

Circulating Materials Efficiently



Description

Students and teachers turn to your library for information and resources. You need an efficient way to get your patrons what they need, and accurately track each item. Destiny Library Manager has easy-to-use circulation features that help library staff check out, check in and track library resources quickly and easily.

Explore how to circulate your library resources, as well as how to run reports to manage overdue materials and fines.

Objectives

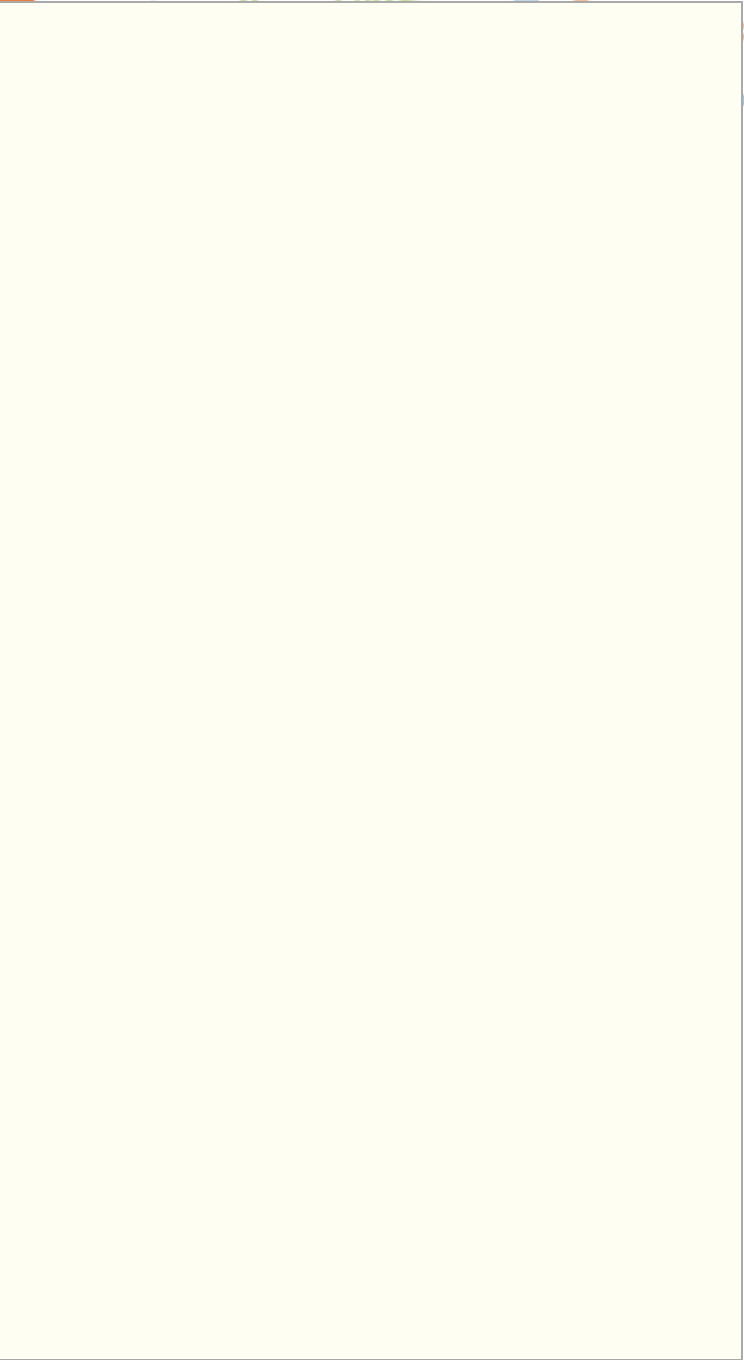
- Learn how to circulate library materials efficiently
- Set up and run the Current Checkouts/Fines (Overdue) report

Activities

- Circulate library materials
- Display copy and patron status information
- Run and save an overdue report

Plan

How do you identify patrons during checkout? For example, do you scan or enter student IDs or library barcodes, or do you look them up by name?



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. 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:

Notes

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

Home Dashboard Catalog **Circulation** Reports Back Office P 1

Check Out

Check Out Items How do I... ?

Check In To Patron By Homeroom

Check In Items

Renew

Holds/ILL

Fines

Copy Status

Item Status

Patron Status

Offline Circulation

Library Information

Find

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

Coop, Abigail (Student: Hidden)

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

Overdue Library: 0 / Resources: 2

Holds Ready 0

Fines Library: \$0.00 / Resources: \$31.25
Patron: \$0.00

Only today's check outs

Checked Out

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

Check Out – By Homeroom

The second way to check out materials to students is By Homeroom. This checkout option eliminates the need to scan patron barcodes or type patron names. Instead, you select patron names from a homeroom list.

Note: This option is only available if your Destiny records contain homeroom information. This is usually automatically added from your Student Information System. Other methods are covered in Destiny Help.

Use the following steps to practice checking out By Homeroom:

1. Select **Circulation > Check Out > By Homeroom** sub-tab.
2. From the **Homeroom** drop-down, select the appropriate homeroom, and then click **Select Patron**.
3. Click a student's name or picture to check out to that student.
4. After you select the patron's record, scan the first item's barcode in the **Find** field. The item appears in the **Checked Out** section. Scanning a second item moves the first book to the **Items Out** section.

Note: To edit the due date for the item in the **Checked Out** section, click **Change**. Select the new due date and whether it is for this item, this patron, or the rest of this session.

5. Click **Receipt** to quickly print a list of all the items the patron has checked out and any fines owed.
6. Make note of the barcode of the item you check out, so you can check it back in later in this training:

7. To check out items to another student in the same class, click **Select Patron**.
8. To check out items to students from a different homeroom, select another one from the **Homeroom** drop-down.

Check Out

Home Dashboard Catalog **Circulation** Reports Back Office Messages

Check Out Items

Check In

Check In Items

Renew

Hold/LL

Fines

Copy Status

Item Status

Patron Status

Offline Circulation

Library Information

Reset

How do I... ?

To Patron **By Homeroom**

Homeroom 175

Find Due Dates

LUSENHOP, KYLIE JADE (Student: P 2480660)

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

Grade Level 3
Homeroom 175

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

Only today's check outs

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	<input type="button" value="Renew"/> <input type="button" value="Lost"/>
5/2/2019	Gorilla doctors : saving endangered great apes (Copy: 35051878)	333.95 Turner	\$14.45	4/18/2019	<input type="button" value="Renew"/> <input type="button" value="Lost"/>

Check In

Properly checking in materials lets you track materials, assess any necessary fines and collect circulation statistics.

Use the following steps to check in the materials you checked out in the first two activities in this section:

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

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

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

Notes:

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

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

Patron Status

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

Note: The information that appears on this page varies based on your district's setup decisions.

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

1. Select **Circulation > Patron Status**.
2. In the **Find Patron** field, scan or type the patron's barcode.

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

The screenshot shows the Patron Status page for Cherie Nicol Llamas. The page is divided into several sections:

- Navigation:** Home, Dashboard, Catalog, Circulation, Reports, Back Office, My Info, Messages.
- Find Patron:** A search field with a 'Go' button and options for 'Only my patrons', 'Only search Last Name', and 'Only Active Patrons'.
- Patron Information:**
 - Barcode:** Hidden (Print Label)
 - Status:** Active
 - Gender:** Female
 - Card Expires:** 7/31/2017
 - Grad Year:** 2017
 - Birthdate:** 2/13/1998
 - District ID:** 6241000102
 - Acceptable Use Policy on File?** No
 - Nickname:** (None)
 - Grade Level:** 9
 - Homeroom:** Mr. Morris
 - User Defined 3:** (None)
 - Primary Language:** 2
 - Lexile Measure:** 544L
- Items Out:**

Due Date	Title	Call Number	Price	Checked Out	Actions
9/11/2018	Swifter, higher, stronger : a photographic history of the Summer Olympics (Copy 1 101820)	796.48 MAC	\$30.12	8/22/2018	Renew, Lost, Renew All
- Fines:** There are no fines for this patron.
- Holds:** There are no holds for this patron.
- Current Transactions:**

Checked Out	Overdue	Holds/Bookings	Fines
Library: 1	Library: 0	0	\$0.00

Copy Status

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

Note: The information that appears on this page varies based on your district's setup decisions.

Use the following steps to view a copy status page:

1. Select **Circulation > Copy Status**.
2. In the **Find Copy** field, scan or type the copy's barcode.

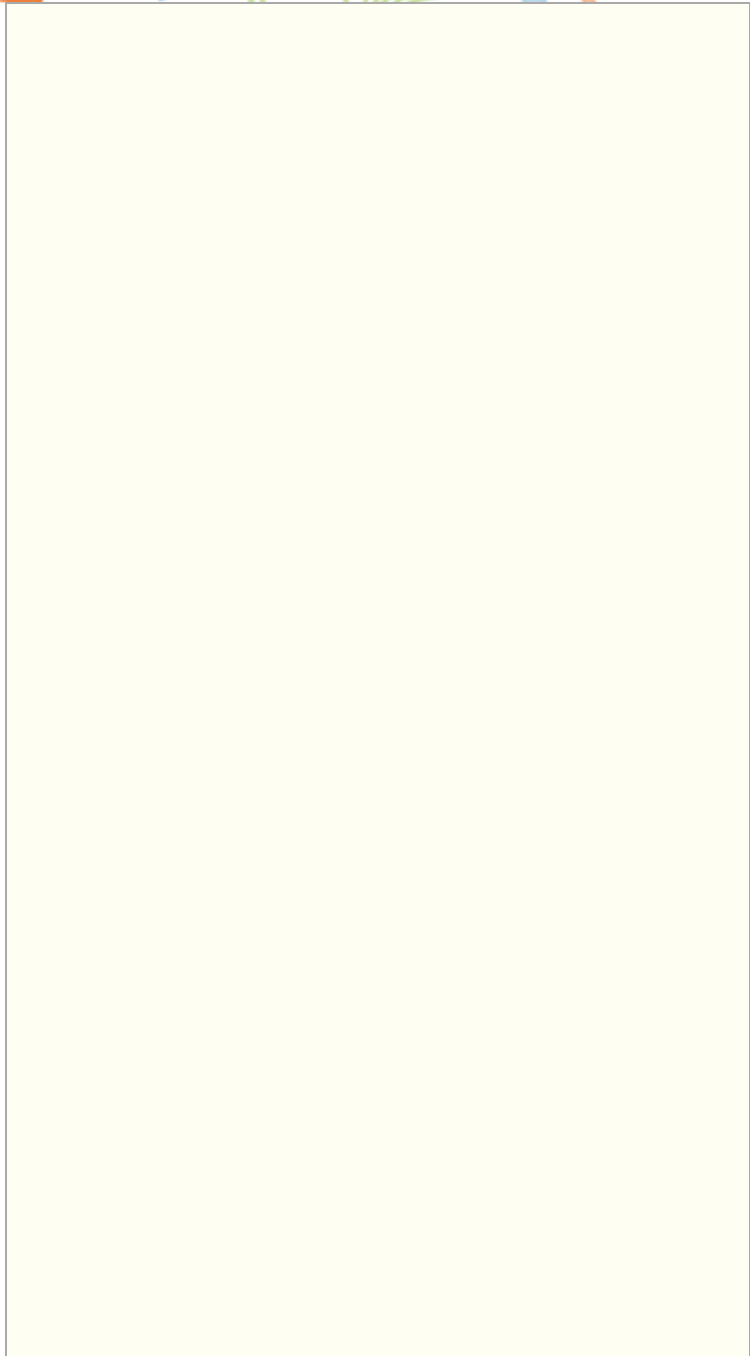
The screenshot displays the 'Copy Status' page for a specific book. The navigation bar at the top includes 'Home', 'Dashboard', 'Catalog', 'Circulation', 'Reports', 'Back Office', and 'My Info'. The left sidebar contains various options like 'Check Out', 'Check In', 'Renew', 'Holds/ILL', 'Fines', 'Copy Status', 'Patron Status', 'Offline Circulation', and 'Library Information'. The main content area shows the book title 'A short history of the honey bee : humans, flowers, and bees in the eternal chase for honey' by Ilona. Key details include: Barcode T 9600, Purchase Price \$16.96, Date Acquired 11/4/2011, and Circulation Type Regular. A 'Current Checkout' section indicates the book was checked out on 8/29/2016 to Patron Hoch, Lilly Loriann [Student] at Grade Level 12. A 'Previous Checkout' section is currently empty. The page also features a 'Notes' section with an 'Add Note' button and a 'Circulation Statistics' table at the bottom.

Circulation Statistics			
Current Month	0	Current Year	0
		Previous Year	0
		Total	2

Plan

How do you prefer to notify students of overdues and/or fines?

- Run a report that lists all overdues and fines in your school.
- Print notices to distribute at school or by mail.
- Email notices to a homeroom/classroom teacher.
- Email notices to a student, parent or both.



Apply

Current Checkouts/Fines Report

The Current Checkouts/Fines report helps you identify or send notices to students with checkouts and/or fines.

To practice setting up the Current Checkouts/Fines report, use the following steps:

- Select **Reports > Library Reports >** (under **Circulation**) **Current Checkouts/Fines**.

Step 1: Format

The screenshot shows the 'Format' step of the report configuration process. The interface includes a sidebar with navigation options like 'My Favorites', 'Library Reports', 'Patron Reports', 'Report Builder', 'Destiny Analytics', and 'Report Manager'. The main content area is titled '1. Format' and contains a table of saved reports and notices. Below the table, there are options to 'Set up a new report or notice' with various filters and checkboxes.

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

♥ +♥ = Favorite / Add to Favorites [Pencil] = Edit [Trash] = Delete

Set up a new report or notice

Show Checked Out/Overdue Materials

- All that are currently overdue
- That are [overdue by] 1 to [] days
- That are due from 10/29/2018 to 10/29/2018
- All that are checked out
- Resources Assigned to a Custodian
- Unpaid Library Fines
- Unpaid Resource Fines
- Unpaid Patron Fines

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

Note: The **Show > Checked Out/Overdue Materials** option is selected by default.

- All that are currently overdue
 - Those overdue by a specific range of days (such as 2–5 days) or due in a specific number of days (such as 2 days)
 - Those due during a specific date range
 - All checked out materials
2. Choose a format:
 - **Report** (PDF or Excel): This is a good option if you want to have a report of all 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. By default, the report includes all active patrons. You can limit patrons by the following:
 - To exclude specific patron types, click **Update**, and then deselect the appropriate checkboxes. Click **Save**.
 - To include only a specific graduating class, select **Graduating in**, and then type the year.
 - If you allow students from other schools in the district to check out your materials, choose if you want to include those patrons.
 - If you want to include patrons with an Inactive or Restricted status, select accordingly.
2. By default, the report includes materials with any circulation type. You can limit materials by the following:
 - To exclude specific circulation types, click **Update**, and then deselect the appropriate checkboxes. Click **Save**.
 - If your school uses Destiny Resource Manager or Destiny Textbook Manager, choose if you want to include resources or textbooks and related fines.
 - If students at your school can check out materials from other schools in the district, choose if you want to include those materials.
3. Click **Continue**.

Step 3: Details

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

If you chose Report:

The screenshot shows the 'Details' step of a report configuration in the Follett Destiny system. The interface is for George Washington High School. The main content area is titled 'Overdue / Assigned Materials & Unpaid Fines Report'. It has three tabs: '1. Format', '2. Limit', and '3. Details' (which is active). Under 'Select & Sort by', there is a dropdown menu set to 'Patron Name', followed by 'from' and 'to' input fields. Below this is a checkbox for 'Start a new page for each group'. The 'Also Display...' section is divided into 'Title Info' and 'Patron Info'. Under 'Title Info', there is a checked checkbox for 'Title for library materials' and an unchecked checkbox for 'Cover image'. Under 'Patron Info', there are checked checkboxes for 'Barcode' and 'Phone number', and unchecked checkboxes for 'Subtotal items/fines for each patron', 'Grade Level', and 'Homeroom'. There are 'Select All' and 'Clear All' buttons for the 'Title Info' section. At the bottom, there are 'Save Setup' and 'Run Report' buttons.

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

Note: If you selected Homeroom, select **Any Homeroom** from both drop-downs to include all.

- To limit the report to one name or number (such as a specific patron or all 8th graders), type or select the same name or number in both fields. For example, you might choose to run the report for one patron (**to Smith from Smith**) or one grade level (**to 8 from 8**).

- If you leave the **from** field blank and type a name or number in the **to** field, it includes all those items up to and including the name or number in that field.
 - If you type a name or number in the **from** field and leave the **to** field blank, it includes that name or number and all those after it.
3. If you chose to run a PDF report, a **Start a new page...** checkbox appears. If you want to start a new page after every group in the report, select it. Groups are determined by the information you selected in the **Select & Sort by** section.
 4. From the **Also Display...** section, select or deselect the title and patron info to include in the report. Select the **Cover image** checkbox to include a thumbnail of cover images.

If you chose 'Email to Homerooms':

1. By default, all homerooms are included. To exclude a homeroom, click **Update**. Deselect homerooms accordingly, and then click **Save**.
2. In the **Display name** field, verify or change the name and email address you want to appear as the email sender.
3. From the **Also Display...** section, select or deselect the title and patron info to include in the report. To include a thumbnail of cover images, select the **Cover image** checkbox.

If you chose Notices:

1. Format
2. Limit
3. Details

Overdue / Assigned Materials & Unpaid Fines/Notices

Select & Sort by Patron Name ▼ from to

Distributed

Internally ?

Mailed

Via email - Provide sender information

Display name

Email Test Email ?

Send To Email 1

Email 2

Email 3

Email 4

Email 5

Page layout ▼

Message 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 Select All

Cover image Clear All

Price of checked out/overdue materials

Patron Info Barcode

Phone number

Grade Level ▼

Homeroom ▼

Save Setup
Run Notices

1. In the **Select & Sort by** section, select a method for identifying patrons to include from the drop-down.

2. In the **from** and **to** fields, do one of the following:
 - To include all patrons, leave both fields blank.

Note: If you selected Homeroom, select **Any Homeroom** from both drop-downs to include all.

 - To limit the report to one name or number (such as a specific patron or all 8th graders), type or select the same name or number in both fields. For example, you might choose to run the report for one patron (**to** Smith **from** Smith) or one grade level (**to** 8 **from** 8).
 - If you leave the **from** field blank and type a name or number in the **to** field, it includes all those up to and including the name or number in that field.
 - If you type a name or number in the **from** field and leave the **to** field blank, it includes that name or number and all those after it.
3. Select how you want notices distributed: **internally**, **mailed** (includes address) or **email**.
4. If you selected **Via email**:
 - In the **Display name** field, verify or change the name you want to appear as the email sender.
 - In the **Email** field, verify or change the email address you want to appear as the email sender.
 - From the **Send To** options, select one or more checkboxes to identify the email addresses you want to send notices to. The options correspond to patron record fields, which can include up to five email addresses.
 - To send yourself a test email, click **Test Email**.
5. If you selected **internally** or **mailed** in the **Distributed** section, in the **Page layout** drop-down, select the number of notices to print on each page.
6. In the **Message** fields, you can customize the salutation before the patron's name and the text of the message.
7. To include the text, "To the Parent or Guardian of:" with the patron's name, select the **Address Label** checkbox.
8. From the **Also Display...** section, select or deselect the title or patron info to include. You can also select to include a thumbnail of cover images.

Step 4: Save & Run

Now that you have the report set up, you are ready to save and/or run it.

If you want to run a report or notices that you do not want to save for later use:

1. Click **Run Notices**. Report Manager appears and displays your report at the top of the list. The status automatically updates.
2. Click the **View** link to see the report, notices or status of the email notices.

If you want to save the report or notices to run again or schedule it to run automatically:

1. Click **Save Setup**.
2. In the **Save As** field, type a name for the report or notices.
3. From the **Schedule Report** drop-down, select **Do Not Schedule** if you do not want the report to run automatically. To schedule the report to run on a daily or weekly basis, select accordingly, and then select the day and/or time you want them to run.

Note: If you do not want the report or notices to run on closed days, select the **Do not run on closed days (Closed: Sunday, Saturday)** checkbox.

4. Click **Save Setup** or **Save & Run**.

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

























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





Notes

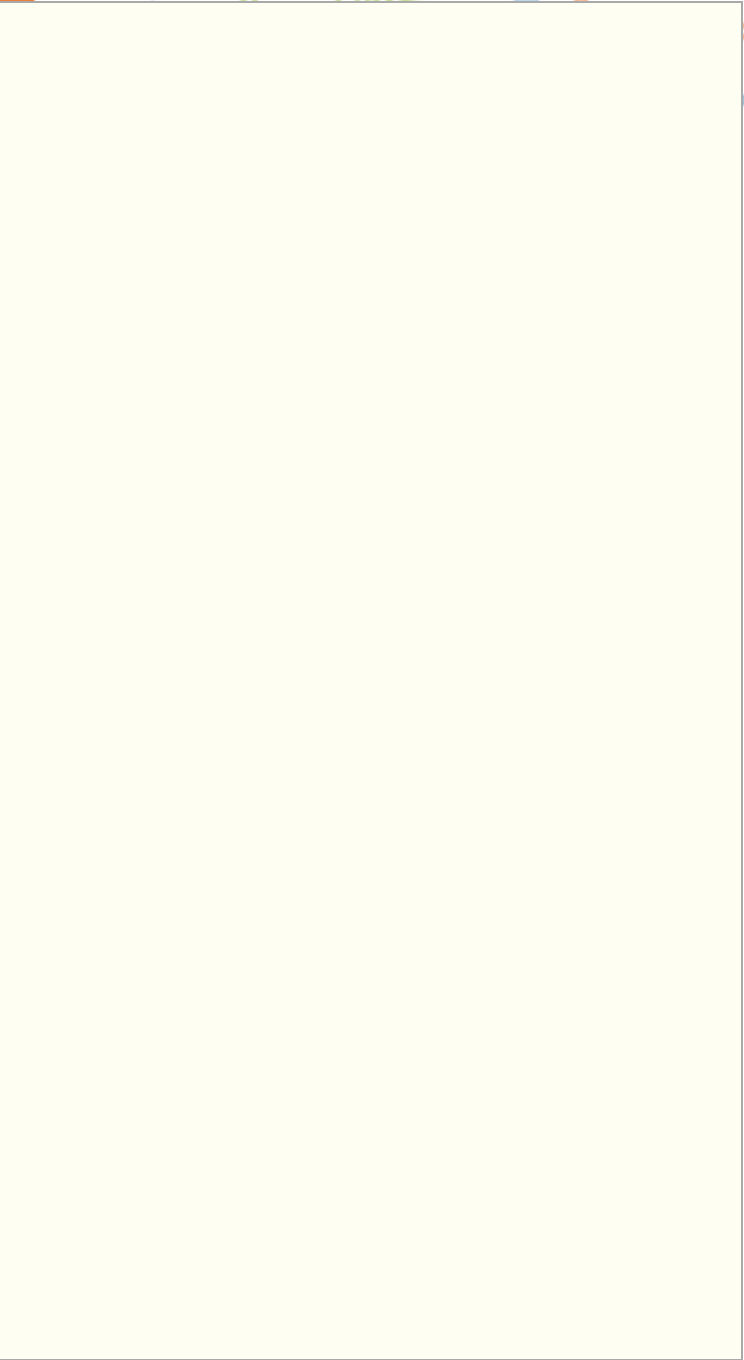
The saved report or notice setup appears on the Format page, in the **Saved Report/Notices** list at the top.

[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 Scheduled Daily 8:00 AM	8/22/2018 8:00 AM	  
 Overdue notices - daily	6/13/2018 9:53 AM	  
Overdue By Patron	11/29/2017 2:43 PM	   
FEC Checked out Materials by Homeroom	4/5/2017 10:55 AM	   
 FEC Overdue Notices to Students	4/5/2017 10:50 AM	  

 /  = Favorite / Add to Favorites  = Edit  = Delete



Assess

In the following table, use checkmarks to self-assess your level of understanding of the learning outcomes covered in this session.

	I can...
	Check out library materials.
	Check in library materials.
	View patron status information.
	View copy status information.
	Run a Current Checkouts/Fines report.
	Run Current Checkouts/Fines notices.

If you need more help, go to:

- Destiny Help for feature information and step-by-step instructions
- www.follettcommunity.com 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.