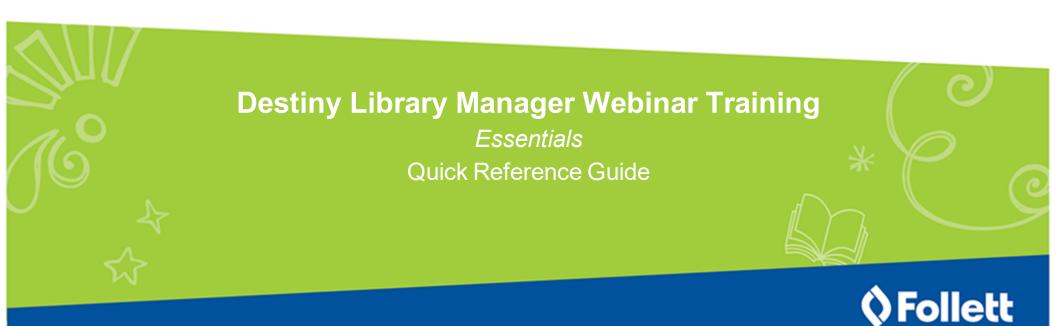


# Follett Destiny®





## Table of Contents

Importing Title Records from Titlewave	. 1
Importing Title Records	. 6
Adding Title and Copy Records from Resource Databases	
Adding Title and Copy Records Manually	.14
Setting Up One Search	. 20



## **Importing Title Records from Titlewave**

Adding new materials to your catalog does not need to be complicated. Destiny Library Manager saves you time and effort. When you buy new titles or copies from Follett, you can import the MARC records to your catalog directly from Titlewave.

1. Select Catalog > Titlewave > Order History sub-tab.



- 2. In the appropriate row, click **Import**. The Import Titles page appears.
- 3. In the Title Matching section, select how you want Library Manager to compare the incoming records for a match in your catalog:
  - **Strict:** Follett recommends strict title matching, which requires a match on the LCCN, ISBN or ISSN, plus the title and material type. If the author and publication dates are present, they are also compared. However, you can choose **Remove the author requirement from the strict matching rules**. If an incoming record contains a 13-digit ISBN and your district collection record has the 10-digit form of that ISBN or the reverse Library Manager considers them the same ISBN.
  - Relaxed: You can choose to have Destiny Library Manager match title records based on title, material type, author and publication date if a standard number is not found. If you don't mind that a title has different publication dates and standard numbers, you can also choose Remove the standard number and publication date requirements from the relaxed matching rules.

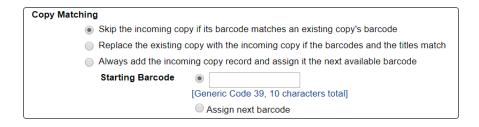
4. Select how you want Library Manager to handle incoming records if its MARC record data matches existing records in your catalog.

**Note:** Follett recommends you replace your existing title records with the import records if they have more information. By default, Library Manager replaces the existing records, but preserves and merges local tags or fields of information that apply specifically to your library.

Title Matching (2)
<ul> <li>Strict - Standard numbers, titles, material types, authors, and publication dates must match</li> <li>Remove the author requirement from the strict matching rules</li> </ul>
<ul> <li>Relaxed - If no standard number is found, allow matches based on title, material type, author, and publication date</li> </ul>
Remove the standard number and publication date requirements from the relaxed matching rules
If an incoming title matches an existing title:
Replace the existing title if the incoming title is better ?
Skip the incoming title
Always add the incoming title (may cause duplicate titles; Strict Matching will be used)

5. In the **Copy Matching** section, select how you want Library Manager to handle any copy records where an incoming barcode matches a barcode already in your catalog.

**Note:** Follett recommends you skip the duplicate incoming copy. If you choose to skip an incoming copy when the barcode matches an existing copy's, the report generated at the end of the import will identify any skipped copies. You need to add these copies manually.







Field	Definition	
Circulation Type	Assigns all the copies in the import file to a specific circulation type.	
	<b>Note:</b> Selecting this option will assign every item in the import file to the selected circulation type. Follett does not recommend selecting this option if the import file contains materials with various circulation types.	
Based on Call Number	Assigns the copies in the import file to different circulation types.	
	<b>Note:</b> To review or update the library's circulation type/call number associations, click <b>Update</b> .	



Field	Definition	
Copy Categories	Assigns all the copies in the import file to one or more copy category that was created prior to the import.	
	<b>Note:</b> To select the appropriate category descriptions, click <b>Assign</b> , and then click <b>OK</b> .	
Sublocation	Assigns the copies in the import file to a specific location/genre/subject.	
	Note: To add a location/genre/subject, click Other.	
Vendor	Assigns copies in the import file to a vendor. Select the appropriate vendor from the <b>Vendor</b> drop-down.	
	Note: To add a new vendor, click Other.	
Funding Source	Assigns the copies in the import file to a particular funding source.	
	Note: To add a new funding source, click Other.	
Status	Assigns a status to copies being added during an import.	

- 7. In the **Import File** section, do the following:
  - a. To add the incoming titles to a previously-created Resource List, select **Add the titles in the import file to** and choose a Resource List from the drop-down.
  - b. If your import file contains eBook records that belong only to your school, select **This file contains eBook records for only this site**. This prevents other sites in your district from being able to view and access the eBooks.
  - c. To limit the details in your import report to errors and warnings, select **Limit the Job Summary details to errors and warnings**.

Note: Deselecting this checkbox will create a record of every title and detail in the import file on the import report.

d. To list possible duplicate titles in the report summary after the import, select List possible duplicate titles in the Job Summary after import.



8. To have Library Manager compare incoming records with existing records, and generate a Job Summary without actually importing the records, click **Preview**.

**Note:** Follett recommends that you check the results before importing the records so you can decide whether the import settings need adjustment before you import.

- 9. If you are happy with the preview, click **Import** to begin the import. The Job Manager opens, and your report displays as *In Progress* at the top of the list.
- 10. When the status is Completed, click View.

Note: If any copies show as "skipped" on the report, you must add them manually.



## **Importing Title Records**

Teachers and students rely on your library for up-to-date resources and information, so you need to be able to add new materials to your catalog quickly and efficiently. Whenever your vendor gives you an importable file of MARC records for new titles or copies, use Destiny Library Manager's easy-to-use title import function.

- 1. Select Catalog > Import Titles > Add/Update sub-tab.
- 2. In the **Title Matching** section, select how you want Library Manager to compare the incoming records for a match in your catalog:
  - Strict: Follett recommends strict title matching, which requires a match on the LCCN, ISBN or ISSN, plus the title and material type. If the author and publication dates are present, they are also compared. However, you can choose Remove the author requirement from the strict matching rules. If an incoming record contains a 13-digit ISBN and your district collection record has the 10-digit form of that ISBN or the reverse Library Manager considers them the same ISBN.
  - Relaxed: You can choose to have Destiny Library Manager match title records based on title, material type, author and publication date if a standard number is not found. If you don't mind that a title has different publication dates and standard numbers, you can also choose Remove the standard number and publication date requirements from the relaxed matching rules.
- 3. Select how you want Library Manager to handle incoming records if its MARC record data matches existing records in your catalog.

**Note:** Follett recommends you replace your existing title records with the import records if they have more information. By default, Library Manager replaces the existing records, but preserves and merges local tags or fields of information that apply specifically to your library.

6

Title Matching ?

Strict - Standard numbers, titles, material types, authors, and publication dates must match
Remove the author requirement from the strict matching rules
Relaxed - If no standard number is found, allow matches based on title, material type, author, and publication date
Remove the standard number and publication date requirements from the relaxed matching rules
If an incoming title matches an existing title:
Replace the existing title if the incoming title is better ?
Skip the incoming title
Always add the incoming title (may cause duplicate titles; Strict Matching will be used) ?

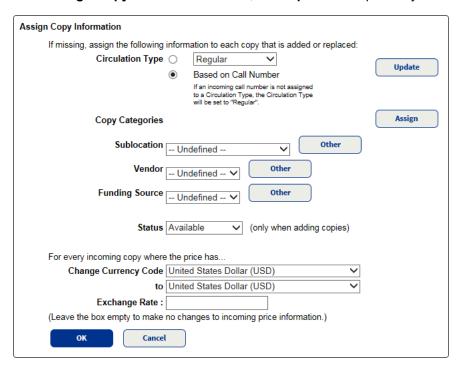
4. In the **Copy Matching** section, select how you want Library Manager to handle any copy records where an incoming barcode matches a barcode already in your catalog.



**Note:** Follett recommends you skip the duplicate incoming copy. If you choose to skip an incoming copy when the barcode matches an existing copy's, the report generated at the end of the import will identify any skipped copies. You need to add these copies manually.

Copy Matching		
Skip the incoming copy if its barcode matches an existing copy's barcode		
<ul> <li>Replace the existing copy with the incoming copy if the barcodes and the titles match</li> </ul>		
<ul> <li>Always add the incoming copy record and assign it the next available barcode</li> </ul>		
Starting Barcode		
[Generic Code 39, 10 characters total]		
Assign next barcode		

5. In the **Assign Copy Information** section, click **Update**. Complete any of the following fields.



Field	Definition
Circulation Type	Assigns all the copies in the import file to a specific circulation type.
	<b>Note:</b> Selecting this option will assign every item in the import file to the selected circulation type. Follett does not recommend selecting this option if the import file contains materials with various circulation types.



Field	Definition	
Based on Call Number	Assigns the copies in the import file to different circulation types.	
	<b>Note:</b> To review or update the library's circulation type/call number associations, click <b>Update</b> .	
Copy Categories	Assigns all the copies in the import file to one or more copy category that was created prior to the import.	
	<b>Note:</b> To select the appropriate category descriptions, click <b>Assign</b> , and then click <b>OK</b> .	
Sublocation	Assigns the copies in the import file to a specific location/genre/subject.	
	Note: To add a location/genre/subject, click Other.	
Vendor	Assigns copies in the import file to a vendor. Select the appropriate vendor from the <b>Vendor</b> drop-down.	
	Note: To add a new vendor, click Other.	
Funding Source	Assigns the copies in the import file to a particular funding source.	
	Note: To add a new funding source, click Other.	
Status	Assigns a status to copies being added during an import.	

- 6. In the **Import File** section, do the following:
  - a. To add the incoming titles to a previously-created Resource List, select Add the titles in the import file to and choose a Resource List from the drop-down
  - b. If your import file contains eBook records that belong only to your school, select **This file contains eBook records for only this site**. This prevents other sites in your district from being able to view and access the eBooks.
  - c. To limit the details in your import report to errors and warnings, select Limit the Job Summary details to errors and warnings.

**Note:** Deselecting this checkbox will create a record of every title and detail in the import file on the import report.

d. To list possible duplicate titles in the report summary after the import, select List possible duplicate titles in the Job Summary after import.



7. To have Library Manager compare incoming records with existing records, and generate a Job Summary without actually importing the records, click **Preview**.

**Note:** Follett recommends that you check the results before importing the records so you can decide whether the import settings need adjustment before you import.

- 8. If you are happy with the preview, click **Import** to begin the import. The Job Manager opens, and your report displays as *In Progress* at the top of the list.
- When the status is Completed, click View.

Note: If any copies show as "skipped" on the report, you must add them manually.





## **Adding Title and Copy Records from Resource Databases**

Maintaining accurate catalog records is vital for your students and teachers to know which information and resources are available. You can easily access and import thousands of title records from Alliance Plus and z-source databases into Destiny Library Manager.

#### **Searching Resource Databases**

- 1. Select Catalog > Add Title.
- 2. Select the material type you want to search for in the **Find** drop-down.
- 3. Select the type of search you want to conduct from the with drop-down.

Note: Follett recommends you search by ISBN to ensure you are not duplicating records.

4. On the Search Results page, scroll to find the item you searched for. The source of the title record is indicated by the icons adjacent to the title.



The red school house indicates the record is already in your district's catalog. If there is a district record in the search results, use that record to avoid duplication. You simply need to add your library's copies.



The "A+" indicates the record is in the Alliance Plus database. If there is not a district title record in the search results, there might be a title record in the Alliance Plus database.



The lightning bolt indicates the record is in the z-source database. If there is not a district or Alliance Plus record available, you can choose to use a z-source record. Z-source databases are owned by the host libraries, and you must set up access to them before you can find z-source search results.



#### Adding a Title from Follett's Alliance Plus or Z-Source Databases

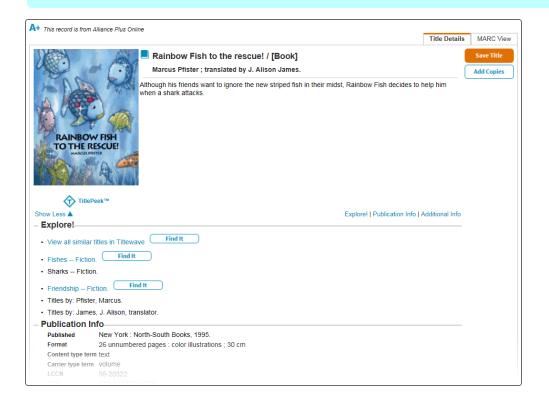
If a particular title is not already in your district's catalog, you can add the title record from Alliance Plus or z-source databases.

1. From the Search Results page, click **Details** or the title link of an item with the lacktriangle or lacktriangle next to it.

Note: You can review the MARC record details on the MARC View subtab.

2. Click Save Title.

Note: If you want to make any changes to the title record, click Edit Title after you save the title record.



## **Adding Copies**

To add copies to an existing district record, click on the title or **Details**. The Title Details page opens with additional information about the item. Select **Add Copies** to add a copy to this record.





## **Adding Title and Copy Records Manually**

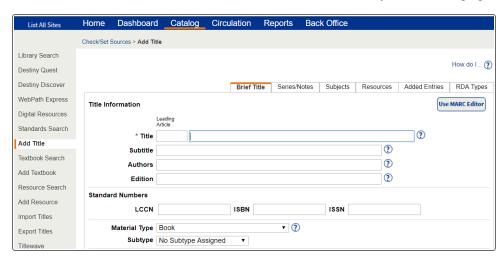
## **Adding Titles**

Some materials might seem challenging to catalog and add to your library's collection, such as your school's yearbook or a self-published collection of your students' work. Destiny Library Manager's Easy Editor makes manually adding any title record quick and easy.

- 1. Click Catalog > Add Title.
- 2. Select the material type you want to search for in the **Find** drop-down.
- 3. Select the type of search you want to conduct from the with drop-down.

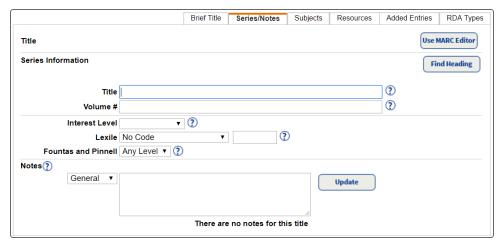
Note: Follett recommends you search by ISBN to ensure you are not duplicating records.

- 4. If a title is not available in the district catalog, Follett's Alliance Plus, or Z-Source databases, the Add Title page opens.
- 5. On the Brief Title sub-tab, enter basic information about the title you are cataloging. You can find most of this information on the item's title or copyright pages.



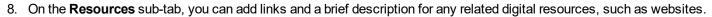
6. On the **Series/Notes** sub-tab, enter information about the title's series or volume, if available, and its interest level. If your school uses Lexile® Meaures or the Fountas and Pinnell program, you can also enter the codes here.





7. On the **Subjects** sub-tab, enter subject headings. Click **Find Heading** to see a list of headings previously used in your library. These headings help your patrons find titles with a common topic.

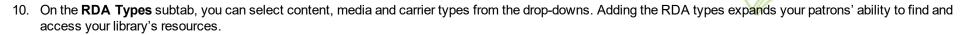






9. On the **Added Entries** sub-tab, you can type a different title for the item or any co-authors, illustrators or editors.

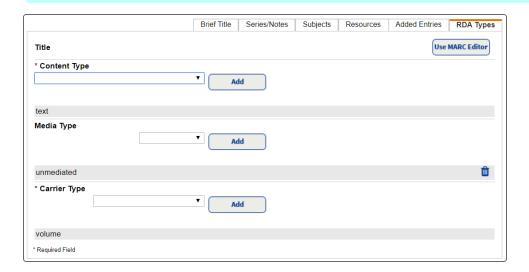




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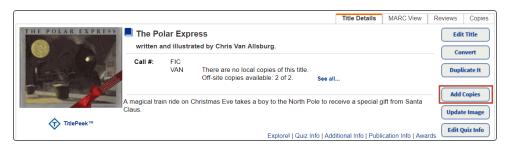
Note: Your district must have RDA as the preferred descriptive cataloging form to view this sub-tab.





## **Adding Copies**

To add copies to an existing district record, click the title or **Details**. The Title Details page opens with additional information about the item. Click **Add Copies**.



On the Add Copies page, enter all required information. Complete other fields as needed. Reports and inventory are more accurate when you complete more fields. Click next to a field for more information.

Field Name	Description
Status	The copy's availability for circulation.
*Number of copies (required)	The number of copies you want to add.
Starting Barcode	Manually add or have Destiny assign the next available barcode.
*Call Number (required)	The copy's call number.
Purchase Price	Include the price if you want the information to show on overdue and fine notices or to calculate your collection value accurately.
Circulation Type	Classifications of library materials that let you have different loan policies for different materials. You can also limit searches, reports and notices by circulation type. By default, this is set to the library's default circulation type.
Date Acquired	By default, it is set to the current date.

Field Name	Description
Copy Categories	Group copies for many different purposes, such as supporting curricula, tracking vendors and funding sources, creating bibliographies and reading lists, and promoting special collections or new materials.
Notes	Include information unique to a copy, such as damage to the book or a signed copy. The note shows at the top of the page whenever you first retrieve a copy in Circulation.
Volume, Issue, etc.	If the copy requires enumeration or chronology (for example, Volume, Issue, Number or Year), you can enter that in this field.
Copy Number	If there are multiple copies of a title, use to identify the number of copies.
Sublocation	Assign the copies to a specific area in your library or by a location/ genre/subject.
Vendor	The vendor you purchased the copies from.
Funding Source	Indicate that the copies were purchased using a particular funding source.

After you enter all the information, click **Save Copies**.



## **Setting Up One Search**

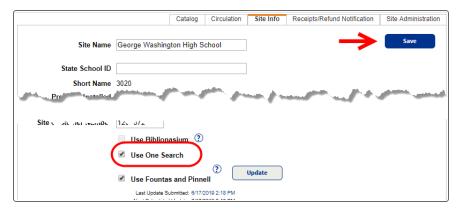
Your teachers and students can take advantage of your school's subscription databases all in one place through Destiny® One Search™. One Search saves staff and patrons time and effort by letting them search the catalog and multiple free and subscription databases all at one time with a single search request. In addition, patrons do not need to remember the URLs, usernames and passwords for multiple databases.

#### **Prepare to Set Up One Search**

Before you begin the setup process, you need the following:

- Your customer number, which can be found in your welcome letter.
- The URL location and the version of the web-based library catalogs you want to make available to your users.
- Usernames and passwords for paid subscription databases.
- IP addresses of your library web server for IP authenticated subscription databases, if applicable.
- A custom URL, if one is required, to access subscription databases.

## **Set Up Site Configuration Settings**



# To set up the One Search Site Configuration setting as the Destiny Administrator:

- 1. On the district Welcome page, click **Setup**.
- 2. Next to the site that will use One Search, click ....
- 3. Confirm that the site's customer number is correct.
- 4. Select the **Use One Search** checkbox.
- 5. Click Save.



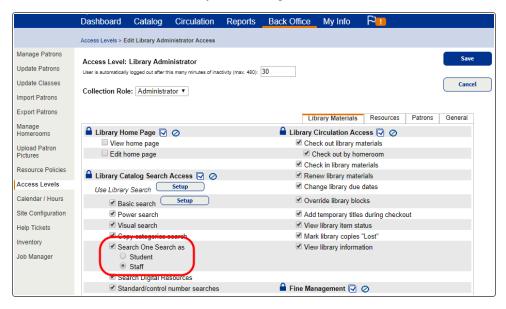
To set up the One Search Site Configuration setting as the Site Administrator:

- 1. Select Back Office > Site Configuration > Site Info.
- 2. Confirm the customer number is correct.
- 3. Select the **Use One Search** checkbox.
- 4. Click Save.



## **Set Up One Search Access Levels**

Those who will add and edit One Search databases need the correct permissions. Most likely the Library Administrator should have this access, but you can also give other access levels, such as library staff, the rights to add and edit databases.



### To set up administrative access to One Search:

- Select Back Office > Access Levels.
- Next to the access level you want to give administrative access to, click
- 3. Select the Search One Search as checkbox, and then select Staff.
- 4. To let users add and edit One Search databases, select the **Set up One Search** checkbox.
- 5. Click Save.

#### To set up patron access to One Search:

- 1. Next to Patron or the access level you use for students, click <a>\_\_\_\_</a>.
- 2. Select Search One Search as, and then select Student.
- 3. Click Save.

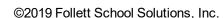
## To let guests who access your library catalog use One Search:

- 1. Next to Guest or the access level you use for guests, click ...
- 2. Select the Search One Search as Guest checkbox.

**Important**: Make sure you understand your online subscription database license agreement before you allow public access. Anyone who can access your Destiny URL from inside or outside your network may be able to use One Search if you allow guest access. You are responsible for complying with the license terms of third-party content vendors.

3. Click **Save** to complete or **Cancel** to leave without granting this access.





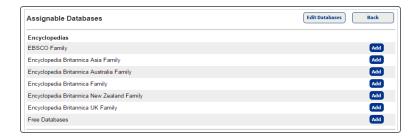


# \*

#### **Add One Search Databases**

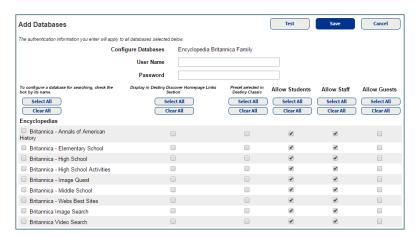
To add non-IP verified subscription databases to the One Search service:

- 1. Select Catalog > Search Setup > Enriched Content Searches.
- 2. Next to One Search Database Information, click Edit.
- 3. Click Add Databases.
- 4. Next to the database you want to add, click Add.



Each database you select might require you to enter different authentication information, such as a username, password, URL or customer number. Obtain this information from the database vendor.

If you would like students to have access to search One Search databases away from school, ensure your students log in to Destiny with a username and password. In the event your selection yields a list of multiple databases, such as when you select a subscription encyclopedia database, select the checkboxes to enable the databases you subscribe to.



Selecting the checkboxes in the "Display in Destiny Discover Homepage Links" column adds those databases to the Destiny Discover homepage Links ribbon.

Selecting the checkboxes under "Preset selected in Destiny Classic" tells Destiny to search these databases by default whenever users perform a Basic library search and set the Material Type drop-down to Any Type. (Selecting Any Type ensures that the online databases are searched.) In Power Search, Destiny automatically selects the checkbox for the Preset selected databases under Include Online Resources. Patrons must manually select any database in Power Search not set as Preset selected.

The **Allow Students**, **Allow Staff** and **Allow Guests** options let you decide which groups of patrons–students, staff or guests, respectively–can search specific databases. You need to enable the students, staff and guest access levels to give these patron groups permission to search One Search.

Ensure your Third-Party Subscription Database licenses allow public access before permitting guests to search One Search. You are responsible for complying with the license terms.

- 5. Click Save.
- 6. Repeat the steps for the databases you want to include in One Search.
- 7. When you finish, close the window.



### **Set Up IP-Verified Subscriptions**

### **Download the Host Script**

If your library has IP-verified database subscriptions, which use verified IP addresses to access the database information, your network administrator must download the One Search host script and configure your web server to access this file.

Have your network administrator (or the person in charge of your computer network) access the One Search host script through Destiny online Help and provide you with the complete path to the FSCPROXY.PL file, as you need to enter it in Destiny when setting up IP-verified subscriptions.

The only difference in patron use of IP-verified database subscriptions and other One Search databases is that while students with a Destiny login can search One Search databases from home, they cannot click a search result in an IP-verified subscription to view it as they can in other subscription databases. Instead, students must save the search result(s) to a Resource List to view later at school.

### Configure a Web Server for IP-Verified Subscriptions

To authenticate your site's subscription to IP-verified subscription databases, you need one or more of the following:

- · Username and password
- Database IP address
- · Custom URL of the database

Note: In addition, the server on which you install this proxy must connect to the Internet through an IP address that has been verified with the subscription service.

Important: Obtain this information from each database provider. Follett does not have access to this information.

You should also have the complete path to the FSCPROXY.PL file your network administrator provided after downloading the One Search host script and configuring your web server to access this file.

If you are setting up the FSCPROXY.PL host script to "tunnel" information through a proxy server, you need to edit the FSCPROXY.PL file once you download it:

- 1. Make sure Perl is configured on your web server. It is a free, cross-platform web server language you can download from numerous websites, including <a href="http://aspn.activestate.com/ASPN/Downloads/ActivePerl/">http://aspn.activestate.com/ASPN/Downloads/ActivePerl/</a>.
- 2. Download the zipped fscproxy.pl file.
  - If you are using the Apache server, place the file in your \cgi-bin directory in \www root on the web server with Execute permissions.
  - If you are using IIS, place it in the \Inetpub\Scripts folder on the web server with Execute permissions.
- 3. Open the FSCPROXY.PL file in a text editor, such as Notepad or ConTEXT.

4. Enter the IP address of your proxy server by replacing the lines

```
my $proxy_path
with
my $proxy_path="127.0.0.1"
and replacing 127.0.0.1
with
your proxy server IP address
```

Important: Quotation marks are required around the IP address.

5. Enter the port on which your proxy server is listening by replacing the line

```
my $proxy_port
with
my $proxy_port="8080"
and entering the correct port number instead of 8080.
```

**Important**: Quotation marks are required around the port number.

6. Save and close the FSCPROXY.PL file.

7. Provide the site or library administrators with the complete path to the FSCPROXY. PL file, as they must enter this path when setting up Destiny to access IP-verified subscriptions.

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**Note:** All patron search requests are handled through <u>onesearch.fsc.follett.com</u>, regardless of IP authentication settings. If IP authentication is enabled for a database, <u>onesearch.fsc.follett.com</u> calls the One Search IP authentication host script (fscproxy.pl), which in turn contacts the selected subscription databases.

Important: At a minimum, the web server hosting the FSCPROXY. PL script must allow requests from onesearch.fsc.follett.com and must allow outgoing HTTP connections to all supported subscription databases. Library patrons and outsiders do not need direct access to the machine hosting the FSCPROXY. PL script.

Follett recommends that you configure the web server to deny access to the FSCPROXY.PL script from all machines except http://onesearch.fsc.follett.com/.

#### **Enter the Host Script Path in Destiny**

To use IP-verified subscriptions, enter the path to the FSCPROXY.PL host script:

- 1. Select Catalog > Search Setup > Enriched Content Searches.
- 2. Click Edit next to IP Verified Subscriptions.
- 3. Enter the path to the FSCPROXY.PL host script in the path field.
- 4. Click **Test** to test the path.
- 5. Click Save.

## Set Up One Search for Multiple Sites

If your district purchases subscriptions to online databases for the entire district, you can push One Search database configurations to multiple sites. This is a simple way to enter authentication information once and apply it to other schools in the district.

## To push One Search database configurations to another site or sites:

- 1. Log in to Destiny as the Destiny Administrator.
- 2. Select Setup > District Options.
- 3. Next to One Search Database Information, click Edit.
- 4. Select a school to be the source site.

The database configurations at the source site will be duplicated at other sites in the district. Therefore, you should set up the source site with every district subscription that you want to push to other sites.



The push process only works for databases that use the same username and password for each school in the district. Any databases that require a unique username and password for each school need to be set up at the individual schools. Users at each school who have the Set up One Search permission can add or edit database configurations.

If any of the receiving schools already have databases configured that are not configured at the source site, those databases are not affected by the push. If the source school and any of the receiving schools have a database in common, the receiving school's configuration for that database will be overridden when the push is processed.

6. From the "Push Configuration to" drop-down, select the entire district, a site type or a single site.

The push process will automatically enable the Use One Search checkbox in Site Configuration for any receiving sites that do not already have it enabled.

- 7. Click Go.
- 8. A message notifies you which sites will receive the database configurations you set up at the source site. To proceed, click Yes.

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