



# 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   |
|--|--|
| <b>Tour of Destiny Library Manager</b><br>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 library, classroom and home.   | <ul style="list-style-type: none"><li>• Log in to Library Manager</li><li>• Navigate tabs, options, sub-tabs, and breadcrumbs</li><li>• Explore the librarian functions of Destiny Library Manager</li><li>• Search for library resources with Destiny Discover®</li></ul>         |
| <b>Configuring Library Manager for Your School</b><br>Your library's collection, loan policies, and hours are customized for your students. With DestinyLibrary Manager, you have many options to tailor the settings to meet your library's unique needs.<br>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.  | <ul style="list-style-type: none"><li>• Create and edit circulation types</li><li>• Create and edit patron types</li><li>• Set up the library calendar</li><li>• Identify site configuration options</li><li>• Set up Follett eBook circulation policies (if applicable)</li></ul> |
| <b>Circulating Library Materials Efficiently</b><br>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.<br>Explore how to circulate your library resources, as well as how to run reports to manage overdue materials and fines. | <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>  |
| <b>Building Your Catalog</b><br>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.  | <ul style="list-style-type: none"><li>• Import titles from Titlewave® and other sources</li><li>• Add title and copy records from resource databases</li><li>• Add title and copy records manually</li></ul>   |

# Touring 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 library, classroom, and home.

## Objectives

- Log in to Library Manager.
- Navigate tabs, options, sub-tabs, and breadcrumbs.
- Explore the librarian functions of Destiny Library Manager.
- Search for library resources with Destiny Discover®.

## Activities

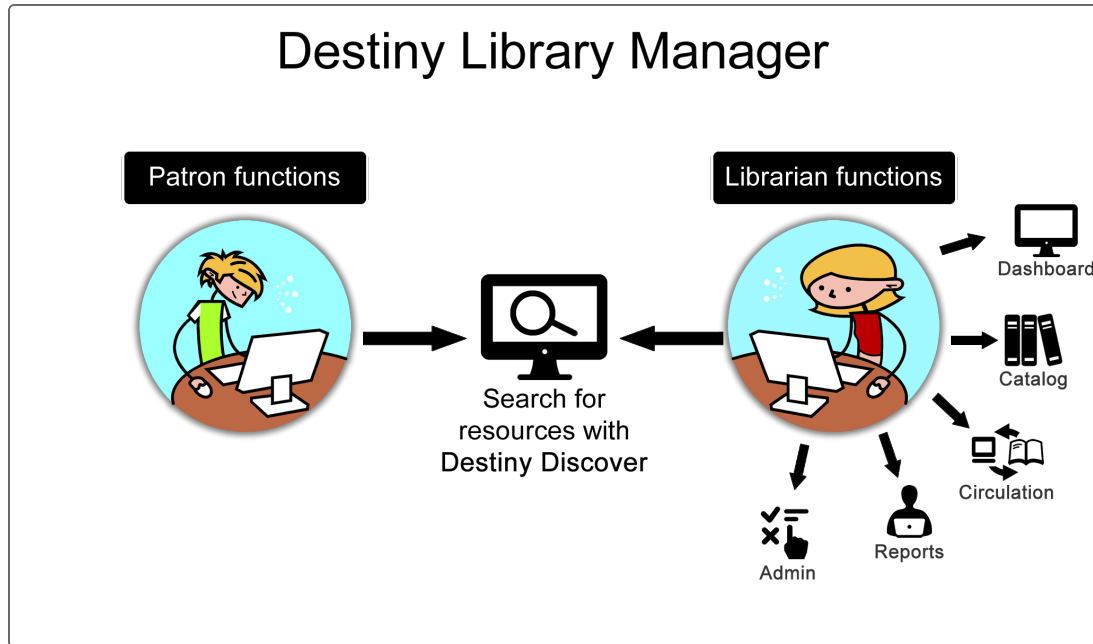
- Log in to and navigate Library Manager.
- Search for library resources.
- Access Follett Help and training resources.
- Find where you perform specific library tasks.

## 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.

Alta Heights School Log In Create Account

Home Catalog

Login

Log in using your account with

Sign in with Google

SAML SSO

OR

Log in using your Destiny account

User Name:

Password:

Forgot password?

Log In Cancel

Don't have an account? [Create new account](#)



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> . |

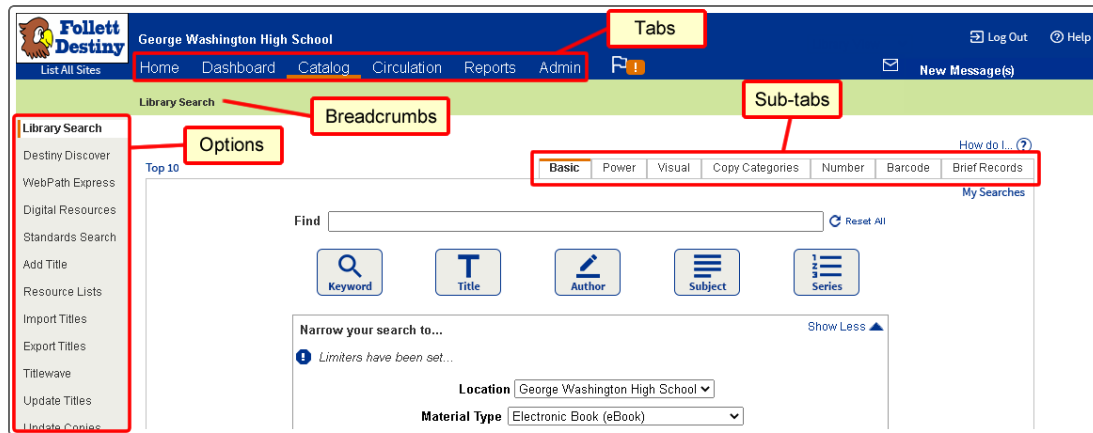
**If you are logging in as a Destiny Administrator or another district-level user, use the following steps:**

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 sub-tabs.

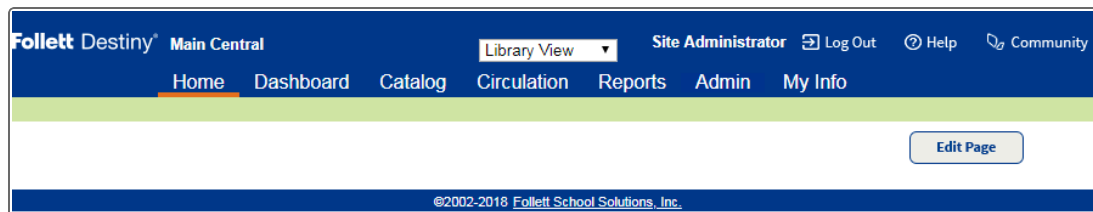


On each tab, a list of options appears on the page's left side. Many options have sub-tabs. Orange highlights and breadcrumbs show where you are. Use them instead of your browser's back button to return to previous pages.

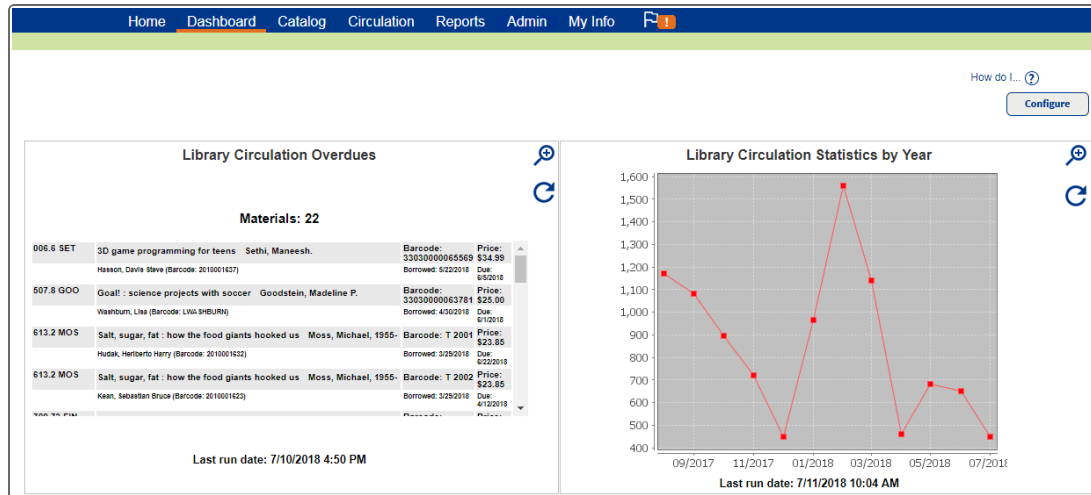
User access to tabs, options, and sub-tabs is based on permissions assigned by a Destiny or site-level administrator.

### 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 Discover, WebPath Express, Digital Resources, Standards Search, Add Title, Resource Lists, Import Titles, Export Titles, Titlewave, Update Titles, Update Copies, and Search Setup. The main search area has a 'Find' 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 (James Madison Elementary School), Material Type (Any Type), Sublocation (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:** Lets 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

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

HomeDashboardCatalogCirculationReportsAdminMy InfoMessages

Manage Patrons

Manage Patrons

Update Patrons

Update Classes

Import Patrons

Export Patrons

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.

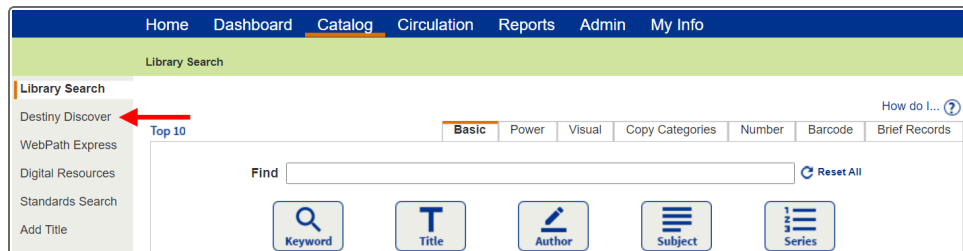
### Access Destiny Discover

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

- Set it as your homepage.
- Create a desktop shortcut.
- Put a link or widget on your school, library, or class webpage.
- Use the Destiny Discover app, available for iOS and Android™ (Android is a trademark of Google LLC) devices.

**Note:** The Destiny Discover app lets you search all library content and open, check out and download Follett eBooks and Audiobooks. New features will be added often to make it the student and teacher go-to for library resources. For updated videos and quick reference guides, visit the Destiny Discover Help Center and Follett Community.

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




## Navigate Destiny Discover

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

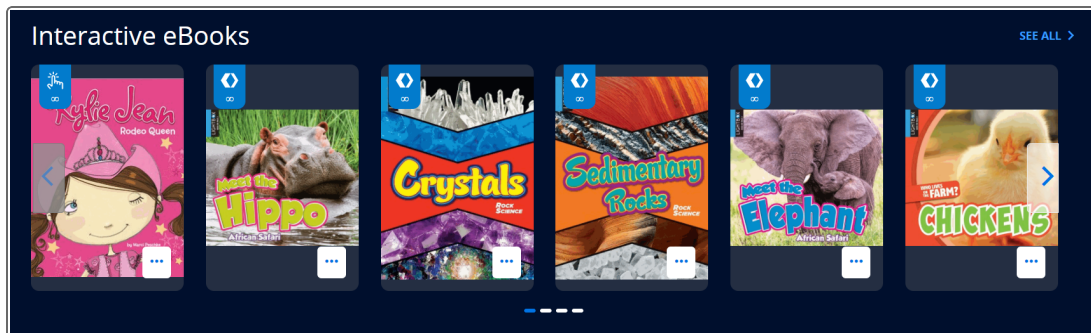
### Use the Header Options

Access the options in the header from any page.



- Use the **My Stuff** drop-down to access your checkouts, history, holds, favorites, and fines.
- Click **Collections** to go to the homepage.
- Use the **More** drop-down to access Destiny Back Office, the Destiny Discover Help Center, widgets, and Discover Admin.
- Click  to search for library resources.
- Access and edit your Profile.

### Browse Featured Content





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


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

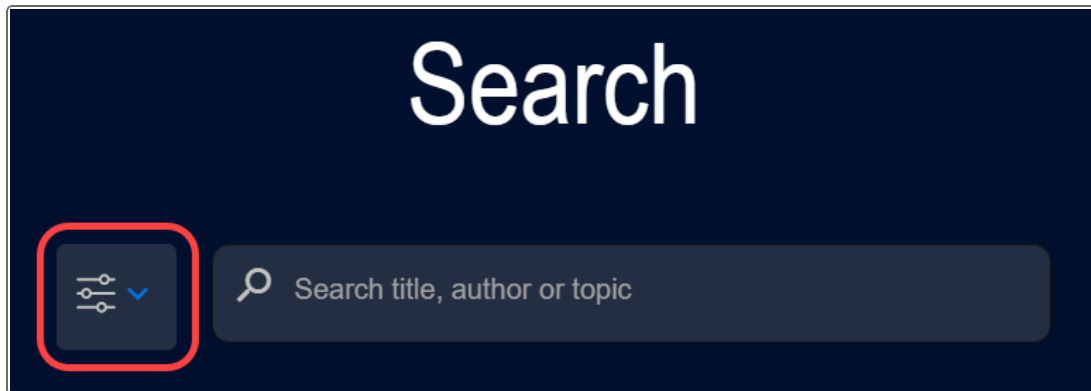
- **Recently Added Books:** Lets you view the newest 15 books that have been added to your collection.
- **Popular Titles:** Displays the 10 most popular books read at your school.
- **Topics:** Shows topics or genres (such as fairy tales, biography, sports), which you can select to perform a predefined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

## Search for Library Resources

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

To perform a search of all library resources:

1. Click  at the top of any page.
2. Type a search term (title, author, or topic). Or leave this field blank to search an entire category, such as All eBooks.
3. To conduct a focused search, click the **Search Options** drop-down.



4. 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, Series, Note, ISBN, or Tags).
  - **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.
  - **Sublocation:** Narrow your search by sublocation. Sublocation is defined in a copy record and typically represents the genre or a physical location in the library where the book can be found.
  - **Reading Programs:** Narrow your search by a reading program range.
  - **Starting** and **Ending Interest Level:** Narrow your search to an interest level range.

- **Starting and Ending Reading Level:** Narrow your search to a reading level range.

### Search Options

Type  
Keyword

Location  
Middle Schools

Format  
Any

Reading Programs  
Any

Starting Interest Level To Ending Interest Level

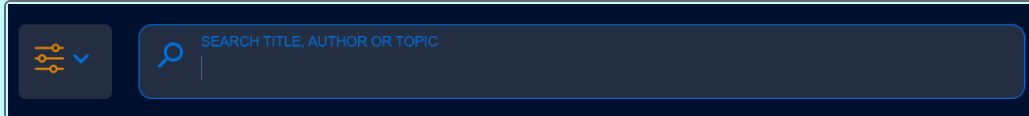
Starting Reading Level To Ending Reading Level

[CLEAR ALL FIELDS](#) [Set Options](#) [Search](#)

5. Click **Search**.

**Notes:**

- If you need to go back and add to or edit your search term, click **Set Options** to save your selections and return to the Search bar. Make your changes, and then click **Return** or **Enter**.
- When search options are set, the **Search Options** drop-down changes from white to orange.



- To clear options, click **CLEAR ALL FIELDS**, and then **Set Options**.

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.   | <i>"Great Pyramid"</i> (with quotation marks) will return results that include the exact phrase in the title record.<br><br><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. |
| <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> .   |

### What happens if I misspell a search term?


If a search term is entered that does not return any search results due to a misspelling, Destiny Discover automatically uses a corrected spelling. For example, if you search for *Dr. Suess*, it corrects the search term to *Dr. Seuss* and displays the message: *We couldn't find "Dr. Suess" in Books. Showing your results for "Dr. Seuss" instead.*

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.

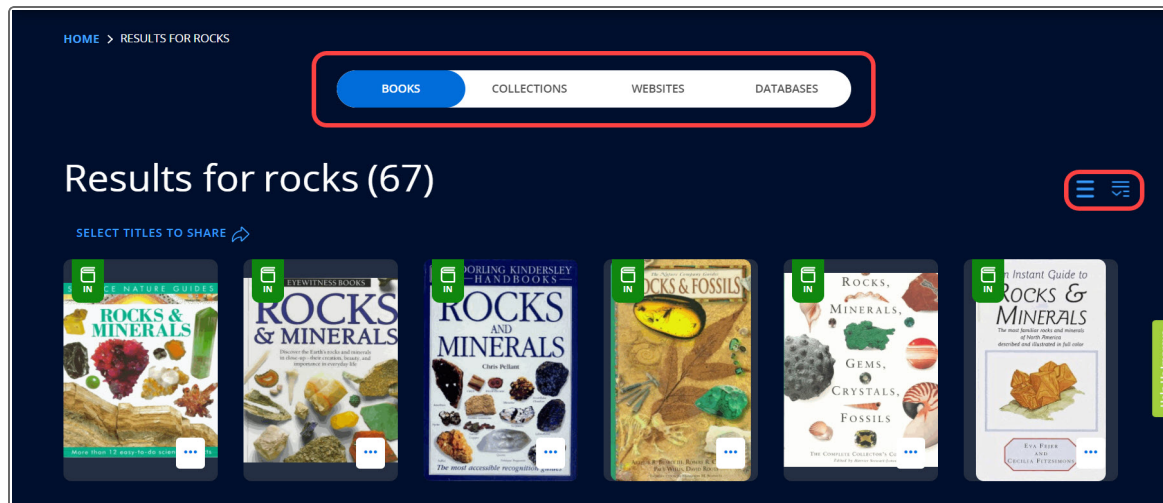
### To switch between list view and grid view:

From the right side of a search results page, click  or .

### To narrow or sort your search results:

1. From the right side of a search results page, click .
2. Do any of the following:
  - Change the sort order.
  - Use one or more filters.

**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. To try it, go to: <http://k12.follett.com/lightbox-demo>

**Next Steps:**

- ☐ To learn more about Follett eBooks, visit Follett Community.

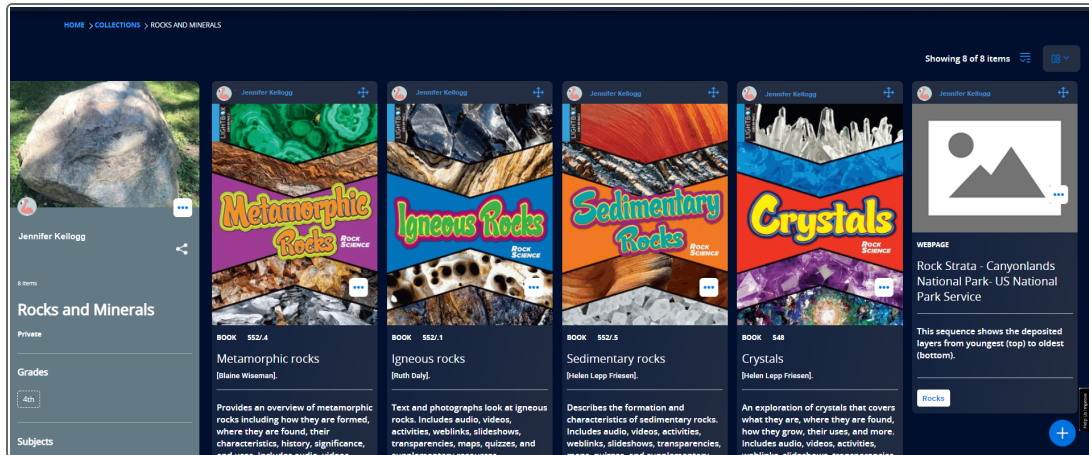
**Databases:** Links to One Search and WebPath Express™ resources.

- **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.

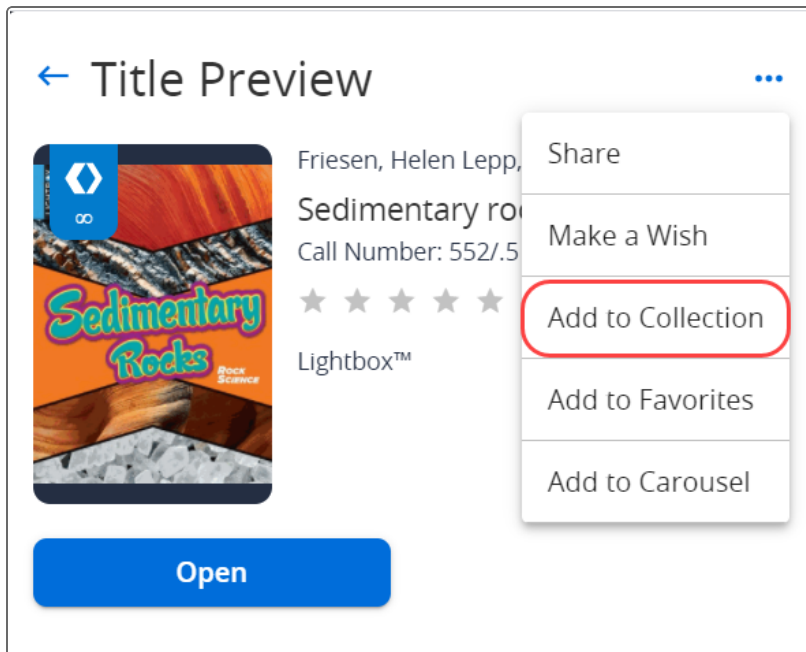
**Collections:** Collections by Destiny® creates new, collaborative ways to share free and purchased resources – with anyone, at any time. Each collection can include webpages, videos, documents, and much more! It's easy to share collections publicly within your district/school or with only a few people.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





**Next Steps:**

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


**Apply****Practice searching Destiny Discover:**

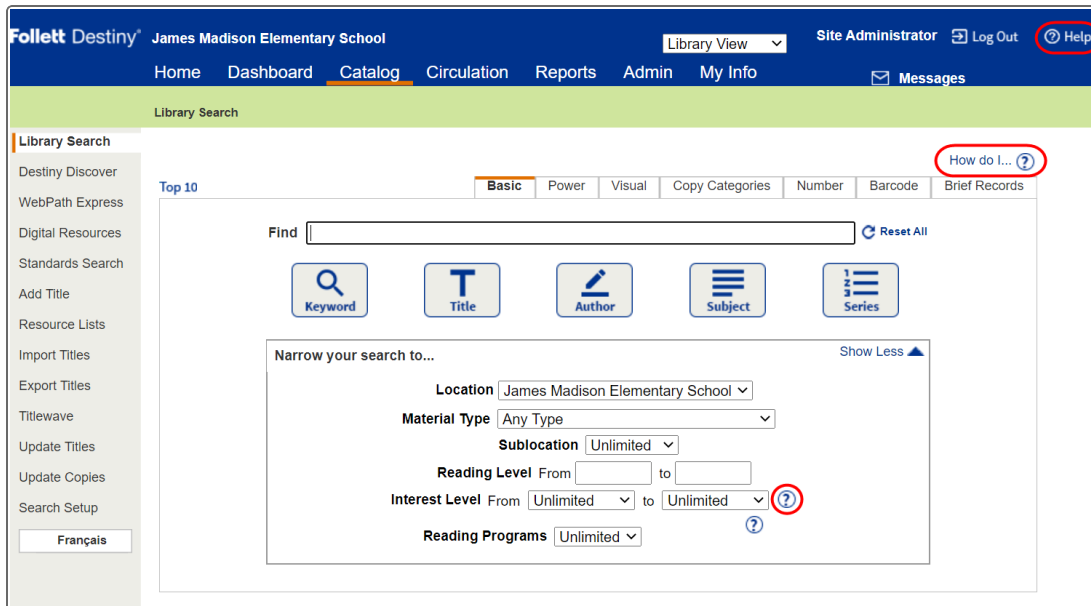
1. Search by entering a keyword of your choice, and then view the search results tabs.
2. Perform another search using **Search Options** to narrow your search.

## Access Destiny Help

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

**Help is accessed the following way in Destiny Back Office:**

- To get more information about a specific field or section of a page, click  next to its 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 features and functions, click the **Help** link at the top of any page in Destiny Back Office.



**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.  |            |

## Access Destiny Discover Help

From the top-left corner of any page in Destiny Discover, select **More > Help**.

### Make sure to check out:

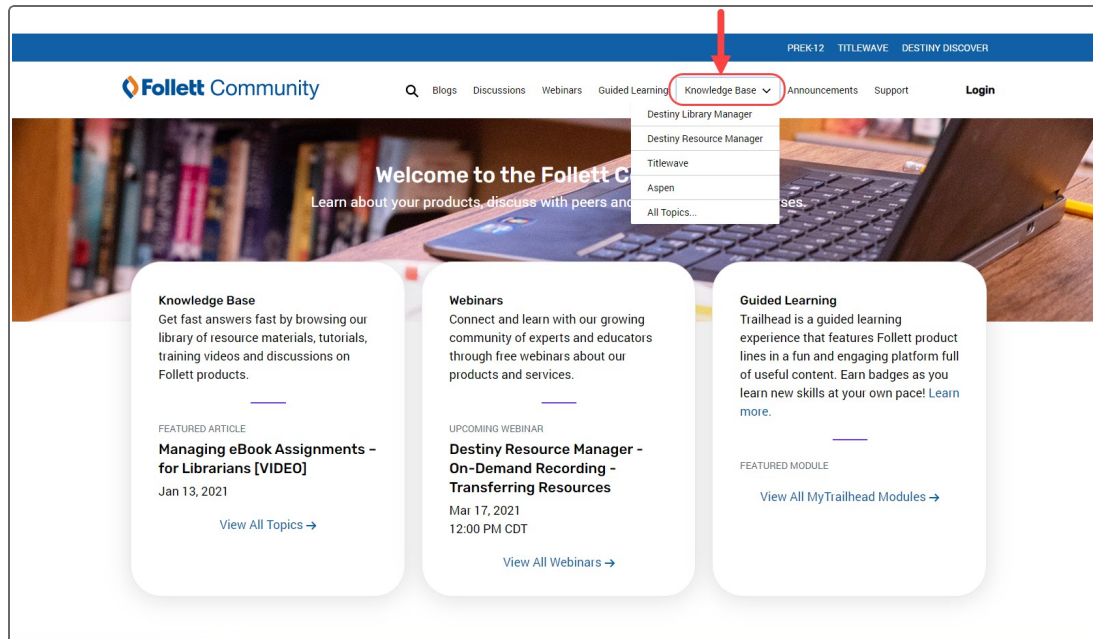
- **What's New:** Destiny Discover frequently releases new features and enhancements. Access this page to learn about the latest!
- **Quick Reference Guides and Videos:** This link brings you to Follett Community, where you can access training resources.
- **Webinars:** Visit Follett Community ([follettcommunity.com](https://follettcommunity.com)) to sign up for webinars, which you can attend live or view recordings of.

## Access Training Resources

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

Use the following steps to practice finding a training resource:

1. Go to <https://www.follettcommunity.com>.  
**Tip:** Bookmark it for quick access later.
2. Use the **Knowledge Base** drop-down to select a product.



3. Click **Tutorials, Training & Videos**.
4. Explore the many training resources available to you!

**Note:** To participate in discussion boards and some other activities, you have to register for an account. To do so, click **Login** from the top-right corner of any page, and then **Register for an account**. Follow the prompts to register.

**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, sub-tabs, 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.   |

# 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 – Circulating

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?



## Apply

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

## Check Out

### Check Out – To Patron

One way to check out materials to students in Destiny Library Manager is with the To Patron checkout option. This method is ideal 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.

**Note:** If the barcode is missing, you can type in the title or a keyword to find the copy.

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**.

To PatronBy Homeroom

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

Overdue Library: 0 / Resources: 2

Holds Ready 0

Fines

Library: \$0.00 / Resources: \$31.25


Patron: \$0.00

Grade Level Student: Homeroom

☐ Only today's check outs

Print Receipt

Checked Out



Wild flamingos (Copy: 400000005)

Due 1/28/2020

Change Date

## 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.

[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  
 Holds Ready 0

Fines Library: \$0.00 / Resources: \$0.00  
 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><br><a href="#">Lost</a> |
| 5/2/2019 |  Gorilla doctors : saving endangered great apes (Copy: 35051878) | 333.95<br>Turner | \$14.45 | 4/18/2019   | <a href="#">Renew</a><br><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 were used in the library but not checked out, select the **Record in-library use** checkbox.
3. To check in off-site items, including copies with a status of checked out or lost, select the **Check in off-site copies** checkbox.

### Notes:

- Only off-site items with a status of checked out or lost can be checked in at another site in the district. A message will let you know the item should be returned to the site.
- The Destiny Administrator must disable **Allow copies to be checked in at any site** (**Setup > Sites** sub-tab, and then edit the district) for this checkbox not to appear.

4. To check in copies that have a status of In Quarantine, select the **Check in quarantined copies** checkbox.

**Note:** The Destiny Administrator must set the number of days to quarantine copies. And if sites are allowed to opt out of quarantine, they must not do so for this checkbox to appear. Users also need the *Override library blocks* permission.

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

Find Copy

Go

How do I...?

User entered: 2456700012

View Today's Checkins

Most Recently Checked In

50

games to play with your cat

2456700012

Due 11/18/2020

100.1

Checked out 10/20/2020 to ADDISON, ABIGAIL (Student: P 302)

Library copies still checked out: 0

Create Fine

#### 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 have the ability 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 appears showing the item must be returned to that site.

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

7. To continue checking in books, scan the next item's barcode in the **Find Copy** field.

#### Notes

## Patron Status

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

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

1. Select **Circulation > Patron Status**.
2. Either:
  - Scan the patron's barcode in the **Find Patron** field.
  - Type the **Barcode** and click **Go**, or press **Enter**.
3. To expand the search to other schools in your district, deselect the **Only my patrons** checkbox.
4. To speed the search, select the **Only search** checkbox and then a field from the drop-down.
5. To search for only active patrons, select the **Only Active Patrons** checkbox.
6. Click **Go**.

**Notes:** If you do not have the patron's barcode at hand, try entering the patron's first, middle, or last name, nickname, grade level, homeroom, user name, a value in one of the User Defined fields, or a District ID.

If you do not have the whole name or word, enter part of it, followed by \*.

Patron Status

How do I... ?

Find Patron

☒ Only my patrons ☐ Only search  ☐ Only Active Patrons

**ABIGAIL ADDISON [Student]**

Barcode: P 302

Status: Active

Gender: Female

Card Expires:

Grad Year:

Birthdate:

District ID: P 2520050

Acceptable Use Policy on File? Yes

Nickname: Abbey

Grade Level: 3

Homeroom: DASSOULI

English Teacher: HUDSON

User Defined 2:

User Defined 3:

User Defined 4:

User Defined 5:

**Items Out**

Library Materials

| Due Date  | Title   | Call Number  | Price   | Checked Out |
|-----------|---|--------------|---------|-------------|
| 1/28/2020 | From Baghdad, with love : a Marine, the war, and a dog named Lava (Copy: 0002200356596) | 956.7044 KOP | \$20.00 | 1/14/2020   |

Resources

## 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.

1. Select **Circulation > Copy Status**.
2. Scan or type the copy barcode in the **Find Copy** field.

**Note:** If you do not have the copy barcode at hand, you can search the collection by entering a keyword from the title (or part of a word, followed by \*) in the **Find Copy** field. If a list appears, select the correct barcode.

3. Click **Go**.

Copy Status

Find Copy  **Go**

**A dog's gotta do what a dog's gotta do : dogs at work** 🔍

Author Singer, Marilyn. Call Number 636.7 Singer

|                         |                            |
|-------------------------|----------------------------|
| Barcode 35050528        | Status Available ?         |
| Purchase Price \$14.40  | Circulation Type Regular ? |
| Date Acquired 8/24/2010 | Vendor                     |
| Copy Number 1           | Sublocation Animals        |
| Description             |                            |

**Current Checkout**  
None

**Previous Checkout**  
(Returned: 1/14/2020)  
Patron Coop, Abigail [Student]  
Barcode P 2465867  
Grade Level 1  
Homeroom

**Notes**  
There are no notes for this copy

**Circulation Statistics**

|                 |                |                 |         |
|-----------------|----------------|-----------------|---------|
| Current Month 0 | Current Year 0 | Previous Year 1 | Total 1 |
|-----------------|----------------|-----------------|---------|



## 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.

## Current Checkouts/Fines Report

The Current Checkouts/Fines report helps you identify or send notices to students with checkouts, overdues, and/or fines. You can report information as broadly or as narrowly as you want.

To set up the Current Checkouts/Fines report:

- Select **Reports > Library Reports**
- Under **Circulation**, select **Current Checkouts/Fines**.

### Step 1: Format

The screenshot shows a web interface for setting up a report. At the top, there are three tabs: '1. Format' (selected), '2. Limit', and '3. Details'. Under the 'Show' section, there are several options:
 

- ☒ **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**

 Under the 'Format' section:
 

- ☒ **Report -- Output**: PDF
- ☐ **Email to Homerooms**
- ☐ **Notices -- Language**: English

 A 'Continue' button is at the bottom right.

1. Select the types of transactions to include in 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
- Outstanding fines

2. Choose a format:

- **Report** (PDF or Excel): This is a good option if you want to have a report of all overdues/fines for your school to refer to or a list of materials that are due soon.
- **Email to Homerooms:** Send an email summary to each homeroom teacher who has a student(s) with overdue materials or fines, or as a reminder of materials that are due soon.

**Note:** This option requires your email server to be set up in Destiny and 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 overdues, fines, or checkouts that are due soon.

3. Click **Continue**.

## Step 2: Limit

1. Format      **2. Limit**      3. Details

Overdue Materials & Unpaid Fines Report

Limit the results to...

**My Patrons** All Patron Types [Update](#)

☐ Graduating in

**Status** ☒ Active  
☐ Inactive  
☐ Restricted

**Also Include** ☐ Patrons of other sites that have [my materials](#) and/or that owe fines to George Washington High School. [?](#)

---

**My Materials** Library - All Circulation Types [Update](#)

☐ Resources All Resource Types [Update](#)

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

[Continue](#)

- 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 **Also Include** those patrons.
  - If you want to include patrons with an **Inactive** or **Restricted** status, select accordingly.
- 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 **Also Include** those materials.
- Click **Continue**.

### Step 3: Details

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

#### If you chose Report:

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

**Note:** If you selected 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.

- 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.
- 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. Format      2. Limit      3. Details

Overdue Materials & Unpaid Fines Notices

Send To All Homerooms **Update**

Display name Mrs. Pixe

Email ACPixie@follett.com **Test Email** ?

Also Display...

Title Info ☒ Title for library materials **Select All**

☐ Cover image **Clear All**

☐ Price of checked out/overdue materials

Patron Info ☒ Barcode

☐ Phone number

☐ Grade Level ▼

☐ Homeroom ▼

- By default, all homerooms are included. To exclude a homeroom, click **Update**. Deselect homerooms accordingly, and then click **Save**.
- In the **Display name** field, verify or change the name and email address you want to appear as the email sender.
- 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**.
5. If you selected **Save & Run**, Report Manager displays your report at the top of the list. The status automatically updates.
6. 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  |                    |          |     |
|  Overdues Report by Homeroom<br>Scheduled Daily 8:00 AM  | 8/22/2020 8:00 AM  |          |      |
|  Overdue notices - daily   | 6/13/2020 9:53 AM  |          |      |
| Overdue By Patron   | 11/29/2019 2:43 PM |          |     |
|  /  = Favorite / Add to Favorites  = Edit  = Delete |                    |          |  |

**Note:** To use the many email features in Destiny, your Destiny Administrator must set up an outgoing mail server (**Setup > District Options** sub-tab). See the *Set Up SMTP Settings* topic in Destiny Help for more information.

## 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.              |
|  | Generate a current checkouts/fines report. |

If you need more help, go to:

- Destiny Help for feature information and step-by-step instructions
- Follett Community ([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.

# 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
- Set up the library calendar
- Identify 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.
- Update 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 |
| <b>Regular</b>     | 2 weeks     | 90 days | 2 weeks    |
| <b>Overnight</b>   | 1 day       | 2 weeks | 1 day      |
| <b>Audiovisual</b> | 1 week      | 30 days | 2 weeks    |


| Circulation Type | Patron Type |         |            |
|------------------|-------------|---------|------------|
|                  | Student     | Faculty | Substitute |
|                  |             |         |            |
|                  |             |         |            |
|                  |             |         |            |

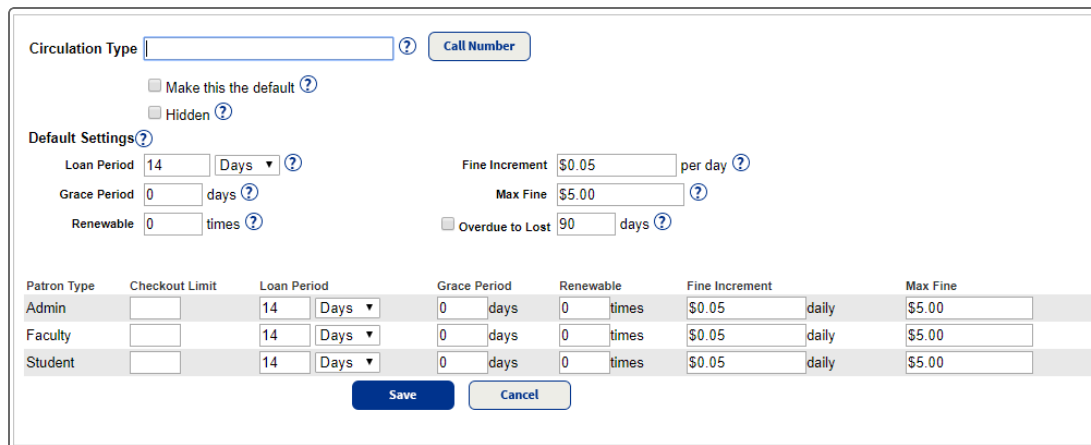
## Set Up Circulation Types

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 or edit a circulation type:**

1. Select **Admin > Library Policies > Circulation Types** sub-tab.
2. Click **Add Circ Type**, or click  next to the circulation type you want to edit.



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                            |
|-------------|----------------------|---|--|---|---|-------------------------------------|
| Admin       | <input type="text"/> | <input type="text" value="14"/> Days <span>?</span> | <input type="text" value="0"/> days <span>?</span> | <input type="text" value="0"/> times <span>?</span> | <input type="text" value="\$0.05"/> daily | <input type="text" value="\$5.00"/> |
| Faculty     | <input type="text"/> | <input type="text" value="14"/> Days <span>?</span> | <input type="text" value="0"/> days <span>?</span> | <input type="text" value="0"/> times <span>?</span> | <input type="text" value="\$0.05"/> daily | <input type="text" value="\$5.00"/> |
| Student     | <input type="text"/> | <input type="text" value="14"/> Days <span>?</span> | <input type="text" value="0"/> days <span>?</span> | <input type="text" value="0"/> times <span>?</span> | <input type="text" value="\$0.05"/> daily | <input type="text" value="\$5.00"/> |

Save Cancel

3. Enter a unique name in the **Circulation Type** field.
4. 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 in **Catalog > Import Titles > Add / Update** sub-tab, under the **Assign Copy Information** section.

5. To make this the default Circulation Type when importing titles and adding copies, select the **Make this the default** checkbox.
6. To make this Circulation Type only available to patrons with the *See local hidden materials* permission, select the **Hidden** checkbox.

7. 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 **Admin > Site Configuration**, 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.

8. Click **Save**.

**Next Steps:**

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




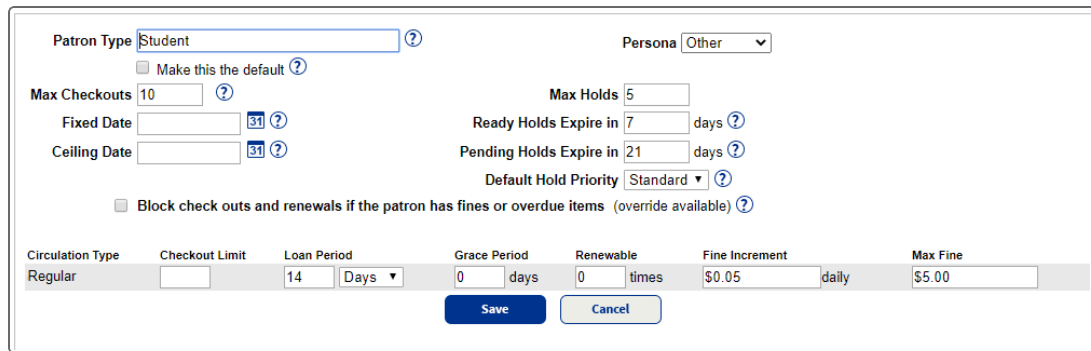
## Set Up Patron Types

Destiny is installed with two patron types: Faculty and Student (the latter is the default). But you can set up customized patron types to meet your school's needs. Keep in mind that patron type usually imports from your Student Information System.

**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 or edit a patron type:**

1. Select **Admin > Library Policies > Patron Types** sub-tab.
2. Click **Add Patron Type**, or click  next to the Patron Type you want to edit.



| Circulation Type | Checkout Limit | Loan Period | Grace Period | Renewable | Fine Increment | Max Fine |
|------------------|----------------|-------------|--------------|-----------|----------------|----------|
| Regular          |                | 14 Days     | 0 days       | 0 times   | \$0.05 daily   | \$5.00   |

3. Enter a unique name in the **Patron Type** field.
4. If you want this Patron Type to be the default when importing titles and adding copies, select the **Make this the default** checkbox.
5. To group patrons together, select a type from the **Persona** drop-down.
6. 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 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 (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. 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.
- **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.

7. 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, you must have the *Override blocks* permission.

8. Edit any of the Circulation Type policies.
9. Click **Save**.


**Next Steps:**

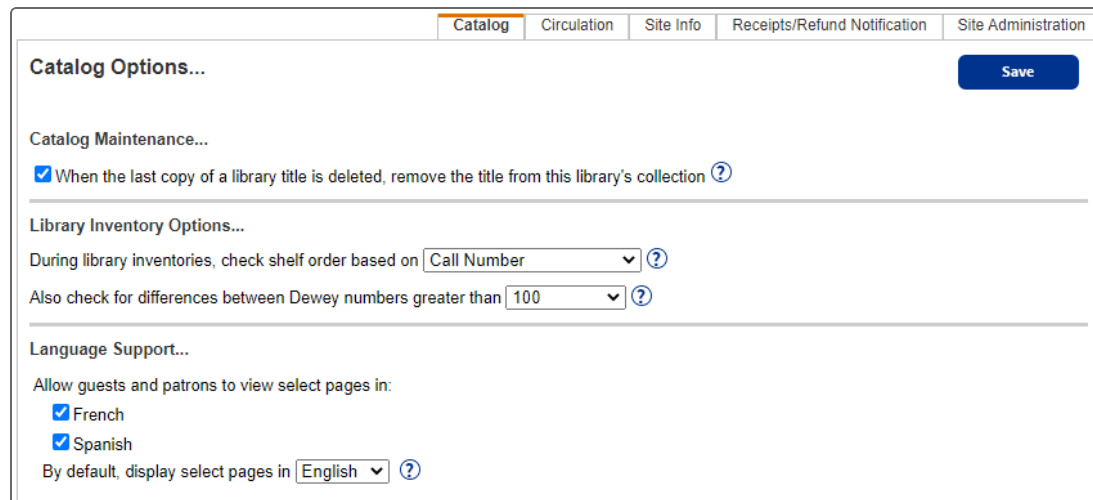
- ☐ After the training, I need to do the following to finish setting up patron types:

## Site Configuration

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

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

1. Select **Admin > Site Configuration > Catalog**.
2. To enable the catalog settings, select the checkbox or appropriate option. Click  for more information about an option.



The screenshot shows the 'Catalog Options...' configuration page. At the top, there are tabs for 'Catalog', 'Circulation', 'Site Info', 'Receipts/Refund Notification', and 'Site Administration'. The 'Catalog' tab is selected. Below the tabs, there is a 'Save' button. The page is divided into three sections: 'Catalog Maintenance...', 'Library Inventory Options...', and 'Language Support...'. In the 'Catalog Maintenance...' section, there is a checkbox labeled 'When the last copy of a library title is deleted, remove the title from this library's collection' which is checked. In the 'Library Inventory Options...' section, there are two dropdown menus: 'During library inventories, check shelf order based on' set to 'Call Number' and 'Also check for differences between Dewey numbers greater than' set to '100'. In the 'Language Support...' section, there are two checkboxes for 'Allow guests and patrons to view select pages in:' with 'French' and 'Spanish' both checked. Below these, there is a dropdown menu for 'By default, display select pages in' set to 'English'.

3. To adjust the circulation data included in the Popular Titles ribbon, select any of the following options in the **Top 10 Titles** section:

Top 10 Titles ?

☒ Show Top 10 in Catalog

☐ Count in-library use circulations

Count circulations of these patron types: All Patron Types [Update](#)

Count circulations of these material types: All Material Types [Update](#)

☐ Count circulations of this call number range: From  to  displayed as

To specify a call number range, enter at least the first 3 digits for Dewey numbers, a complete call number prefix, or a call number prefix and author cutter.

| If you want to...  | Then...   |
|--|---|
| Include or exclude circulations identified as "in-library use" | Select or deselect the <b>Count in-library use circulations</b> checkbox.   |
| Count circulations of only specific patron types               | a. Next to <b>Count circulations of these patron types:</b> , click <b>Update</b> .<br>b. Select or deselect the appropriate <b>Patron Types</b> .<br>c. Click <b>OK</b> .  |
| Count circulations of only specific material types             | a. Next to <b>Count circulations of these material types:</b> , click <b>Update</b> .<br>b. Select or deselect the appropriate <b>Material Types</b> .<br>c. Click <b>OK</b> .  |
| Include circulations in a specific call number range           | a. Select the <b>Count circulations of this call number range</b> checkbox.<br>b. In the <b>From</b> and <b>to</b> fields, specify a call number range. Type at least 3 digits of each Dewey number or a complete call number prefix. |

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

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

1. Select **Admin > Site Configuration > Circulation** sub-tab.

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

Library Options Save

☒ Allow library materials to circulate to all patrons in the district ?

☒ Allow library materials to be renewed at the borrowing site ?

Calculate library loan periods based on open days ?

☒ Automatically calculate fines for overdue items ?

☒ Automatically calculate overdue fine when lost book is found ?

☒ Require explanation when waiving library fine ?

☒ Require explanation when issuing library refunds ?

☒ Automatically create fine for lost library materials ?

☒ "Lost" library materials must be returned in a timely fashion to generate a refund ?

Calendar days from date "lost" before a paid library fine becomes non-refundable: 999

☒ Display TitlePeek cover images in Check Out - Check Out ?

☒ Display TitlePeek cover images in Check Out - Items Out ?

☒ Display TitlePeek cover images in Check In ?

☒ Turn on Ready Scan Check In functionality ?

☒ Record in-library use in Check In ?

☐ Check In off-site copies ?

☐ Opt out of district auto-quarantine

2. To enable a circulation setting, select its checkbox. Click ? for more information about an option.

#### Notes:

- 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. Select **Calendar** if you want Destiny to calculate due dates regardless of your Calendar.
- TitlePeek™ shows book cover images. It includes a table of contents, fiction profiles, brief summary, annotation, author notes, first chapter or excerpt, and published reviews. Books are matched with TitlePeek by their ISBN. Choose

the appropriate options to have the cover image appear in circulation.

- The Destiny Administrator must enable **Allow copies to be checked in at any site** (**Setup > Sites** sub-tab, and then edit the district) for the **Check in off-site copies** checkbox to appear.
- The Destiny Administrator must **Enable sites to opt out of auto-quarantine** (**Setup > Sites** sub-tab, and then edit the district) for the **Opt out of district auto-quarantine** checkbox to be available to select.

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

**Next Steps:**

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

Look in **Admin > Site Configuration > Site Info** to find your **Site Customer Number**, and record it for future reference:

## Library Calendar/Hours

It is important to update the Library Manager calendar regularly, as the system 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 **Admin > 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 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 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.

[How do I... ?](#)

| Today << August 2021 >>  |              |              |              |              |              |              |
|--|--------------|--------------|--------------|--------------|--------------|--------------|
| Sunday   | Monday       | Tuesday      | Wednesday    | Thursday     | Friday       | Saturday     |
| 1<br>Closed  | 2            | 3<br>Closed  | 4<br>Closed  | 5<br>Closed  | 6<br>Closed  | 7<br>Closed  |
| 8<br>Closed  | 9            | 10<br>Closed | 11<br>Closed | 12<br>Closed | 13<br>Closed | 14<br>Closed |
| 15<br>Closed   | 16           | 17<br>Closed | 18<br>Closed | 19<br>Closed | 20<br>Closed | 21<br>Closed |
| 22<br>Closed   | 23           | 24           | 25           | 26           | 27           | 28<br>Closed |
| 29<br>Closed   | 30<br>Closed | 31           |              |              |              |              |
| Closed: Sunday, Saturday      Hours: 8:00 AM - 4:00 PM <a href="#">View 2021</a> |              |              |              |              |              |              |

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 **Admin > 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

+ Add Circulation Type

| 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

+ Add Circulation Type

| Circulation Type | Default Loan Period | Default | Action   |
|------------------|---------------------|---------|--|
| Faculty          | 10                  |         |  |
| General eBook    | 5                   | ✓       | <ul style="list-style-type: none"> <li>✓ Make Default</li> <li>Edit</li> <li>Delete</li> </ul> |

+ Add Circulation Type

## 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
- Follett Community ([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

Every district is unique. Some districts add title records and only permit schools to add copies to existing records. In other districts, a district or school can add title and copy records. Some districts have policies such as whether a title is hard cover or paperback, only one title record should be included. No matter how your district catalogs, it is important to check for existing title records prior to adding new ones to avoid duplicates.

1. What policies does your district have in place in regards to cataloging resources?
2. How does your school handle adding new resources to your catalog?

## 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 eliminating duplicate records.

Notes

## 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). To find out who your Sales Representative, Customer Service Representative, or Technical Support contact is for Follett content, technology, and textbook products and services, go to [www2.follettlearning.com/find-your-follett-team.cfm](http://www2.follettlearning.com/find-your-follett-team.cfm).

**If you have a Titlewave account:**

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

The screenshot shows the Follett catalog interface. The top navigation bar includes links for Home, Dashboard, Catalog (selected), Circulation, Reports, Admin, My Info, and Messages. A left sidebar contains various search and management options, with 'Titlewave' highlighted. The main content area is titled 'Order History' and shows a table of shipments. The table has columns for Run Date, Invoice, PO Number, School Name, Details, Import MARC, Download Date, and Import Date. A single shipment is listed with a run date of 12/11/2019, invoice 508493F, PO number 062619, and school name CASEY. There are 'Details' and 'Import' buttons for this shipment.

| Run Date   | Invoice | PO Number | School Name | Details                 | Import MARC            | Download Date | Import Date |
|------------|---------|-----------|-------------|-------------------------|------------------------|---------------|-------------|
| 12/11/2019 | 508493F | 062619    | CASEY       | <a href="#">Details</a> | <a href="#">Import</a> |               |             |

2. 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.*

**Important:** Everyone in the district must adhere to the same title and copy matching specifications because title records are shared throughout the district and variations can cause issues such as duplicates or deleted title records.

Add / Update
Recent Imports

### 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) ?

### Copy Matching

☒ Skip the incoming copy if its barcode matches an existing copy's barcode

☐ Replace the existing copy with the incoming copy if the barcodes and the titles match

☐ Always add the incoming copy record and assign it the next available barcode

**Starting Barcode** ☒

[Generic Code 39, 9 characters total]

☐ Assign next barcode

### Assign Copy Information

If missing, assign the following information to each copy that is added or replaced:

- Circulation Type: Regular
- Status: Available (only when adding copies)

**Import File**  No file chosen

☐ 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).

☐ List possible duplicate titles in the Job Summary after import. ?

**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.**

| Brief Title   | Series/Notes | Subjects | Resources | Added Entries |
|---|--------------|----------|-----------|---------------|
| <b>Title Information</b> <span>Use MARC Editor</span> |              |          |           |               |
| Leading Article                                       |              |          |           |               |
| * Title   |              |          |           |               |
| Subtitle  |              |          |           |               |
| Authors   |              |          |           |               |
| Edition   |              |          |           |               |
| <b>Standard Numbers</b>                               |              |          |           |               |
| LCCN  | ISBN         | ISSN     |           |               |
| Material Type <span>Book</span>                       |              |          |           |               |
| Subtype <span>No Subtype Assigned</span>              |              |          |           |               |

**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
- Follett Community ([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.  |

## Destiny® Library Manager

| Term                                      | Definition   |
|---|--|
| <b>Boolean operator</b>                   | Term that expresses a logical relationship between keywords or phrases used in searches, such as AND, OR, and NOT.   |
| <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>carousel</b>                           | Customizable display group on the Destiny Discover homepage that shows library resources broken down by categories, such as Recently Added Books, Popular Titles, and eBooks. Also used in Collections by Destiny.   |
| <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.  |

## Destiny® Library Manager

| Term                          | Definition   |
|-------------------------------|--|
| <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.  |
| <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 Back Office</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 site configuration options, 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.  |

## Destiny® Library Manager

| Term                              | Definition   |
|-----------------------------------|--|
| <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.  |
| <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 on the Admin tab.  |
| <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.   |



## Destiny® Library Manager

| Term  | Definition   |
|---|--|
| <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.   |
| <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.  |

## Destiny® Library Manager

| Term                                 | Definition  |
|--------------------------------------|---|
| <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. |
| <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.  |

## Destiny® Library Manager

| Term                             | Definition  |
|----------------------------------|---|
| <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.  |
| <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. |

## Destiny® Library Manager

| Term                                     | Definition   |
|--|--|
| <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 Back Office 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 tab (Collections)</b>         | The Private tab contains all collections you created or copied. Only collection owners can access (the) collections on their Private tab.  |
| <b>Public tab (Collections)</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. |

## 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, or submit a review to Follett Digital resources. |
| <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> .   |

## Destiny® Library Manager

| Term                   | Definition  |
|------------------------|---|
| <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.  |
| <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 checkout, 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 Back Office 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.   |

## Destiny® Library Manager

| Term            | Definition  |
|-----------------|---|
| <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. |
| <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. Don't 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. Your trainer will let you know which URL to use and provide additional information needed to access the survey.

Course Survey: <https://follettlearning.tfaforms.net/79>

Work Order Number (provided by instructor): \_\_\_\_\_

Or

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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