

FINES

How are the overdue fines calculated?

Destiny looks at your site's calendar for open and closed dates to calculate fines. Fines are not charged until the grace period is over, and then all open days are counted in the fine.

Fines are calculated according to your Library Policies set up under the **Back Office** tab → **Library Policies** option and the two subtabs there. Fines vary according to patron and circulation type.

How can I see a list of all the fines and refunds at my site?

Back Office tab → **Reports** option → **Patron** subtab → scroll to the **Fine History** report. Run the report. For a refund to appear on the report, the refund must be updated in the **Circulation** tab → **Patron Status** option. Once you have paid the refund to the patron, click on the **Update** button for a receipt.

How do I pay or delete a fine that exists from the site that the patron last attended?

Ensure configurations are set up properly. **Back Office** tab → **Site Configuration** → **Circulation** subtab. Check the box "To allow library materials to circulate across the district" so you can view the patron record. Accept the money from the patron, notify originating library that you will be sending the money, and pay fine in Destiny.

How do I reprint fines receipt for fines already paid?

Access Patron in the **Fines** option → **View History** button → select the **Details** button to the right of the appropriate fine → select the **Printable** button.

DUE DATES

How do refunds show up on the Fines screen?

Refunds are displayed by the icon of two stacks of coins and the amount is displayed in parentheses in red font.

How are due dates calculated?

Destiny counts all days in when calculating due dates. For example, if you wanted to loan to a book out for 7 days, and it was checked out on Monday, the book would be due back on the following Monday. If your library needs to close (i.e. for a snow day), your site's calendar must reflect this closed date. This is done under the **Back Office** tab → **Calendar/Hours** option. If a book is due back on the closed date, the due date will be moved to the next open day.

How can I set the due date?

Back Office tab → **Library Policies** option → **Circulation Types** subtab. For each circulation type (i.e. regular or audio visual equipment), you can specify loan periods, fines, and more.

How do I over-ride the calculated due date?

If a particular item needs a special due date, you can do this when you are checking the item out to a patron under the **Circulation** tab → **Check Out** option. Once you check the item out, click on the calendar icon to set a special due date.

Where can I view my Loan Policies?

Back Office tab → **Library Policies** option → View both **Circulation Type** and **Patron Type** subtabs.

How do I change a due date once the item is already checked out?

Circulation tab → **Renew** option. On the right side of the screen, next to the due date click on the calendar icon.

I'm having problems printing a receipt.

Enable popup screens in browser or if the receipt printer install the correct drivers and setup in **Back Office** tab → **Site Configuration** options → **Receipts** subtab.

PATRONS

How do I check out to a patron?

Circulation tab → **Check out** option. If you are using a scanner, scan the patron barcode then the copy barcode to complete the check out. Tip - put the scanner light close to the barcode and pull away slowly to understand scanning distance. If you do not have a barcode, type the patron information, click on the Find Patron button, type the copy information and click on the Find Copy button. Click on How do I...? in on page help for details.

How do I manually add or edit a patron?

Find out if your district does an automated update of patron info. If so, your manual entry may get overwritten. If they do not, and you have to manually add patrons, click the **Back Office** tab → **Import Patrons** option. Refer to online help—Import Patron Records for details on this process.

Find out if you have patrons updated by automated XML process or a converted file through a student management system using the patron conversion utility imported into Destiny. Contact your school expert if needed. Consult if entering patrons is done manually, if so, barcode or ID and last name are the only required fields.

- To create a patron: **Back Office** tab → **Add Patron** option → create a new patron.
- To edit a patron: **Back Office** tab → **Find Patron** search. When the patron information comes up, you may edit the information and then save it.

How do I import patrons into Destiny?

Export patrons from Student Information System in comma delimited format (CSV).

- If a **district version** of Destiny is installed, use an automated process to import a district-wide database of students using our new Patron Converter Utility. Go to Destiny Help and key in "Patron XML Converter". If your district uses the XML Stylesheet method, go to Destiny Help and key in "XML".
- If you are using the **single-site version** of Destiny, the Patron Conversion utility will map and convert your CSV file for import into Destiny under **Back Office** tab → **Import Patron** option. You can find this import information on the Import Patron page by clicking on the question mark balloon. Patron Pictures can also be imported into Destiny. For detailed information on this process, go to Destiny Help and type *upload patron pictures* as your keywords.

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Destiny®
Quick-Reference
Guide Version 1.5

The purpose of this guide is to answer the top questions customers have regarding Destiny.

REPORTS

Why can't I find a report?

Back Office tab → **Reports** option → check the right side of the screen for subtabs. Be sure to check each subtab for the appropriate report. If you still cannot find the report, check with your Destiny administrator to see if he/she limits access to a report at certain times or to see if you have the correct access permission for your login name.

Do the statistics contain weeded or removed copies?

Yes, the circulations are tallied for weeded, deleted, or removed items in the statistics report. Historical information is available up to the deletion date.

How do I get more details about my Statistics Summary Report?

You can drill down into the report by clicking on the blue hyperlinked items. Copy counts on the right are also available.

How do I customize the Collection Statistics Summary?

Back Office tab → **Reports** option → **Collection Statistics Summary**. The **Customize Copy View** link at the top of the page will bring you to the bottom of the screen. There you will find options to select to view details for copies.

How do I define what call numbers show on the Collection Statistics Summary Report?

In the range column, select call number ranges by clicking on the checkbox to the left of the call numbers. Select the **Range Selected Above** radio button at the bottom of the screen.

How do I create an overdue report?

Back Office tab → **Reports** option → **Patrons** subtab. The reports that show overdue information are called **Checked Out/Overdue Materials and Unpaid Fines** or **Overdue Reports by Call Number**. On the right side of the screen, click on **How do I...?** for a step-by-step procedure to create a report/notices and save it. See **Quick Help for Overdue Notices**.

How do I set up an overdue report?

Back Office tab → **Reports** option → **Patrons** subtab → Click **Checked Out/Overdue Materials & Unpaid Fines** report → Specify time frame for overdue materials → choose report, email or notice → click **Continue**.

What is included in my Checked Out/ Overdue Materials and Unpaid Fines report?

You can limit the report results to patrons of a certain status, type, grade, graduation year and materials by circulation type. You can include materials from other sites. Select and sort by either patron name, grade level, homeroom or user defined field.

What options are available for scheduling Checked Out/ Overdue Materials and Unpaid Fines to run daily or weekly?

In the **Details** section of the Checked Out/Overdue Materials & Unpaid Fines Report Builder. Click **Save Setup** after selecting your preferences for your report. Type the name of your report in the **Save As** field. From the **Schedule Report** drop-down list, select **Daily** or **Weekly** , If weekly, choose the weekday and the time. If daily, choose the time. When you're done, click **Save Setup**

- To run, edit, or delete the saved report or notice, click the appropriate icon.
- To change the day or time that it runs, or to stop it from running automatically, click the hyperlink next to "Scheduled" in the Saved Report/ Notices section.
- To open the report or notice, click the date under **Last Run**.

Examples: You can create a list of customized reports and notices such as these: All shipped (checked out) materials, Materials due in this week, Materials due in next week, Overdue notices, Bill notices for items more than 30 days overdue.

How do I generate a call number report?

Back Office tab→ **Reports** option→ **Library Materials** or **Media** tab→ select **Copy Call Number Reports**→ From the **Show** list→ select the report you want→ Enter a range of titles for **Copies with different call numbers** or **Copies without call numbers**, You can leave both boxes blank to include *all* titles→ Click **Run Report**

- If the **From** box is left blank, enter a title in **To** box, to included titles up to and including that title.
- If to box is left blank, enter a title in the **From** box to included that title and all those after it.
- Enter the same title in both boxes to include that title.

How do I access Patron Barcode Reports?

For Patron barcodes, select **Back Office** tab→ **Reports** option→ **Patrons** subtab.

If you are still having problems make sure you have access level permission to: *Generate Library Collection Reports* and *Access My Lists for Library*. **Back Office** tab→ **Access Levels** option→ **Library Materials** subtab and edit the access level.

How do I access Copy Barcode Labels report?

Back Office tab→ **Reports** option→ **Library Materials** subtab→ **Barcode Labels** or **Barcodes Lists** hyperlink.

Why can't I print my barcode report correctly?

1. Ensure offset settings are correct. Use the on-page help for suggestions on label stock and printer offsets.
2. You may have to update to a higher Adobe Reader version, it should be 6, 7, or 8.

After generating barcode labels in the Job Manager, click **View** and go to File→ Print→ select a printer from the **Name** drop down list. In the Page Handling option select **None** from the Page Scaling drop down list. Uncheck (turn off) Auto-Rotate and Center. Uncheck the choose paper source by PDF page size.

INVENTORY

How do I globally delete items marked LOST without being in inventory?

Back Office tab →**Reports** option→Run the Library Title & Copy List report for LOST copies. Create a .TXT file of barcodes from the report information, then perform a **Batch Delete** from **Catalog**→ **Update Copies**. Click the **How do I...?** link for more information.

How do I globally reset LOST items?

Back Office tab →**Inventory** option →From inventory drop down list, choose correct inventory. Select **View Details** hyperlink (in the far right corner). Next to Accounted For, select See Details hyperlink. Scroll to the bottom to the Reset all library materials marked "lost" on field. Enter a date manually or click the calendar icon. Click the **How do I... ?** link for more information.

What is the definition of Inventory Statuses?

During an inventory, Destiny defines all items as accounted for or unaccounted for. **Accounted for** are items are designated as Available, Checked Out, On Order, Loaned Out, Out for Repairs, In Transit or Lost and/or scanned into inventory. **Unaccounted for** items are items that you have not scanned yet. Lost items are accounted for because it has been marked lost manually.

How do circulations affect inventory?

You can circulate during an inventory because checked out items are classified as **Accounted for** by default. Also, when an inventory is started, Destiny accounts for checked out items.

Where can I see the Inventory Statuses, Accounted for and Unaccounted for?

From the **Back Office** tab →**Inventory** option, click on the **View In-Progress & Completed Inventories** hyperlink. Then, on the right side of the page, click on the **View** button. Select the appropriate radio button. Choose **Run Report**.

CATALOGING

How do I Import a title?

Catalog tab→ **Import Titles** option→ in the **Import File** field click **Browse** to search for the file→ select **Open**. Refer to on-page help for details on how to customize the option available to import titles. In the Import Titles screen→ select **Preview** to ensure your customized options are correct. Select **Import** if the preview looks successful. From the Job Manager, refresh the page to see progress→ select **View**.

What does the Title matching checkbox in the Import screen do?

This checkbox, when selected, compares incoming records with ones in your database already. If there are no standard numbers, Destiny uses four criteria to determine if it's the same record. Click on the question mark box for more details.

What do I put for a starting barcode?

- Select the first option to enter a starting barcode number. (To fill gaps in your barcode sequence, enter the lowest number in your symbology. Destiny skips any barcode numbers already in use.) **Important:** If you enter a number larger than 7 digits, it must be one that agrees with your symbology that appears in brackets. If you need to change the symbology, go to **Back Office** tab→ **Site Configuration**.
- Select **Assign next barcode** to allow Destiny to find and use the next highest barcode numbers available.

How do I add a title?

Catalog tab→ **Add Title** option→ search for a title using the **Find** drop down list for material type. From the **with** drop down list select a Title, Author or standard number. Type in your preference. Click **Go!**

Destiny will search through Z-sources if they are set up or Alliance Plus Online.

Once a title is found, click the **Details** link→select **Save Title**. You may add a copy after the title is saved to your database. If the title doesn't exist in either Z-sources or Alliance Plus Online, add it. Click **Add Title** to the right of the title search box under the **Catalog** tab→ **Add Title** option. Add title by filling in the fields in the Add Title screen or click the MARC format subtab. Click **Save Title**.

How do I edit a title?

Select the Library Search option→ search for a title→ select **Details**→ select **Edit Title** button→ use the subtabs in the **Edit Title** Screen, or select the **MARC format** subtab and edit the title using cataloging rules.

How do I change a material type?

To edit an individual record from a book to video, perform a Library Search, click **Details** on the title, **Edit Title**→ Select **Video (film, filmstrip, transparency)** from the **Material Type** drop down list→ click the **Save Title** button.

How do I find a title without including an article in the search?

Back office tab→ **Site Configuration** option→ Check or uncheck the **Ignore leading articles in search terms when browsing for (or reporting on) titles**.

How to I find information about MARC format?

Click **Help**→ **Contact us** tab→ click the **Tag of the Month** hyperlink.

How do I add a copy?

Perform a Library Search → type in the title→ choose **Details**→ **Copies** subtab, click **Add Copies**→ Select **Assign next barcode** option or type in a barcode→ enter a call number (see on-page help for more details)→ click **Save Copies**. See Help: Understanding Call Number Ordering for additional information.

How do I edit a copy?

Perform a Library Search→ Select the title→ **Copies** tab →click the edit icon to manually edit the information.