CURRENT CHECKOUTS/FINES REPORTS – RESOURCE MANAGER

Destiny Resource Manager allows users with limited and full access to generate reports used to identify students with checked-out items, overdue items, and/or outstanding fines.

In this tutorial you will learn how to:

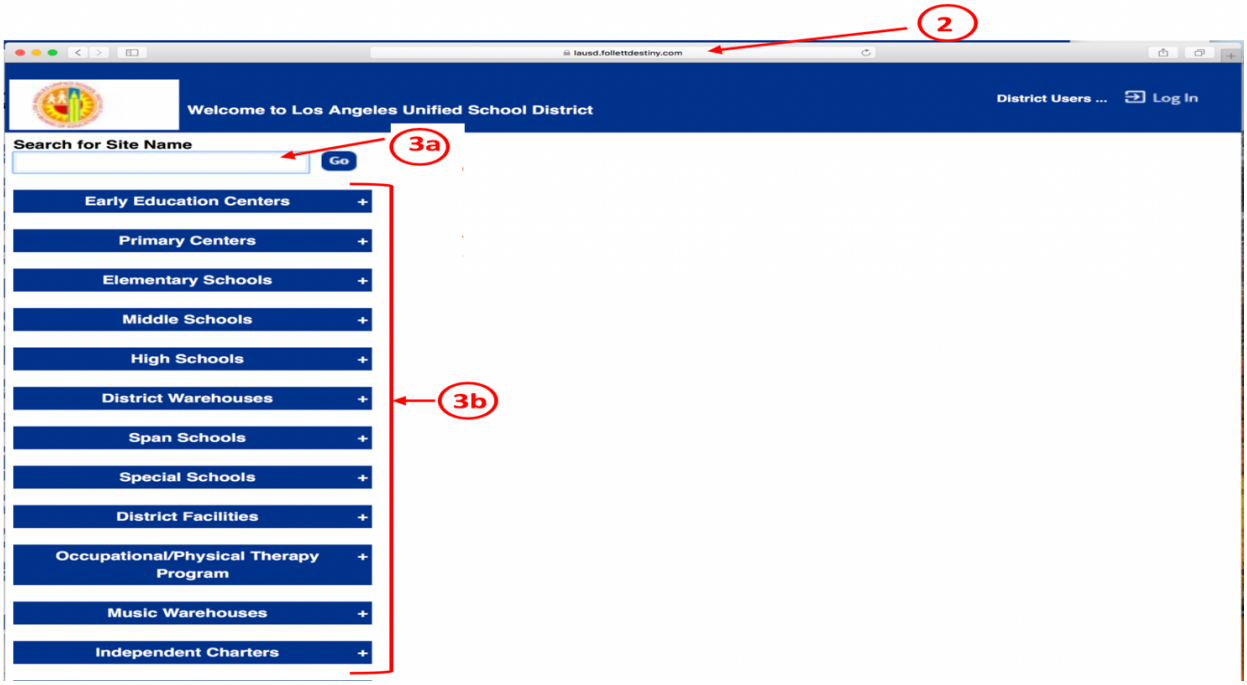
- *Generate various reports used to identify students with checked-out items, overdue items, and/or outstanding fines.*
- *The reports include:*
  - *An Excel Spreadsheet* ***Page 3***
  - *Email to Homerooms (A PDF is sent to homeroom teachers listing their students with checked-out items, overdue items, and/or outstanding fines.)* ***Page 6***
  - *Notices (to be printed and given to patrons)* ***Page 9***
  - *Notices (emailed directly to patrons via Destiny)* ***Page 12***

Requirements:

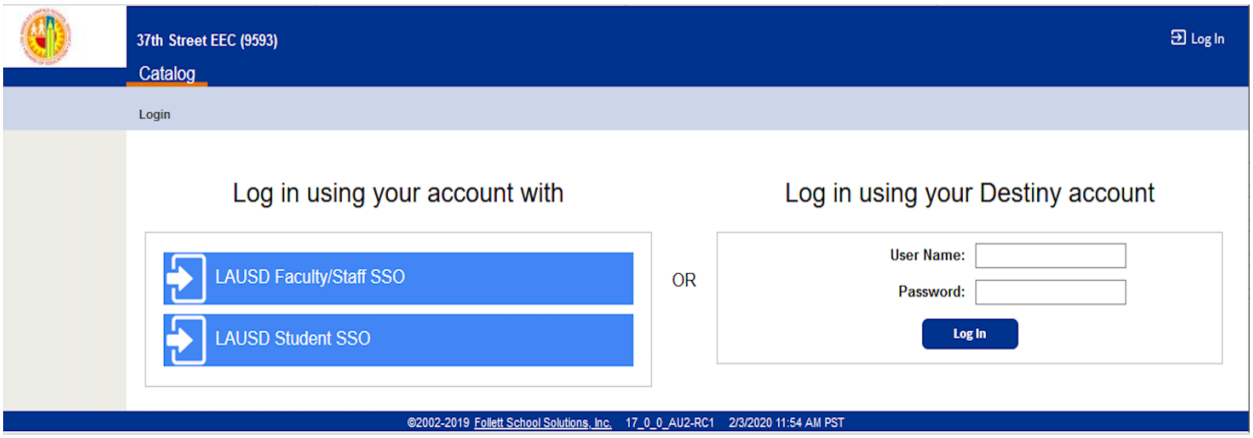
- *PC or Mac*
- *A web browser such as:*
  - *Google Chrome*
  - *Mozilla Firefox*
  - *Safari*
- *Limited or full access to Destiny Resource Manager*
- *An Internet connection*
- *An LAUSD Single-Sign-On (SSO)*

LOG IN TO DESTINY

1. Open a web browser
2. In the address bar, type the following URL: http://lausd.follettdestiny.com
3. There are two ways to find your school:
    a. In the **Search for Site Name** field, type in the name or location code of your school. Press the **Enter** key on the keyboard or click on the **Go** button, OR
    b. Click on the blue bar associated with your school group (e.g. Middle School) then find and click on your school's link. You will be taken to your site's home page. Click on **Log In**, located on the top right side of the window.

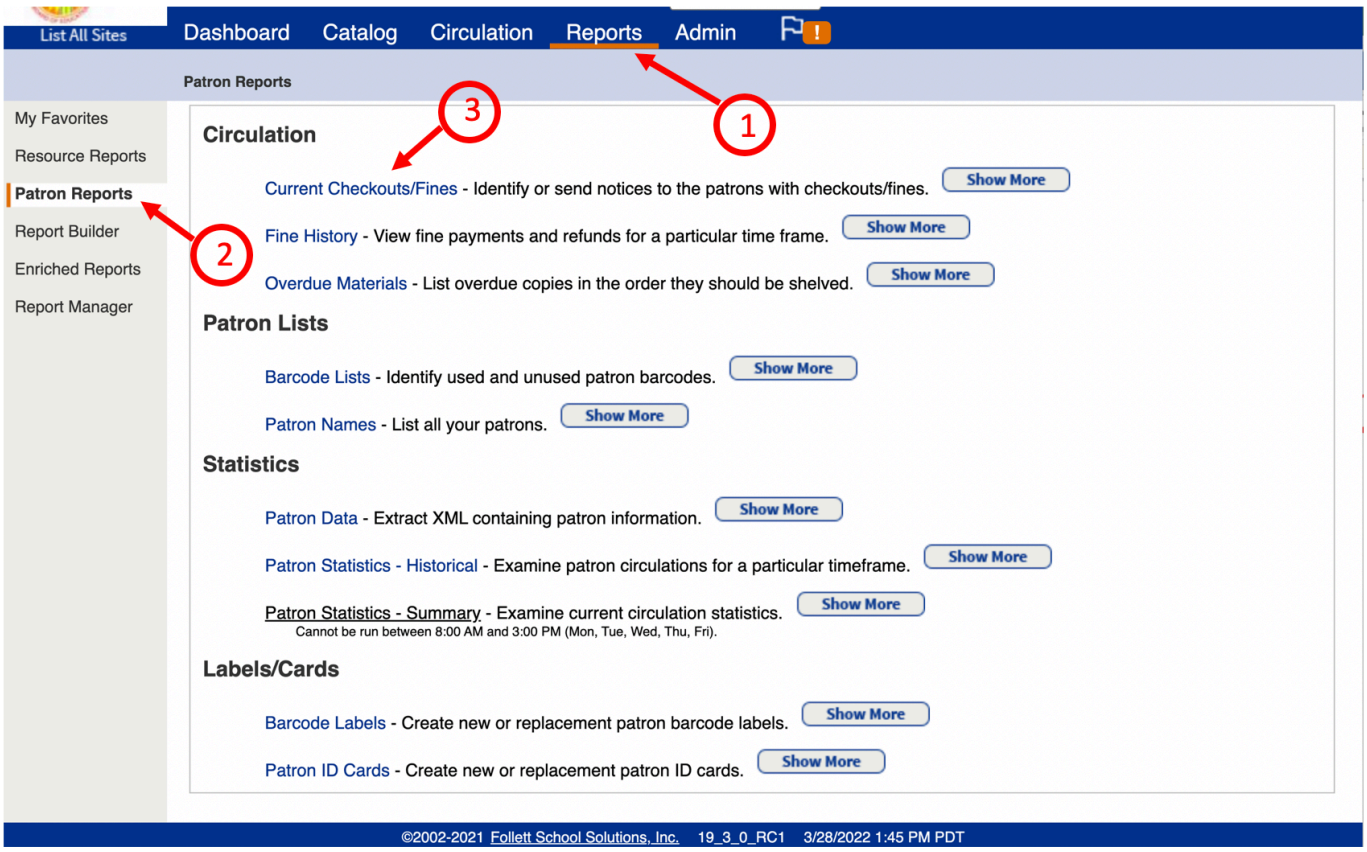


Select the **LAUSD Faculty/Staff SSO** to login. Enter your full LAUSD email (e.g. jane.doe@lausd.net) and password to log in.
Individuals granted access to Destiny for a specific site(s) or District level access and assigned a specific User Name and Password, use the Destiny account log in on the right.

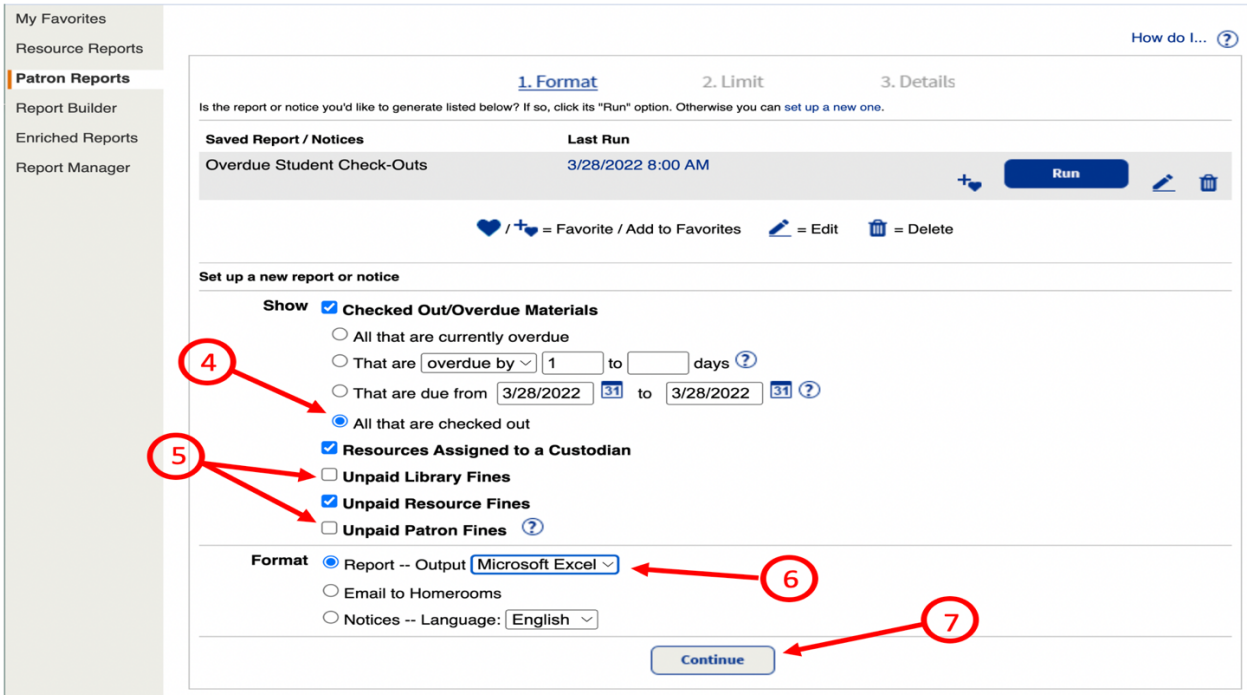


GENERATING AN EXCEL SPREADSHEET

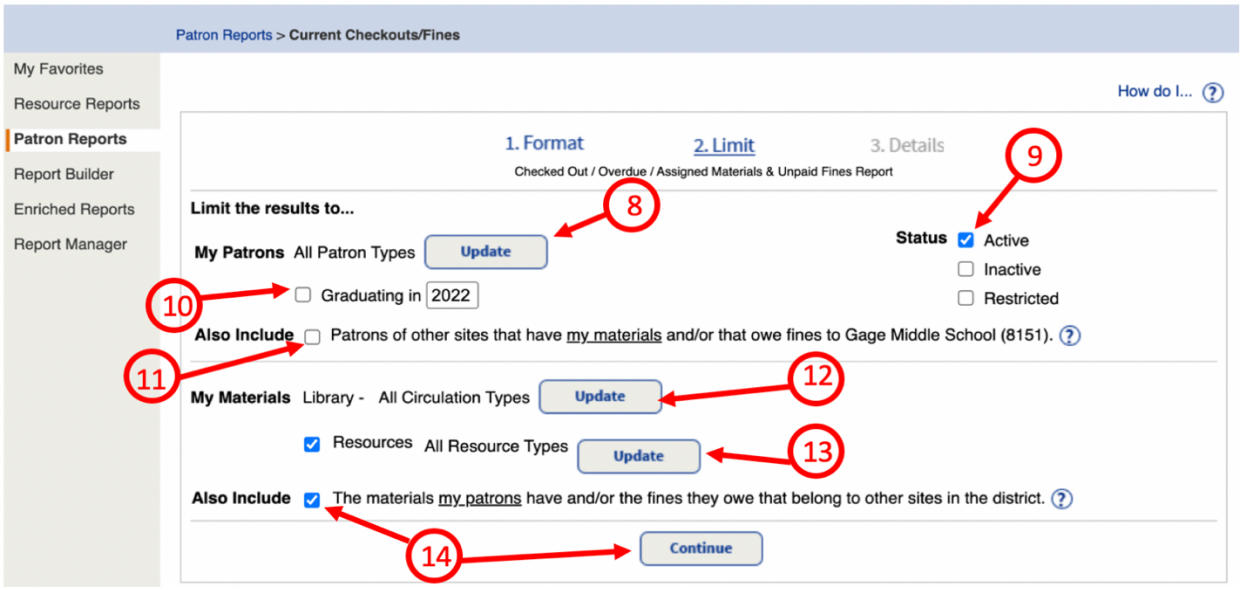
1. Click on the **Reports** tab.
2. Click on the **Patron Reports** option.
3. Under the **Circulation** section, click on the **Current Checkout/Fines** report.



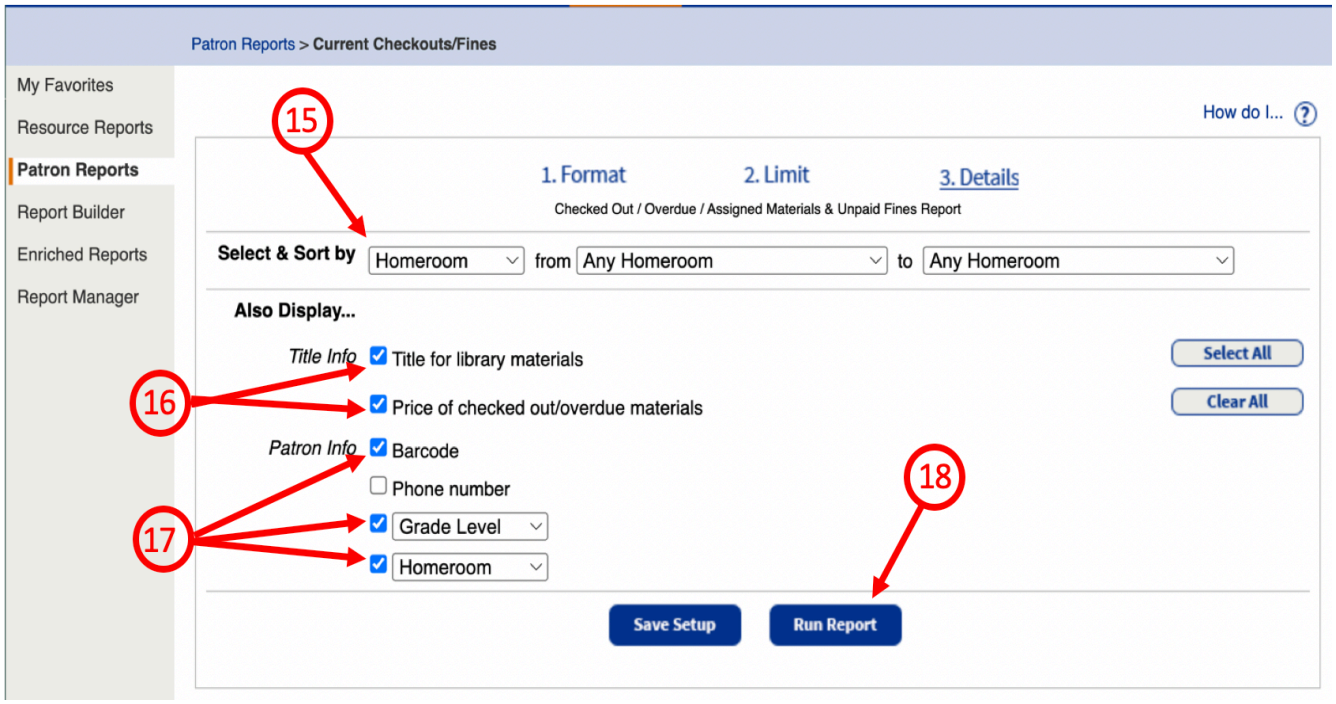
4. Under the **Set up a new report or notice**, in the **Show** section, select the radial button for **All that are checked out** (NOTE: You have the option to customize the report by selecting any of the other options. However, this tutorial will show how to generate a report that will include students with items checked out and overdue as well as students with outstanding fines.)
5. Uncheck **Unpaid Library Fines** and **Unpaid Patron Fines**.
6. In the **Format** section, select the radial button for **Report—Output** and use the drop-down menu to select **Microsoft Excel**.
7. Click on **Continue.**



8. Click on **Update** for **All Patron Types.** From the options, check the box for the patron types you want to include. Then, click on **OK**.
9. For **Status**, only check **Active.**
10. Leave the box for **Graduating in** unchecked.
11. Leave the box for **Patrons of other sites that have <u>my materials</u> and/or that owe fines…** unchecked.
12. Click on the button, **Update**, for **All Circulation Types**. Click on **Clear All**, then click on **OK**.
13. Check the box for **Resources**. Then click on the button, **Update**, for **All Resource Types.** In the first row, click on the button **Clear All.** Then only check the box for **Textbooks,** second row. Scroll to the bottom of the page and click on **OK**.
14. Check the box for **The materials <u>my patrons</u> have and/or the fines they owe that belong to other sites in the District.** Then click **Continue**.

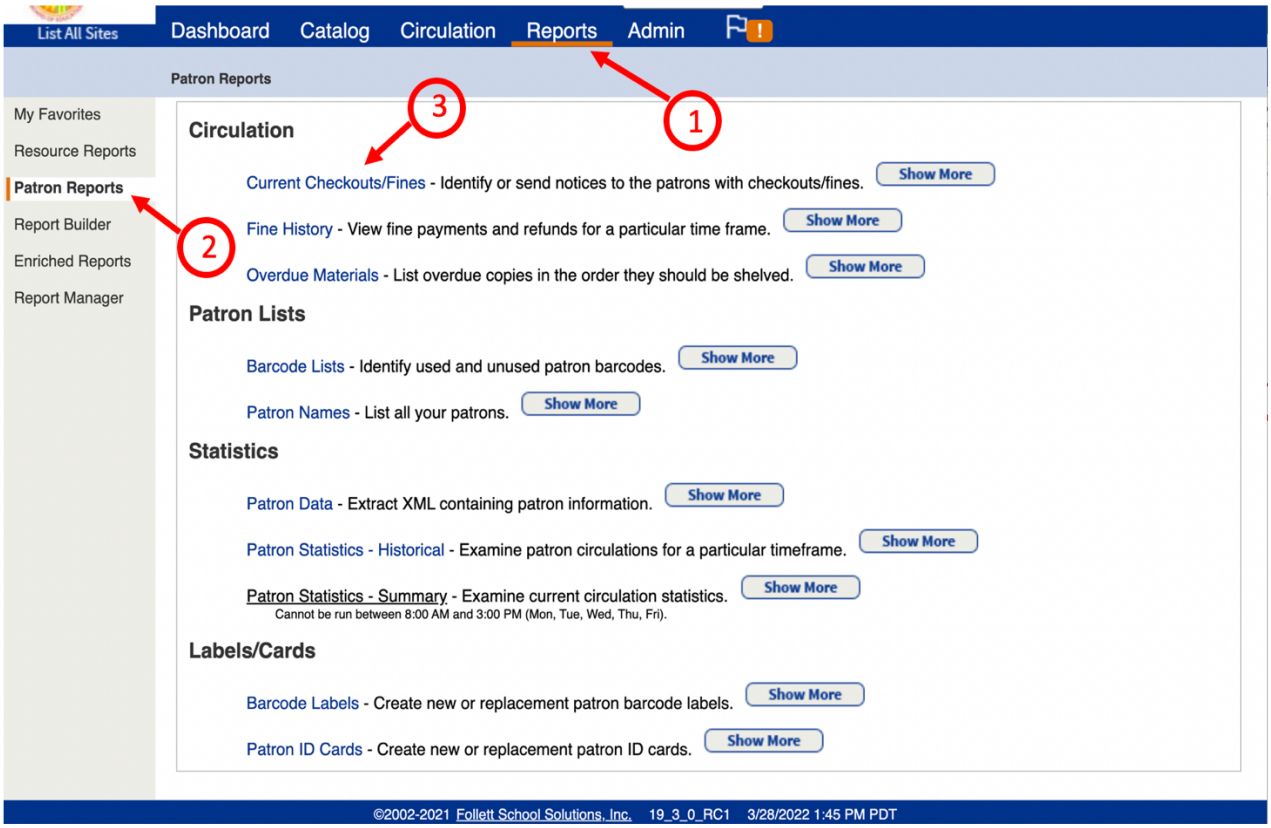


15. For **Select & Sort by**, use the drop-down menu to select how you want the data sorted. You can choose between **Patron Name**, **Grade Level**, and **Homeroom**. It is recommended to sort by **Homeroom**. Leave the **From** and **to** drop-down menus on **Any Homeroom**. For the other options, leave them blank to include all. If you want a specific **Patron Name**, **Grade Level**, or **Homeroom**, use the **From** and **to** drop-down menus to specify one or a range.
16. Check the box for **Title for library materials** as well as for **Price of checked out/overdue materials.**
17. For **Patron Info**, check the box for **Barcode,** then use the dropdown menu to select **Grade Level,** and **Homeroom** and check those boxes.
18. Click on **Run Report**. You will be taken to the Job Manager. Once the status shows **completed**, you can click on the **View** link to access the report.
    NOTE: If you choose to save the report, click on **Save Setup**. You will be prompted to name the report in the **Save As** field. **IMPORTANT** – **DO NOT** SCHEDULE THE REPORT. After naming your report, you can either click on **Save Setup** or **Save & Run**.

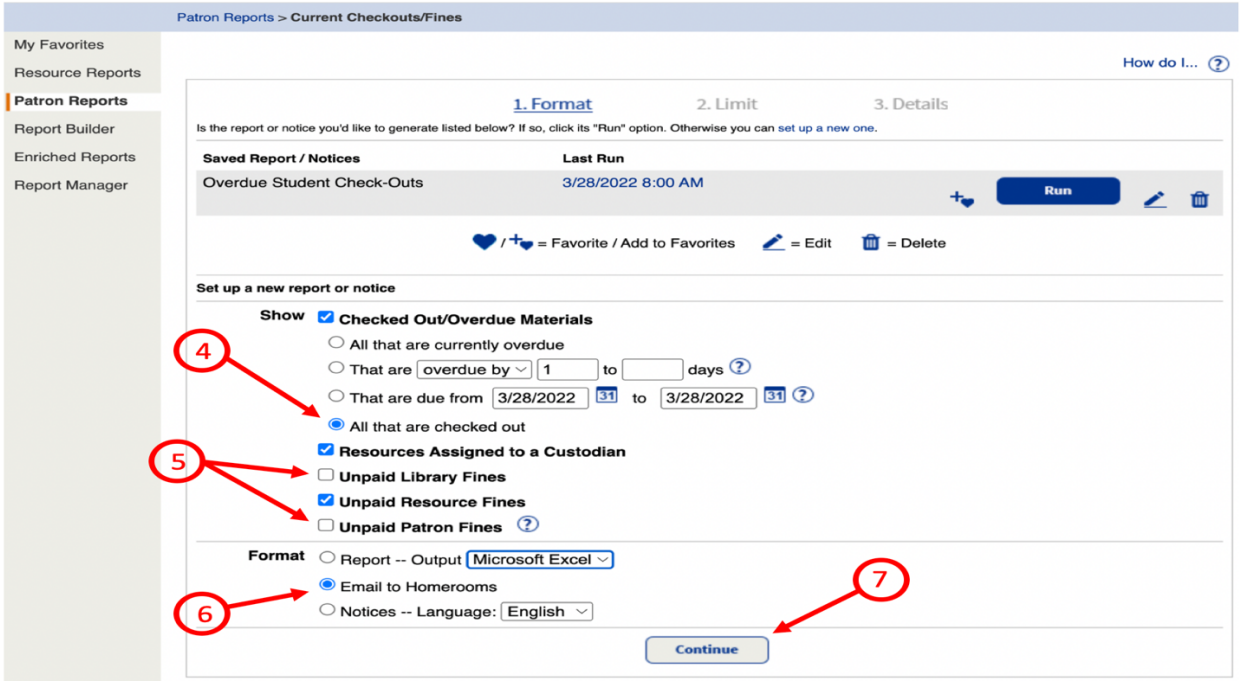


GENERATING AN EMAIL TO HOMEROOMS (When using this feature, it is recommended you first inform teachers and ask if they are willing to receive this email and inform the students of their outstanding materials and or fines.)

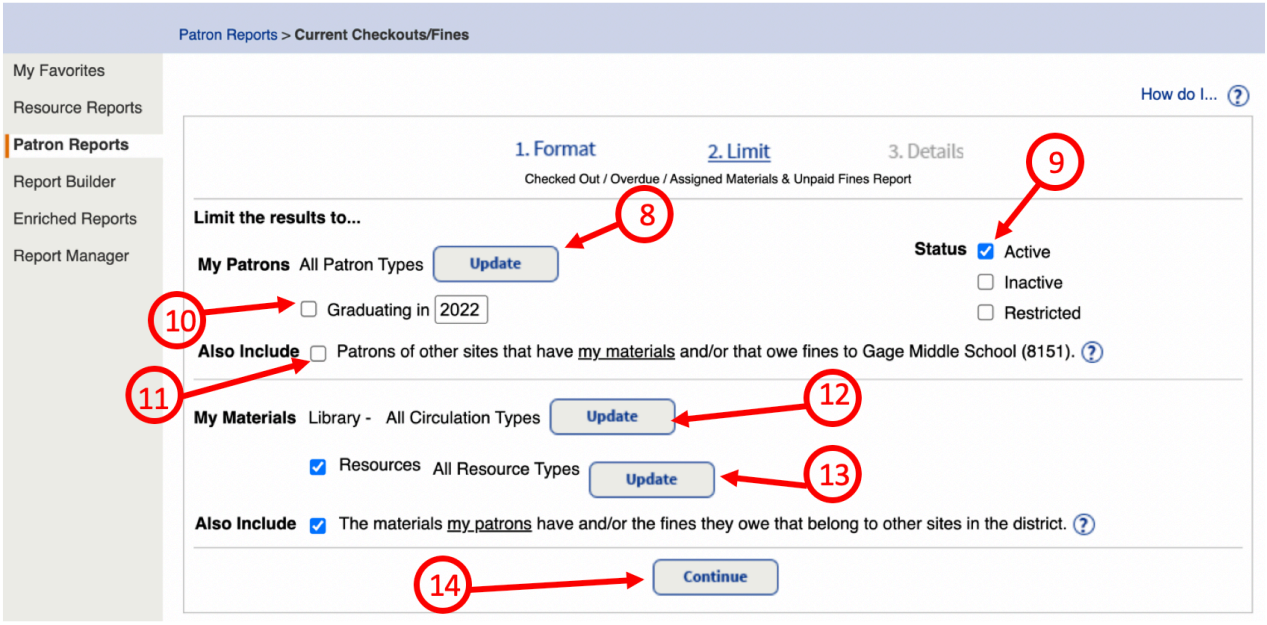
1. Click on the **Reports** tab.
2. Click on the **Patron Reports** option.
3. Under the **Circulation** section, click on the **Current Checkout/Fines** report.



4. Under the **Set up a new report or notice**, in the **Show** section, select the radial button for **All that are checked out** (NOTE: You have the option to customize the report by selecting any of the other options, however, this tutorial will show how to generate a report that will include students with items checked out and overdue as well as students with outstanding fines.)
5. Uncheck **Unpaid Library Fines** and **Unpaid Patron Fines**.
6. For **Format**, select the radial button, **Email to Homerooms.**
7. Click on **Continue.**

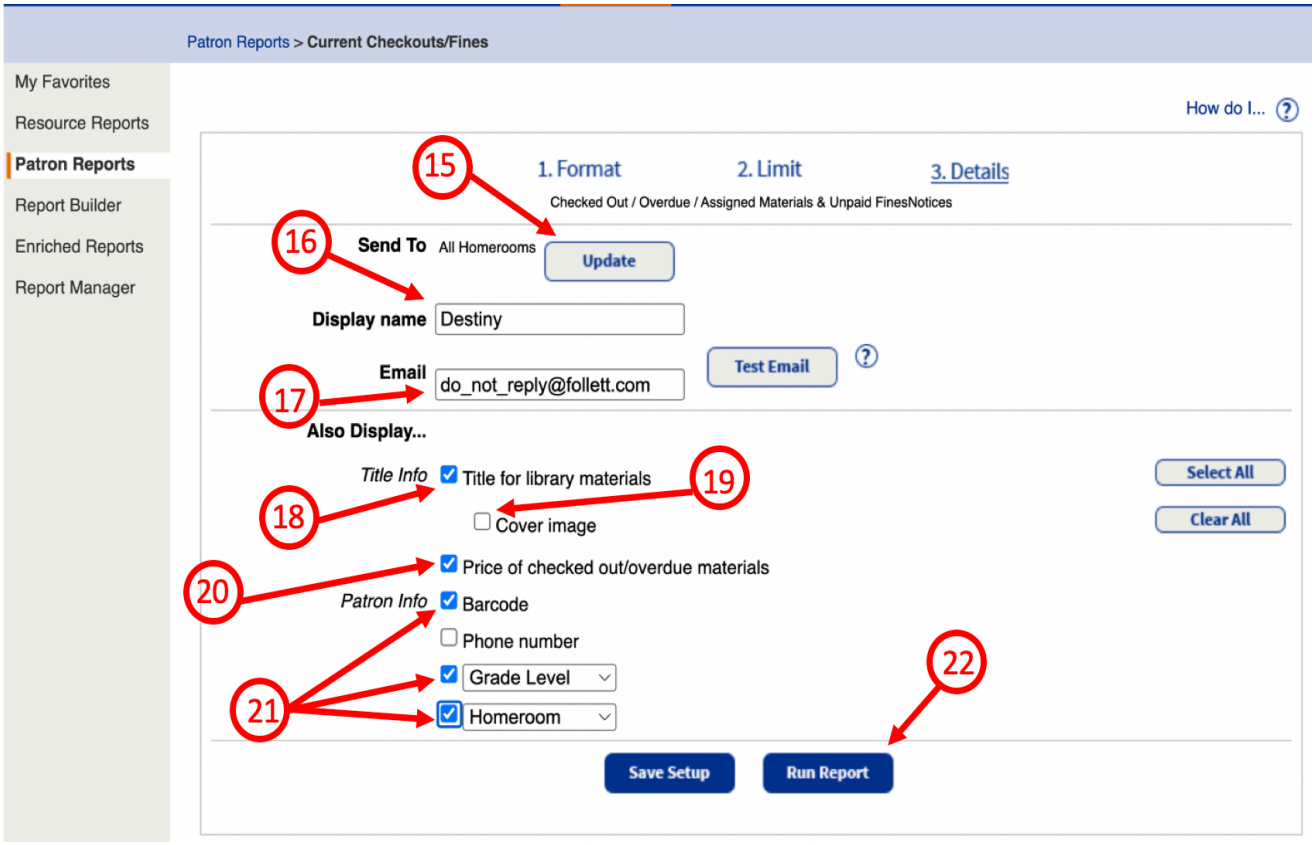


8. Click on **Update** and check the box for the patron types you want to include. Then click on **OK**.
9. For **Status**, only check the box for **Active.**
10. Leave the box for **Graduating in** unchecked.
11. Leave the box for **Patrons of other sites that have my materials and/or that owe fines…** unchecked.
12. Click on the button, **Update**, for **All Circulation Types**. Click on **Clear All**, then click on **OK**.
13. Check the box for Resources, then click on the button, **Update**, for **All Resource Types.** In the first row, click on the button **Clear All.** Then only check the box for **Textbooks;** second row. Scroll to the bottom of the page and click on **OK**.
14. Check the box for **The materials my patrons have and/or the fines they owe that belong to other sites in the District,** then click **Continue**.



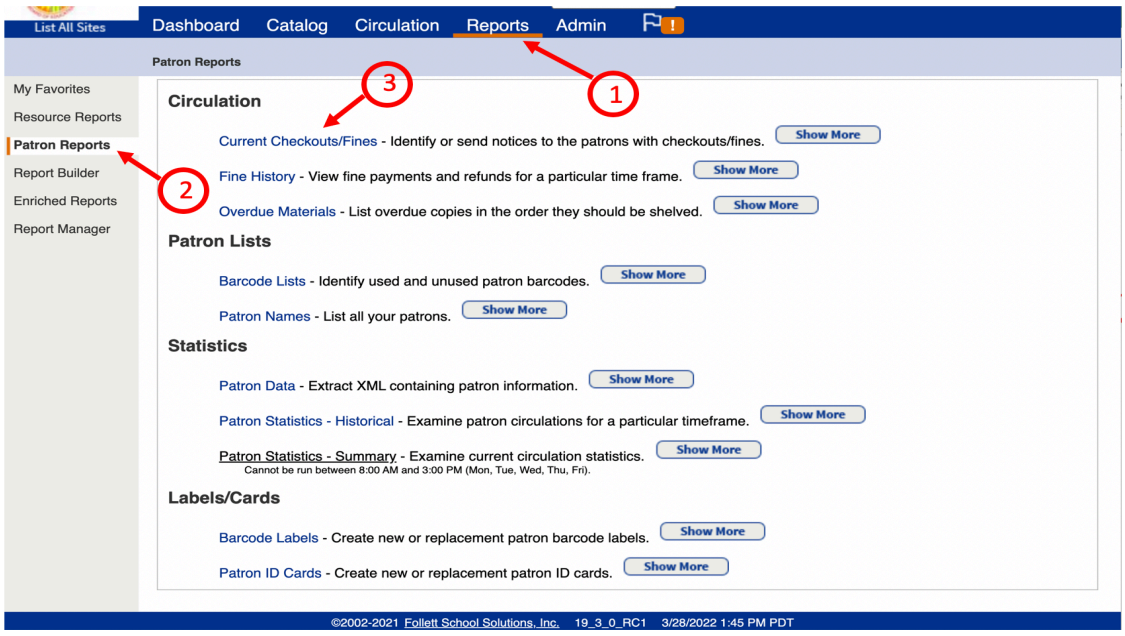
15. To include all homerooms, skip this step. Otherwise, for **Send To All Homerooms**, click on the **Update** button to select the specific homerooms you want to send an email to and then scroll down and click **OK.**
16. By default, the **Display name** (sender name) will be **Destiny**. This name will be displayed on the email received by the homeroom teachers. You have the option to change this to whatever name you want displayed.
17. By default, the Email displayed will be **do_not_reply@follett.com** (this prevents recipients from replying to the email). You have an option to change this to include your email, if you are willing to receive replies. It is recommended to leave the default email.
18. Check the box for **Title for library materials**.
19. Uncheck the box for **Cover image**
20. Check the box for **Price of checked out/overdue materials.**
21. For **Patron Info**, check the box for **Barcode.** Then use the dropdown menu to select **Grade Level,** and **Homeroom** and check those boxes.
22. Click on **Run Report**. You will be taken to the Job Manager to view a summary of the emails sent.

    NOTE: If you choose to save the report, click on **Save Setup**. You will be prompted to name the report in the **Save As** field. **IMPORTANT** – **DO NOT** SCHEDULE THE REPORT. After naming your report, you can either click on **Save Setup** or **Save & Run**.

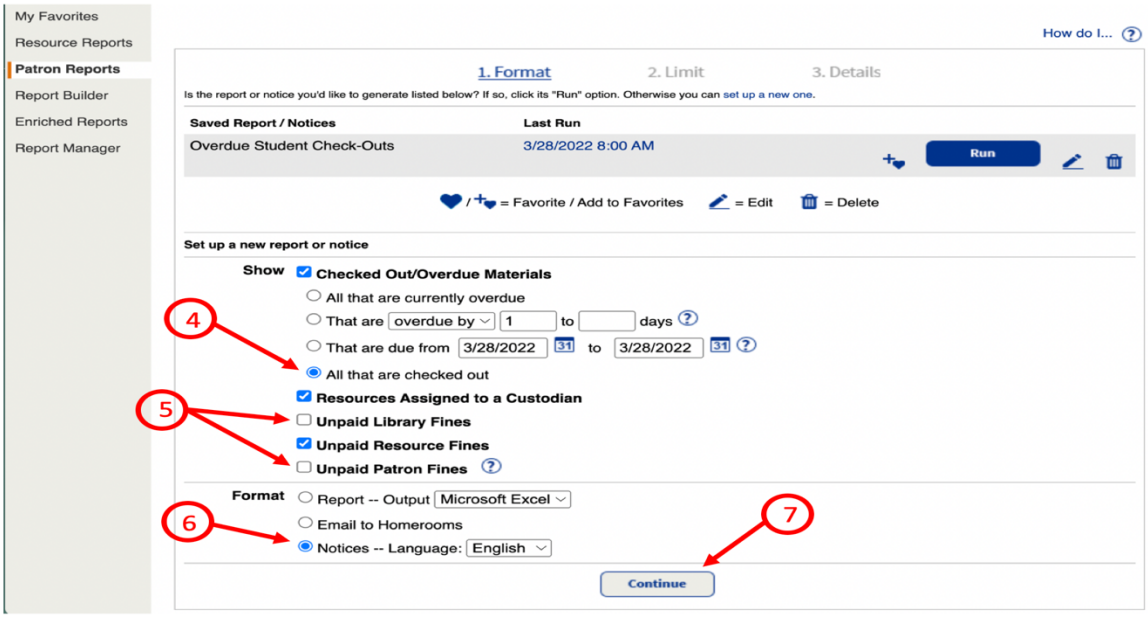


GENERATING NOTICES (These are meant to be printed and given to patrons.)

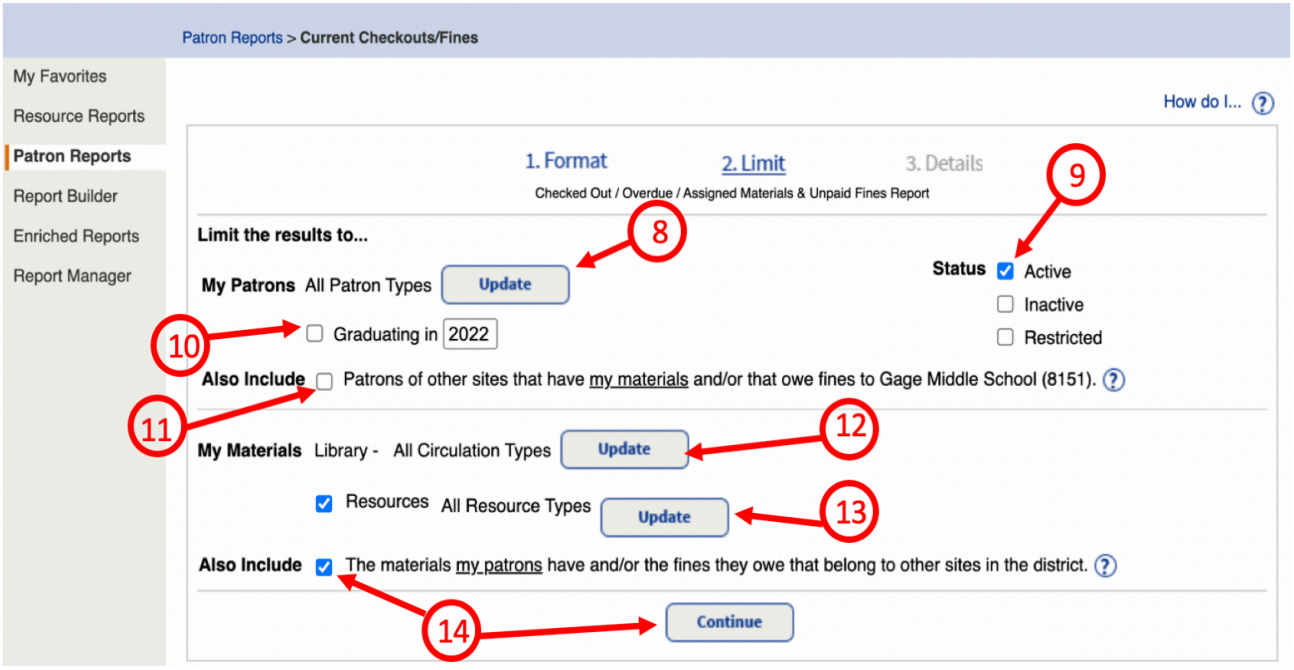
1. Click on the **Reports** tab.
2. Click on the **Patron Reports** option.
3. Under the **Circulation** section, click on the **Current Checkout/Fines** report.



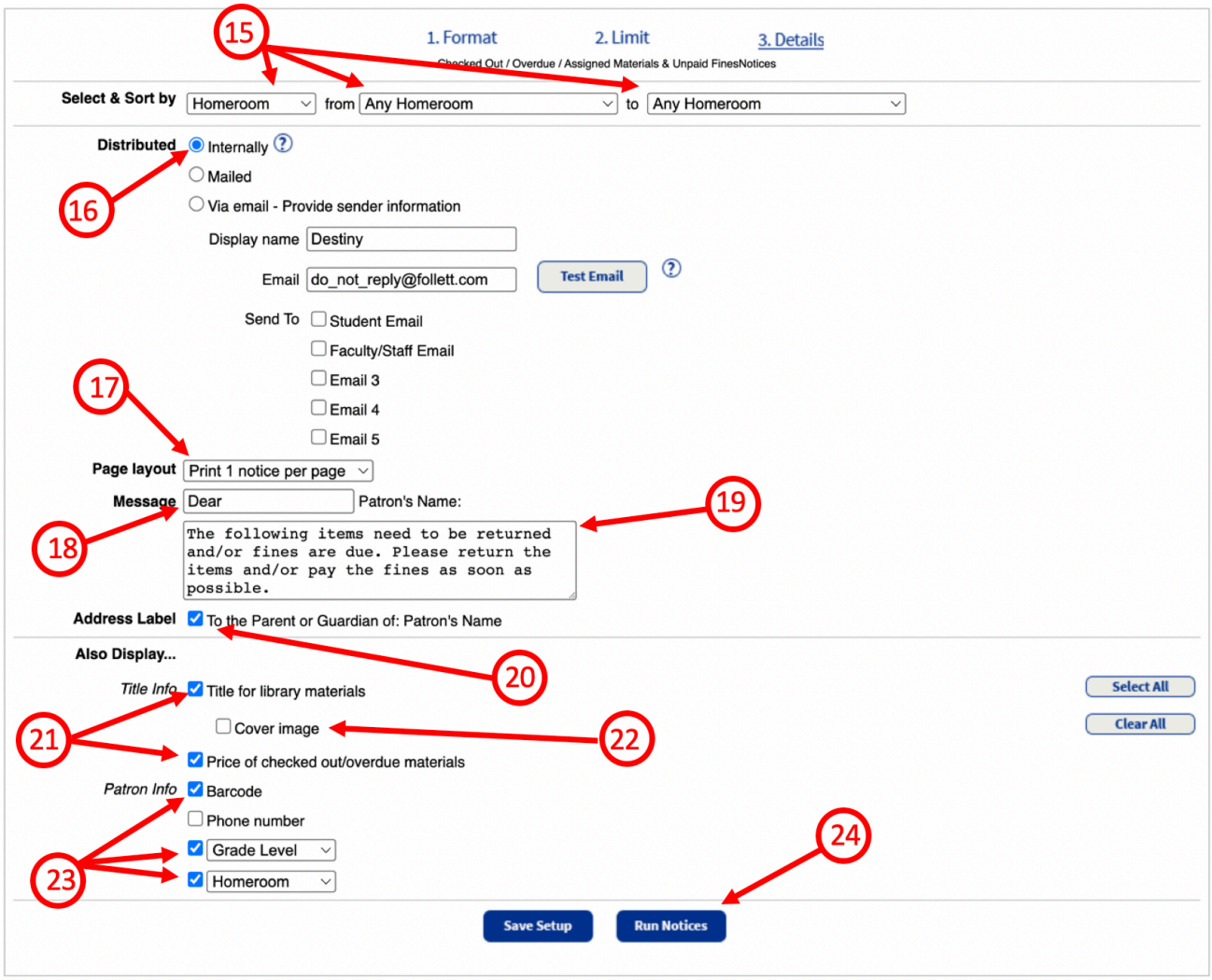
4. Under the **Set up a new report or notice**, in the **Show** section, select the radial button for **All that are checked out** (NOTE: You have the option to customize the report by selecting any of the other options. However, this tutorial will show how to generate a report that will include students with items checked out and overdue as well as students with outstanding fines.)
5. Uncheck **Unpaid Library Fines** and **Unpaid Patron Fines**.
6. For **Format**, select the radial button **Notices – Language** and use the drop-down menu to select the language to be used: **English**, **Spanish**, or **French**.
7. Click on **Continue.**



8. Click on **Update.** Check the box for the patron types you want to include. Then click on **OK**.
9. For **Status**, only check **Active.**
10. Leave the box for **Graduating in** unchecked.
11. Leave the box for **Patrons of other sites that have my materials and/or that owe fines…** unchecked.
12. Click on the button, **Update**, for **All Circulation Types**. Click on **Clear All**, then click on **OK**.
13. Check the box for **Resources**, then click on the button, **Update**, for **All Resource Types.** In the first row, click on the button **Clear All** then only check the box for **Textbooks,** second row. Scroll to the bottom of the page and click on **OK**.
14. Check the box for **The materials my patrons have and/or the fines they owe that belong to other sites in the District,** then click **Continue**.

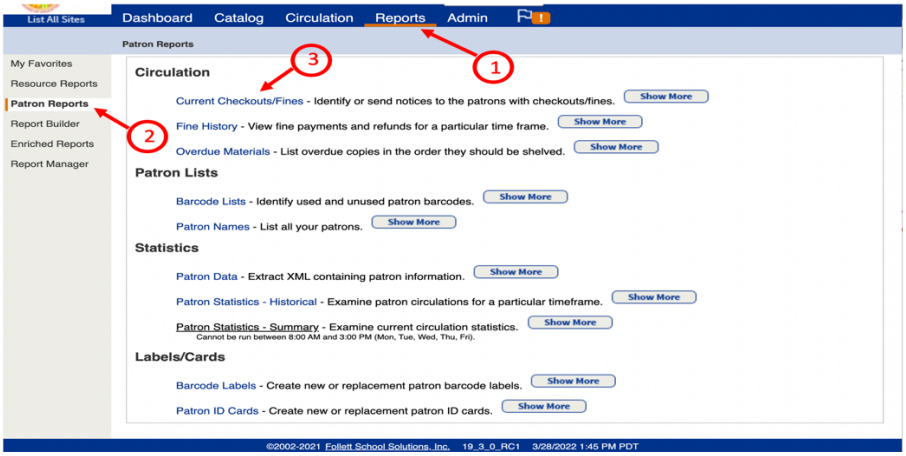


15. For **Select & Sort by**, use the drop-down menu to select how you want the data sorted. You can choose between **Patron Name**, **Grade Level**, and **Homeroom**. It is recommended to sort by **Homeroom**. Leave the **From** and **to** drop-down menus to **Any Homeroom**. If you want a specific **Patron Name**, **Grade Level**, or **Homeroom**, use the **from** and **to** drop-down menus to specify one or a range.
16. Select the radial button for **Internally.**
17. For **Page layout**, use the drop-down menu to select to print one, two, or four notices (students) per page. One or two are recommended.
18. In the **Message** field, the default greeting is **Dear**, this can be changed.
19. The message box should include something generic as this message will be going out to all who fit the criteria selected. (For example: *The following items need to be returned and/or fines are due. Please return the items and/or pay the fines as soon as possible*.)
20. Check the box for **Address Label**, **To the Parent or Guardian of: Patron's Name**
21. Check the box for **Title for library materials** and for **Price of checked out/overdue materials.**
22. Uncheck the box for **Cover image**
23. For **Patron Info**, check the box for **Barcode,** then use the dropdown menu to select **Grade Level,** and **Homeroom** and check those boxes.
24. Click on **Run Notices**. You will be taken to the Job Manager. Once the status shows **completed**, you can click on the **View** link to access the report and print the notices. NOTE: If you choose to save the report, click on **Save Setup**. You will be prompted to name the report in the **Save As** field. **IMPORTANT** – **DO NOT** SCHEDULE THE REPORT. Then after naming your report, you can either click on **Save Setup** or **Run Notices**.

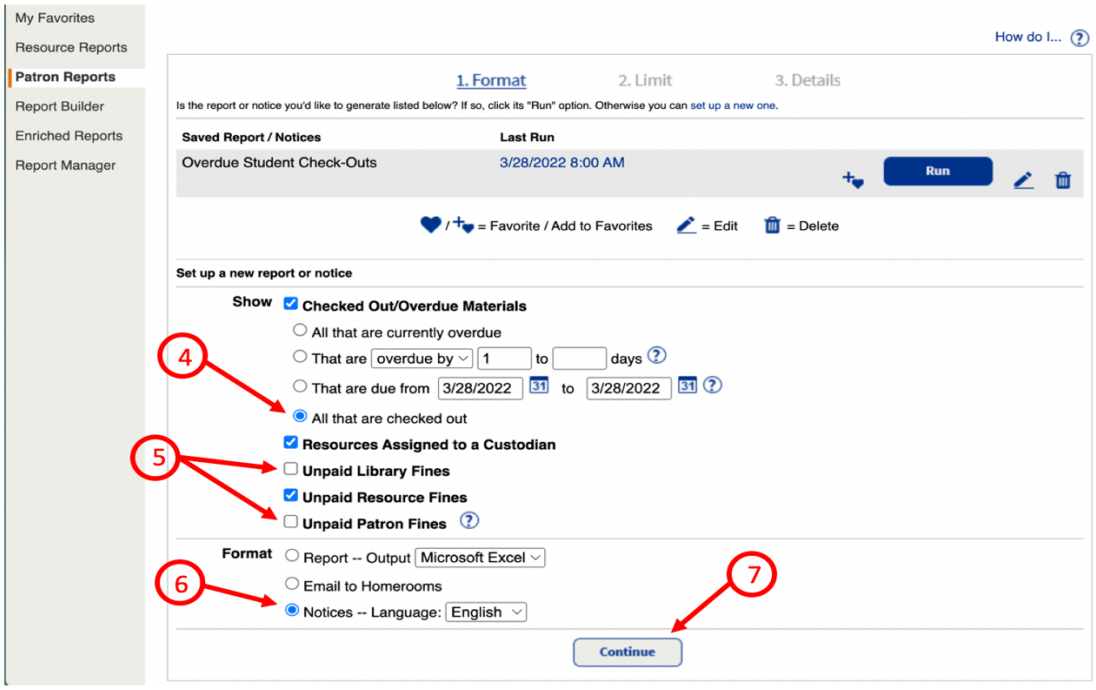


<u>GENERATING EMAIL NOTICES</u> (When using this feature, it is recommended you first inform patrons that they may be receiving an email and if they do, express your expectations of what needs to be done.)

1. Click on the **Reports** tab.
2. Click on the **Patron Reports** option.
3. Under the **Circulation** section, click on the **Current Checkout/Fines** report.

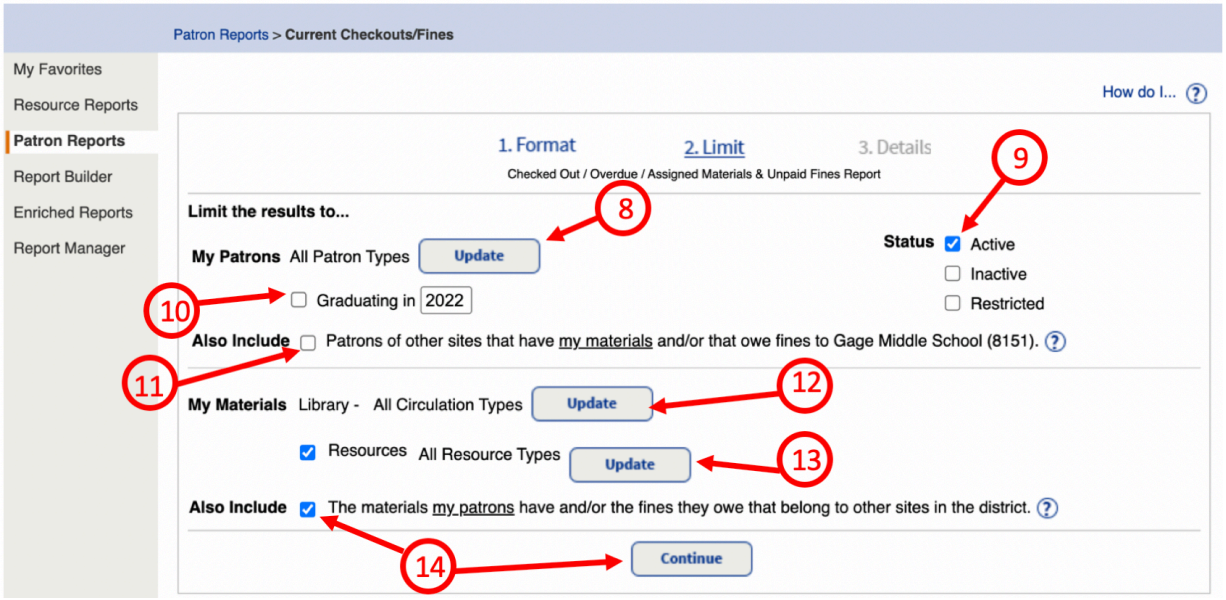


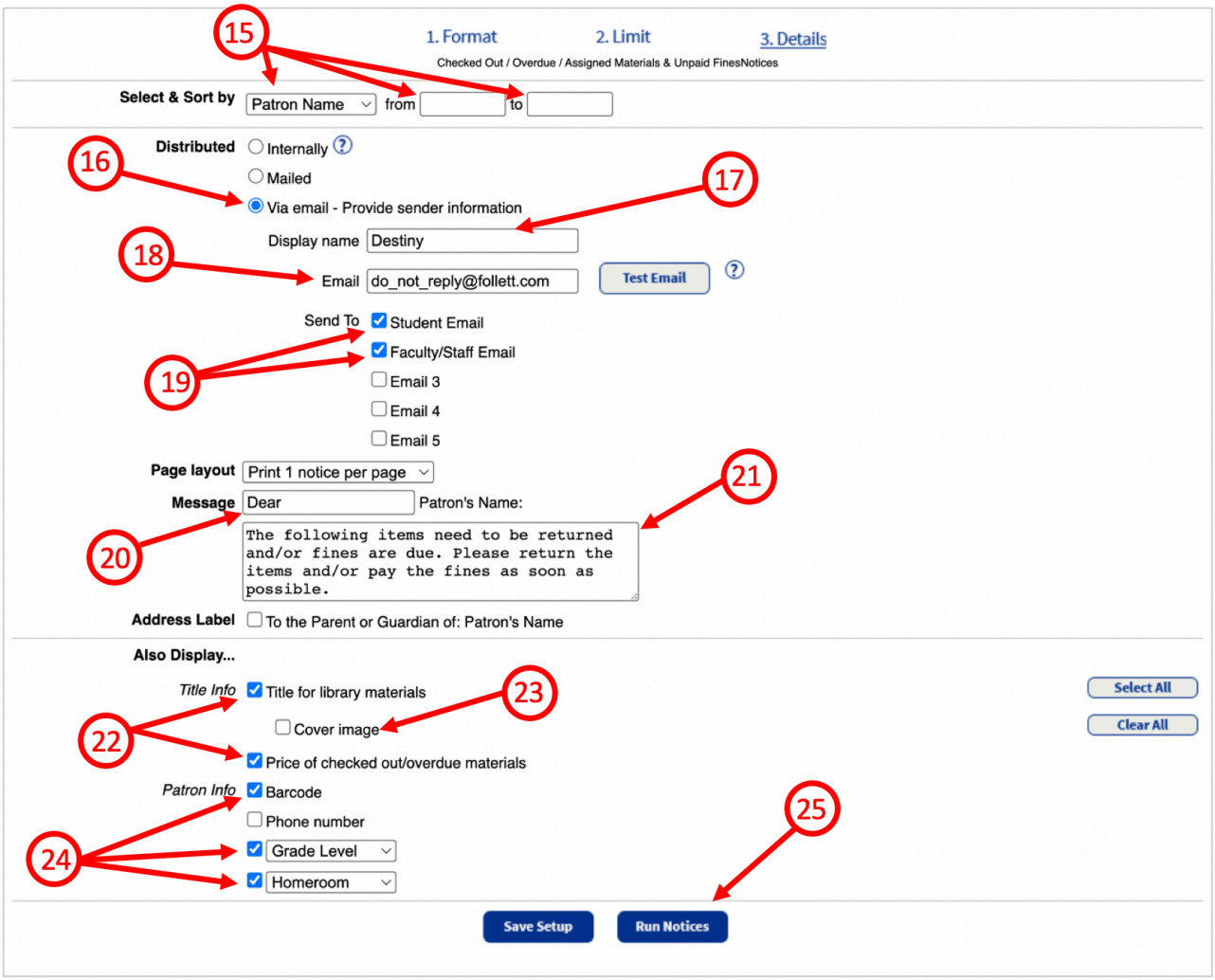
4. Under the **Set up a new report or notice**, in the **Show** section, select the radial button for **All that are checked out** (NOTE: You have the option to customize your results by selecting any of the other options. However, this tutorial will show how to generate a report that will include students with items checked out and overdue as well as students with outstanding fines.)
5. Uncheck **Unpaid Library Fines** and **Unpaid Patron Fines**.
6. For **Format**, select the radial button **Notices – Language** and use the drop-down menu to select the language to be used: **English**, **Spanish**, or **French**.
7. Click on **Continue.**



8. Click on **Update.** Check the box for the patron types you want to include. Then click on **OK**.
9. For **Status**, only check **Active.**
10. Leave the box for **Graduating in** unchecked.
11. Leave the box for **Patrons of other sites that have my materials and/or that owe fines…** unchecked.

12. Click on the button, **Update**, for **All Circulation Types**. Click on **Clear All**, then click on **OK**.
13. Check the box for **Resources**, then click on the button, **Update**, for **All Resource Types.** In the first row, click on the button **Clear All** then only check the box for **Textbooks,** second row. Scroll to the bottom of the page and click on **OK**.
14. Check the box for **The materials my patrons have and/or the fines they owe that belong to other sites in the District,** then click **Continue**.



15. For **Select & Sort by**, leave the drop-down menu at **Patron Name** and the **From** and **to** fields blank.
16. For **Distributed**, select the radial button for **Via email – Provide sender information**
17. By default, the **Display name** (sender name) will be **Destiny**. This name will be displayed on the email received by the patrons. You have the option to change this to whatever name you want.
18. By default, the Email displayed will be **do_not_reply@follett.com** (this prevents recipients from replying to the email.) You have an option to change this to include your email, if you are willing to receive replies. It is recommended to leave the default email.
19. For **Send To**, check the appropriate box(es) depending to whom you intend to email the notices; **Student Email** and/or **Faculty/Staff Email**.
20. In the **Message** field, the default greeting is **Dear**, this can be changed.
21. The message box should include something generic as this message will be going out to everyone who fit the criteria selected. (For example: *The following items need to be returned and/or fines are due. Please return the items and/or pay the fines as soon as possible*.)
22. Check the boxes for **Title for library materials** and for **Price of checked out/overdue materials.**
23. Uncheck the box for **Cover image**
24. For **Patron Info**, check the box for **Barcode.** Then use the dropdown menu to select **Grade Level,** and **Homeroom** and check those boxes.

25. Click on **Run Notices**. You will be taken to the Job Manager and can view the summary to show the emails sent.
    NOTE: If you choose to save the report, click on **Save Setup**. You will be prompted to name the report in the **Save As** field. **IMPORTANT** – **DO NOT** SCHEDULE THE REPORT. After naming the report, you can either click on **Save Setup** or **Run Notices**.