

Destiny Library Manager

Webinar Essentials Training



Participant Guide



Follett® Software
Company

A Follett Corporation Company

Destiny[®] Library Manager[™]

Essentials Training

Participant Guide

Version 10.0



Participant Guide

Published by Follett Software Company
1391 Corporate Drive, McHenry, Illinois 60050-7041
Phone: (800) 323-3397 | Fax: (815) 578-5572
<http://www.follettsoftware.com>

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Printed in the United States of America.

12001A 12/11

Special Notes to the Participant

Course Description

Welcome to the Library Manager Essentials training. This training introduces you to Library Manager and the fundamentals of using the product.

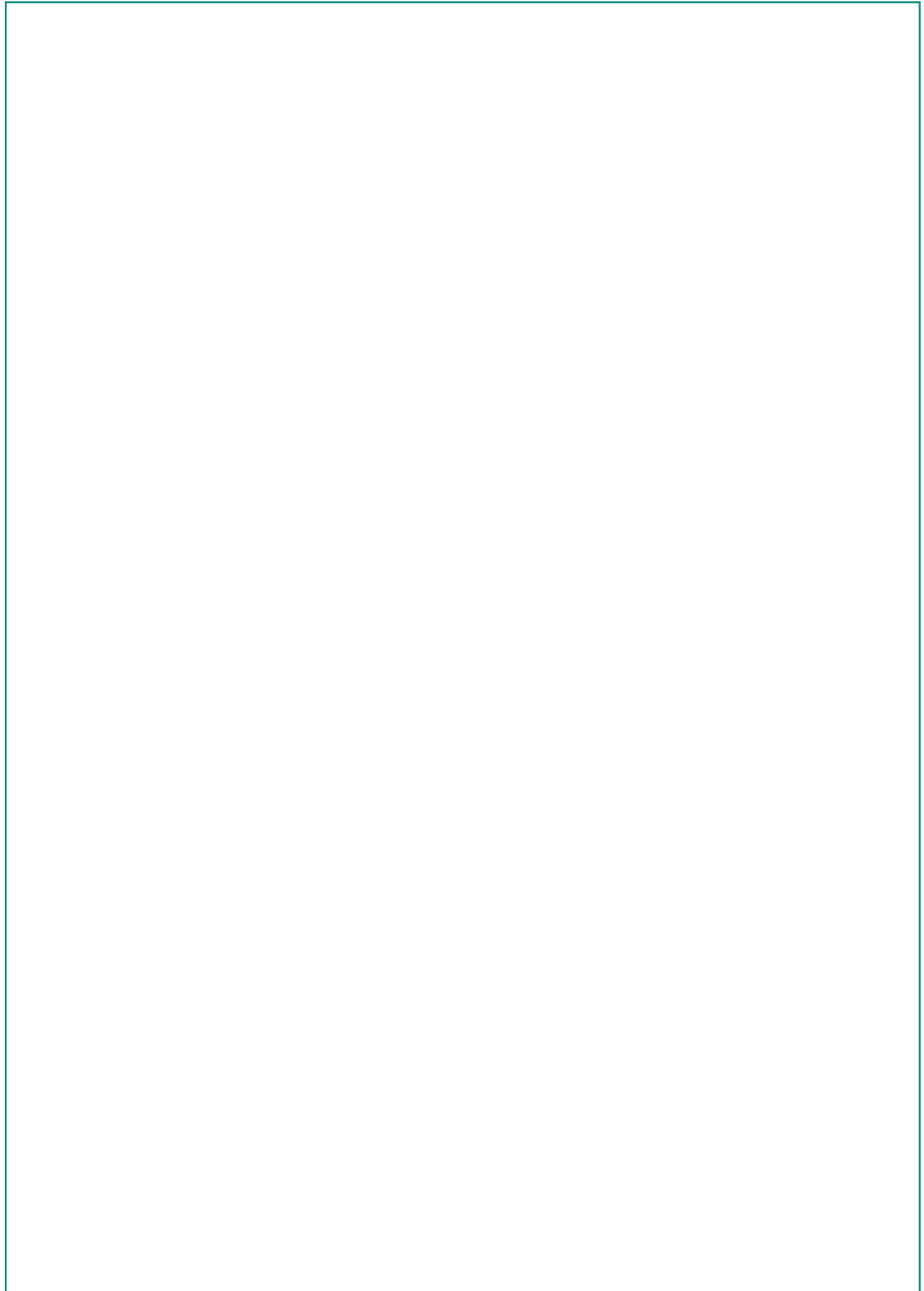
During the training, please do not hesitate to ask questions. Your trainer may take notes to respond to questions later in the training when the related topic arises.

We want you to be confident in your ability to use Destiny Library Manager, and we know that this Essentials training simply opens the door to some of the power of this product. Because we know that you'll want to explore other features and functionality as you grow more confident, we provide a number of eLearnings for your product that are available through the Follett Software website, as well as product support. If you can't find what you're looking for, please don't hesitate to contact your Follett Software representative as additional trainings not yet posted may be available to you and your school or district.

We're delighted that you are a Follett Software customer, and we look forward to providing you with the training, professional development, and services you need to achieve success.

Who Should Take This Training?

Librarians, information technology personnel, and others assigned a role using Library Manager.



Agenda

Library Manager Overview

This module describes how to navigate Library Manager and explains how to access the Destiny Help systems.

Catalog Searches

The search features in Library Manager accommodate all types of users in your library or school, from early learners to power users, through the Destiny Classic and Destiny Quest® search interfaces. This module describes Library Manager's Basic, Power, and Visual search options and use of searching tools such as Boolean operators and wildcards to enhance and focus catalog searches.

Advanced Catalog Features

This module describes Library Manager's advanced search features, including One Search™, and demonstrates how to create and share Resource Lists and book ratings and reviews with other patrons. You can customize the way the catalog displays to make it easy for patrons to find what they need in the library catalog, and this module also describes the catalog customization options available in Site Configuration.

Circulation Basics

In addition to enabling you to check materials out and in with ease, Library Manager's circulation features allow you to set special due dates, generate overdue notices, and assess fines for overdue, damaged, or lost items. The module also explores features that allow you to gather information on individual copies and patrons and explains how to customize your circulation options through Site Configuration.

Circulation Loan Periods & Policies

Library policies define the circulation periods for your library materials and are based on circulation types, patron types, and the library calendar, all of which work together to enable Library Manager to assign due dates and assess overdue fines automatically. This module explains how to set up the settings for your library loan periods and policies.

Collection Management

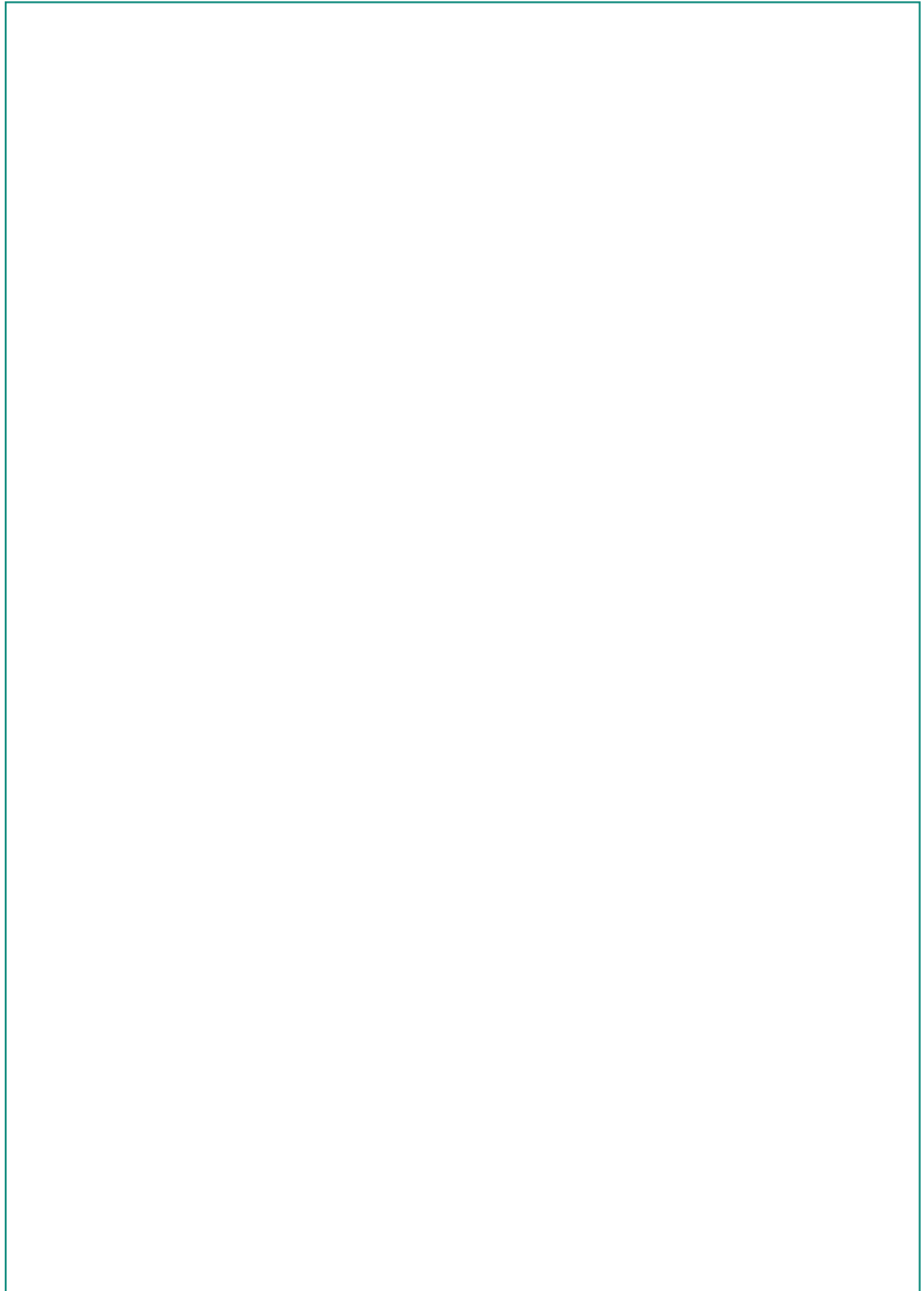
One of your primary tasks in collection management and development is adding resources to the collection. This module explores methods for adding and importing title and copy records to avoid creating duplicate records, ensure accurate collection reports, and enable patrons to find the materials they need easily.

Reports Overview

Library Manager's Reports feature offers several options for gathering circulation information and tracking fines and other policy-related data. This module describes how to create reports that show current checkouts and fines as well as generate overdue notices.

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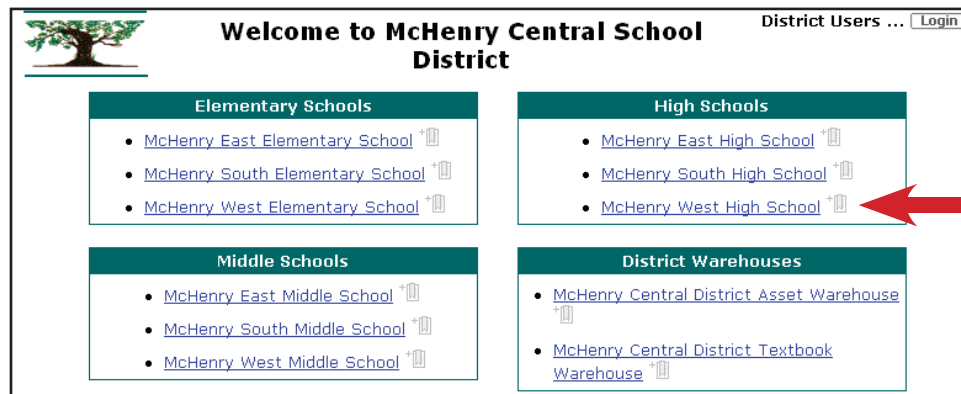
Library Manager Overview

Learning Objectives

As a result of completing this module, you should be able to:

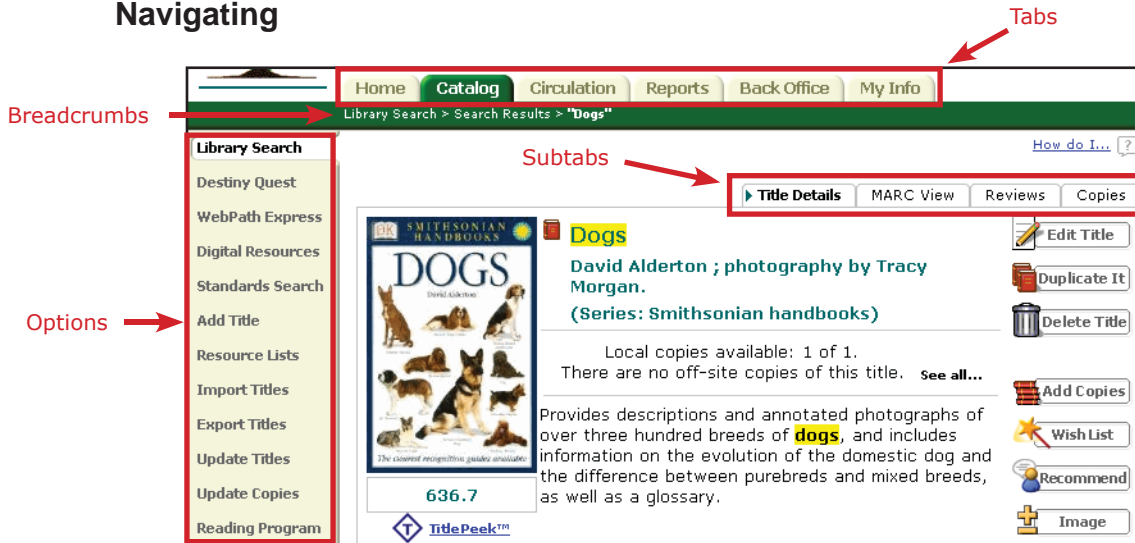
- Access and navigate Destiny Library Manager.
- Use on-page and online **Help** systems to locate additional information.

Logging in



Any user of Destiny Library Manager is a patron. The patron who logs in to the system has access to a range of features and functionality. A patron who does not log in to the system is called a Guest and has access to basic functionality only, such as searching the catalog.

Navigating



Tabs identify the four major functional areas of Library Manager: **Catalog**, **Circulation**, **Reports**, and **Back Office**.

- The key functions in **Catalog** are searching for, adding, and updating item records.
- The key functions in **Circulation** are checking items out and in, placing holds and requesting Interlibrary loans (ILLs), and assessing fines.
- The **Reports** tab enables users to generate preconfigured and customized reports.
- The **Back Office** tab enables administrative tasks such as setting up loan policies, managing patron records, and conducting inventory.

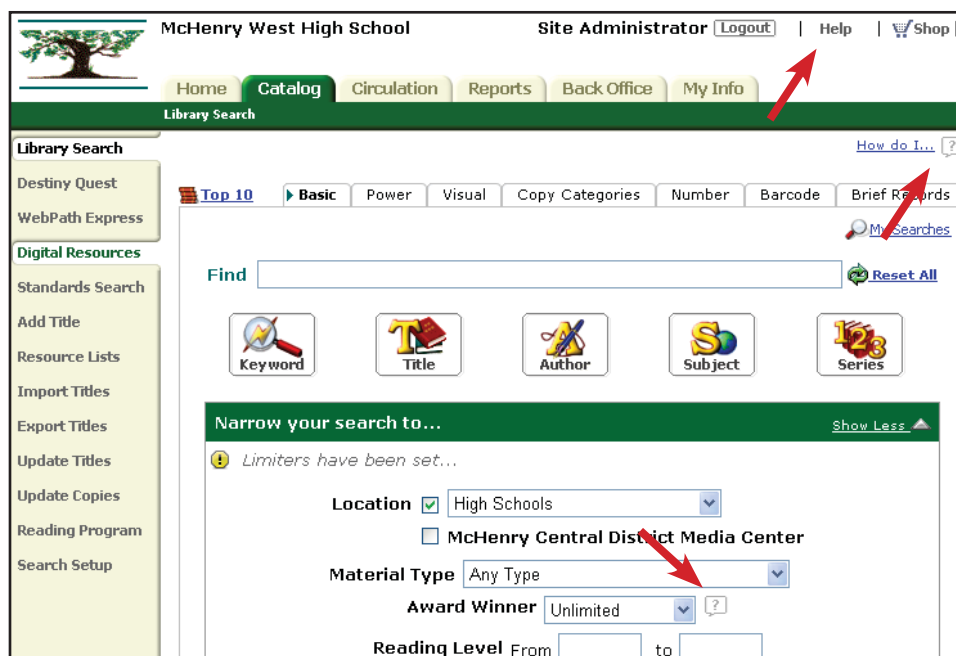
Options are the functions associated with each tab. The list of options changes as users select a different tab.

Subtabs are additional functions of a particular option. Some options have multiple subtabs. Selecting a subtab takes users to a new screen and a different function.

Breadcrumbs indicate the path of tabs and subtabs users have navigated. It is important to use the breadcrumbs to back out of a function because using the browser back arrow may log users out of Destiny.

Destiny Help Systems

Library Manager offers two help systems: on-page **Help** and online **Help**.



On-page Help allows users to locate information regarding the screen/page or a specific field displayed currently.

Online Help allows users to locate information on any topic, regardless of which screen or page displays currently.

In addition to Library Manager's Help Systems, eLearnings on many topics are available when you log in to the Customer Portal on Follett Software Company's® homepage at: <http://www.follettsoftware.com>.

Catalog Searches

Learning Objectives

As a result of completing this module, you should be able to:

- Perform **Basic** and **Power** searches.
- Perform a **Visual** search.
- Perform a search in Destiny Quest.
- Use **MyQuest** features.

Basic Searches

The default **Basic** search function allows patrons to use simple search terms or phrases to locate materials and to set limiters to narrow their search results. Its buttons provide the ability to perform five types of searches: **Keyword**, **Title**, **Author**, **Subject**, and **Series**.

The screenshot displays the 'Library Search' interface. At the top, there's a green header with 'Catalog' and 'Library Search'. Below this, a sidebar on the left contains 'Library Search', 'Destiny Quest', and 'Resource Lists'. The main area features a search bar with a 'Find' button and a 'Reset All' button. Below the search bar are five icons for different search types: Keyword, Title, Author, Subject, and Series. A green bar labeled 'Narrow your search to...' is followed by several filter options: 'Location' (McHenry West High School), 'Material Type' (Any Type), 'Award Winner' (Unlimited), 'Reading Level' (From to), 'Interest Level' (From Unlimited to Unlimited), and 'Reading Programs' (Unlimited). A 'Show Less' link is also present.

A **Keyword** search displays the largest number of titles in the **Search Results** list as it searches all title, author, subject, series, and note tags (fields of information) in the district's MARC (title) records.

Power Searches

A **Power** search is a more complex search interface that allows patrons to use Boolean operators and additional limiters to perform a more precise search.

Boolean operators are words that link search terms to broaden or narrow search results. These operators are AND, OR, and NOT.

A limiter is a means of limiting a search to a particular field or fields.

The screenshot shows the 'Library Search' interface with the 'Power' tab selected. It features three keyword input fields, each with a dropdown menu for Boolean operators (AND, OR, NOT) and a dropdown for 'All these words'. Below the keywords is a section titled 'Limit your search for titles...' with various filters: Location (McHenry West High School), Material Type (Any Type), Publication Year (Any Year), Circulation Type (All Circulation Types), Award Winner (Unlimited), Reading Level (From to), Interest Level (From Unlimited to Unlimited), and Reading Programs (Unlimited). There are 'Search' and 'Clear' buttons at the top right.

Limiting Your Search

Both the **Basic** and **Power** search options let patrons limit their search to a particular Location, Material Type, Reading Level, and other limiters.

This screenshot shows the 'Narrow your search to:' section. It includes filters for Location (McHenry West Middle School), Material Type (Any Type), Award Winner (Unlimited), Reading Level (From to), Interest Level (From Unlimited to Unlimited), and Reading Programs (Unlimited). A 'Show Less' link is visible at the top right.

This screenshot shows the 'Limit your search for titles...' section. It includes filters for Location (McHenry West Middle School), Material Type (Any Type), Publication Year (Any Year), Circulation Type (All Circulation Types), Award Winner (Unlimited), Reading Level (From to), Interest Level (From Unlimited to Unlimited), and Reading Programs (Unlimited). A 'Show Less' link is visible at the top right.

Library Manager limiters:

- **Location** (available in **Basic** and **Power** search) allows patrons to narrow the search to materials owned by their school, the entire district, or a group of schools (such as all elementary, middle, or high schools).
- **Material Type** (available in **Basic** and **Power** search) allows patrons to narrow the search to a specific material type, such as Book or Video.
- **Publication Year** (available in **Power** search) allows patrons to narrow the search to any material published during a specific year or range of years.
- **Circulation Type** (available in **Power** search) allows patrons to narrow the search to materials that share a particular circulation type. The default is **All Circulation Types**; click the **Update** button to limit the search to one or more of the eight types listed, such as Reference, Audiovisual, and DVDs.
- **Award Winner** (available in **Basic** and **Power** search) allows patrons to narrow the search to award-winning materials by selecting a specific state or "Literary Prizes" from the drop-down list. Once patrons select one of those options, they refine the search further by selecting a specific award. The Destiny Administrator must enable this limiter on the **Edit District** screen. Destiny updates the list of award winners automatically once a month.
- **Reading Level** (available in **Basic** and **Power** search) allows patrons to narrow the search for books that are not too easy or too hard for them to read. Patrons can enter values between 0.1 and 20.0, using one or both fields.
- **Interest Level** (available in **Basic** and **Power** search) allows patrons to narrow the search to books that should interest students in a particular grade level. Patrons must select grade levels in both the **From** and **to** fields.
- **Reading Programs** (available in **Basic** and **Power** search) allows patrons to narrow the search to books that match particular reading levels from the Accelerated Reader®, Reading Counts!®, Lexile® or Fontas and Pinnell® Reading Programs based on reading levels and point values. This feature is available only with a Reading Program Service Enriched Content Subscription.

The **Online Resources** checkbox (available in **Power** search) allows patrons to include the library's online resources in a search. Selecting this function opens a list of available resources to choose from. **Online Resources** are automatically included in a **Basic** search. This function is available if **One Search™** is enabled.

Visual Search

Destiny's **Visual Search** feature allows patrons to click on a series of pictorial buttons to search for resources instead of entering search terms.



Visual searches use two types of buttons: group and search (or URL) buttons. Click on the **Visual** subtab to display the group buttons. Group buttons represent broad topics to help guide patrons toward a particular area of interest. Clicking on a group button displays the search buttons. When patrons click a search button, the **Search Results** screen opens and shows a list of the resources in the library's collection that match the search topic.

Search Tools

Library Manager provides many tools that help patrons perform successful searches.

Wildcards help when patrons are unsure of the complete word or do not know the exact spelling. When using wildcards, patrons might begin with a title search, then, if necessary, expand the search with a subject or keyword search.

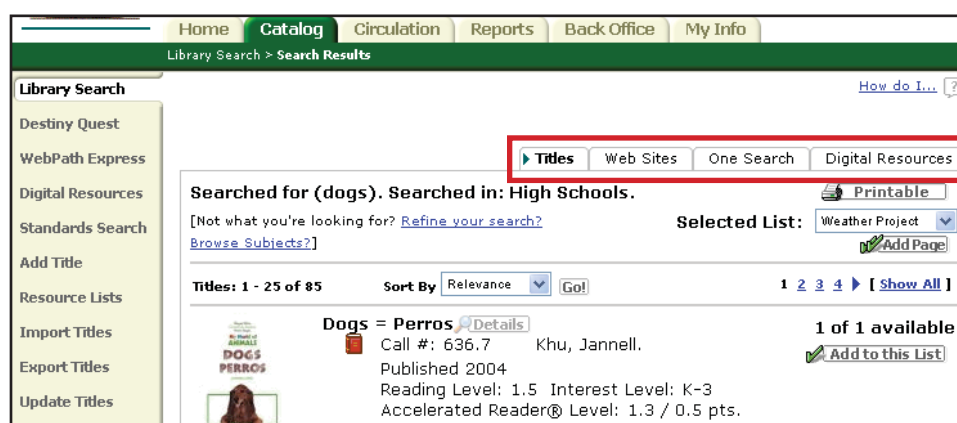
- **Asterisk (*)**
The * replaces any number of letters at the end of a word. However, it cannot be used in place of a word's first or last letter, and it cannot have any letters after it. For example, entering teach* and then choosing a **Title** search locates any MARC (title) records with the letters teach in the title, such as teach, teaches, teacher, and teaching.
- **Question Mark (?)**
The ? wildcard replaces single letters; however, it cannot replace the first or last letter of the word. For example, entering m?n and then choosing a **Title** search locates any MARC (title) records with a single three-letter word that

starts with m and ends with n, such as man and men. To expand the search results, patrons might conduct a **Subject** search with m?n, which yields results of titles that have the letters m and n and any letter in between in both the titles and the subject tags (fields). The broadest wildcard search is a keyword search.

If a patron misspells a search term while using the **Keyword** search, Library Manager tries to locate a match close to the word the patron entered in the **Find** field with the **Did you mean...** feature in the Search Results

Search Results

Search results are organized by material types on subtabs on the **Search Results** screen.



The **Titles** subtab lists materials in your library that match the search term. This includes Follett ebooks.

The **Digital Resources** subtab lists videos, pictures, or sound files from a digital provider.

The **Web Sites** subtab lists the websites that have information about the search term. This tab is only available to sites with a subscription to **WebPath Express**.

The **One Search** subtab lists resources in your online databases.

Searching With Destiny Quest

Destiny Quest is a highly graphical searching interface included with Destiny Library Manager. It engages K–12 students and helps them easily locate appropriate library materials that meet their classroom needs and personal interests.

Access Destiny Quest by clicking on the **Destiny Quest** option on the **Catalog** tab. The **Destiny Quest Home** page contains **The Top 10 Books**, **Resource Lists**, **New Arrivals**, and **My Personal List**.



To access **Destiny Quest**, a workstation must have the following:

- One of these browsers—Microsoft Internet Explorer version 7 or higher, Apple Safari, Mozilla Firefox, or Google Chrome.
- Monitors with a minimum screen resolution of 1024 x 768.

Quest's **Simple Search** function allows patrons to enter a keyword search term in the Find field and select **Go!** to locate library materials. Patrons can access **Simple Search** within every main link in Destiny Quest: the **Find** field appears at the top of each screen.

The **Advanced Search** feature in Destiny Quest is comparable with the **Power** search in Destiny Classic. It allows patrons to use Boolean operators (AND, OR, NOT) to narrow or expand searches, but in Destiny Quest patrons add another limiter line to indicate AND and fill in a **But I don't want** field to indicate NOT.



Advanced Search

As you use the options below, your Advanced Search term appears here.

Go!

Reset

Show me everything that has...

All of these **Keywords** **- +**

This exact **Keyword** **- +**

One or more of these **Keywords** OR OR **- +**

But I don't want...

One or more of these **Keywords** OR OR **- +**

Limit my search to...

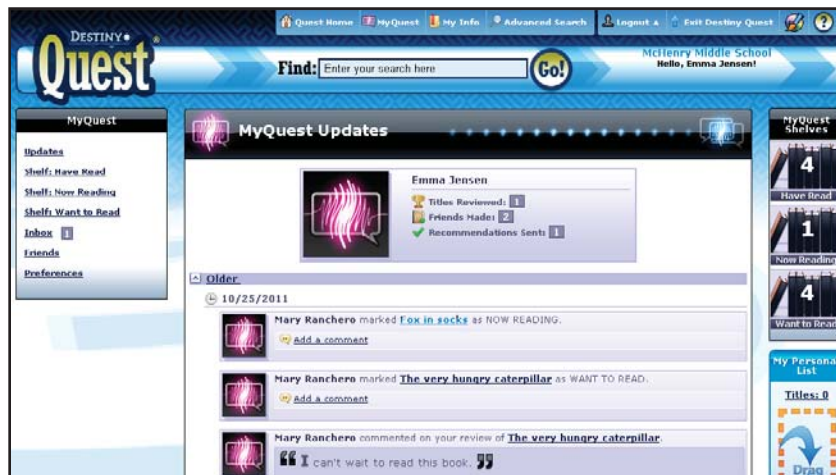
Choose... **- +**

Visual Search in Destiny Quest functions in the same manner as it does in the Classic Catalog and uses the same predefined groups and searches. Clicking the **Visual Search** link opens the **Visual Search** window.



MyQuest

MyQuest gives patrons their own space to create “shelves” containing the books they have read, the books they are currently reading, and the books they want to read. They can also request and accept **Friends** with whom they can share ratings and reviews, recommendations, and comments. **MyQuest** is available to patrons only if granted the appropriate permissions by the Destiny or site administrator based on school policies.



- **Friends**
Patrons can send other patrons **Friend Requests**. Patrons can choose to notify their **MyQuest** Friends and be notified about the following activities: shelf updates, new ratings, and reviews. **Friends** can make recommendations to each other and comment on reviews, shelf changes, and other comments.
- **Inbox**
The Inbox is an area where incoming **Friend Requests**, recommendations, and other actionable items reside.
- **Shelves**
MyQuest shelves allow patrons to display books they want to read, are currently reading, and have read. The shelves are shared with their **MyQuest** **Friends**.
- **Updates**
Updates give a date-based view of what patrons and their friends have shared in **MyQuest**. They can add comments to reviews, ratings, and shelf additions or changes. Comments are a private conversation between **MyQuest** **Friends**. Patrons have the option to report inappropriate comments.

A Destiny Quest Mobile application is available to students, teachers, and librarians. It allows remote access to Destiny Quest to browse the catalog, place an item on hold or save it to a resource list, and view a detailed summary of their account.

Advanced Catalog Features

Learning Objectives

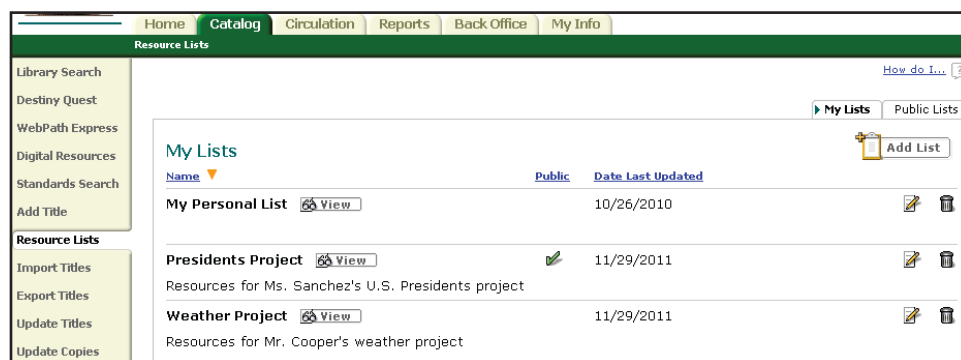
As a result of completing this module, you should be able to:

- Create and use **Resource Lists**.
- Create title ratings and reviews.
- Conduct a search with the **One Search** feature.
- Describe and demonstrate the **Digital Content Subscriptions** your library purchased.
- Customize your catalog.

Resource Lists

A resource list is a group of library titles that are organized for a specific purpose. Destiny's **Resource Lists** function makes it easy for patrons to organize titles they locate through searches and other Destiny functions. With access level permission, patrons can create two types of Resource Lists—private and public.

Access a resource list by selecting the **Catalog** tab > **Resource Lists** option. Personal lists are located on the **My Lists** subtab. Public Lists are located on the **Public Lists** subtab.



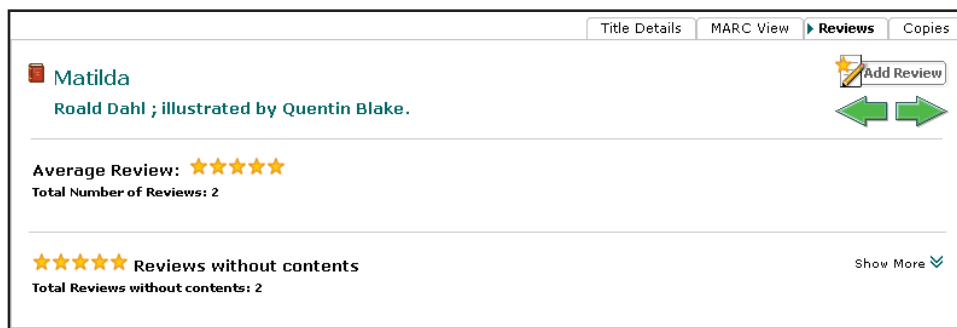
Use a resource lists to:

- Store titles you want to locate or materials you used for a project.
- Share resources with other users.
- Create citation lists and bibliographies.
- Print barcodes for new materials.
- Merge duplicate titles

Title Ratings and Reviews

Reviews offer students a way to share their opinions of their favorite (or least favorite) titles. A 1- to 5-star average rating appears on the **Search Results** and **Title Details** screens of the **Catalog** tab. In Destiny Quest, patrons can narrow their search of the initial Search Results based on the review ratings. Patrons may also include a written comment about the title.

Ratings and reviews display on the **Reviews** subtab on the **Title Details** screen.



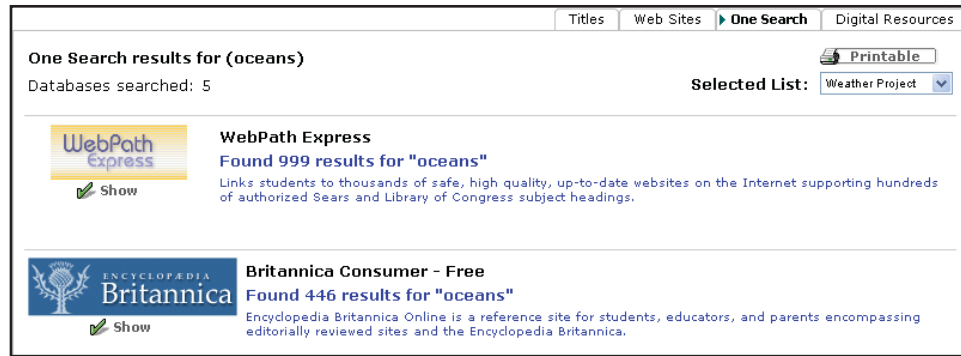
The ability to add ratings and reviews and upload digital content is controlled by permissions.

One Search

One Search allows patrons to search multiple resources, including the library collection and online free and subscription databases, simultaneously.

A **Basic** search searches these multiple resources automatically. The **One Search** results are available on the **One Search** subtab.

To access **One Search** results in a **Power Search**, click on the **Include Online Resources** checkbox. Then select the databases you want to include or choose **Select All**. Click **Search**.



Digital Content Subscriptions

The following are Digital Content Subscriptions that your school may have a subscription to.

WebPath Express™ provides today's K–12 kids with a safe, fun, and familiar search tool that integrates trustworthy, relevant websites into your library catalog while filtering out questionable content. You can limit WebPath Express website searches to specific grade levels.

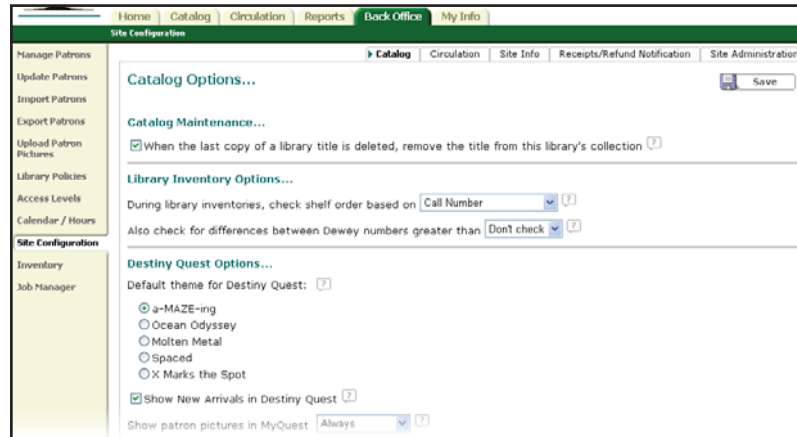
Follett's **Reading Program Service** enhances your library records with reading program information for Accelerated Reader®, Reading Counts!®, Lexile®, Fountas and Pinnell® and other popular reading programs.

Follett's **Standards** subscription automatically aligns your library resources and educator-reviewed websites with the standards being taught, helping you find appropriate materials by using fast and convenient searching options.

TitlePeek™ is a subscription service that displays in the **Search Results** the book cover along with varied additional content, such as the title profile, table of contents, brief summary, author notes, first chapter or excerpt, and published reviews. Books in your collection are matched with TitlePeek by means of their ISBN numbers.

Catalog Configuration Options

You can customize the way your catalog displays through the use of the **Site Configuration** option on the **Back Office** tab. The customization options are on the **Catalog** subtab.



Some of the customization options available include the following:

Destiny Quest Options...

- **Show patron pictures in MyQuest:** If pictures are attached to patron records, your choice in this setting displays or hides them when patrons use the **Friends** feature in **MyQuest**.

Library Title Display Settings...

- **Library Reviews:** Select the format for displaying the reviewer's name on reviews. You can also choose to hide the reviewer's name.

Quiz/Level Based Searches...

These settings allow your patrons to limit their searches by a particular reading program and reading/interest levels, if this information is in the MARC record.

Search Settings...

- **Enable search suggestions in Destiny Quest:** This setting turns on the **Auto-suggest** feature in Destiny Quest.
- **Filter search suggestions:** This setting allows you to enter specific words that you do not wish to appear in the **Auto-suggest** drop-down list. It does not stop the patron from using the word as a search term, but it does prohibit others from seeing it in the list.
- **By default, show limiter options in Basic search:** When enabled, this setting displays all the limiter fields on the **Basic** search screen.

Top Ten Titles

This setting displays the top 10 titles that circulated in your library. You may choose to count only titles checked out by students, particular material types, or call number ranges.

Circulation Basics

Learning Objectives

At the end of the module, you will be able to:

- Circulate materials.
- Change due dates.
- Explore patron and copy information.

Checking Out

To check out library materials to patrons, click the **Circulation** tab. By default, the **Check Out** option is selected.

You have two checkout choices:

- **To Patron** subtab: Use this subtab to check out items to individual patrons.
- **By Homeroom** subtab: Use this subtab to check out items to students using the library during class time.



The screenshot shows the library system's interface. At the top, there is a navigation bar with tabs: Home, Catalog, Circulation (selected), Reports, Back Office, and My Info. Below this, the 'Check Out' subtab is active. On the left, a sidebar menu lists: Check Out (selected), Check In, Renew, Holds/ILL, Fines, and Copy Status. The main content area has a 'Find' input field, a 'Go!' button, and two buttons: 'Find Patron' (with a magnifying glass icon) and 'Find Copy' (with a magnifying glass icon). Below these, there is a checkbox for 'Only search' and a dropdown menu currently set to 'Patron Names'. A 'Due Dates' link is also visible. In the top right corner of the main area, there are tabs for 'To Patron' (selected) and 'By Homeroom', along with a 'How do I...?' link.

Checked Out and Items Out Sections

Checked Out section—identifies the last copy checked out during a circulation session.

Items Out section—lists all copies checked out to a particular patron.

The screenshot shows a library system interface for a patron named Hernandez, Ava (Student: 2010001722). The interface includes search filters, a patron profile, and two sections: 'Checked Out' and 'Items Out'.

Patron Information:

- Checked Out Library:** 3
- Overdue Library:** 0
- Holds Ready:** 0
- Fines:** Library: \$0.00, Patron: \$0.00
- Grade Level:** 12
- Homeroom:** Mr. Henderson

Checked Out Section:

- Item: F. Scott Fitzgerald : The Great Gatsby (Copy: T 377)
- Due Date: 12/22/2011
- Buttons: Change, Receipt

Items Out Section:

Due Date	Title	Call Number	Price	Checked Out	Buttons
12/13/2011	Turtle in paradise (Copy: T 3861)	[Fic] HOL		11/29/2011	Renew, Lost
12/13/2011	Weather : air masses, clouds, rainfall, storms, weather maps, climate (Copy: T 2789)	551.5		11/29/2011	Renew, Lost

Buttons: Renew All

Changing Due Dates

Select the **Change** icon under the **Checked Out** section on the **Check Out** screen.

The dialog box titled 'Change the due date for checkout to patron...' allows users to select a new due date. It includes a 'Save' button, a 'Cancel' button, and a calendar for December 2011.

Selected date: 12/22/2011 **until logout**

Default date: 12/22/2011

Calendar (December 2011):

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Checking In

The **Check In** option looks similar to the **Check Out** option, but, unlike the **Check Out** option, you do not check in items by patron—you check in by item only. Recently checked in items appear in the **Most Recently Checked In** section. This section is helpful for confirming items were checked in. The list holds the 10 most recent checkins.

Find Copy	Go!	<input checked="" type="checkbox"/> Record in-library use
Most Recently Checked In		
F. Scott Fitzgerald : The Great Gatsby (Copy: T 377)		
Checked out 12/8/2011 to Hernandez, Ava (Student: 2010001722)		
Library copies still checked out: 2		
Due 12/22/2011		813/.54
Create Fine		

- **Record in-library use** checkbox—This option counts in-library use of materials that are not officially checked out (Ex. reference books).
- **Create Fine** button—This button allows you to assess a fine for a damaged book immediately after checking in the item.

Copy Status

The **Copy Status** option displays information about a particular copy, including current and previous checkout information. In addition, on this screen you can edit the copy record, add a hold, mark the copy lost, print new barcode labels, or add a note to the copy record.

From the **Check In** screen, click the copy barcode number of an item recently checked in to open the **Copy Status** screen. You can also access **Copy Status** information by clicking on the Copy Status option and scanning the barcode or typing the name or barcode of a title.

Circulation Statistics			
Current Month	Current Year	Previous Year	Total
0	1	0	1

Patron Information

The patron information section is in the top portion of the **Check Out** screen. In the patron information section of the **Check Out** screen, you can perform the following tasks.

The screenshot shows the 'Check Out' screen with a navigation bar at the top containing 'Home', 'Catalog', 'Circulation', 'Reports', 'Back Office', and 'My Info'. The 'Circulation' tab is active. On the left is a sidebar with links: 'Check Out', 'Check In', 'Renew', 'Holds/ILL', 'Fines', 'Copy Status', 'Patron Status', 'Offline Circulation', and 'Library Information'. The 'Patron Status' section is expanded, showing a 'Reset' button. The main area displays the 'Check Out' title and a 'How do I...?' link. Below this are buttons for 'To Patron' and 'By Homeroom'. A search section includes a 'Find' input field, a 'Go!' button, and icons for 'Find Patron', 'Find Copy', and 'Add Title'. There are checkboxes for 'Only search' and 'Homeroom', and a 'Due Dates' link. The patron information for 'Hernandez, Ava' (Student: 2010001722) is shown, with an 'Edit Patron' link. The status includes: 'Checked Out Library: 2', 'Overdue Library: 0', 'Holds Ready 0', 'Grade Level 12', and 'Homeroom Mr. Henderson'. A photo of the patron is displayed. Fines are listed as 'Library: \$0.00' and 'Patron: \$0.00'. At the bottom right, there is a checkbox for 'Only today's check outs' and a 'Receipt' button.

- View patron information
Click the **patron's barcode** hyperlink to display the **Patron Status** screen.
- Manage fines
Click the **Fines** link to display any fines for this patron, create or waive fines, or mark them as paid.
- Print a patron transaction receipt
To print a receipt showing all transactions, select the **Receipt** button. To print just the daily transactions, click on the **Only today's check outs** checkbox. After you make your selection, a new window containing the transaction information opens.

Circulation Loan Periods & Policies

Learning Objectives

At the end of the module, you should be able to:

- Create new and edit existing **Circulation Types**.
- Create new and edit existing **Patron Types**.
- Edit the library **Calendar**.
- Explain and set up appropriate **Site Configuration** circulation settings.

Getting Started

Before setting up your **Patron** and **Circulation Types**, you should gather the following information:

- A list of patron groups, such as students, faculty, staff, parents, and volunteers. This is the list of **Patron Types**.
- A list of circulation periods for the different types of materials in the library collection. This is the list of **Circulation Types**, which in some cases may be based on patron type.

Material	Students	Faculty	Substitutes
Open stack	2 weeks	90 days	2 weeks
Media	1 week	30 days	2 weeks
Circulating reference	1 hour	1 hour	1 hour
Noncirculating reference	No	Overnight	No

- A copy of the library policy handbook or a list of the circulation policies for the library.
- The library calendar.

Circulation Types

Once you identify your patron types and the loan policies for the types of materials in your collection, you are ready to set up those policies in Library Manager. To do so, select the **Back Office** tab and the **Library Policies** option. Select the **Circulation Types** subtab to edit these policies.

The screenshot shows the 'Circ Types' page in the Library Manager interface. The left sidebar contains a menu with options like 'Manage Patrons', 'Library Policies', 'Access Levels', etc. The main content area is titled 'Circ Types' and has tabs for 'Patron Types' and 'Circ. Type'. Under the 'Circ. Type' tab, there are 'Default Settings' for eBooks and a table of circulation types.

Default Settings

Loan Period	Days: 14	Fine Increment	\$0.05 per day
Grace Period	Days: 0	Max Fine	\$5.00
Renewable	Times: 0	Overdue to Lost	N/A

Circulation Types Table

Patron Type	Checkout Limit	Loan Period	Grace Period	Renewable	Fine Increment	Max Fine
Faculty		Days: 14	Days: 0	Times: 0	\$0.05 per day	\$5.00
Student		Days: 14	Days: 0	Times: 0	\$0.05 per day	\$5.00

Library Manager assigns the **Default Circulation Type** to any new copies you add. Click the **Edit** icon to make any changes to a **Circulation Type**. To add a new **Circulation Type**, click the **Add Circulation Type** button. Make decisions on the following options:

Loan Period: period of time patrons are allowed to keep library materials. You can customize these for different patron types.

Grace Period: number of days a checkout is not yet considered overdue and for which a fine is not calculated.

Renewable: number of times a patron can renew a particular item before Library Manager blocks the transaction.

Fine Increment: amount incurred for each open day that a checkout is overdue.

Max Fine: upper limit or cap of a fine. In addition, Library Manager can automatically charge a fine to a patron based on the purchase price in the copy record when a checked out copy is marked lost. If a purchase price is missing, Library Manager assesses the max fine.

Overdue to Lost __ Days: number of days library material can be overdue before the copy status changes automatically to lost.

Patron Types

After editing the **Circulation Types** settings, select the **Patron Types** subtab under the **Back Office** tab > **Library Policies** option to edit these additional library loan policies.

The screenshot shows the 'Patron Types' configuration page in the Library Manager. The left sidebar contains a menu with options: Manage Patrons, Update Patrons, Import Patrons, Export Patrons, Upload Patron Pictures, Library Policies (selected), Access Levels, Calendar / Hours, Site Configuration, Inventory, and Job Manager. The main content area is titled 'Patron Types' and has two tabs: 'Patron Type' (active) and 'Circ. Type'. Below the tabs, there are two columns of settings for the 'Faculty' patron type. The first column includes 'Max Checkouts' (10), 'Fixed Due Date' (None), 'Ceiling Date' (None), and 'Block on Fines/Overdues' (No). The second column includes 'Max Holds' (5), 'Ready Holds Expire in' (Days: 7), 'Pending Holds Expire in' (Days: 21), and 'Default Hold Priority' (Standard). At the bottom, there is a table with columns: Circulation Type, Checkout Limit, Loan Period, Grace Period, Renewable, Fine Increment, and Max Fine. The table lists four circulation types: eBook, eBooks, *NC, and Regular, each with its respective settings.

Circulation Type	Checkout Limit	Loan Period	Grace Period	Renewable	Fine Increment	Max Fine
eBook		Days: 14	Days: 0	Times: 0	\$0.05 per day	\$5.00
eBooks		Days: 10	Days: 0	Times: 0	\$0.00 per day	\$5.00
*NC		Days: 14	Days: 0	Times: 0	\$0.05 per day	\$5.00
Regular		Days: 14	Days: 0	Times: 0	\$0.05 per day	\$5.00

The Library Manager installation provides two default **Patron Types: Faculty** and **Student** (the latter is the default patron type). To edit the policies for one of the **Patron Types**, select the **Edit** icon to its right and make decisions on the following options.

Max Checkouts: number of copies of all **Circulation Types** a person of this **Patron Type** can check out at any time.

Max Holds: maximum number of holds a patron can place at one time.

Ready Holds Expire in ___ days: 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 to others.

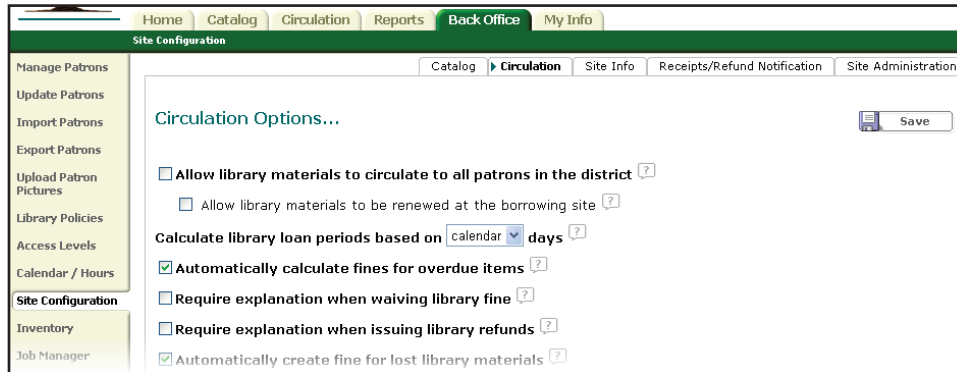
Pending Holds Expire in ___ days: number of days a patron hold remains active in the hold queue.

Default Hold Priority: order of patrons in the hold queue.

Block check outs and renewals if the patron has fines or overdue items: Library Manager alert that blocks checkout of additional items when a patron owes fines or has overdue materials. You can override the block.

Circulation Site Configuration Options

You can customize your circulation options through the use of the **Site Configuration** option on the **Back Office** tab. The customization options below appear on the **Circulation** subtab.



Allow library materials to circulate to all patrons in the district: enables interlibrary loans with other sites or schools (for district installs only).

Calculate library loan periods based on calendar/open days (offers two options):

- **Calendar:** this setting calculates due dates according to the calendar, including weekends, holidays, and any other library closed days in the loan period. This setting works hand-in-hand with the **Loan Period** setting in **Library Policies**.
- **Open:** this setting calculates due dates based on open days in the Library Manager calendar only. It does not count closed dates such as weekends and holidays as part of the loan period. The patron has a due date of x number of open days. For example, if your library is open five days a week and you want to set a two-week loan period, set the loan period to ten days, not fourteen days.

Note: If a calculated due date falls on a closed day, the due date moves to the next open day.

Automatically calculate fines for overdue items: enable if your school charges overdue fines. Overdue fines are then charged upon checkin of an overdue item. If your school does not charge overdue fines, it is very important that you uncheck this option or Library Manager will assess fines that will then require you to override and/or delete the fines.

“Lost” library materials must be returned in a timely fashion to generate a refund: allows placing a time limit for patrons who paid a lost fine to receive a refund for a returned copy. After checking the box, enter the number of days in which patrons can receive a refund in the **Calendar days from date “lost” before a paid library fine becomes non-refundable** field.

Library Calendar/Hours

It is important to update the Library Manager library calendar regularly as Library Manager uses it to assign due dates, calculate fines, manage holds, and report circulation statistics. To ensure that Library Manager’s calculations are accurate, you should mark closed dates for the entire school year, either at the end of the previous school year or the first day you return at the beginning of the new school year.

Home Catalog Circulation Reports Back Office My Info							
Calendar							
Manage Patrons	How do I... ?						
Update Patrons	<< December 2011 >>						
Import Patrons	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Export Patrons					1	2	3 Closed
Upload Patron Pictures	4 Closed	5	6	7	8	9	10 Closed
Library Policies	11 Closed	12	13	14	15	16	17 Closed
Access Levels	18 Closed	19	20	21	22	23	24 Closed
Calendar / Hours	25 Closed	26	27	28	29	30	31 Closed
Site Configuration	Closed: Sunday, Saturday Hours: 8:00 AM - 4:00 PM View 2011						
Inventory							
Job Manager							

Closed dates are marked “Closed” and highlighted in gray. If an unscheduled closed day occurs (due to bad weather, for example), you can mark the date closed retroactively when school opens again. Upon return to school, simply select the **Back Office** tab > **Calendar Hours** option and click on all dates the school was unexpectedly closed. While the due dates for checked-out items do not change, Library Manager does not assess fines for items due on the dates you close retroactively. Library Manager counts only open days when calculating fines.

Collection Management

Learning Objectives

At the end of the module, you should be able to:

- Import title records without creating duplicates.
- Add titles by using resource databases, such as Follett's Alliance Plus Online® database.
- Add copies to existing title records.

Importing Titles From a Vendor File

When your library receives a book order from a publishing firm that provides MARC and copy records, performing a title import is the most efficient way to add the title and copy records to Library Manager.



To import the records, select the **Catalog** tab > **Import Titles** option. The **Import Titles** screen contains four sections:

Title Matching

Before importing a title record, Library Manager checks to see whether it is a duplicate (or match) of a record already in the district's collection. In the **Title Matching** section, you set up how you want Library Manager to handle a match: retain the existing record or replace it with the incoming record.

The **Strict** option (recommended) performs the most comprehensive check to avoid creating duplicate MARC or bibliographic records. When using the strict matching rules, Library Manager determines that an incoming record is a duplicate of an existing record if the two records share all the following information:

- A standard number—LCCN, ISBN, or ISSN
- First 80 characters of the title (Field 245_a)
- Material type (e.g., video, book, sound recording)
- Material type subtype (if present)
- First 20 characters of the author's name (Fields 100, 110, or 111) (if present)

Please note: Library Manager ignores the author field if the **Remove the author requirement** checkbox is selected.

- Publication date (if present)

Copy Matching

Library Manager next determines whether an incoming copy is a duplicate of one in the library's collection by comparing barcode numbers and site names.

- **Skip the incoming copy if its barcode matches an existing copy's barcode**—The import summary report provides information you need to investigate why a barcode number in the vendor import file matches one already in the collection.
- **Replace the existing copy with the incoming copy if the barcodes and the titles match**—updates the information in the existing copy records.
- **Always add the incoming copy record and assign it the next available barcode**—ignores barcode numbers in incoming records and assigns new ones to every incoming copy. Use this option when the vendor hasn't assigned barcode numbers.

Assign Copy Information

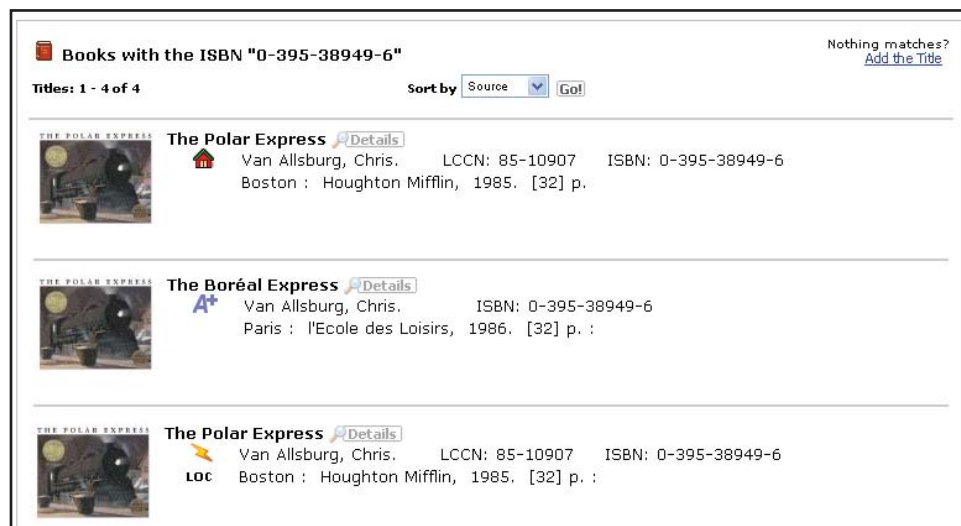
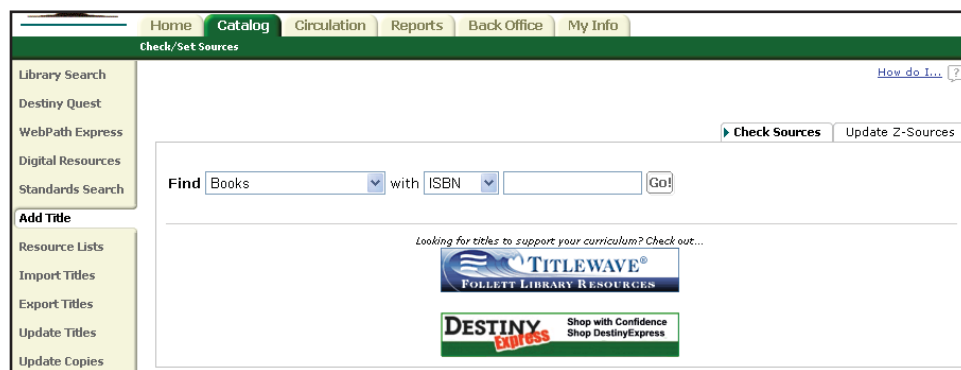
If all the imported copy records are for one site (library), you can add the following information to copy records if it is missing: circulation types, copy categories, sublocations, vendors, and funding sources.

Import File

The **Import File** section provides options to select the import file, add the imported titles to a resource list, limit the **Job Summary**, and preview the import before completing it.

Adding Titles by Using Resource Databases

If the title you wish to add does not have a district record, it may have a title record in Follett's Alliance Plus Online database, which contains more than 8 million MARC records. Using an Alliance Plus Online database record saves time by eliminating the need to create a record manually. To avoid duplication, it is important to search for the item before adding a new title to the database.



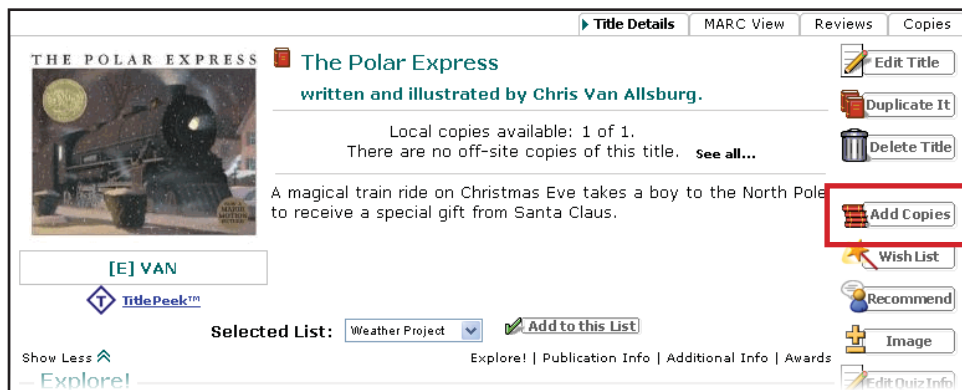
The house icon represents a title record that already exists in the district's collection in Library Manager.

The **A+** icon represents a title record in Follett's Alliance Plus Online database. If no matching title exists in Library Manager, use this source.

The lightning bolt icon represents a title record located in a library database that was set up as a zSource in your software.

Adding Copies

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



The steps for using resource databases are basically the same as adding a copy to an existing district record.

When electronic sources don't provide the correct record, or any record at all, for an item you are adding to the collection, you may need to create a record manually by using Library Manager's **Easy Editor** or **MARC Editor**. For more information on manually adding a title record, refer to on-page **Help**.

Reports Overview

Learning Objectives

At the end of the module, you should be able to:

- Generate a **Current Checkouts/Fines** report and notices.
- Understand how to find preformatted reports that provide valuable information about your library resources and patrons.

Current Checkouts/Fines Report

The **Current Checkouts/Fines** report helps you track unresolved transactions in your library. The report can include checkouts, overdue copies, and fines. You have the option to run reports or notices.

Depending on how you format, limit, and sort a report, you can generate reports on the following:

- Patrons with overdue copies and outstanding fines, grouped by homeroom
- Graduating patrons with any checkouts, grouped alphabetically by patron name
- Only patrons with outstanding fines

Checked Out Materials, Unpaid Fines.					
Circulation Types: All. Patron Types: All.				McHenry West High School	
Homeroom:					
Antiohi, Henry					
Library Materials	Due	Call Num.	Barcode	Title	Est. Fine
	11/9/2010	813/.54	T 1003	[Lord of the flies	\$5.00 (\$0.05/day)
Connely, Mary					
Library Materials	Due	Call Num.	Barcode	Title	Est. Fine
	11/9/2010	813/.54	T 1004	[Lord of the flies	\$5.00 (\$0.05/day)
Delgado, Ursula					
Library Materials	Due	Call Num.	Barcode	Title	Est. Fine
	11/9/2010	614.5/14	T 881	The ghost map : the story of London's most terrifying epidemic-- and how it changed science, cities, and the modern world	\$5.00 (\$0.05/day)
	11/9/2010	813/.52	T 127	Their eyes were watching God	\$5.00 (\$0.05/day)
	11/9/2010	813/.54	T 376	F. Scott Fitzgerald : The Great Gatsby	\$5.00 (\$0.05/day)
	11/9/2010	[Fic]	T 937	The red badge of courage	\$5.00 (\$0.05/day)
Elliott, Rebecca A.					
Library Materials	Due	Call Num.	Barcode	Title	Est. Fine
	11/9/2010	[Fic]	T 201	Black and white	\$5.00 (\$0.05/day)

Depending on how you limit the patrons and materials, you can generate the following notices:

- Overdue notices.
- Fine notices.
- Bills for books presumed lost.

Other Reports

In addition to the Library Manager's preformatted reports, Report Builder enables the creation of custom reports. Visit online **Help** or the eLearnings for more information on custom reports.

Additional Resources

eLearnings

Destiny 10.0 — Getting Around in Destiny
Destiny 10.0 — Managing Access Level Permissions
Destiny 10.0 — Performing Basic Searches
Destiny 10.0 — Performing Power Searches
Destiny 10.0 — Using Visual Searches
Destiny 10.0 — Searching for Digital Resources
Destiny 10.0 — Using Destiny Quest
Destiny 10.0 — Creating Resource Lists
Destiny 10.0 — WebPath Express for Students
Destiny 10.0 — WebPath Express for Educators
Destiny 10.0 — Setting Up WebPath Express
Destiny 10.0 — Searching With One Search
Destiny 10.0 — Searching With Standards
Destiny 10.0 — Importing Titles
Destiny 10.0 — Setting Library Loan Policies
Destiny 10.0 — Adding Titles from Sources
Destiny 10.0 — Editing Copy Records
Destiny 10.0 — Creating Title Records Manually
Destiny 10.0 — Circulating Materials
Destiny 10.0 — Generating Collection Statistics Summary Reports
Destiny 10.0 — Generating Collection Statistics Historical Reports
Destiny 10.0 — Generating Overdue Notices and Reports
Destiny 10.0 — Creating a Report With Report Builder
Destiny 10.0 — Learning the Features of the Destiny Quest Mobile App
Destiny 10.0 — Downloading and Configuring the Destiny Quest Mobile Application for Android or iPhone Mobile Devices

Quick Reference Resources

Checking Out
Checking In
Adding a Title
Adding a Copy
Basic Searching in Destiny Classic
Basic Searching in Destiny Quest
Checked Out/Overdue Reports (Lists)
Checked Out/Overdue Reports (Notices)

Online and On-page Help Articles

Both online and on-page **Help** are valuable resources as you learn the software or need more detailed information on a topic.

