



# Follett Destiny<sup>®</sup>

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><b>Tour of Destiny Library Manager</b></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"> <li>• Log in to Library Manager</li> <li>• Navigate tabs, options, subtabs and breadcrumbs</li> <li>• Explore the administrative functions of Destiny Library Manager</li> <li>• Search for library resources with Destiny Discover</li> <li>• Explore the types of resources you can access with Destiny Discover</li> </ul>
<p><b>Configuring Library Manager for Your School</b></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"> <li>• Create and edit circulation types</li> <li>• Create and edit patron types</li> <li>• Identify a plan for setting up the library calendar</li> <li>• Describe the site configuration options</li> <li>• Set up Follett eBook circulation policies (if applicable)</li> </ul>
<p><b>Circulating Library Materials Efficiently</b></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. Destiny Library Manager has easy-to-use circulation features that help library staff check out, check in and track library resources quickly and easily.</p> <p>Explore how to circulate your library resources, as well as how to run reports to manage overdue materials and fines.</p>	<ul style="list-style-type: none"> <li>• Learn how to circulate library materials efficiently</li> <li>• Set up and run the Current Checkout/Fines (Overdue) report</li> </ul>
<p><b>Building Your Catalog</b></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"> <li>• Import titles from Titlewave and other sources</li> <li>• Add title and copy records from resource databases and manually</li> </ul>

# 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

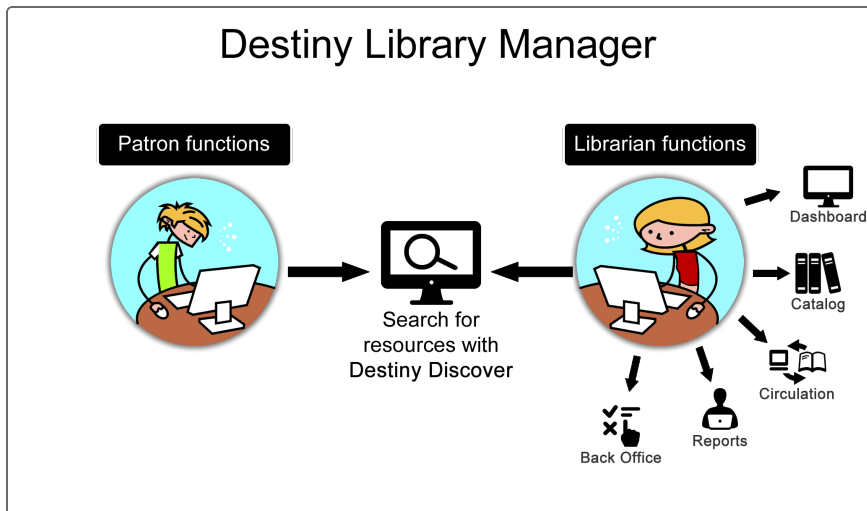
- Log in to and navigate Library Manager.
- Search for library resources.
- Access Follett Help and training resources.
- Find where you perform specific library tasks.

## 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 checkout, checkin 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**. The Login page appears.

3. Do one of the following:

If you want to...	Then...
Log in to Destiny using a single sign-on (SSO) with Google or another protocol	Click the appropriate field, and type in your credentials.
Log in with your Destiny user name and password	Type your <b>User Name</b> and <b>Password</b> , and then click <b>Log In</b> .



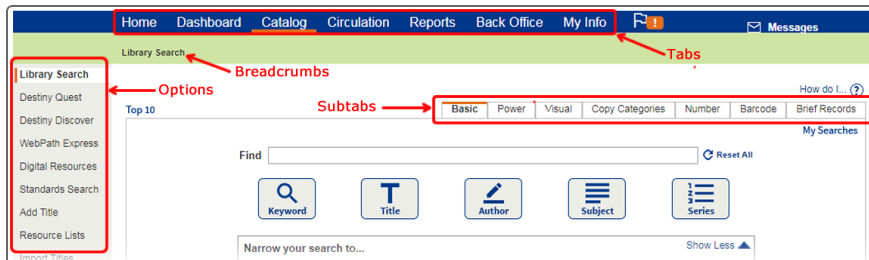
If you are logging in as a **Destiny Administrator** or another district-level user, use the following steps:

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

**Note:** If your school uses SSO, district users with site access can log in at the site or district, and switch between the two. If a district user without site access logs in at the site level, they will be routed to the district. If a site user logs in at the district level, they will be routed to their site.

## Tour of Circulation, Cataloging and Other Librarian Functions

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

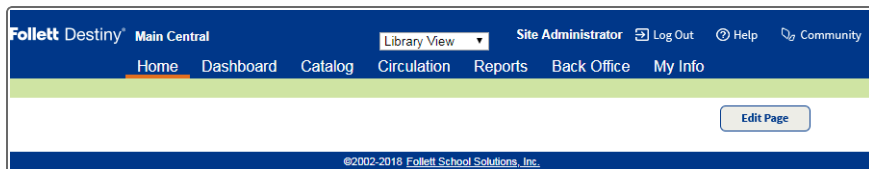


On each tab, a list of options appears on the page's left side. Many options have subtabs. Orange highlights and breadcrumbs show where you are. Use them instead of your browser's back button to return to previous pages.

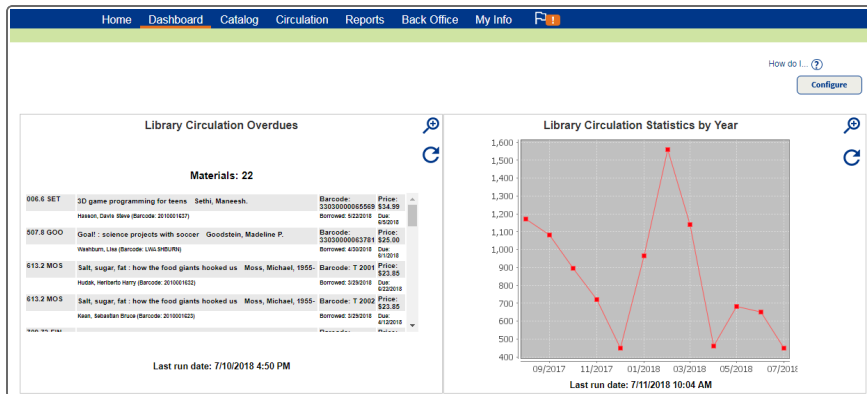
User access to tabs, options and subtabs is based on permissions assigned by a Destiny or site-level administrator.

### 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.



**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', 'Destiny Discover', 'WebPath Express', 'Standards Search', 'Add Title', 'Resource Lists', 'Import Titles', 'Export Titles', 'Titelwave', 'Update Titles', 'Update Copies', 'Import Authority', 'Manage Authority', 'Manage Subjects', and 'Search Setup'. The main search area has a 'Find' input field and a 'Reset All' button. Below the search field are buttons for 'Keyword', 'Title', 'Author', 'Subject', and 'Series'. A 'Narrow your search to...' section allows filtering by '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).

**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.

Name	Created By	Last Run	Run
Follett Students' Choice HS Books	Site Administrator	10/26/2016 11:53 AM	Run
Lost Copies That Had Multiple Circs	unknown	5/6/2015 8:03 AM	Run

= From District   
 = Remove from Favorites

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

DashboardCatalogCirculationReportsBack OfficeMy Info

Manage Patrons

Manage Patrons

Update Patrons

Update Classes

Import Patrons

Export Patrons

Manage Homerooms

Find

in

All

Search

☐ Search across the district

☒ Only Active Patrons

How do I...?

Nonexistent?

Add New Patron

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

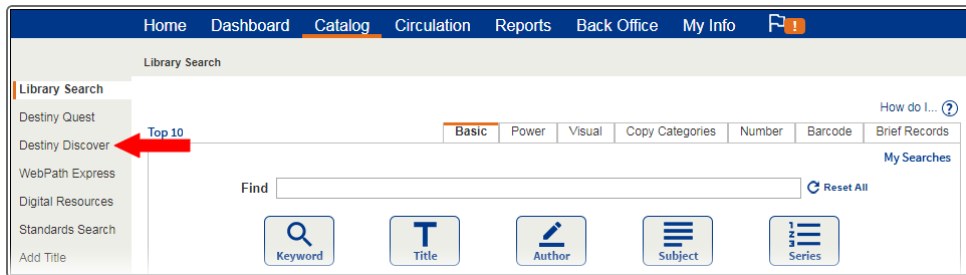
Destiny Discover makes it easy to look for resources in your library's entire catalog. With a single search, you can find everything from eBooks to print materials to websites.

### 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.

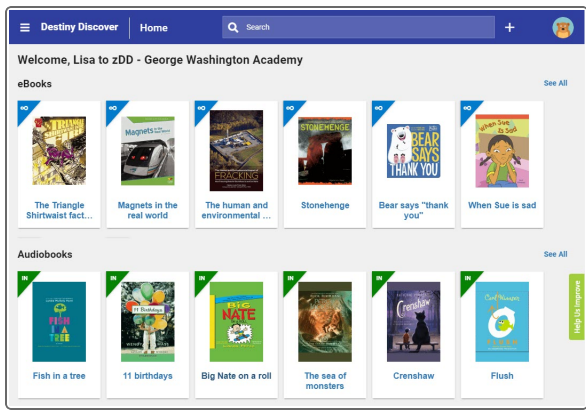

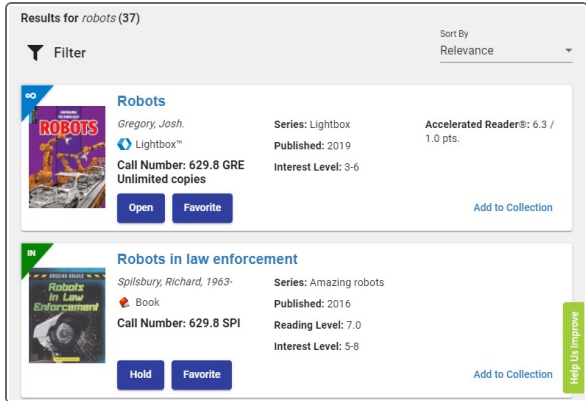
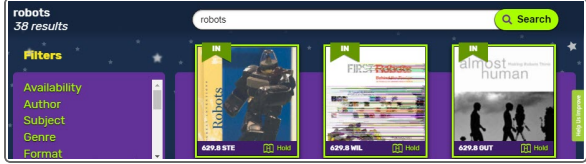
If your daily work includes tasks like circulation or cataloging, you might find it easiest to access Destiny Discover from the Catalog tab. Switch back and forth between interfaces without logging in again.



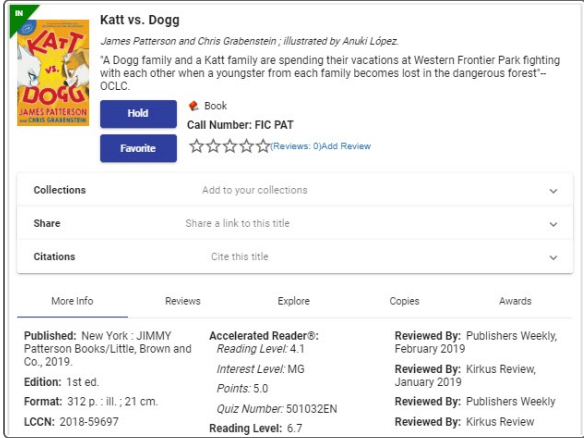
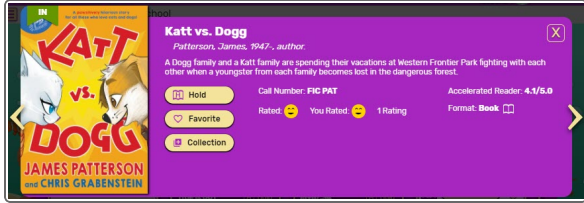
## Choose a Destiny Discover Version

You can choose between two versions of Destiny Discover – Standard and Simplified – for your groups of users.

Use the following table to explore the design and feature differences:

	Standard	Simplified
Design	A clean, blue design; geared for upper grade levels (6-12).	Choose from four student-friendly themes; geared for lower grade levels (K-5). Themes include aquarium, book fair, space or kids outside.
-Homepage		
-Search results		



	Standard	Simplified
-Title Details	 <p><b>Katt vs. Dogg</b> James Patterson and Chris Grabenstein ; illustrated by Anuki López. "A Dogg family and a Katt family are spending their vacations at Western Frontier Park fighting with each other when a youngster from each family becomes lost in the dangerous forest"--OCLC.</p> <p>Hold Book Call Number: FIC PAT Favorite ☆☆☆☆☆ (Reviews: 0) Add Review</p> <p>Collections Add to your collections Share Share a link to this title Citations Cite this title</p> <p>More Info Reviews Explore Copies Awards</p> <p>Published: New York : JIMMY Patterson Books/Little, Brown and Co., 2019. Edition: 1st ed. Format: 312 p. : ill. ; 21 cm. LCCN: 2018-59697</p> <p>Accelerated Reader®: Reading Level: 4.1 Interest Level: MG Points: 5.0 Quiz Number: 501032EN Reading Level: 6.7</p> <p>Reviewed By: Publishers Weekly, February 2019 Reviewed By: Kirkus Review, January 2019 Reviewed By: Publishers Weekly Reviewed By: Kirkus Review</p>	 <p><b>Katt vs. Dogg</b> Patterson, James, 1947-, author. A Dogg family and a Katt family are spending their vacations at Western Frontier Park fighting with each other when a youngster from each family becomes lost in the dangerous forest.</p> <p>Hold Call Number: FIC PAT Accelerated Reader: 4.1/5.0 Favorite Rated You Rated 1 Rating Format: Book Collection</p>
Features	<ul style="list-style-type: none"> <li>• Create individual citations or a citation list.</li> <li>• Share a link to a title's details via a permalink or QR code.</li> <li>• Access full Title Details, such as professional reviews and awards, as well as links to explore resources with the same subject, author, curriculum tag or series.</li> <li>• Add star ratings and/or text reviews (with appropriate permission).</li> </ul>	<ul style="list-style-type: none"> <li>• Navigate with ease: <ul style="list-style-type: none"> <li>◦ Scrollable featured content.</li> <li>◦ Easy-to-see, clickable links.</li> <li>◦ One-click access to digital content.</li> <li>◦ And more!</li> </ul> </li> <li>• Rate books with an emoji rating scale (with appropriate permission).</li> </ul>
<b>Next Steps</b> <p><input type="checkbox"/> For more information on setting up versions, visit Follett Community or Destiny Discover Help.</p>		

## Navigate the Homepage

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

**Note:** Homepage navigation varies based on the display version selected by your school:

- Standard (blue-themed design)
- Simplified (varied themes: aquarium, space, kids outside or bookfair)

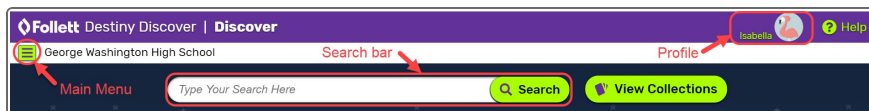
## Use the top toolbar

Access the top toolbar from any page.

### Standard view



### Simplified view (color scheme varies based on theme)

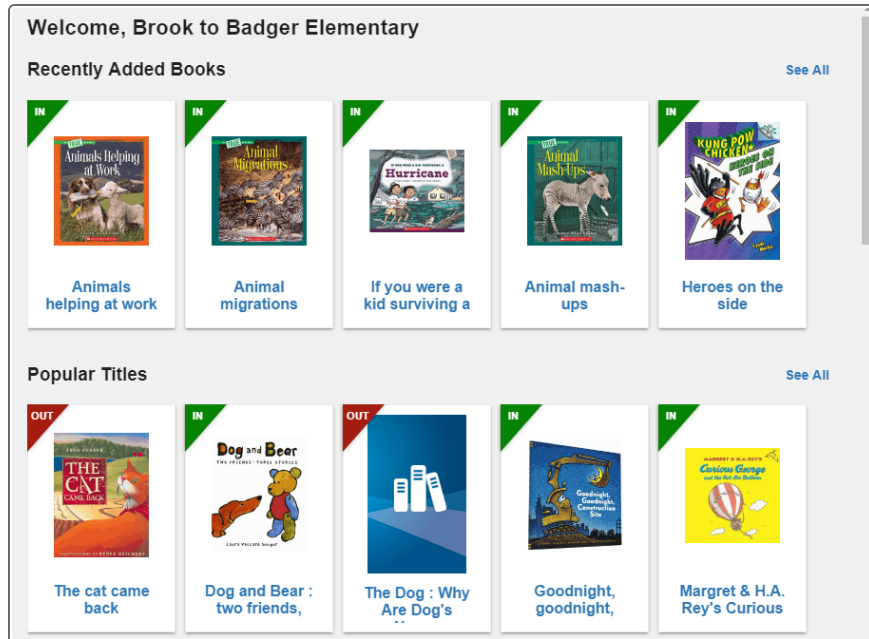


- Use the Main Menu to access a variety of functions, Help or to log out.
- Use the Search bar to search for library resources.
- Access and edit your Profile.

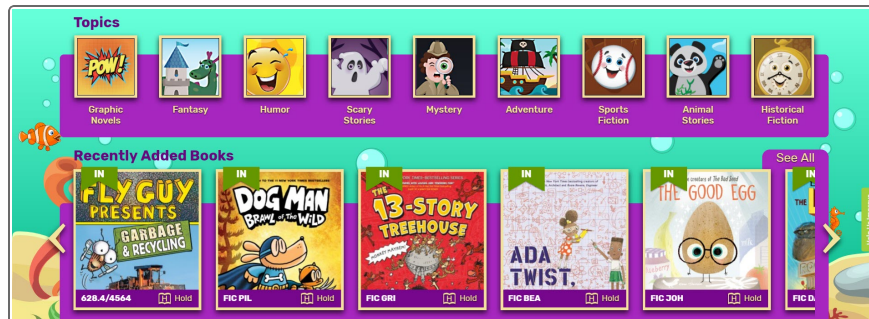
**Note:** In the Simplified view, if you have appropriate permissions, you can use the **Profile** drop-down to access **My Stuff** (Checkouts, Holds, Fines, Favorites, History).

## Browse the ribbons

### Standard view



### Simplified view



Browse the ribbons for a quick way to explore some of your library's featured resources. Depending on your view, click **See All** or scroll 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.
- **Topics:** 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™.
- **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.

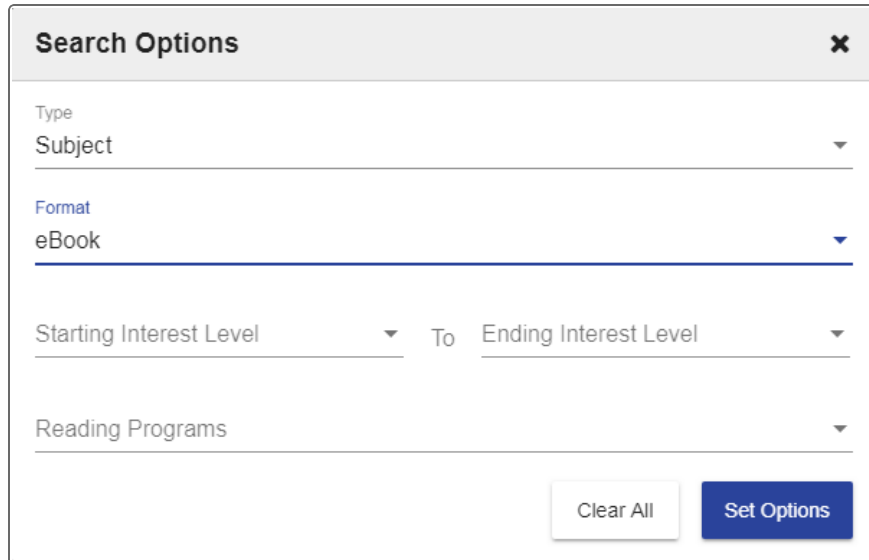
### To perform a keyword search of all library resources:

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** (only available in the Standard version of the user interface):

1. Next to the search bar at the top of any page, click .
2. 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.

3. Click **Set Options**.



**Search Options** x

Type  
Subject ▼



Format  
eBook ▼

Starting Interest Level ▼ To Ending Interest Level ▼

Reading Programs ▼

Clear All Set Options

4. In the search bar, type a search term.
5. Press **Enter** or **Return**.


**Note:** If the 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**.

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

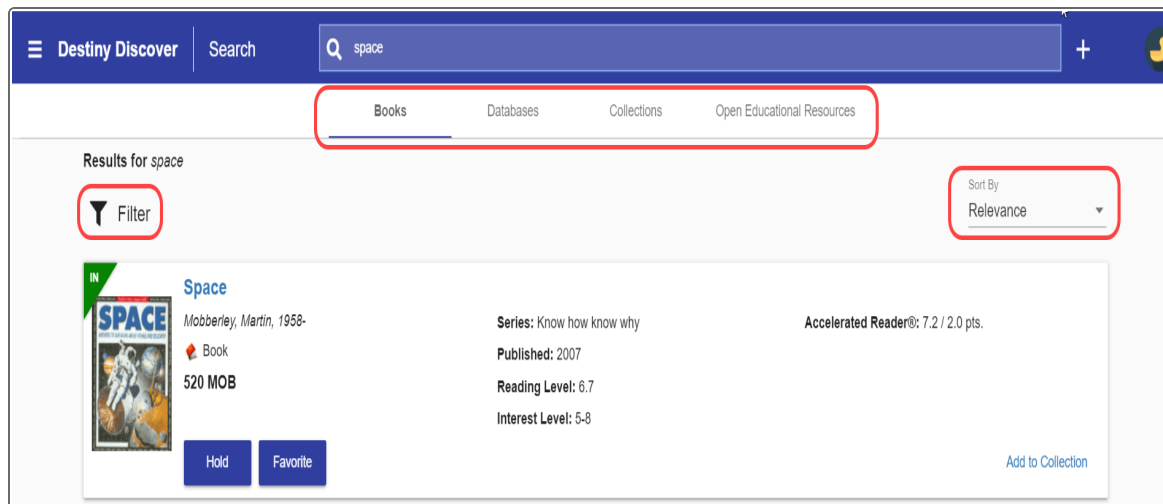
Search tool	Description	Example
<b>Quotation marks (")</b>	Use quotes around search terms to find a specific phrase.	<p><i>"Great Pyramid"</i> (with quotation marks) will return results that include the exact phrase in the title record.</p> <p><i>Great Pyramid</i> (without quotation marks) will return results with the words "Great" and "Pyramid" anywhere in the title record, in no specific order and not necessarily together.</p>
<b>Asterisk (*)</b>	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</i> , <i>Houdini</i> , <i>Houston</i> , etc.
<b>Question mark</b>	Use a question mark to replace a single character.	<i>ho?e</i> will return <i>hole</i> , <i>home</i> , <i>hose</i> , <i>Howe</i> , etc.
<b>AND, OR and NOT</b>	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> .

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.





**Explore the search results tabs:**

**Books:** All print books and other physical materials, as well as 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, visit Follett Community.

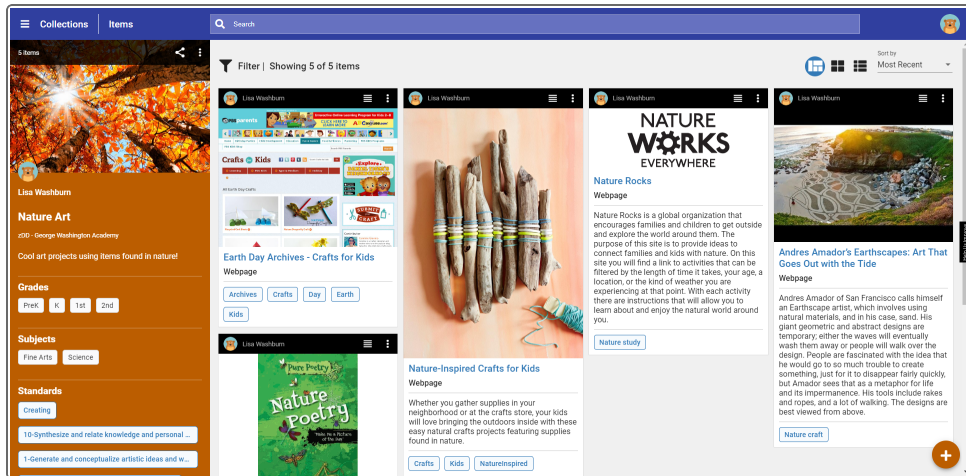
**Databases:** Links to One Search and WebPath Express™ resources.

- **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.

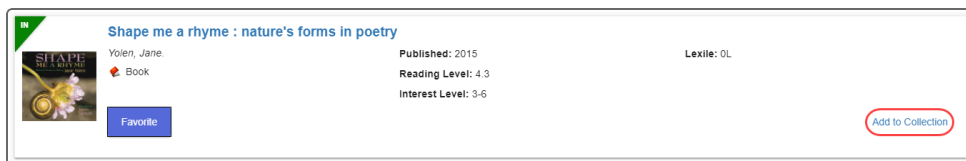
**Collections:** Collections by Destiny creates new, collaborative ways to share free and purchased resources – with anyone, at any time. Each collection can include webpages, videos, documents and much more! It's easy to share collections publicly within your district/school or with only a few people.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

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



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




### Next Steps:

- ☐ To learn more about Collections, visit Follett Community or Collections Help.

**Open Educational Resources:** You can access openly-licensed educational resources (OERs) alongside print and digital library resources in Destiny Discover.

## 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.

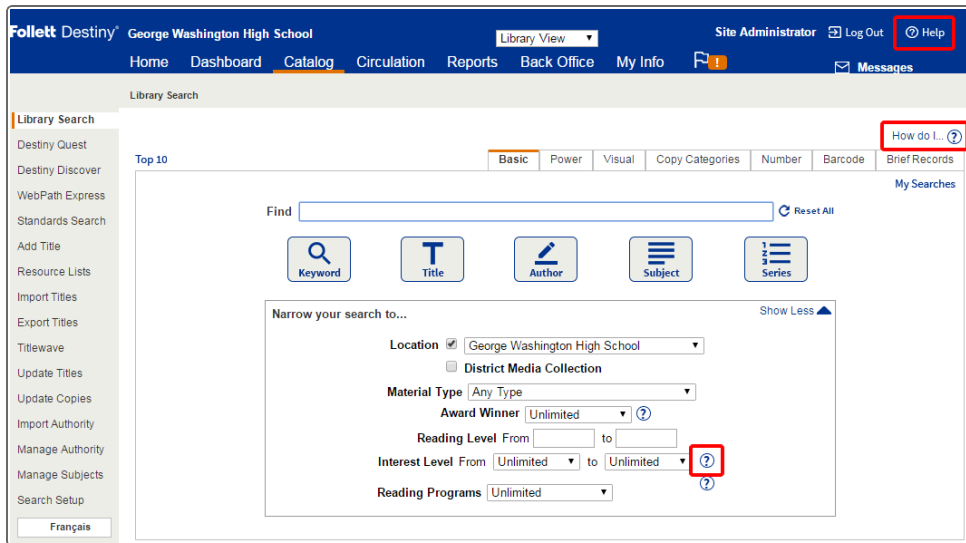
## Access Follett Help and Training Resources

### 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

From the Destiny Discover header, click  > **Help** from the top-left corner of 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.	

## Training Resources

Visit Follett Community to find videos, quick reference guides and lesson plans to refresh your memory, learn about additional topics and help you train other users. You can also access news, blogs and discussions forums.

**Use the following steps to register for an account, and practice finding a training resource:**

1. Go to <https://www.follettcommunity.com>.  
**Tip:** Bookmark it for quick access later.
2. Click a product, and then click **Tutorials, Training & Videos**.
3. Explore the many training resources available to you!

**Note:** To participate in discussion boards, you have to register for an account.

### 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.

# 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

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.**

Library Policies

How do I... ?

Patron Types Circulation Types

Add Patron Type Add Circ Type

To add Follett eBook Policies, click [here](#).

**Circ Types**

**Regular** ☒ Default Circulation Type ?

**Default Settings**

<b>Loan Period</b>	Days: 14	<b>Fine Increment</b>	\$0.05 per day
<b>Grace Period</b>	Days: 0	<b>Max Fine</b>	\$5.00
<b>Renewable</b>	Times: 0	<b>Overdue to Lost</b>	N/A

Patron Type	Checkout Limit	Loan Period	Grace Period	Renewable	Fine Increment	Max Fine
Faculty		Days: 7	Days: 1	Times: 2	\$0.00 per day	\$0.00
Student		Days: 14	Days: 0	Times: 1	\$0.05 per day	\$5.00

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.
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**.

Circulation Type  [?](#) [Call Number](#)

☒ 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="7"/> Days <a href="#">?</a>	<input type="text" value="1"/> days <a href="#">?</a>	<input type="text" value="2"/> times <a href="#">?</a>	<input type="text" value="\$0.00"/> daily <a href="#">?</a>	<input type="text" value="\$0.00"/> <a href="#">?</a>
Student	<input type="text"/>	<input type="text" value="14"/> Days <a href="#">?</a>	<input type="text" value="0"/> days <a href="#">?</a>	<input type="text" value="1"/> times <a href="#">?</a>	<input type="text" value="\$0.05"/> daily <a href="#">?</a>	<input type="text" value="\$5.00"/> <a href="#">?</a>

[Save](#) [Cancel](#)

**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**.

**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**.

The screenshot shows the 'Patron Types' page in the Destiny Library Manager. The 'Faculty' patron type is selected. The settings for 'Faculty' are as follows:

Setting	Value
Max Checkouts	10
Fixed Due Date	None
Ceiling Date	None
Block on Fines/Overdues	No
Max Holds	5
Ready Holds Expire in	Days: 7
Pending Holds Expire in	Days: 21
Default Hold Priority	Standard

Below these settings are two tables:

Circulation Type	Checkout Limit	Loan Period	Grace Period	Renewable	Fine Increment	Max Fine
Professional	Days: 30	Days: 0	Times: 0	\$0.00 per day	\$0.00	
Regular	Days: 7	Days: 1	Times: 2	\$0.00 per day	\$0.00	
Special Collection	Days: 45	Days: 0	Times: 9	\$0.05 per day	\$5.00	

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 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  ?

☒ Default Patron Type ?

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
Reference	<input type="text" value="2"/>	<input type="text" value="2"/> 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" value="5"/>	<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 patron type:**

1. Next to the Patron Type you want to edit, select **Back Office > Library Policies > Patron Types > **.
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**.

**Next Steps:**


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

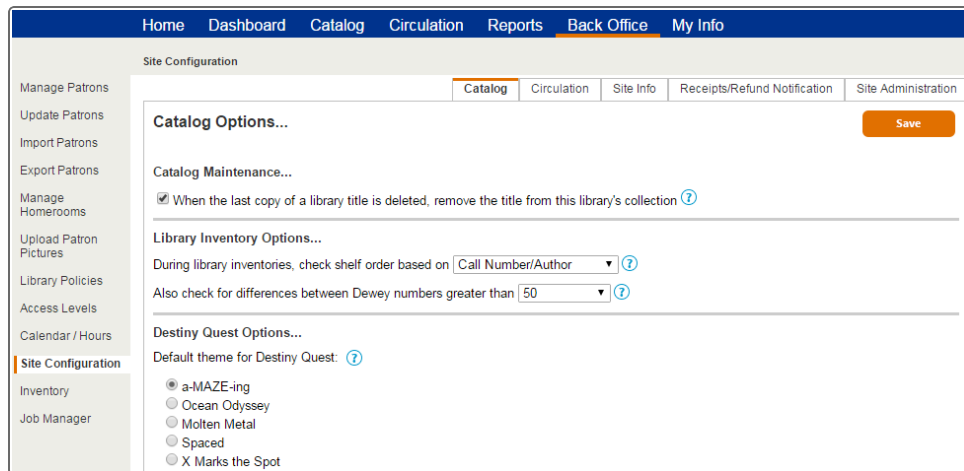


## Site Configuration


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
<b>Library Options</b> <span>Save</span>				
<input checked="" type="checkbox"/> Allow library materials to circulate to all patrons in the district <a href="#">?</a>				
<input checked="" type="checkbox"/> Allow library materials to be renewed at the borrowing site <a href="#">?</a>				
Calculate library loan periods based on <span>calendar</span> days <a href="#">?</a>				
<input checked="" type="checkbox"/> Automatically calculate fines for overdue items <a href="#">?</a>				
<input type="checkbox"/> Automatically calculate overdue fine when lost book is found <a href="#">?</a>				
<input type="checkbox"/> Require explanation when waiving library fine <a href="#">?</a>				
<input type="checkbox"/> Require explanation when issuing library refunds <a href="#">?</a>				
<input checked="" type="checkbox"/> Automatically create fine for lost library materials <a href="#">?</a>				
<input type="checkbox"/> "Lost" library materials must be returned in a timely fashion to generate a refund <a href="#">?</a>				
Calendar days from date "lost" before a paid library fine becomes non-refundable: <input type="text"/>				
<input checked="" type="checkbox"/> Display TitlePeek cover images in Check Out - Check Out <a href="#">?</a>				
<input checked="" type="checkbox"/> Display TitlePeek cover images in Check Out - Items Out <a href="#">?</a>				
<input checked="" type="checkbox"/> Display TitlePeek cover images in Check In <a href="#">?</a>				
<input checked="" type="checkbox"/> Turn on Ready Scan Check In functionality <a href="#">?</a>				

#### 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.

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.

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						

Closed: Sunday, Saturday      Hours: 9:00 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.

Patron Types    Circulation Types

Patron Types

Add Patron Type    Add Circ Type

To add Follett eBook Policies, click [here](#).

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**.

Policies > Circulation types

Circulation Types

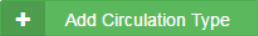
Circulation Type	Default Loan Period	Default	
Faculty	10		Action ▼
General eBook	5	✓	Action ▼


+ Add Circulation Type

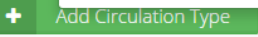
3. In the **Circulation Type Name** field, type a name.
4. In the **Default Loan Period** field, type the number of days for the loan period that will be assigned to this circulation type by default.

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**.

### Circulation Types



Circulation Type	Default Loan Period	Default	Action
Faculty	10		
General eBook	5		<div><div>✓ Make Default</div><div>Edit</div><div>Delete</div></div>



## 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 Community.

### 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):

## 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:

- Destiny Help for feature information and step-by-step instructions
- [www.follettcommunity.com](http://www.follettcommunity.com) for how to's, videos, training tools, blogs and forums

For the most recent product updates, see the *What's New in Destiny* document, available in both 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 check-out option. This method is ideal 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** sub-tab.
2. Scan or type the patron's barcode in the **Find** field.


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

3. After 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. To print a list of all the items the patron has checked out and any fines owed, click **Print Receipt**.
5. Make note of the item's barcode you checked out, so you can check it back in during a later training:

6. To clear the completed checkout and begin checking out to a new patron, click **Reset**.

Home Dashboard Catalog **Circulation** Reports Back Office 

Check Out

Check Out Items How do I...? 

Check In To Patron By Homeroom

Check In Items

Renew

Holds/ILL

Fines

Copy Status

Item Status

Patron Status

Offline Circulation

Library Information

**Find**  **Go** **Find Patron** **Find Copy** **Add Title**

☐ Only my patrons ☐ Only search **Patron Names** ☐ Only Active Patrons **Due Dates**

**Coop, Abigail** (Student: Hidden) **Edit Patron**

**Checked Out** Library: 1 / Resources: 2 **Grade Level** Student: **Homeroom**


**Overdue** Library: 0 / Resources: 2

**Holds Ready** 0

**Fines** Library: \$0.00 / Resources: \$31.25 **Print Receipt**

Patron: \$0.00 ☐ Only today's check outs

**Checked Out**

 **Wild flamingos** (Copy: 400000005) **Due** 5/2/2019 **Change Date**

**Reset**

Notes

## 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 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** sub-tab.
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. After 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 later in this training:

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.

Check Out

How do I... ?

To Patron By Homeroom

Homeroom 175 [Select Patron](#)

Find  [Find Copy](#) Due Dates

**LUSENHOP, KYLIE JADE** (Student: P 2480660) [Edit Patron](#)

Checked Out Library: 2 / Resources: 0  
Overdue Library: 0 / Resources: 0

Grade Level 3  
Homeroom 175

Holds Ready 0  
Library: \$0.00 / Resources: \$0.00  
Fines Patron: \$0.00

☐ Only today's check outs [Print Receipt](#)

**Items Out**

Due Date	Title	Call Number	Price Checked Out	
5/2/2019	A dolphin named Bob (Copy: 35051433)	F George	\$8.76 4/18/2019	<a href="#">Renew</a> <a href="#">Lost</a>
5/2/2019	Gorilla doctors : saving endangered great apes (Copy: 35051878)	333.95 Turner	\$14.45 4/18/2019	<a href="#">Renew</a> <a href="#">Lost</a>

[Renew All](#)

## Notes

## 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**.
2. To track the use of items that weren't actually checked out, select the **Record in-library use** checkbox.
3. To check in off-site items with a status of checked out or lost, select the **Check in off-site copies** checkbox.

**Note:** The Destiny Admin must enable **Allow copies to be checked in at any site (Setup > Sites** sub-tab, and then edit the district) for this checkbox to appear.

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

### Notes:

- In the **Most Recently Checked In** section, you can see the item's title, barcode number, due date, patron's name and other information.
- If you are able to check in off-site barcodes, and a barcode is duplicated across the district, a list of the copies with that barcode appears. If you select a copy from another site, a message states that the item must be returned to that site.

5. If a book is damaged and you want to add a fine to the patron's record, click **Create Fine**.

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

**Note:** If you do not have the patron's barcode number, click **Find Patron** to see a complete list of your patrons. Then click the patron's name to open the Patron Status page.

The screenshot displays the 'Patron Status' page for a user named Cherie Nicol Llamas. The page is divided into several sections:

- Navigation Bar:** Home, Dashboard, Catalog, Circulation, Reports, Back Office, My Info, Messages.
- Left Sidebar:** Check Out, Check In, Renew, Holds/LL, Fines, Copy Status, Patron Status (selected), Offline Circulation, Library Information, Reset.
- Find Patron:** A search bar with a 'Go' button and checkboxes for 'Only my patrons', 'Only search Last Name', and 'Only Active Patrons'.
- Patron Information:**
  - Barcode:** Hidden (with a 'Print Label' button).
  - Status:** Active.
  - Gender:** Female.
  - Card Expires:** 7/31/2017.
  - Grad Year:** 2017.
  - Birthdate:** 2/13/1998.
  - District ID:** 6241000102.
  - Acceptable Use Policy on File?** No.
  - Nickname:** (empty).
  - Grade Level:** 9.
  - Homeroom:** Mr. Morris.
  - User Defined 3:** (empty).
  - Primary Language:** 2.
  - Lexile Measure:** 544L.
- Items Out:** A table showing library materials checked out.
 

Due Date	Title	Call Number	Price	Checked Out	Buttons
9/11/2018	Swifter, higher, stronger : a photographic history of the Summer Olympics (Copy T 10182D)	796.48 MAC	\$30.12	8/22/2018	Renew, Lost, Renew All
- Fines:** A section with an 'Add Fine' button and a 'View History' button. It states 'There are no fines for this patron'.
- Holds:** A section with an 'Add Hold' button and a 'View History' button. It states 'There are no holds for this patron'.
- Current Transactions:**
  - Checked Out: 1
  - Overdue: 0
  - Library: 0
  - Holds/Bookings: 0
  - Fines: \$0.00



Copy Status

You can see information about a specific copy, including current checkouts, fines, holds, contact information and circulation statistics on the Copy 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 copy 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/ILL

Fines

Copy Status

Patron Status

Offline Circulation

Library Information

Find Copy

Go

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

Purchase Price \$16.96

Date Acquired 11/4/2011

Copy Number

Description

Status Due 9/16/2016

Circulation Type Regular

Vendor

Sublocation

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 Lorian [Student]

Barcode 2010001758

Grade Level 12

Homeroom Mr. Jackson

Nickname

Homeroom

User Defined 3

Primary Language 1

Lexile Measure 971L

Previous Checkout

None

Add Note

There are no notes for this copy

Circulation Statistics

Current Month 0

Current Year 0

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.

## 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 > (under Circulation) Current Checkouts/Fines**.

### Step 1: Format

The screenshot shows the 'Library Reports' interface with the 'Format' step selected. The left sidebar lists navigation options: My Favorites, Library Reports (selected), Patron Reports, Report Builder, Destiny Analytics, and Report Manager. The main area has three tabs: 1. Format (selected), 2. Limit, and 3. Details. A note asks if the user wants to generate a report or notice, suggesting to click 'Run' or 'set up a new one'.

Saved Report / Notices	Last Run	
♥ Overdues Report by Homeroom Scheduled Daily 8:00 AM	10/29/2018 8:00 AM	Run Edit Delete
♥ Overdue notices - daily	10/4/2018 3:45 PM	Run Edit Delete
Overdue By Patron	9/26/2018 2:02 PM	+♥ Run Edit Delete
FEC Checked out Materials by Homeroom	4/5/2017 10:55 AM	+♥ Run Edit Delete
♥ FEC Overdue Notices to Students	4/5/2017 10:50 AM	Run Edit Delete

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

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: 10/29/2018 to 10/29/2018
- ☐ All that are checked out

☒ Resources Assigned to a Custodian

☒ Unpaid Library Fines

☒ Unpaid Resource Fines

☒ Unpaid Patron Fines

1. Select the information you want to show on the report:

**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 overdue/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 your patron records to 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 overdue, 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 resources or textbooks and related fines.
  - If students at your school can check out materials from other schools in the district, choose if you want to include those materials.
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:

The screenshot shows the Follett Destiny Reports interface for George Washington High School. The top navigation bar includes links for Home, Dashboard, Catalog, Circulation, Reports, Back Office, My Info, and Messages. The 'Reports' tab is selected, and the 'Library View' dropdown is set to 'Library View'. The 'Reports' section is titled 'Library Reports > Current Checkouts/Fines'. The 'Select & Sort by' section has a dropdown menu set to 'Patron Name' and fields for 'from' and 'to'. The 'Also Display...' section has checkboxes for 'Title Info' (Title for library materials, Cover image, Price of checked out/overdue materials) and 'Patron Info' (Barcode, Phone number, Subtotal items/fines for each patron). The 'Homeroom' dropdown is set to 'Homeroom'. Buttons for 'Save Setup' and 'Run Report' are at the bottom.

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.

- 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 items 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. 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. Select the **Cover image** checkbox to include a thumbnail of cover images.

### If you chose 'Email to Homerooms':

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. To include a thumbnail of cover images, select the **Cover image** checkbox.

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

Test Email

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

Save Setup Run Notices

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.

- 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 **Via email**:

- In the **Display name** field, verify or change the name you want to appear as the email sender.
- In the **Email** field, verify or change the email address you want to appear as the email sender.
- From the **Send To** options, select one or more checkboxes 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** in the **Distributed** section, in 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. To include the text, "To the Parent or Guardian of:" with the patron's name, select the **Address Label** checkbox.

8. From the **Also Display...** section, select or deselect the title or patron info to include. You can also select to include a thumbnail of cover images.

#### 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 and displays your report at the top of the list. The status automatically updates.
2. Click the **View** link to see the report, notices or status of the email notices.

**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**.

If you selected **Save & Run**, Report Manager displays your report at the top of the list. The status automatically updates.

5. Click the **View** link to see the report, notices or status of the email notices.

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

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 Notice		<div>+♥</div> <div>Run</div> <div></div> <div></div>
♥ Overdues Report by Homeroom Scheduled Daily 8:00 AM	8/22/2018 8:00 AM	<div>Run</div> <div></div> <div></div>
♥ Overdue notices - daily	6/13/2018 9:53 AM	<div>Run</div> <div></div> <div></div>
Overdue By Patron	11/29/2017 2:43 PM	<div>+♥</div> <div>Run</div> <div></div> <div></div>
FEC Checked out Materials by Homeroom	4/5/2017 10:55 AM	<div>+♥</div> <div>Run</div> <div></div> <div></div>
♥ FEC Overdue Notices to Students	4/5/2017 10:50 AM	<div>Run</div> <div></div> <div></div>

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

## 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...
	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:

- Destiny Help for feature information and step-by-step instructions
- [www.follettcommunity.com](http://www.follettcommunity.com) for how to's, videos, training tools, blogs and forums

For the most recent product updates, see the *What's New in Destiny* document, available in both locations.



# 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.

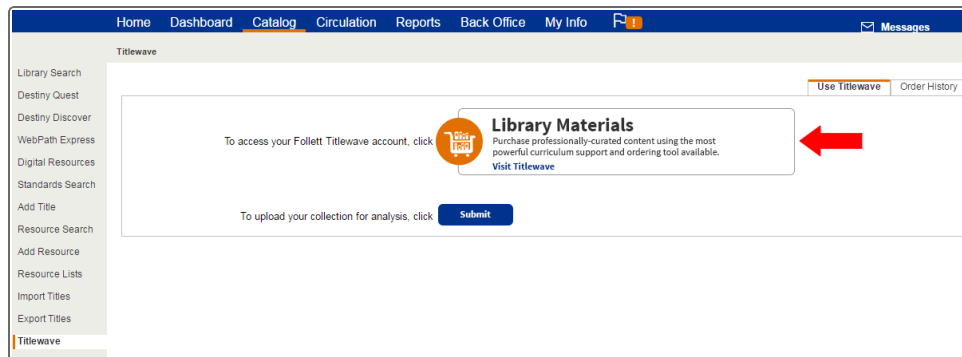
## Import Title Records from Titlewave

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](http://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.

## Import Title Record Files

To see where you import a title record that is not from Titlewave, select **Catalog > Import Titles**. Choose 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 page has a navigation bar at the top with links: Home, Dashboard, Catalog, Circulation, Reports, Back Office, and My Info. The 'Catalog' link is highlighted. Below the navigation bar, there is a sidebar on the left with a list of links: Library Search, Destiny Quest, Destiny Discover, WebPath Express, Digital Resources, Standards Search, Add Title, Resource Lists, Import Titles (highlighted), Export Titles, Titlewave, Update Titles, Update Copies, Import Authority, Manage Authority, Manage Subjects, and Search Setup. The main content area is titled 'Import Titles' and contains several sections: 'Title Matching' with radio buttons for 'Strict' and 'Relaxed' matching rules, 'Copy Matching' with radio buttons for 'Skip', 'Replace', and 'Always add' options, 'Starting Barcode' with a text input field and a 'Assign next barcode' button, and 'Assign Copy Information' with a list of options: 'Circulation Type: Regular' and 'Status: Available (only when adding copies)'. At the bottom, there is an 'Import File' section with a 'Choose File' button, a 'View List' button, and a list of checkboxes: 'Add the titles in the import file to -- Select a List --', 'This file contains eBook records for only this site.', 'Limit the Job Summary details to errors and warnings (clear this option for a record of every title and copy in the import file).', and 'List possible duplicate titles in the Job Summary after import.' There are also 'Preview' and 'Import' buttons at the bottom right.

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



## Import 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. Select **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.

## Add 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.**

**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:

- Destiny Help for feature information and step-by-step instructions
- [www.follettcommunity.com](http://www.follettcommunity.com) for how to's, videos, training tools, blogs and forums

For the most recent product updates, see the *What's New in Destiny* document, available in both locations.

# Destiny® Library Manager

## Library Manager Terms

This glossary uses lowercase for all terms except product names and acronyms.

Term	Definition
<b>AACR2</b>	(Anglo-American Cataloging Rules) Previously, this was the cataloging standard written for the card environment, with the primary focus on cataloging print materials. AACR2 is being replaced by RDA, which is designed for the digital environment. See also <i>RDA</i> .
<b>Accelerated Reader</b>	(AR) Commercial reading program with reading levels assigned to books.
<b>access level</b>	Set of permissions that defines the Destiny functions a user can perform and what the user can see.
<b>Alliance Plus</b>	Cataloging database with access to more than 7 million quality MARC (MACHine Readable Cataloging) records for library materials.
<b>authority record</b>	A record of the authoritative form of a name (personal, corporate, meeting or geographic), uniform title, series title or topical term used as a heading in a library catalog. An authority record can also contain "See from" and "See also from" references to help library patrons.
<b>barcode</b>	Machine-readable code consisting of vertical bars, spaces and text that can be scanned or entered manually in Destiny to identify an item or a patron.
<b>barcode symbology</b>	The structural rules and conventions for representing data within a particular barcode. For example, Code 39 barcodes consist of 5 bars and 4 spaces and a specific character set.
<b>Biblionasium</b>	Available as a Destiny subscription, this integrated online platform supports independent reading – letting students, teachers and parents interact in a social community.
<b>Boolean operator</b>	Term that expresses a logical relationship between keywords or phrases used in searches, such as AND, OR and NOT.

# Destiny® Library Manager

Term	Definition
<b>brief record</b>	A bibliographic record with minimal cataloging information (title, author, and local call number). Destiny considers any record that does not contain tags 305 to 899 (inclusive) to be a brief record (excludes 526 tag).
<b>call number</b>	Numbers and/or letters that represent the location of a book in the library. Call numbers can be listed in the library's catalog or on the spine of the book.
<b>call number prefix</b>	Letters that come before the Dewey number or the suffix. For example, both E 811 SIL and E HAR have a prefix of E.
<b>ceiling date</b>	Overrides the due date calculated by Destiny if earlier than that date. A commonly used ceiling date is the last day of school.
<b>checkout limit</b>	Maximum number of checkouts allowed for any single Circulation Type. This is different than Max Checkouts, which is the number of copies of all Circulation Types that someone of a Patron Type can have checked out at any one time.
<b>circulation type</b>	Classification of library materials that lets library staff set up different loan policies for different types of materials. A copy's Circulation Type, when combined with a Patron Type, determines the copy's loan period to a patron of that Patron Type.
<b>Classroom Ready Collections (CRCs)</b>	Pre-built, standards-aligned collections, curated from open educational resources (OERs) and available by subscription in Collections by Destiny.
<b>Collections by Destiny</b>	An interface in Destiny Discover that lets users share free or purchased resources. Each collection can include web pages, videos, documents and much more.
<b>copy category</b>	A way to group copies for many different purposes. These include supporting curricula, producing bibliographies and reading lists, and promoting special collections or new materials.
<b>copy record</b>	Barcoded copy of an item that is added to the title (or bibliographic) record.
<b>copy status</b>	Describes a copy's availability for circulation. The possible copy statuses are Available, Lost, Checked Out, On Hold, On Order, Loaned Out, In Transit, and Out for Repairs.

# Destiny® Library Manager

Term	Definition
<b>curriculum tag</b>	Keywords added to the record of items in Destiny Discover and Collections, and listed in Titlewave, to indicate that a book might be used to support instruction in specific areas.
<b>dashboard</b>	Provides a graphical, at-a-glance view of various preconfigured reports that you have added to Destiny.
<b>Destiny Classic</b>	The traditional interface in Follett Destiny Library Manager. This lets library staff search for library resources and complete library administrative tasks, such as accessing the Back Office, circulating books, adding items to the catalog and running reports.
<b>Destiny Discover</b>	An interface in Follett Destiny Library Manager that lets you search for all your library's resources, from eBooks to print materials to subscription databases to digital resources.
<b>Destiny Discover app</b>	A downloadable app that lets patrons search for materials or read eBooks available in Destiny Discover.
<b>district ID</b>	A unique student number that some schools or districts assign to students and staff. District IDs can be imported into Destiny as part of the patron record. This field can be alpha numeric.
<b>easy editor</b>	One of the two data entry pages in the Catalog, used to add, edit or delete MARC records. See also <i>MARC editor</i> .
<b>eBook</b>	Electronic version of a printed book that can be read on a computer or device. eBooks have different licensing rights assigned by the publisher. Unlimited, Simultaneous Access means one copy of the eBook can be read at the same time by many people. Single Use means only one person can read a copy of the book at a time.
<b>extent</b>	In cataloging, an item's number of pages, volume or playing time. Extent is recorded in the 300_a tag of a MARC record.
<b>Featured Collections</b>	Free, Follett-sponsored collections in Collections by Destiny that are created by Follett educators and provide instructional tools to teachers and students.

## Destiny® Library Manager

Term	Definition
<b>fine increment</b>	The dollar amount incurred for each open day that a checkout is overdue. No fine increment is charged until the end of the grace period (if defined). Once the grace period is past, the fine begins accruing on the day after the due date.
<b>fine type</b>	A cause for fines; there are four default fine types: Overdue, Damaged, Lost and Refund. Besides these, you can create additional fine types, such as copier fees.
<b>fixed due date</b>	A set due date for checkouts that does not depend on the date of checkout. Set up in Library Policies in the Back Office.
<b>Follett Community</b>	A Follett website providing free online training, webinars and resources for all PreK-12 educators. Resources include step-by-step Quick Reference Guides and how-to videos for Destiny.
<b>Follett Destiny Mobile app</b>	A downloadable app that library staff can use for basic checking in and out functionality.
<b>Follett Remote</b>	A single-user application that lets admins circulate and collect copy and patron barcode numbers (either by scanning or typing) outside of Destiny. The data files can be stored locally or remotely and then uploaded to Destiny.
<b>Fountas &amp; Pinnell (reading levels)</b>	Reading instruction method that assigns reading levels to books. Levels are designated as letters, which can be used in the Guided Reading program.
<b>genrefied library</b>	A library where books are organized and displayed in sections by genre, such as science fiction, mystery, etc.
<b>guest user</b>	Anybody using Destiny that has not logged in. By default, guest users have a separate access level with limited permissions that can be edited by the Destiny Admin.
<b>hidden material</b>	Marking an item hidden in the Circulation Type lets you hide library materials that you do not want all your patrons to see.
<b>hold priority</b>	Determines who gets the first available copy of an item. Defined for Patron Types in Library Policies.

# Destiny® Library Manager

Term	Definition
<b>hold vs. reserve</b>	A hold is a request by a patron for the next available copy of a title. Destiny scans the list of holds before completing each checkout. Any checkout that conflicts with a hold is interrupted with an alert message. A reserve is a hold request placed for one or more copies needed on a specific future date, similar to a reservation.
<b>homeroom</b>	Value that can be indicated in the patron record, as well as imported. Several reports and functions use the Homeroom field as a choice for sorting and selecting data.
<b>in library use circulation</b>	Option to record library circulation statistics for items used in the library, but not checked out.
<b>interactive eBooks vs. eBooks</b>	An eBook is a digital or electronic book that can be read on a device, like a computer or tablet. Interactive eBooks include features such as animation, sound and touch.
<b>interlibrary loan</b>	(ILL) System that lets a patron of one library borrow books from another library.
<b>ISBN</b>	(International Standard Book Number) Used to identify books and is currently 13 digits. Older titles might have a 10-digit ISBN. See also <i>standard number</i> .
<b>ISSN</b>	(International Standard Serial Number) An 8-digit number used to identify serial publications. See also <i>standard number</i> .
<b>job manager</b>	Place where reports are listed after they have completed.
<b>LCCN</b>	(Library of Congress Control Number) The number the Library of Congress assigns to each catalog record; includes the year and a 6-digit serial number. See also <i>standard number</i> .
<b>Lexile scale</b>	Framework that assigns reading ability levels to readers and difficulty levels to text.
<b>Library of Congress</b>	(LOC) The official library of the US Congress and possibly the largest library in the world. It catalogs most copyrighted publications and is used as a resource for libraries worldwide.



## Destiny® Library Manager

Term	Definition
<b>library fine</b>	Fine associated with a library copy. There are four default fine types: Overdue, Damaged, Lost and Refund. It is possible to create additional fines.
<b>Lightbox</b>	An educational platform featuring interactive titles, available for purchase.
<b>loan period</b>	The amount of time a patron can keep the checked-out material.
<b>lost</b>	A copy or item status that indicates the copy or item has been lost by a patron, Inventory or Offline Circulation.
<b>MARC editor</b>	One of the two data entry pages in the Catalog, used to add, edit or delete MARC records. See also <i>easy editor</i> .
<b>MARC record</b>	The record for each title in a collection. Every bibliographic record has a copy record for each physical or digital copy in the library.
<b>material type</b>	The physical form of the material being added, such as book, map, kit, etc. This appears in the MARC record fields 000 and 008.
<b>max checkouts</b>	The number of copies of all Circulation Types that someone of a particular Patron Type can have checked out at any time.
<b>offline circulation</b>	Barcode numbers collected outside of and separate from Destiny, using the Destiny Remote application. When the system is online again, the information can be uploaded into Destiny.
<b>One Search</b>	A configurable option in Destiny that lets you search the catalog and multiple free and subscription databases all at one time, with a single search request. Patrons do not need to remember the URLs, usernames and passwords for multiple databases.
<b>Open Educational Resource</b>	(OER) Free and openly-licensed educational material that can be used for teaching, learning and research.

## Destiny® Library Manager

Term	Definition
<b>option</b>	Destiny is organized by tabs, options and sub-tabs. Options appear in a gray bar on the left side of the screen and represent different functions that can be performed within a tab. A user has access to different tabs and functions based on assigned permissions.
<b>overdue report vs. overdue notice</b>	When creating a Current Checkouts/Fines report, you can choose the format of Report or Notice. Report (PDF or Excel) is a good option if you want to see all overdues/fines for your school or a list of materials that are due soon. Notice lets you hand out, mail or email notes to individual students and/or parents about overdues, fines and checkouts that are due soon.
<b>patron</b>	Anyone who uses Destiny. The functions a patron can perform are defined by their Access Level.
<b>patron fine</b>	Fee associated with a patron, such as for printing or ID badge replacement; not associated with a particular item in Destiny.
<b>patron type</b>	Classification (groupings) of patrons that makes it possible to set up different loan policies for different types of patrons. You can also limit reports and notices by patron type. In addition, Destiny maintains circulation statistics based on patron types.
<b>permission</b>	The authorization to view and use features of the system. Permissions are given when the Destiny Administrator or Site Administrator set up access levels. All users are assigned an access level with associated permissions.
<b>power search</b>	A keyword search in the Destiny Classic Catalog that uses up to three words or phrases, and can include wildcard characters, Boolean operators, and the selection of fields to narrow or expand a search.
<b>private collections</b>	The Private tab contains all collections you created or copied from the Public tab. Only collection owners can access the collections on their Private tab.
<b>public collections tab</b>	Includes collections that users have made visible to their school, their district or the public.
<b>public collections ribbon</b>	Located on the Public tab in Collections by Destiny; includes collections that users have made visible to the public.

## Destiny® Library Manager

Term	Definition
<b>RDA</b>	(Resource Description and Access) A new cataloging standard that is replacing the Anglo-American Cataloging Rules (AACR2). RDA is designed for the digital environment, and has the potential to expand data sharing capabilities. See also AACR2.
<b>Reading Counts</b>	(RC) Commercial reading program with reading levels assigned to books.
<b>reading level</b>	A designation of the difficulty level of a book based on the number of words on a page, complexity of the vocabulary, sentence length, book length, etc. Many programs assign levels, including Fountas & Pinnell, Lexile, Reading Counts, Accelerated Reader and DRA. The levels often consist of numbers or letters.
<b>ready hold</b>	A hold that is available to be picked up by a patron.
<b>ready hold expiration</b>	The number of days that an available copy is held for a patron. If the copy is not picked up, the hold expires. By expiring a ready hold that has not been picked up, Destiny can make the next pending hold ready, giving another patron in the queue the opportunity to check out the item.
<b>ready reservation</b>	A reservation that is available to be picked up by the patron.
<b>report builder</b>	An option in Reports that lets you to create a custom report.
<b>report manager</b>	An option in Reports where you can view and print reports that have run.
<b>resource list</b>	A place to collect information about titles and/or resources, and then edit and print the list. You can use the list for finding the titles or resources. You can also merge items from duplicated title and/or resource records onto one. In addition, use the list to generate reports or replacement barcode labels, or to collect resources for exporting or transferring to another site. Resource lists in Library Manager can be imported into Collections by Destiny.
<b>ribbon</b>	Customizable display group on the Destiny Discover homepage that shows library resources broken down by categories, such as Recently Added Books, Databases and eBooks. Also used in Collections by Destiny.

## Destiny® Library Manager

Term	Definition
<b>search options</b>	In Destiny Discover, these let you apply certain limiters to a search, such as author, format or reading level, instead of just performing a keyword search.
<b>serial</b>	Any publication (periodicals, newspapers, annuals, journals, numbered monographic series) issued in successive parts and bearing numerical or chronological descriptions.
<b>series</b>	Separate, independent works, usually related by subject, and issued at different times.
<b>shared account (Follett Digital)</b>	If patrons do not have a unique username and password, a Shared Account lets them access Follett Digital materials with a shared username and password. In addition, you can set up specific IP addresses to be logged in to the Shared Account automatically. With a Shared Account, patrons can open a title that has at least one copy that is not checked out or in use. Shared Account users cannot check out books, place holds, submit a review to Follett Digital resources or use the Notebook.
<b>shop</b>	A link to <a href="https://destinyexpress.com">destinyexpress.com</a> , where you can purchase hardware, scanners, barcodes and more.
<b>site association</b>	The site (school) associated with or assigned to a user, such as their home campus. Users can be associated with multiple sites.
<b>spine label</b>	Sticker that is placed on the spine of the book. Spine labels usually include a call number, but can also include genre, series number, etc.
<b>standard</b>	State or national learning goal for what students should know and be able to do in each grade.
<b>standard number (LCCN, ISBN, ISSN)</b>	Unique number assigned to books and journals; used for cataloging MARC records and ordering. See also <i>ISBN</i> , <i>LCCN</i> and <i>ISSN</i> .
<b>sublocation</b>	An area in your library or building, such as a special shelving location, display cabinet or classroom. Sublocations show in the catalog search results and are often used for genrefied libraries.

# Destiny® Library Manager

Term	Definition
<b>temporary title</b>	A title (and copy) that exists for a limited amount of time. Created "on the fly" in Check Out when no permanent record exists for a copy. When the copy is returned and there is no fine or hold, the title and copy are deleted from the database automatically if the "Title is deleted when checked in" checkbox is selected. To be able to create temporary records during check-out, you must have the <i>Add temporary titles during checkout</i> permission.
<b>title record</b>	Contains information about materials in your library collection. It includes title, author and subject headings. Title (or bibliographic) records are shared across the district. A copy record is added to the title record for each physical or digital copy in the library.
<b>TitlePeek</b>	Catalog enhancement that provides cover images for books. When available, a table of contents, fiction profiles, brief summary, annotation, author notes, first chapter or excerpt, and published reviews are included.
<b>Titlewave</b>	Follett's powerful online collection development and curriculum support tool that lets you make purchases for your school, analyze your collection, and create lists for future needs.
<b>TitleWise</b>	Tool designed to help you assess your library collection and identify strengths and areas of need, make decisions about purchases and weeding, and have the information needed to advocate for your library.
<b>transaction</b>	An event occurring between a patron and an item in the collection, such as checking out, checking in, placing a hold or paying a fine.
<b>visual search</b>	Hierarchical interface in Destiny Classic where students click on a series of pictorial buttons to search for resources.
<b>WebPath Express</b>	Online subscription service that gives your students instant access to thousands of relevant, grade-appropriate internet sites with just one search, directly from Destiny.
<b>wildcard</b>	Character, such as "*" or "?", that replaces one or more letters in a search term, when you are not sure of the spelling or form of the word. The * character can be used after the second letter to get all results that start with the characters that preceded it. For example, "Mil*" would return results for "Mile", "Miller", "Milk", etc. The "\$" replaces a single character. For example, a search for "Sm?th" would return results for "Smith" and "Smyth". Wildcards can be used in both catalog and circulation searches.

# Destiny® Library Manager

Term	Definition
<b>z-source</b>	Database of libraries around the world that have Z39.50 servers and let you search for and retrieve MARC records.



## Wrap-up

Thank you for attending 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, call Technical Support at 888.511.5114.

## Course Survey

Your feedback helps us improve current and future courses to better meet your needs. Please take a few minutes to complete a brief survey.

Course Survey: [www.follettsoftware.com/contactdata](http://www.follettsoftware.com/contactdata)

Course Task ID (provided by instructor): \_\_\_\_\_

Zip Code (confirm with instructor): \_\_\_\_\_

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