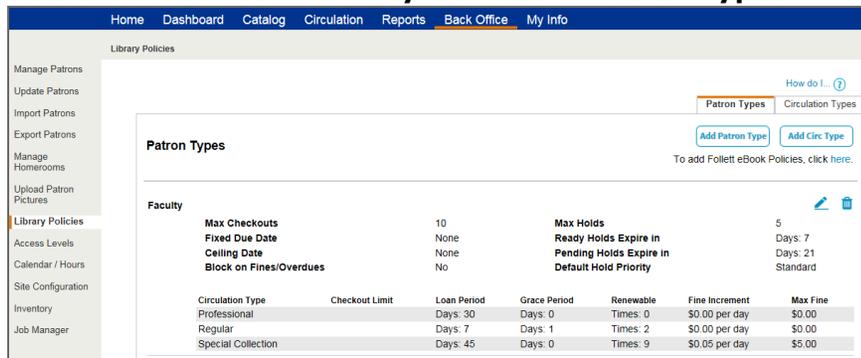
Patron types

Destiny Library Manager is installed with two patron types: Faculty and Student (the latter is the default patron type). But you can set up customized patron types to meet your school's needs.

Set up at least one of the Patron Types you identified in the *Plan* section by editing an existing Patron Type and/or adding a new Patron Type.

To add a new patron type:

1. Select **Back Office > Library Policies > Patron Types > Add Patron Type.**



2. In the **Patron Type** field, type the new patron type.
3. If you want this Patron Type to be the default when you import a patron record that does not have one, select the **Make this the default** checkbox.
4. Review the loan policy setting fields, and make any changes:
 - **Max Checkouts:** Number of copies of all Circulation Types a person of this Patron Type can check out at any time.
 - **Fixed Due Date:** A specific due date applied no matter when the item is checked out.

Note: A fixed due date must be entered here before Fixed Due Date can be selected from the Loan Period drop-down in the Circulation Type table at the bottom of this page or on the Circulation Type edit page.

- **Ceiling Date:** Due date that overrides the normal loan period's calculated due date when the ceiling date is earlier than the calculated date. A Ceiling Date is

Notes

normally used for the end of the school year. On this date, checkouts revert back to the normal loan period.

- *Max Holds*: Maximum number of holds a patron can place at one time.
- *Ready Holds Expire in ___ day(s)*: Number of days an available copy is held for a patron until it is released for the next patron in the hold queue or placed back on the shelf for circulation to others.
- *Pending Holds Expire in ___ day(s)*: Number of days a patron hold remains active in the hold queue.
- *Default Hold Priority*: Order of patrons in the hold queue.

Note: Library staff can override any of the circulation policies during checkout if they want to waive the existing policy.

5. If you want Library Manager to alert you when you look up a patron in Circulation that has any fines or overdue items, select **Block check outs and renewals if the patron has fines or overdue items (override available)**.

Note: You must address the block condition or override it before continuing with the transaction. To override messages, a staff member must have the *Override blocks* permission.

6. Fill in the Circulation Type policies in the table at the bottom of the page.
7. Click **Save**.

Patron Type ⓘ

Make this the default ⓘ

Max Checkouts ⓘ

Fixed Date ⓘ

Ceiling Date ⓘ

Max Holds

Ready Holds Expire in days ⓘ

Pending Holds Expire in days ⓘ

Default Hold Priority ⓘ

Block check outs and renewals if the patron has fines or overdue items (override available) ⓘ

Circulation Type	Checkout Limit	Loan Period	Grace Period	Renewable	Fine Increment	Max Fine
Professional	<input type="text"/>	30 Days	<input type="text" value="0"/> days	<input type="text" value="0"/> times	<input type="text" value="\$0.00"/> daily	<input type="text" value="\$0.00"/>
Regular	<input type="text"/>	14 Days	<input type="text" value="0"/> days	<input type="text" value="0"/> times	<input type="text" value="\$0.05"/> daily	<input type="text" value="\$5.00"/>
Special Collection	<input type="text"/>	45 Days	<input type="text" value="0"/> days	<input type="text" value="9"/> times	<input type="text" value="\$0.05"/> daily	<input type="text" value="\$5.00"/>

Notes

To edit a patron type:

- 1. Next to the Patron Type you want to edit, select **Back Office > Library Policies > Patron Types > [edit icon]**.
- 2. If you want this Patron Type to be the default when importing titles and adding copies, select the **Make this the default** checkbox.
- 3. Edit any of the Default Settings fields described in steps 4–5 of *Adding a New Patron Type*.
- 4. Click **Save**.

Patron Type ?

Default Patron Type ?

Max Checkouts ?

Fixed Date ?

Celling Date ?

Max Holds

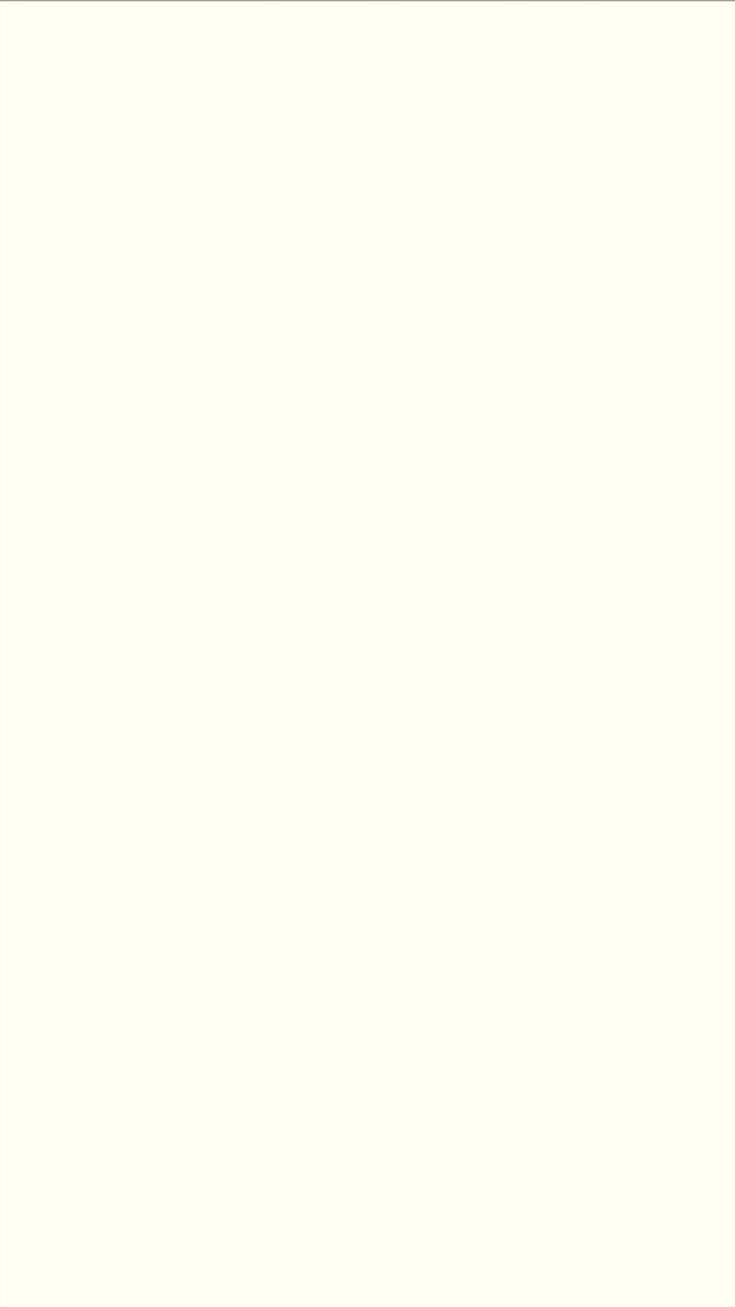
Ready Holds Expire in days ?

Pending Holds Expire in days ?

Default Hold Priority ?

Block check outs and renewals if the patron has fines or overdue items (override available) ?

Circulation Type	Checkout Limit	Loan Period	Grace Period	Renewable	Fine Increment	Max Fine
Professional	<input type="text" value="0"/>	<input type="text" value="0"/> Days	<input type="text" value="0"/> days	<input type="text" value="0"/> times	<input type="text" value="\$0.05"/> daily	<input type="text" value="\$5.00"/>
Regular	<input type="text"/>	<input type="text" value="14"/> Days	<input type="text" value="0"/> days	<input type="text" value="1"/> times	<input type="text" value="\$0.05"/> daily	<input type="text" value="\$5.00"/>
Special Collection	<input type="text"/>	<input type="text" value="45"/> Days	<input type="text" value="0"/> days	<input type="text" value="9"/> times	<input type="text" value="\$0.05"/> daily	<input type="text" value="\$5.00"/>



Notes

Next Steps:

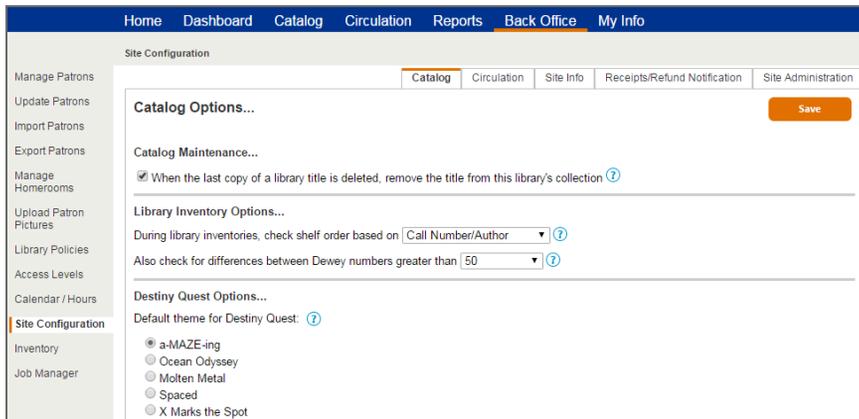
- After the training, I need to do the following to finish setting up patron types:

Site Configuration

Site Configuration options let you customize catalog and circulation procedures, controlling settings like interlibrary loans, fines, preferred barcode symbologies and even circulation sounds.

Use the following instructions to review and edit the catalog options:

1. Select **Back Office > Site Configuration > Catalog**.
2. To enable the catalog settings, select the checkbox or appropriate option. Click  for more information about an option.
3. After choosing the preferred **Site Configuration** options, click **Save** at the top or bottom of the page.



Use the following instructions to review and edit the circulation options:

1. Select **Back Office > Site Configuration > Circulation**.
2. To enable the circulation settings, select the checkbox. Click  for more information about an option.

Note: From the "Calculate library loan periods based on ___ days" drop-down, select **Open** if you want Destiny to calculate due dates (based on your loan periods) using only days that are open on your Calendar. For example, if your library is open 5 days a week and you want a loan period to be 2 weeks, set the loan period to 10 days. Choose **Calendar** if you want Destiny to calculate due dates regardless of your Calendar.

3. After choosing the preferred **Site Configuration** options, click **Save** at the top or bottom of the page.

Catalog **Circulation** Site Info Receipts/Refund Notification Site Administration

Library Options Save

- Allow library materials to circulate to all patrons in the district 
- Allow library materials to be renewed at the borrowing site 

Calculate library loan periods based on open days 

- Automatically calculate fines for overdue items 
- Require explanation when waiving library fine 
- Require explanation when issuing library refunds 
- Automatically create fine for lost library materials 
- "Lost" library materials must be returned in a timely fashion to generate a refund 

Calendar days from date "lost" before a paid library fine becomes non-refundable: 180

- Display TitlePeek cover images in Check Out - Check Out 
- Display TitlePeek cover images in Check Out - Items Out 
- Display TitlePeek cover images in Check In 
- Turn on Ready Scan Check In functionality 

Notes

Next Steps:

- After the training, I need to do the following to finish making site configuration selections:

Calendar

It is important to update the Library Manager library calendar regularly, as Library Manager uses it to assign due dates, calculate fines, manage holds and report circulation statistics. To ensure that Library Manager's calculations are accurate, it is ideal to mark closed dates for the entire school year, either at the end of the previous school year or the first day library staff return at the beginning of the new school year. The Destiny Administrator can set up the calendar for the whole district, or librarians can edit their individual site calendars.

Using your school or library's calendar, mark at least one closed date in the Library Manager calendar.

1. Select **Back Office > Calendar/Hours**.
2. Closed dates are marked "Closed" and highlighted in gray. By default, all Saturdays and Sundays are marked closed. To close another day of the week for every week of the year, click the **Closed: Sundays, Saturdays** link in the lower left-hand corner, and select the closed day of the week.
3. To close additional dates, go to and click on each date link. This changes the date to "Closed." To navigate to another month, select the forward or back arrows beside the name of the month at the top of the calendar. Or, select the **View (Year)** link in the lower-right corner to view an annual calendar. Clicking on the name of a month advances the calendar to that month.

Note: If you click a date by mistake, click it again to toggle back to the "open" status.

Notes

4. Select the hours link beneath the calendar to enter the normal opening and closing times for the library. If your library has a Circulation Type with an hourly circulation period, Library Manager uses the library hours to compute the time a resource is due when it is checked out.

<< July 2016 >>						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
					1	2 Closed
3 Closed	4	5	6	7	8	9 Closed
10 Closed	11	12	13	14	15	16 Closed
17 Closed	18	19	20	21	22	23 Closed
24 Closed	25	26	27	28	29	30 Closed
31 Closed						

Calendar / Hours

Hours: 8:00 AM - 4:00 PM

If there is an unscheduled closed day (such as a bad weather day), the date can be marked closed retroactively as soon as school opens again. While the due dates for checked-out items do not change, Library Manager does not assess fines for items due on dates that were closed retroactively. Library Manager counts only open days when calculating fines.

Next Steps:

- After the training I need to do the following to finish setting up the library calendar:

Circulation policies for Follett eBooks

Follett eBook loan policies are managed in Follett Digital Setup.

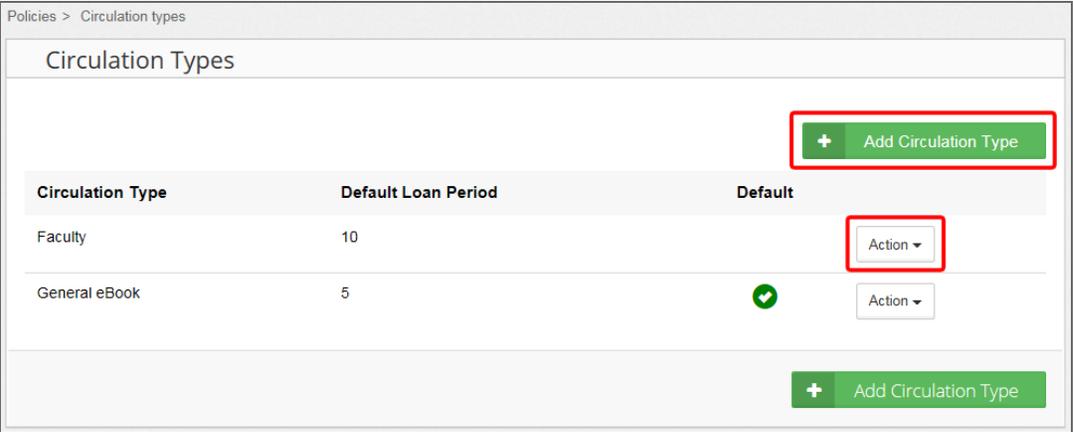
Note: This requires the access level permission, *Allow Follett Digital setup*.

To add or edit a Follett eBook circulation type:

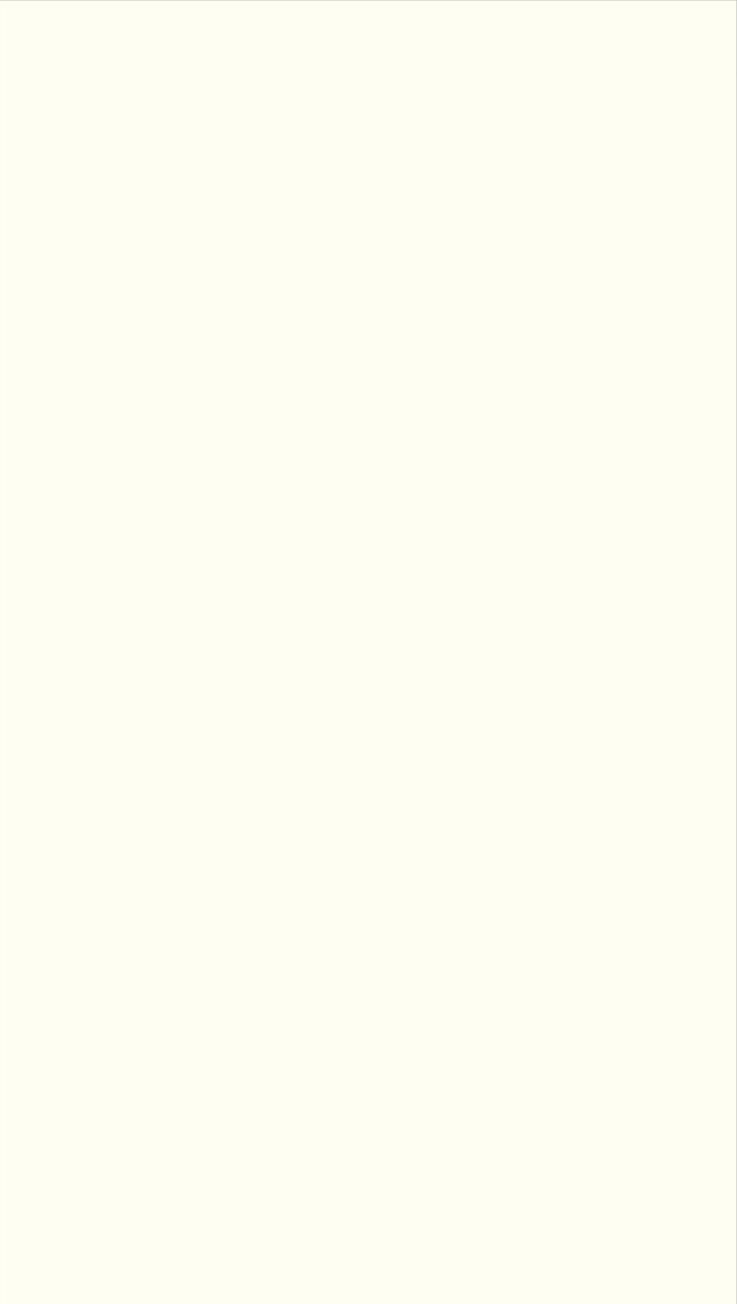
1. Select **Back Office > Library Policies**, and then click the **To add Follett eBook Policies, click here** link.



2. From the Circulation Types page, do one of the following:
 - To add a new circulation type, select **+Add Circulation Type**.
 - To edit an existing circulation type, click the **Action** drop-down next to its name, and then click **Edit**.

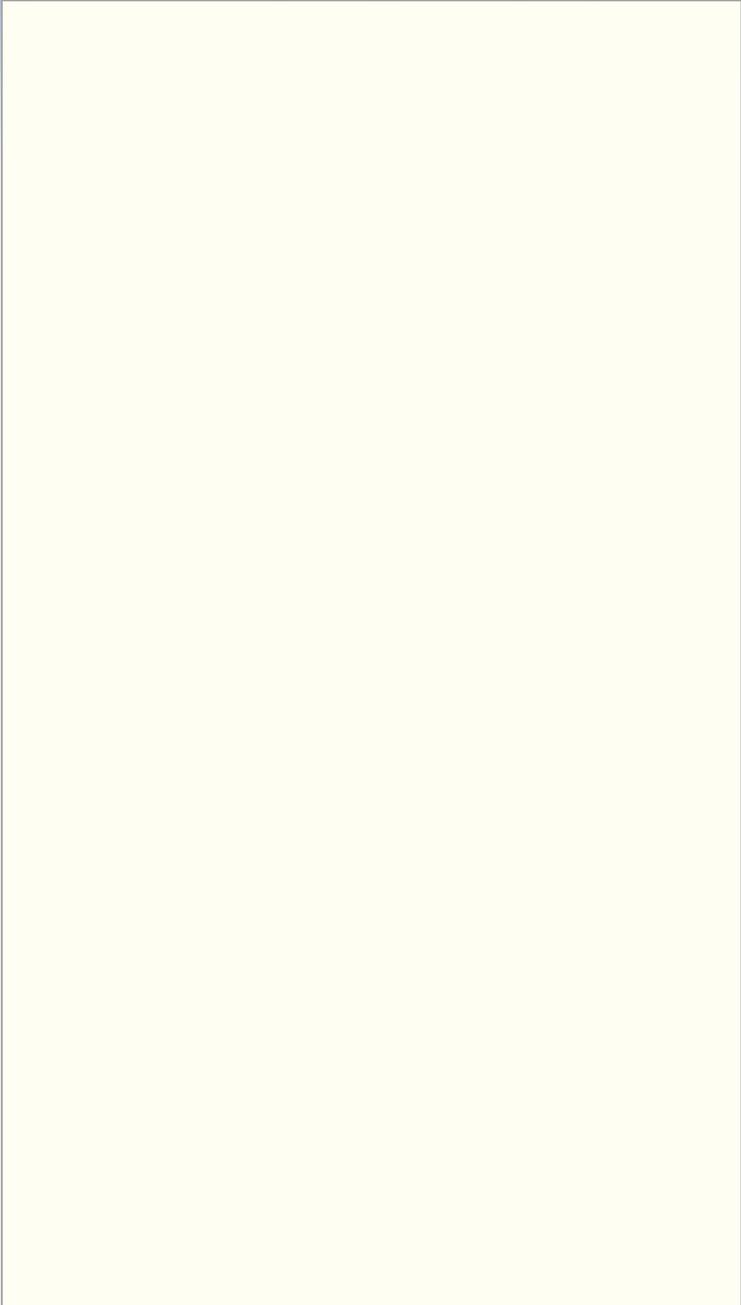
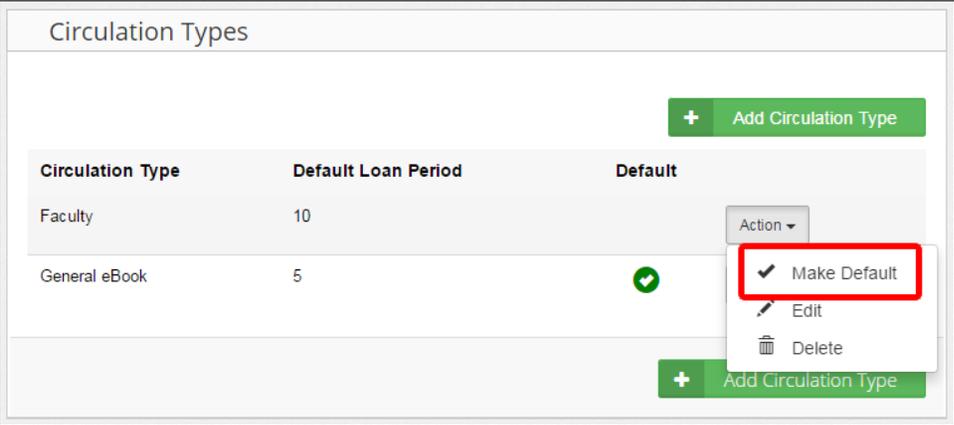


3. In the **Circulation Type Name** field, type a name.



Notes

- 4. In the **Default Loan Period** field, type the number of days for the loan period that will be assigned to this circulation type by default.
- 5. In the fields next to the patron type, type the number of days each Patron Type can check out eBooks for this circulation type.
- 6. If you have a Shared Account and do not want shared account users to access the circulation type, deselect the **Allow Access to this Circulation Type** checkbox.
- 7. Click **Save**.
- 8. To set a circulation type as the default for newly added Follett eBooks, click the **Action** drop-down next to the circulation type, and then select **Make Default**.



Setting Up a shared Follett eBook account

For the best eBook experience, it is recommended that students log in with unique usernames and passwords. This gives them access to check out, place a hold and add a review to Follett digital materials. However, if your students do not have unique logins, you can set up a shared Follett eBook account. You can also identify IP addresses/ranges so that patrons on an identified computer are automatically logged in as Shared Account users.

For more information on setting up Follett Digital resources, see Destiny Discover Help or the Follett Resource Center.

Next Steps:

- After the training, I need to do the following to finish setting up Follett eBook loan policies and a Shared Account (if applicable):

Notes

Assess

In the following table, use checkmarks to self-assess your level of understanding of the learning outcomes covered in this session.

	I can...
	Add and edit Circulation Types.
	Add and edit Patron Types.
	Set up the Calendar.
	Customize Catalog and Circulation options in Site Configuration.
	Set up circulation policies for Follett eBooks (if applicable).
	Set up a shared guest account for Follett eBooks (if applicable).

If you need more help, go to:

- Resource Center (resources.follettlearning.com) for how to's, videos and training tools
- Destiny Help for feature information and step-by-step instructions
- FollettCommunity.com for blogs and forums

For the most recent product updates, make sure to check out the *What's New in Destiny* document, available in all three locations.

Circulating Materials Efficiently

Description

Students and teachers turn to your library for information and resources. You need an efficient way to get your patrons what they need, and accurately track each item. Destiny Library Manager has easy-to-use circulation features that help library staff check out, check in and track library resources quickly and easily.

Explore how to circulate your library resources, as well as how to run reports to manage overdue materials and fines.

Objectives

- Learn how to circulate library materials efficiently
- Set up and run the Current Checkouts/Fines (Overdue) report

Activities

- Circulate library materials
- Display copy and patron status information
- Run and save an overdue report

Plan

How do you identify patrons during checkout? For example, do you scan or enter student IDs or library barcodes, or do you look them up by name?

Notes

Apply

With Destiny, you can choose between two checkout methods, and easily switch between the two, based on the situation.

Check Out

Check Out–To Patron

One way to check out materials to students in Destiny Library Manager is with the To Patron checkout option. This method is ideal for when students come to the library individually or in small groups.

Use the following steps to practice checking out a book to yourself using the To Patron checkout option:

1. Select **Circulation > Check Out > To Patron**.
2. In the **Find** field, scan or type the patron's barcode.

Note: If you don't have the patron's barcode number, you can click **Find Patron** to see a complete list of your patrons. Then click the patron's name to continue the checkout.

3. Once you select the patron's record, scan the first item's barcode in the **Find** field. The item appears in the Checked Out section. Scanning a second item moves the first book to the Items Out section.

Note: To edit the due date for the item in the Checked Out section, click **Change**. Select the new due date and whether it is for this item, this patron or the rest of this session.

4. Click **Print Receipt** to quickly print a list of all the items the patron has checked out and any fines owed.
5. Make note of the barcode of the item you check out, so you can check it back in during a later activity:

Notes

- Click **Reset** to clear the completed checkout and begin checking out to a new patron.

Home Catalog **Circulation** Back Office My Info

Check Out

Check Out

Check In How do I...?

Renew To Patron By Homeroom

Fines

Copy Status

Patron Status

Library Information

Find

Only my patrons Only search Only Active Patrons Due Dates

Llamas, Cherie Nicol (Student: 2010001426)

Checked Out Library: 1

Overdue Library: 0

Fines Library: \$0.00 / Textbooks: \$0.00 / Resources: \$0.00
Patron: \$0.00

Grade Level 9
Homeroom Mr. Morris
Lexile

AUP Signed?
English Teacher
F&P Level 2
Battle of Books? 944L

Only today's check outs

Items Out

Due Date	Title	Call Number	Price	Checked Out	
7/18/2016	 Swifter, higher, stronger : a photographic history of the Summer Olympics (Copy: T 10182)	796.48 MAC	\$30.12	6/28/2016	<input type="button" value="Renew"/>

Check Out—By Homeroom

The second way to check out materials to students is By Homeroom. This checkout option eliminates the need to scan patron barcodes or type patron names. Instead, you'll select patron names from a homeroom list.

Note: This option is only available if your Destiny records contain homeroom information. This is usually automatically added from your Student Information System. Other methods are covered in Destiny Help.

Use the following steps to practice checking out By Homeroom:

1. Select **Circulation > Check Out > By Homeroom**.
2. From the **Homeroom** drop-down, select the appropriate homeroom, and then click **Select Patron**.
3. Click a student's name or picture to check out to that student.
4. Once you select the patron's record, scan the first item's barcode in the **Find** field. The item appears in the Checked Out section. Scanning a second item moves the first book to the Items Out section.

Note: To edit the due date for the item in the Checked Out section, click **Change**. Select the new due date and whether it is for this item, this patron, or the rest of this session.

5. Click **Receipt** to quickly print a list of all the items the patron has checked out and any fines owed.
6. Make note of the barcode of the item you check out, so you can check it back in during a later activity:

7. To check out items to another student in the same class, click **Select Patron**.

8. To check out items to students from a different homeroom, select another one from the **Homeroom** drop-down.

Notes

To Patron **By Homeroom**

Homeroom Mr. Henderson Select Patron

Find Find Copy Due Dates

Santacruz, Merlin Marvin (Student: 2010001724)

Checked Out Library: 2
Overdue Library: 0
Fines: Library: \$0.00 / Textbooks: \$48.78 / Resources: \$0.00
Patron: \$0.00

Grade Level 6
Homeroom Mr. Henderson
Lexile
AUP Signed?
English Teacher
F&P Level 5
Battle of Books? 1011L

Only today's check outs Print Receipt



Items Out

	Due Date	Title	Call Number	Price	Checked Out	
	7/18/2016	Pollution : opposing viewpoints (Copy: T 8657)	363.73 POL	\$29.92	6/28/2016	Renew
	7/18/2016	Water pollution & health (Copy: T 11039)	363.739 STR	\$36.36	6/28/2016	Renew

Renew All

Check In

Properly checking in materials lets you track materials, assess any necessary fines and collect circulation statistics.

Use the following steps to check in the materials you checked out in the first two activities in this section:

1. Select **Circulation > Check In**.

Note: To track the use of items that weren't actually checked out, but were used in the library, you can select the **Record in-library use** checkbox before checking an item in.

2. Scan or type the barcode number of an item in the **Find Copy** field.

Note: In the Most Recently Checked In section, you can see the item's title, barcode number, due date, patron's name and other information.

3. If a book is damaged, click **Create Fine** to add a fine to the patron's record.
4. To continue checking in books, scan the next item's barcode in the **Find Copy** field.



Notes

Patron Status

You can see information about a patron, including current checkouts, fines, holds, contact information and circulation statistics on their Patron Status page.

Note: The information that appears on this page varies based on your district's setup decisions.

Use the following steps to view a patron's status page:

- 1. Select **Circulation > Patron Status**.

Notes

2. In the **Find Patron** field, scan or type the patron’s barcode.

Note: If you don’t have the patron’s barcode number, you can click **Find Patron** to see a complete list of your patrons. Then click the patron’s name to open their Patron status page.

Home Dashboard Catalog **Circulation** Reports Back Office My Info Messages

Patron Status

Check Out
Check In
Renew
Holds/ILL
Fines
Copy Status
Patron Status
Offline Circulation
Library Information
Reset

Find Patron Only my patrons Only search Barcode Only Active Patrons

Isabelle Silva Tiffany [Student]

Barcode: 2010001493 Nickname: _____
 Status: Active Grade Level: 9
 Gender: Female Homeroom: Ms. Richardson
 Card Expires: 7/31/2017 Lexile: _____
 Grad Year: 2017 AUP Signed?: _____
 Birthdate: 6/9/1998 English Teacher: _____
 District ID: 3941000102 F&P Level: 1
 Acceptable Use Policy on File?: No Battle of Books?: 942L

Items Out

Due Date	Title	Call Number	Price	Checked Out	
9/16/2016	Looking for Alaska : a novel (Copy: T 1902065)	FIC		8/29/2016	<input type="button" value="Renew"/> <input type="button" value="Lost"/> <input type="button" value="Renew All"/>

Fines

There are no fines for this patron

Holds

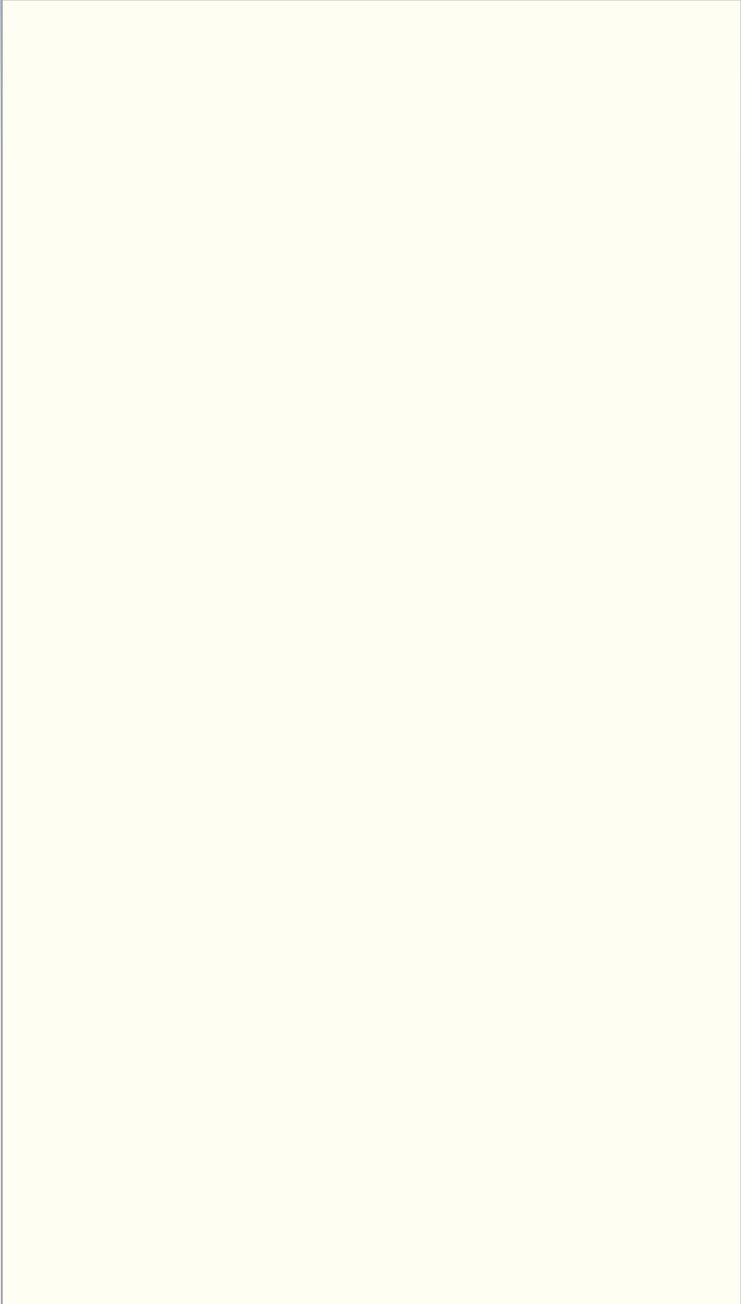
Title	Requested	Quantity	Status
To kill a mockingbird	Any Copy	1	Pending

Current Transactions

Checked Out	Overdue	Holds/Bookings:	Fines:
Library: 1	Library: 0	1	\$0.00

Library Circulation Statistics

Lifetime	Previous Year	Current Year	Current Month
5	0	4	0



Notes

Copy Status

You can see information about a specific copy, including current checkouts, fines, holds, contact information and circulation statistics on their Patron Status page.

Note: The information that appears on this page varies based on your district's setup decisions.

Use the following steps to view a patron's status page:

- 1. Select **Circulation > Copy Status**.
- 2. In the **Find Copy** field, scan or type the copy's barcode.

Home Dashboard Catalog **Circulation** Reports Back Office My Info Messages

Copy Status

Check Out
Check In
Renew
Holds/LL
Fines
Copy Status
Patron Status
Offline Circulation
Library Information
Reset

Find Copy Go

How do I... ?

A short history of the honey bee : humans, flowers, and bees in the eternal chase for honey 🔍

Author Ilona. Call Number 638 ILO

Barcode T 9600 Status Due: 9/16/2016 ?
Purchase Price \$16.96 Circulation Type Regular ?
Date Acquired 11/4/2011 Vendor
Copy Number Sublocation
Description

Edit Copy
Add Hold
Mark Lost
View History
Print Labels

Current Checkout
(Due: 9/16/2016)
Checked Out 8/29/2016 7:16 AM
Patron Hoch, Lilly Loriann [Student]
Barcode 2010001758
Grade Level 12
Homeroom Mr. Jackson
Lexile
AUP Signed?
English Teacher
F&P Level 1
Battle of Books? 971L

Previous Checkout
(Returned: 8/29/2016)
Patron Sanders, Antonio [Student]
Barcode 2010200720
Grade Level 8
Homeroom Mr. Sanchez
Lexile Student
AUP Signed? Multiple Site Associations
English Teacher Sales Script
F&P Level AnSanders2
Battle of Books? 1090L

Notes
There are no notes for this copy
Add Note

Circulation Statistics
Current Month 0 Current Year 2 Previous Year 0 Total 2



Plan

How do you prefer to notify students of overdues and/or fines?

- Run a report that lists all overdues and fines in your school.
- Print notices to distribute at school or by mail.
- Email notices to a homeroom/classroom teacher.
- Email notices to a student, parent or both.

Notes

Apply

Current Checkouts/Fines Report

The Current Checkouts/Fines report helps you identify or send notices to students with checkouts and/or fines.

To practice setting up the Current Checkouts/Fines report, use the following steps:

Select **Reports > Library Reports > Current Checkouts/Fines**.

Step 1: Format

The screenshot shows the 'Current Checkouts/Fines' report configuration interface. The top navigation bar includes Home, Dashboard, Catalog, Circulation, Reports, Back Office, My Info, and Messages. The left sidebar lists My Favorites, Library Reports, Patron Reports, Report Builder, and Report Manager. The main content area is titled 'Library Reports > Current Checkouts/Fines' and contains a 'How do I...?' link. Below this is a section for 'Saved Report / Notices' with a table listing various reports and their last run dates. Each row has a '+♥' icon, a 'Run' button, an edit icon, and a delete icon. A legend at the bottom indicates that the heart icon is for 'Favorite / Add to Favorites', the pencil icon is for 'Edit', and the trash icon is for 'Delete'. Below the table is a section for 'Set up a new report or notice' with a 'Show' dropdown and several checkboxes and radio buttons for filtering the report data.

Saved Report / Notices	Last Run
Spanish Overdue Notices	
♥ Overdue notices - daily Scheduled Daily 8:00 AM	9/13/2016 8:00 AM
Overdue library resources grouped by grade level	7/25/2016 11:00 AM
checked out txtbooks	1/28/2015 3:23 PM
Overdue Notices (Mailed)	11/3/2012 9:53 AM
Over 60 Days Overdue Report	12/22/2011 8:55 AM

Set up a new report or notice

Show Checked Out/Overdue Materials

- All that are currently overdue
- That are overdue by 1 to days
- That are due from 9/13/2016 to 9/13/2016
- All that are checked out
- Resources Assigned to a Custodian
- Unpaid Library Fines
- Unpaid Textbook Fines
- Unpaid Resource Fines
- Unpaid Patron Fines

Notes

1. Select the information you want to show (**Note:** The **Show Checked Out/Overdue Materials** option is selected by default.):
 - All that are currently overdue
 - Those overdue by a specific range of days (such as 2–5 days) or due in a specific number of days (such as 2 days)
 - Those due during a specific date range
 - All checked out materials
2. Choose a format:
 - **Report** (PDF or Excel): This is a good option if you want to have a report of all overdues/fines for your school to refer to or a list of materials that are due soon.
 - **Email to Homerooms:** Send an email summary to each homeroom teacher who has a student(s) with overdue materials or fines, or as a reminder of materials that are due soon.
Note: This option requires your email server to be set up in Destiny and that your patron records contain homeroom information.
 - **Notices** (Choose English, French or Spanish): Choose this option if you want to mail or email students and/or parents to notify them of overdues, fines or checkouts that are due soon.
3. Click **Continue**.

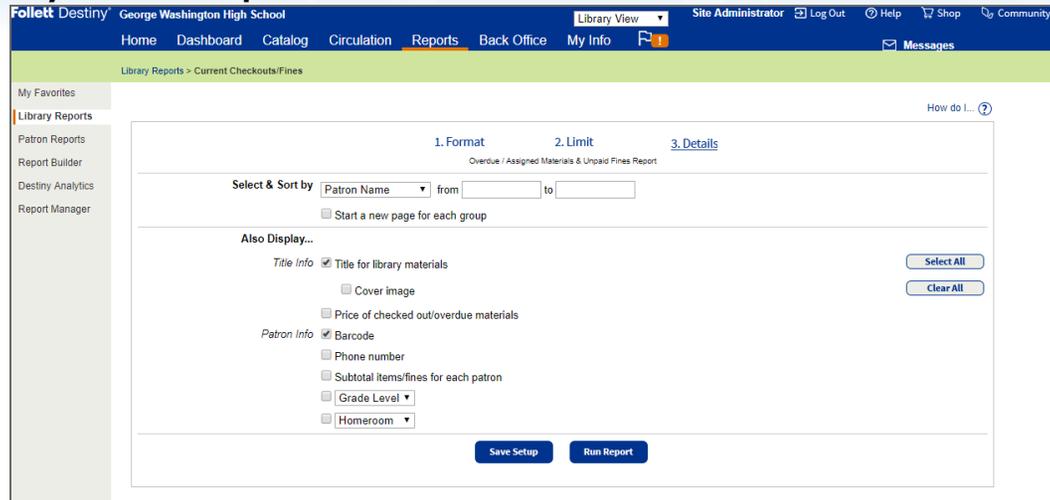
Step 2: Limit

1. By default, the report includes all active patrons. You can limit patrons by the following:
 - To exclude specific patron types, click **Update**, and then deselect the appropriate checkboxes. Click **Save**.
 - To include only a specific graduating class, select **Graduating in**, and then type the year.
 - If you allow students from other schools in the district to check out your materials, choose if you want to include those patrons.
 - If you want to include patrons with an Inactive or Restricted status, select accordingly.
2. By default, the report includes materials with any circulation type. You can limit materials by the following:
 - To exclude specific circulation types, click **Update**, and then deselect the appropriate checkboxes. Click **Save**.
 - If your school uses Destiny Resource Manager or Destiny Textbook Manager, choose if you want to include textbooks and fines.
 - If students at your school are allowed to check out materials from other schools in the district, choose if you want to include materials checked out from other schools by patrons at your school.
3. Click **Continue**.

Step 3: Details

The instructions for this step vary depending on the format you selected in Step 1.

If you chose Report:



1. In the "Select & Sort by" section, select a method for identifying patrons to include from the drop-down.
2. In the **from** and **to** fields, do one of the following:
 - To include all patrons, leave both fields blank.
Note: If you selected Homerroom, select **Any Homerroom** from both drop-downs to include all.
 - To limit the report to one name or number (such as a specific patron or all 8th graders), type or select the same name or number in both fields. For example, you might choose to run the report for one patron (**to** Smith **from** Smith) or one grade level (**to** 8 **from** 8).
 - If you leave the **from** field blank and type a name or number in the **to** field, it includes all those up to and including the name or number in that field.
 - If you type a name or number in the **from** field and leave the **to** field blank, it includes that name or number and all those after it.

Notes

3. If you chose to run a PDF report, a "Start a new page..." checkbox appears. If you want to start a new page after every group in the report, select it. Groups are determined by the information you selected in the "Select & Sort by" section.
4. From the "Also Display..." section, select or deselect the title and patron info to include in the report.

If you chose 'Email to Homerooms':

The screenshot shows a web interface for configuring reports. The top navigation bar includes Home, Dashboard, Catalog, Circulation, Reports, Back Office, My Info, and Messages. The main content area is titled 'Library Reports > Current Checkouts/Fines'. On the left, there is a sidebar with 'My Favorites', 'Library Reports', 'Patron Reports', 'Report Builder', and 'Report Manager'. The main area has three tabs: '1. Format', '2. Limit', and '3. Details'. Below the tabs, there is a section for 'Send To' with a dropdown set to 'All Homerooms' and an 'Update' button. The 'Display name' field contains 'Mrs. G' and the 'Email' field contains 'librarian@school.edu', with a 'Test Email' button. The 'Also Display...' section has two sub-sections: 'Title Info' with checkboxes for 'Title for library materials' (checked), 'Price of checked out/overdue materials', and 'Barcode' (checked); and 'Patron Info' with checkboxes for 'Phone number', 'Grade Level' (dropdown), and 'Homeroom' (dropdown). 'Select All' and 'Clear All' buttons are next to the 'Title Info' section. At the bottom, there are 'Save Setup' and 'Run Report' buttons.

1. By default, all homerooms are included. To exclude a homeroom, click **Update**. Deselect homerooms accordingly, and then click **Save**.
2. In the **Display name** field, verify or change the name and email address you want to appear as the email sender.
3. From the "Also Display..." section, select or deselect the title and patron info to include in the report.

Notes

If you chose Notices:

1. Format 2. Limit 3. Details
Overdue / Assigned Materials & Unpaid Fines/Notices

Select & Sort by Patron Name ▼ from [] to []

Distributed Internally [?]
 Mailed
 Via email - Provide sender information

Display name [Mrs. G]
Email [librarian@school.edu] [?]

Send To Email 1
 Email 2
 Email 3
 Email 4
 Email 5

Page layout [Print 1 notice per page] ▼

Message [Dear] Patron's Name:
[The following items are overdue. Please return them as soon as possible.]

Address Label To the Parent or Guardian of: Patron's Name

Also Display...

Title Info Title for library materials
 Cover image
 Price of checked out/overdue materials

Patron Info Barcode
 Phone number
 Grade Level ▼
 Homeroom ▼

1. In the "Select & Sort by" section, select a method for identifying patrons to include from the drop-down.
2. In the **from** and **to** fields, do one of the following:
 - To include all patrons, leave both fields blank.
 - Note:** If you selected Homeroom, select **Any Homeroom** from both drop-downs to include all.

Notes

Notes

- To limit the report to one name or number (such as a specific patron or all 8th graders), type or select the same name or number in both fields. For example, you might choose to run the report for one patron (**to** Smith **from** Smith) or one grade level (**to** 8 **from** 8).
 - If you leave the **from** field blank and type a name or number in the **to** field, it includes all those up to and including the name or number in that field.
 - If you type a name or number in the **from** field and leave the **to** field blank, it includes that name or number and all those after it.
3. Select how you want notices distributed: **internally**, **mailed** (includes address) or **email**.
 4. If you selected **email**:
 - In the **Display name** field, verify or change the name and email address you want to appear as the email sender.
 - From the **Send To** options, select one or more checkbox to identify the email addresses you want to send notices to. The options correspond to patron record fields, which can include up to five email addresses.
 - To send yourself a test email, click **Test Email**.
 5. If you selected **internally** or **mailed**, from the **Page layout** drop-down, select the number of notices to print on each page.
 6. In the **Message** fields, you can customize the salutation before the patron's name and the text of the message.
 7. From the "Also Display..." section, select or deselect the title or patron info to include.

Step 4: Save & Run

Now that you have the report set up, you are ready to save and/or run it.

If you want to run a report or notices that you do not want to save for later use:

1. Click **Run Notices**. Report Manager appears.
2. When the status of the job is Completed, click the **View** link to see the report, notices or status of the email notices. Click **Refresh List** to update the status.

If you want to save the report or notices to run again or schedule it to run automatically:

1. Click **Save Setup**.
2. In the **Save As** field, type a name for the report or notices.
3. From the **Schedule Report** drop-down, select **Do Not Schedule** if you do not want the report to run automatically. To schedule the report to run on a daily or weekly basis, select accordingly, and then select the day and/or time you want them to run.
Note: If you do not want the report or notices to run on closed days, select the **Do not run on closed days (Closed: Sunday, Saturday)** checkbox.
4. Click **Save Setup** or **Save & Run**.
5. If you selected **Save & Run**, Report Manager appears. When the status of the job is Completed, click the **View** link to see the report, notices or status of the email notices. Click **Refresh List** to update the status.

The saved report or notice setup appears on the Format page, in the **Saved Report/Notices** list at the top.

Notes

[1. Format](#) 2. Limit 3. Details

Is the report or notice you'd like to generate listed below? If so, click its "Run" option. Otherwise you can [set up a new one](#).

Saved Report / Notices	Last Run			
Spanish Overdue Notices		+♥	Run	 
♥ Overdue notices - daily Scheduled Daily 8:00 AM	9/13/2016 8:00 AM		Run	 
Overdue library resources grouped by grade level	7/25/2016 11:00 AM	+♥	Run	 
checked out txtbooks	1/28/2015 3:23 PM	+♥	Run	 
Overdue Notices (Mailed)	11/3/2012 9:53 AM	+♥	Run	 
Over 60 Days Overdue Report	12/22/2011 8:55 AM	+♥	Run	 

♥ / +♥ = Favorite / Add to Favorites  = Edit  = Delete

Assess

In the following table, use checkmarks to self-assess your level of understanding of the learning outcomes covered in this session.

	I can...
	Check out library materials.
	Check in library materials.
	View patron status information.
	View copy status information.
	Run a Current Checkouts/Fines report.
	Run Current Checkouts/Fines notices.

If you need more help, go to:

- Resource Center (resources.follettlearning.com) for how to's, videos and training tools
- Destiny Help for feature information and step-by-step instructions
- FollettCommunity.com for blogs and forums

For the most recent product updates, make sure to check out the *What's New in Destiny* document, available in all three locations.

Notes

Building Your Catalog

Description

With so many teachers and students relying on your library for the most up-to-date resources, you need a quick and easy way to add new materials to your catalog. Destiny Library Manager provides multiple features to help you maintain and improve catalog records. Learn how to add title and copy records to your catalog.

Objectives

- Import titles from Titlewave® and other sources
- Add title and copy records from resource databases
- Add title and copy records manually

Activities

- Answer questions about how your school adds new materials to your catalog.
- Demonstrate how to import title records, and add copies to existing title records.
- Demonstrate how to add title records using the Alliance Plus database.
- Explain how to add titles manually.

Plan

How does your school handle adding new resources to your catalog? Do you receive copies of the MARC record for each new item?

Notes

Apply

Maintaining accurate catalog records is vital for your students and teachers to know which information and resources are available. Destiny makes it easy to add high-quality title records while ensuring duplicate records do not exist.

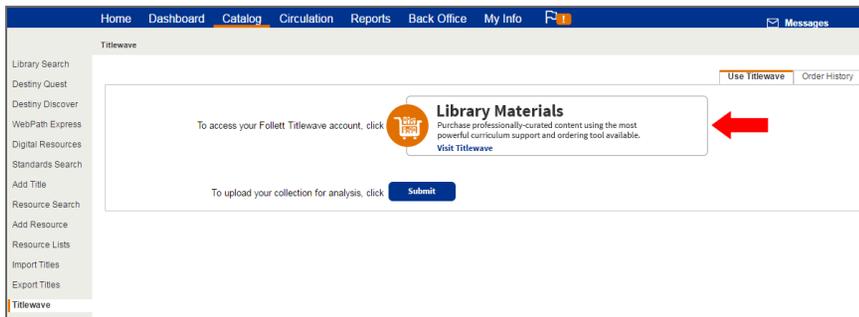
Importing Title Records from Titlewave

Whenever you purchase new titles or copies from Follett, you can import the MARC records to your catalog directly from Titlewave.

Note: If you don't have a Titlewave account and want to learn more or register for one, go to www.titlewave.com.

If you have a Titlewave account:

1. Select **Catalog > Titlewave > Library Materials**.



2. Click **Order History**, and view the options available to you.
3. View your order history.

Note: For step-by-step instructions, see the *Importing Title Records from Titlewave* quick reference guide.

Importing Title Record Files

To see where you import a title record that is not from Titlewave, go to **Catalog > Import Titles**. Select the appropriate settings to import a file of title records. **Do not upload a file or click Import.**

The screenshot shows the 'Import Titles' page in a library management system. The navigation bar includes Home, Dashboard, Catalog, Circulation, Reports, Back Office, My Info, and Messages. The left sidebar lists various library functions, with 'Import Titles' highlighted. The main content area is titled 'Import Titles' and includes a 'How do I...?' link and buttons for 'Add / Update', 'Update Only', and 'Recent Imports'. The 'Title Matching' section has two radio button options: 'Strict' (selected) and 'Relaxed'. Below this, there are three radio button options for handling incoming titles that match existing ones. The 'Copy Matching' section has three radio button options for handling incoming copies that match existing ones. There is a 'Starting Barcode' field with a dropdown menu currently set to '[Follett Classic]' and an 'Assign next barcode' option. The 'Assign Copy Information' section includes a note about missing information and a 'Circulation Type: Regular' option. The 'Import File' section has a 'Choose File' button and a 'No file chosen' status. There are three checkboxes for import options: 'Add the titles in the import file to -- Select a List --', 'This file contains eBook records for only this site.', and 'Limit the Job Summary details to errors and warnings'. At the bottom, there are 'Preview' and 'Import' buttons.

Note: For step-by-step instructions, refer to the *Importing Title Records* quick reference guide.

Importing Title Records from a Resource Database

You can easily access and import thousands of title records from Alliance Plus and z-source databases into Destiny Library Manager.

You just purchased a new book, *Mr. Popper's Penguins* by Richard Atwater (ISBN: 0-316-05842-4). You do not have a title record to import. Practice searching for a district and Alliance Plus title record using the following steps:

1. Go to **Catalog > Add Title**.
2. Search for the book.

Note: To find an exact match, search by the ISBN number.

Did you find the book in your district? Describe the steps for adding the new copy to your catalog if a title record exists in the district.

Look at the Alliance Plus title records available. If there is more than one, describe how you would select one.

Adding Title Records Manually

Destiny Library Manager's Easy Editor makes manually adding any title record quick and easy.

There are some titles you will not find in Alliance Plus, such as your school's yearbook or a student-published book. Using either of those examples or one of your own, practice cataloging a title manually using the Easy Editor option. Only save the title record if you want to keep it in your catalog.

The screenshot shows the 'Add Title' interface in the Destiny Library Manager. The top navigation bar includes Home, Dashboard, Catalog (selected), Circulation, Reports, Back Office, and My Info. Below the navigation, there's a breadcrumb trail: Check/Set Sources > Add Title. A sidebar on the left lists various search and management options, with 'Add Title' highlighted. The main content area has tabs for Brief Title, Series/Notes, Subjects, Resources, Added Entries, and RDA Types. The 'Title Information' section contains fields for Title (with a 'Leading Article' checkbox), Subtitle, Authors, and Edition, each with a help icon. A 'Use MARC Editor' button is located to the right. The 'Standard Numbers' section has input fields for LCCN, ISBN, and ISSN. The 'Material Type' is set to 'Book' and the 'Subtype' is 'No Subtype Assigned', both with help icons.

Note: For step-by-step instructions, refer to the *Adding Title and Copy Records Manually* quick reference guide.

Assess

In the following table, use checkmarks to self-assess your level of understanding of the learning outcomes covered in this session.

	I can...
	Import title records.
	Add copies to title records.
	Add titles using Alliance Plus.
	Create title and copy record manually.

If you need more help, go to:

- Resource Center (resources.follettlearning.com) for how to's, videos and training tools
- Destiny Help for feature information and step-by-step instructions
- FollettCommunity.com for blogs and forums

For the most recent product updates, make sure to check out the *What's New in Destiny* document, available in all three locations.

Notes

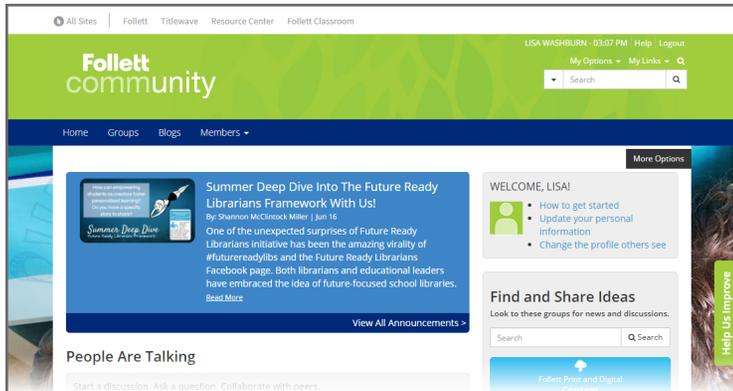
Additional Resources

Follett Community

Access news, blogs and discussion forums in Follett Community.

Visit www.follettcommunity.com to register for an account.

Note: You need your Follett customer number.



Future Ready Librarians

To help students be future ready, we must provide opportunities for them to engage in critical thinking, collaborate and solve real-world problems. Future ready librarians work with district leaders to promote innovative learning for students. To find out more about how librarians and libraries support Future Ready schools, visit:

- Future Ready Librarians webpage: <https://futureready.org/program-overview/librarians/>
- Follett Community www.follettcommunity.com
- Future Ready Librarians Facebook page
- @folletlearning and #futurereadylibs on Twitter

Wrap-up

Thank you for participating in the Follett Destiny training today. Follett greatly appreciates your business and that you took time out of your day to participate. Please do not hesitate to ask any questions that were not fully addressed. Your facilitator is happy to answer your questions.

Technical Support

For help with Destiny configuration, operational issues, or troubleshooting, contact Technical Support via phone at 888.511.5114.

Course Survey

Follett greatly appreciates your time and feedback. The feedback you provide us helps us improve current and future courses and better meet your needs. Please take a few minutes to complete a brief survey.

Course Survey: www.follettsoftware.com/contactdata

Course Task ID (provided by instructor): _____

Zip Code (confirm with instructor): _____

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#12217A v16.0 PG

Published date: 07/23/2018