

# CURRENT CHECKOUTS/FINES REPORTS – LIBRARY MANAGER



*Destiny Library Manager allows users with 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:**

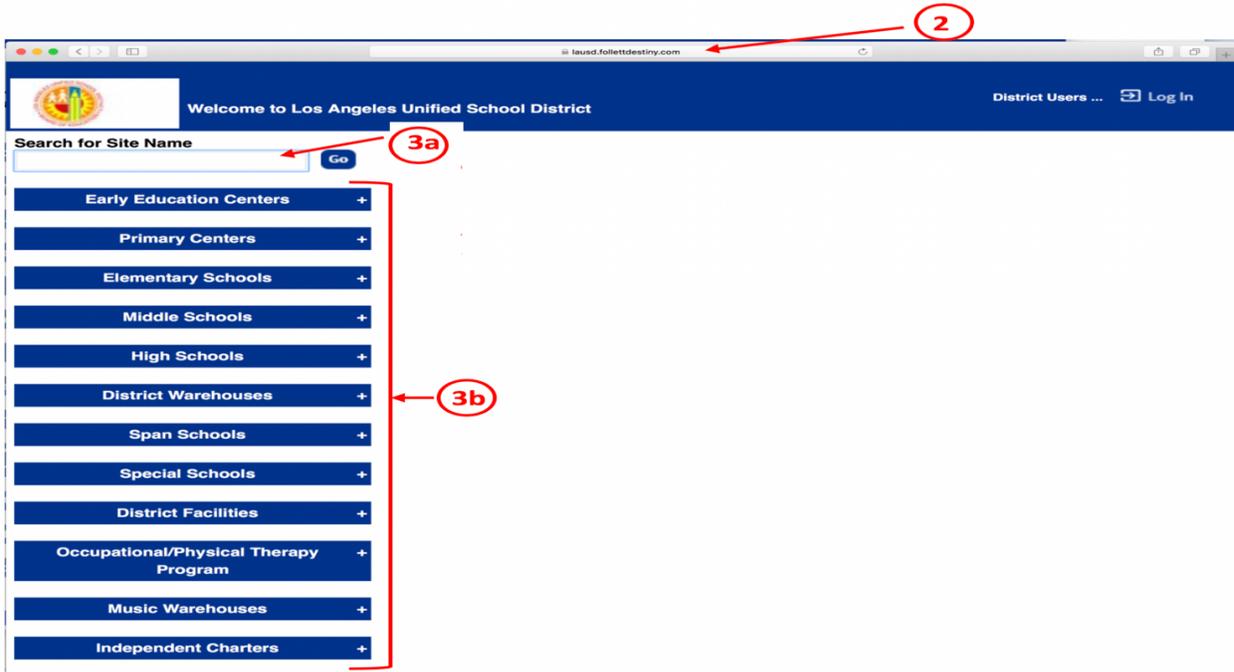
- *Generate various reports used to identify students with checked-out items, overdue items, and/or outstanding fines.*
- *The reports include:*
  - *An Excel Spreadsheet **Page 3***
  - *Email to Homerooms (A PDF is sent to homeroom teachers listing their students with checked-out items, overdue items, and/or outstanding fines.) **Page 5***
  - *Notices (to be printed and given to patrons) **Page 7***
  - *Notices (emailed directly to patrons via Destiny) **Page 10***

## **Requirements:**

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

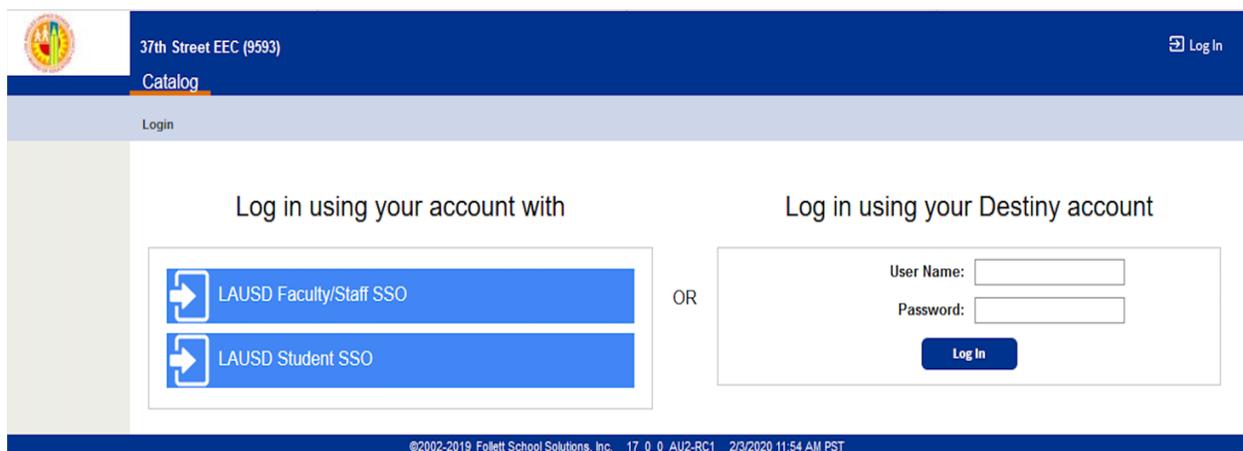
## LOG IN TO DESTINY

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.



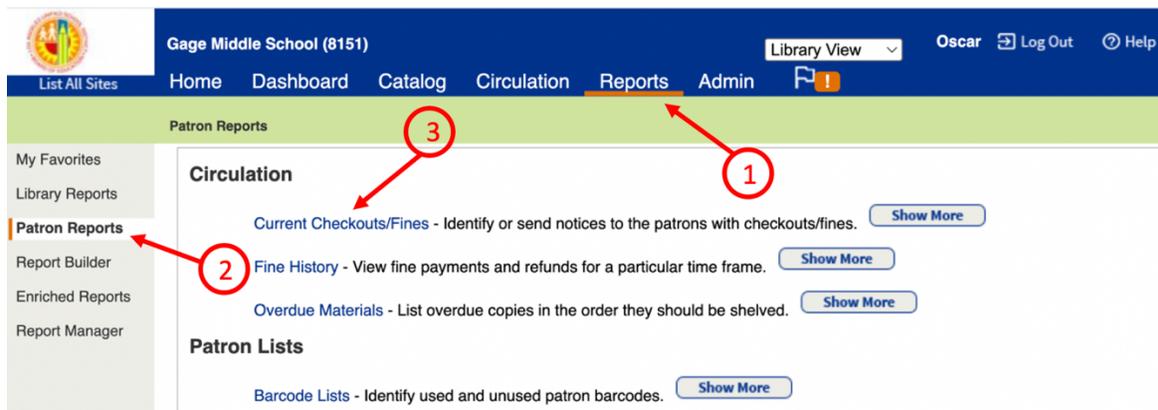
Select the **LAUSD Faculty/Staff SSO** to login. Enter your full LAUSD email (e.g. jane.doe@lausd.net) and password to log in.

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.

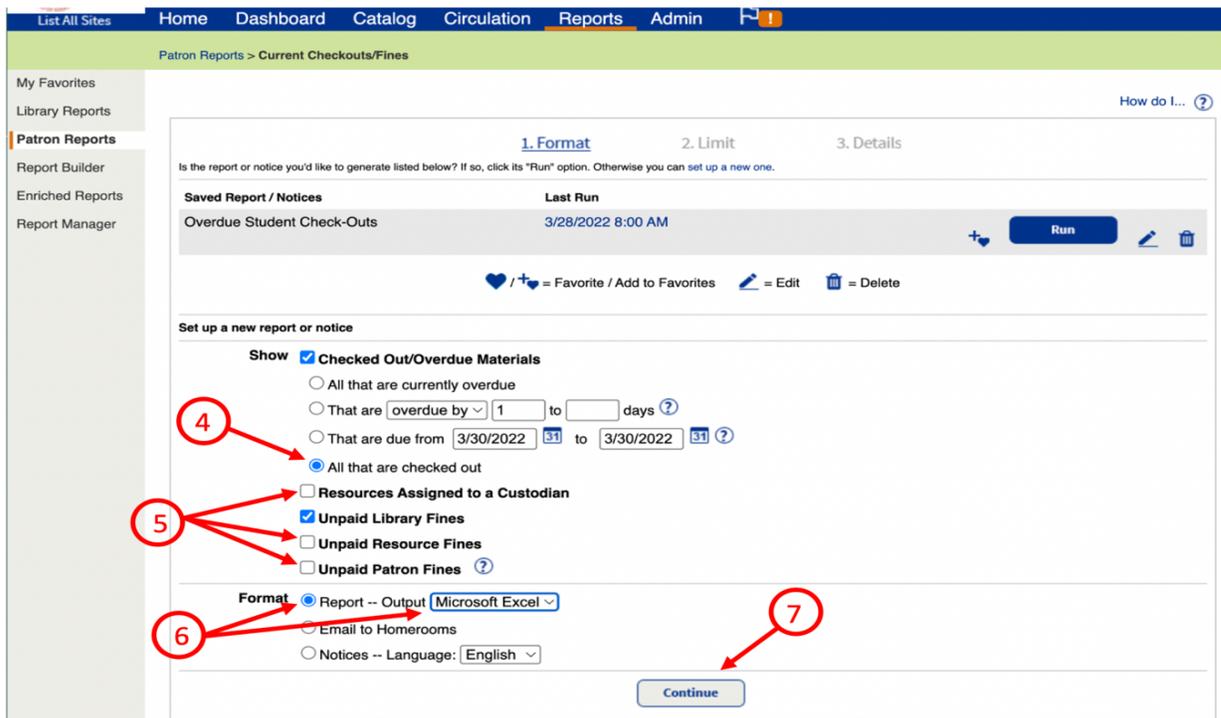


## GENERATING AN EXCEL SPREADSHEET

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.



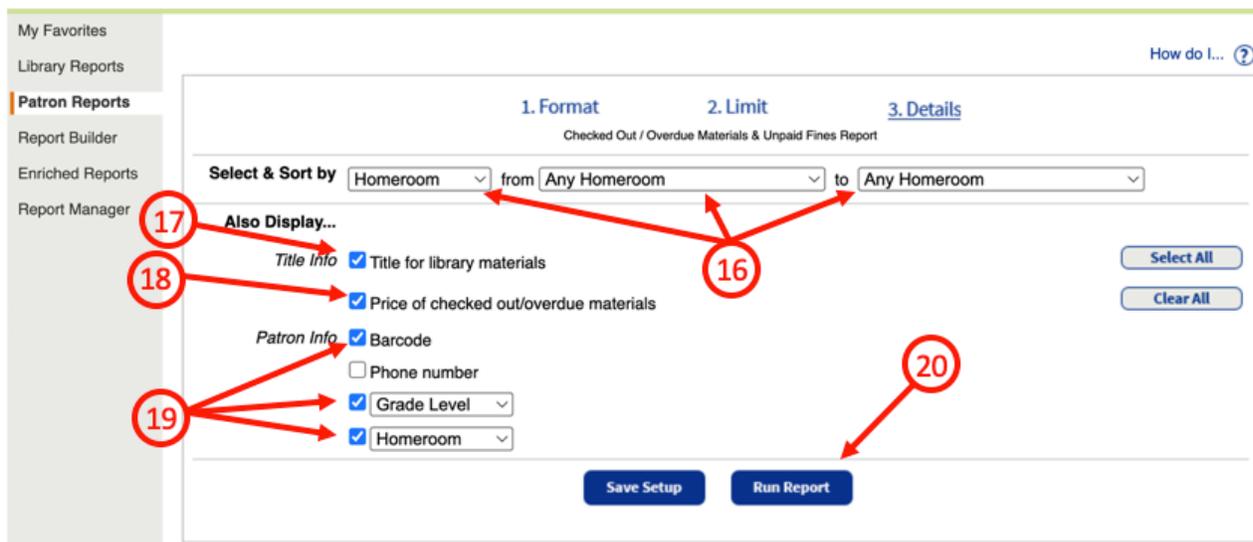
4. Under the **Set up a new report or notice**, in the **Show** section, select the radial button for **All that are checked out** (NOTE: You have the option to customize the report by selecting any of the other options. However, this tutorial will show how to generate a report that will include students with items checked out and overdue as well as students with outstanding fines.)
5. Uncheck **Resources Assigned to a Custodian**, **Unpaid Resource 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. For **My Patrons**, click on **Update** and 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. Do not change anything for **All Circulation Types**.
13. Uncheck the box for **Resources**.
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. Click on **Continue**.

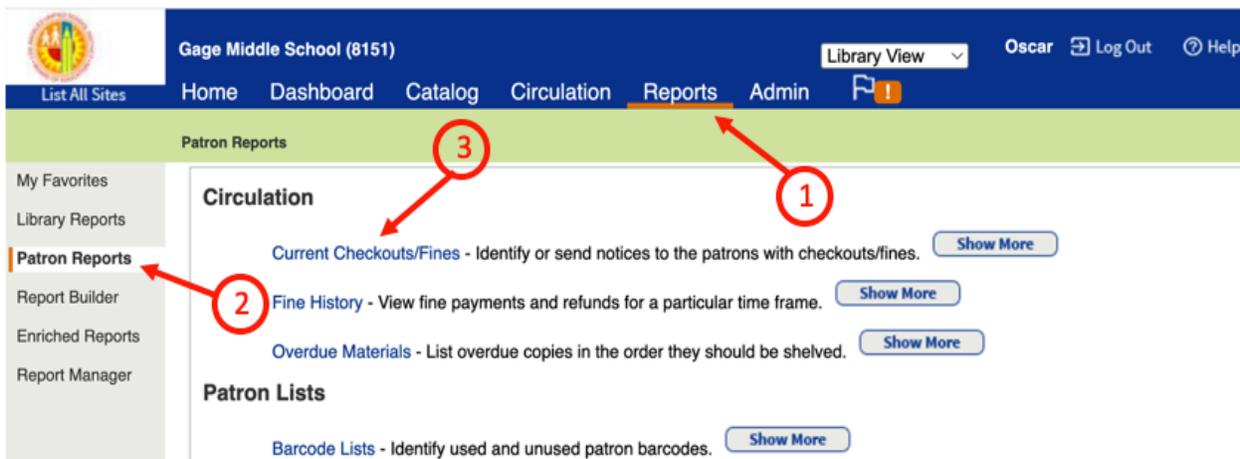
The screenshot shows a web interface for creating a report. The left sidebar contains navigation options: My Favorites, Library Reports, Patron Reports (highlighted), Report Builder, Enriched Reports, and Report Manager. The main content area is titled 'Checked Out / Overdue Materials & Unpaid Fines Report' and is divided into three steps: 1. Format, 2. Limit (current step), and 3. Details. A 'How do I...?' help link is in the top right. The 'Limit' step includes sections for 'Limit the results to...', 'My Patrons', 'Also Include', 'My Materials', 'Resources', and another 'Also Include' section. Each section has an 'Update' button. Red circles with numbers 8-15 are overlaid on the interface, pointing to specific elements as described in the instructions.

16. For **Select & Sort by**, use the drop-down menu to select how you want the results 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.
17. Check the box for **Title for library materials**.
18. Check the box for **Price of checked out/overdue materials**.
19. For **Patron Info**, check the box for **Barcode**, then use the dropdown menu to select **Grade Level**, and **Homeroom** and check those boxes.
20. 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 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 **Resources Assigned to a Custodian**, **Unpaid Resource Fines** and **Unpaid Patron Fines**.
6. For **Format**, select the radial button, **Email to Homerooms**.
7. Click on **Continue**.

Set up a new report or notice

**Show**  **Checked Out/Overdue Materials**

All that are currently overdue

That are overdue by  to  days [?](#)

That are due from   to   [?](#)

All that are checked out

Resources Assigned to a Custodian

Unpaid Library Fines

Unpaid Resource Fines

Unpaid Patron Fines [?](#)

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**Format**  Report -- Output

Email to Homerooms

Notices -- Language:

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. Do not change anything for **All Circulation Types**.
12. Uncheck the box for **Resources**.
13. Check the box for **The materials my patrons have and/or the fines they owe that belong to other sites in the District**.
14. Click **Continue**.

1. Format      2. Limit      3. Details

Checked Out / Overdue Materials & Unpaid Fines/Notices

Limit the results to...

**My Patrons** All Patron Types

Graduating in

**Status**  Active

Inactive

Restricted

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**My Materials** All Circulation Types

Resources All Resource Types

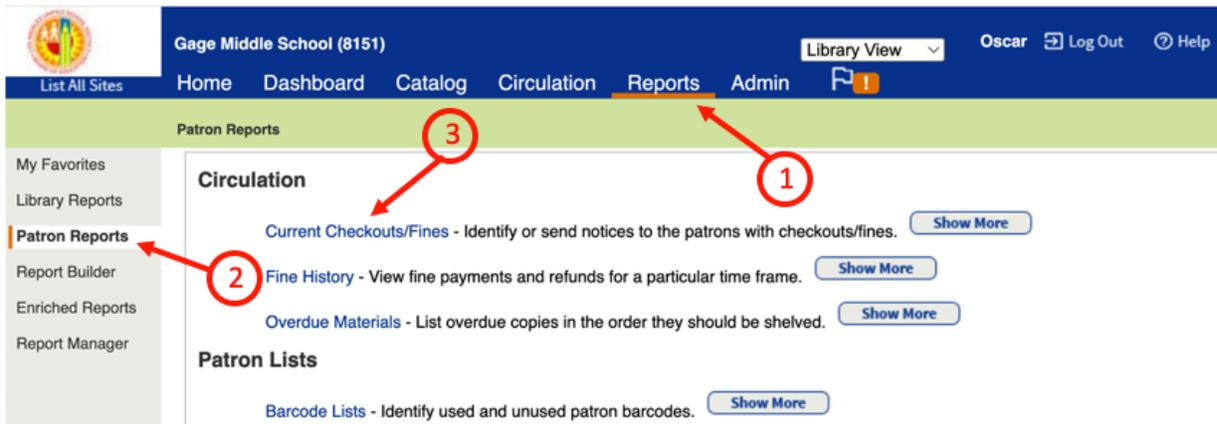
**Also Include**  The materials my patrons have and/or the fines they owe that belong to other sites in the district. [?](#)

15. To include all homerooms skip this step. Otherwise, for **Send To All Homerooms**, click on the **Update** button to select specific homerooms 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** and **Price of checked out/overdue materials**.
  19. Uncheck the box for **Cover image**.
  20. For **Patron Info**, check the box for **Barcode**. Then, use the dropdown menu to select **Grade Level**, and **Homerroom** and check those boxes.
  21. 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 then 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 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 **Resources Assigned to a Custodian**, **Unpaid Resource 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 the box for **Active**.
10. Leave the box unchecked for **Graduating in**.
11. Leave the box unchecked for **Patrons of other sites that have my materials and/or that owe fines to...**
12. Do not change anything for **All Circulation Types**.
13. Uncheck the box for **Resources**.

14. Check the box for **The materials my patrons have and/or the fines they owe that belong to other sites in the District.**
15. Click **Continue**.

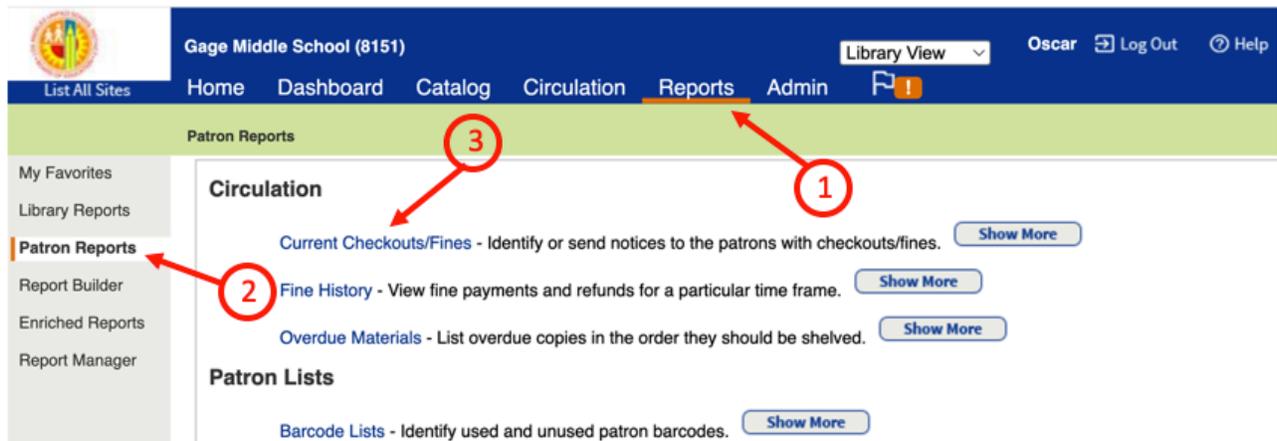
The screenshot shows a web interface for generating reports. On the left is a sidebar with 'Patron Reports' selected. The main area has three tabs: '1. Format', '2. Limit', and '3. Details'. Under '2. Limit', there are sections for 'My Patrons', 'My Materials', and 'Resources'. Each section has an 'Update' button. There are also 'Also Include' checkboxes. A 'Continue' button is at the bottom right. Red circles with numbers 8-15 point to specific elements: 8 (Update My Patrons), 9 (Status), 10 (My Patrons), 11 (Also Include Patrons of other sites), 12 (Update My Materials), 13 (Resources), 14 (Also Include The materials my patrons have), and 15 (Continue).

16. 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**. 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.
17. Select the radial button for **Internally**.
18. 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.
19. In the **Message** field, the default greeting is **Dear**, this can be changed.
20. The message box should include something generic as this message will go 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.*)
21. Check the box for **Address Label, To the Parent or Guardian of: Patron's Name**
22. Check the box 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. 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**.

The screenshot shows a configuration page for email notices. At the top, there is a 'Select & Sort by' dropdown set to 'Patron Name' (callout 16) and two empty input fields for 'from' and 'to'. Below this is the 'Distributed' section (callout 17) with radio buttons for 'Internally' (selected), 'Mailed', and 'Via email - Provide sender information'. The 'Via email' option has a 'Display name' field with 'Destiny' and an 'Email' field with 'do\_not\_reply@follett.com', along with a 'Test Email' button (callout 18). Underneath are 'Send To' checkboxes for 'Student Email', 'Faculty/Staff Email', 'Email 3', 'Email 4', and 'Email 5'. The 'Page layout' section (callout 19) has a dropdown set to 'Print 1 notice per page'. The 'Message' section (callout 20) includes a 'Dear' field and a 'Patron's Name:' field, followed by a text area containing a sample notice: '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.' Below the message is an 'Address Label' checkbox checked for 'To the Parent or Guardian of: Patron's Name'. The 'Also Display...' section (callout 21) has two sub-sections: 'Title Info' with checkboxes for 'Title for library materials' (checked, callout 22), 'Cover image' (unchecked, callout 23), and 'Price of checked out/overdue materials' (checked, callout 24); and 'Patron Info' with checkboxes for 'Barcode' (checked, callout 24), 'Phone number' (unchecked), 'Grade Level' (checked, callout 24), and 'Homeroom' (checked, callout 24). There are 'Select All' and 'Clear All' buttons on the right. At the bottom are 'Save Setup' and 'Run Notices' buttons (callout 25).

**GENERATING EMAIL NOTICES** (It is strongly recommended that if you use this feature, you first communicate with patrons to inform them that they may be receiving an email and your expectations of what needs to be done if they do.)

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 **Resources Assigned to a Custodian**, **Unpaid Resource 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**.

The screenshot shows a web form titled "Set up a new report or notice". It is divided into three main sections: "Show", "Format", and a "Continue" button at the bottom right.

- Show Section:**
  - Radio button:  **Checked Out/Overdue Materials**
    - All that are currently overdue
    - That are overdue by  to  days
    - That are due from  to
    - All that are checked out**
  - Resources Assigned to a Custodian**
  - Unpaid Library Fines**
  - Unpaid Resource Fines**
  - Unpaid Patron Fines**
- Format Section:**
  - Report -- Output:
  - Email to Homerooms
  - Notices -- Language:**
- Continue Button:** A blue button labeled "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 the box for **Active**.
10. Leave the box unchecked for **Graduating in**.
11. Leave the box unchecked for **Patrons of other sites that have my materials and/or that owe fines to...**
12. Do not change anything for **All Circulation Types**.
13. Uncheck the box for **Resources**.
14. Check the box for **The materials my patrons have and/or the fines they owe that belong to other sites in the District**.
15. Click **Continue**.

My Favorites  
Library Reports  
**Patron Reports**  
Report Builder  
Enriched Reports  
Report Manager

How do I... ?

1. Format      2. Limit      3. Details

Checked Out / Overdue Materials & Unpaid Fines Report

Limit the results to...

8      9

10      **My Patrons** All Patron Types

Graduating in 2022

**Status**  Active  
 Inactive  
 Restricted

**Also Include**  Patrons of other sites that have my materials and/or that owe fines to Gage Middle School (8151). ?

11      12

**My Materials** All Circulation Types

13       Resources All Resource Types

**Also Include**  The materials my patrons have and/or the fines they owe that belong to other sites in the district. ?

14      15

16. For **Select & Sort by**, leave the drop-down at **Patron Name** and the **From** and **to** fields blank.
17. For **Distributed**, select the radial button for **Via email – Provide sender information**
18. 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.
19. 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.
20. For **Send To**, check the appropriate box(es) depending to whom you intend to email the notices; **Student Email** and/or **Faculty/Staff Email**.
21. In the **Message** field, the default greeting is **Dear**. You can change it if desired.
22. 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.*)
23. Check the boxes for **Title for library materials** and **Price of checked out/overdue materials**.
24. Uncheck the box for **Cover image**.
25. For **Patron Info**, check the box for **Barcode**. Then, use the dropdown menu to select **Grade Level** and **Homeroom**. Check those boxes.
26. Click on **Run Notices**. You will be taken to the Job Manager and can view the summary to see 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**.

1. Format      2. Limit      3. Details

Checked Out / Overdue Materials & Unpaid Fines/Notices

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

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**Distributed**

- Internally ?
- Mailed
- Via email - Provide sender information

Display name:

Email:   ?

Send To

- Student Email
- Faculty/Staff Email
- Email 3
- Email 4
- Email 5

Page layout:

**Message**

Dear  Patron's Name:

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.

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

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**Also Display...**

**Title Info**

- Title for library materials
- Cover image

Price of checked out/overdue materials

**Patron Info**

- Barcode
- Phone number
- Grade Level
- Homeroom