

This step-by-step video tutorial will guide end-users through the use of the Destiny Resource Manager application.

In this tutorial, you will learn how to:

- Login to Destiny Resource Manager
- Search the resource catalog
- Check out resources
- Check in resources
- Reset the screen
- Transfer resources
- Change the home location
- Run various reports: checkout and fines, item status, patron barcode report and the resource checkout summary

#### Requirements:

- \*\* PC or MAC
- A web browser such as:
  - Google Chrome 🧑
  - Internet Explorer 🥝
  - Mozilla Firefox 🙆
  - Safari
- An Internet Connection
- A Barcode Scanner
- Full Destiny Access

**<u>NOTE</u>**: If using an iPad and Bluetooth scanner, please refer to the Bluetooth Pairing Instructions before circulating.

### **<u>STEP 1</u>**: LOGIN TO DESTINY

- 1. Open a web browser
  - Google Chrome
  - Internet Explorer 🌔
  - Mozilla Firefox
  - Safari
- 2. In the address bar, type the following URL and press the "Enter" key on the keyboard:
  - <u>http://lausd.follettdestiny.com</u>
- 3. To find your school do one of the following:
  - a. In the "Search for Site Name" field, type in the name or location code of your school and press the "Enter" key on the keyboard or click on the "Go!" button OR
  - b. Click on the "Green Bar" associated to your school group (e.g. Middle School)
     Locate your school's link, click on the "Login" button, and use your LAUSD Single-Sign on (SSO)



### **<u>STEP 2</u>:** CATALOG TAB

• Once you've logged in, you will see five tabs: "Catalog", "Circulation", "Reports", "Back Office" and "My Info"

#### **RESOURCE SEARCH OPTION**

- On the left-side of the screen, you will find the "Resource Search" option
- On the right-side of the screen, there are three (3) sub-tabs: "Search", "Browse Resources", and "Item Categories"

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#### ▶ SEARCH SUB-TAB

A. Search for Resources and Items

"Find all" — search all resource ITI cataloged items

1. Click on the drop-down menu to browse for and locate specific items

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"Where Resource" -- allows a Boolean type search

- 1. Click on the drop-down menu to search for a resource or an item by using one of the following:
  - Displayable Name (*Resource*)
  - Barcode (Item)
  - District Identifier (Item)
  - Purchase Order (Item)
  - Serial Number (*Item*)

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- 2. Clicking on the "**Contains**" drop-down menu allows you to specify the type of resource details you want to search
- 3. Clicking in the blank field allows you to type in or scan a specific resource to search

- 4. You have the option to further limit your resource search by selecting any of the following:
  - Home Location
  - Custodian
  - Funding Source
  - Department
  - Purchase Price
  - Date Acquired
- 5. Once you have entered your search parameters, click the "Search" button

	Limit your search for resources by
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Department	All ×
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### **BROWSE RESOURCE SUB TAB**

**NOTE**: The types of resources you have in your catalog will be indicated by the appearance of a clickable blue hyperlink

- 1. Click the "Browse Resources" sub-tab located on the right
- **2.** To search items, you have the option to select the active hyperlinks to check the available resources.



- 3. Once you click on the resource, you are able to view:
  - The resource
  - The number of items available

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**NOTE:** The amount available should always be zero. All resources should be checked out to patrons, (e.g. student or principal) during the school year.

- 4. Once a resource is clicked on, you are able to view two sub tubs: "Resource Details" and "Items"
- 5. The "Resource Details" sub tab will allow you to view details
- 6. The "Items" sub tab will allow you to view:
  - Barcode
  - Status
  - Condition
  - Home Location

**NOTE**: To go back in Destiny, use the <u>BREADCRUMBS</u> trail—the Internet back button is not a viable option while working in the Destiny application.

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#### TRANSFER RESOURCES OPTION

- 1. Click on the "Transfer Resources" option located on the left-side of the screen
- 2. To the right-side there are three (3) sub tabs: "Track", "Upload" and "Notices"
  - Track Enables resource managers to track completed incoming transfers, outgoing transfers and completed outgoing transfers. For a detailed view of each of the above actions, click on the "View" icon to see the specific details regarding the transfer
  - b. Upload Enables resource managers to transfer resources from one site to another by either scanning one barcode at a time OR by uploading a list of barcodes into the application.
  - c. Notices Enables communications through the Destiny application regarding impending transfers to the receiving school

**NOTE:** To stop a resource transfer before the incoming school receives it, click on the "**View**" icon then click on the "**Stop Transfer**" button. This is done from the "**Track Resources**" page on the "**Outgoing Transfers**" section.

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<u>Conducting a Resource Transfer</u> (To District Warehouse Facility ONLY)

**NOTE**: The District Warehouses are listed in Destiny as: ITAM Beaudry, ITAM Pico Rivera and ITAM Soto.

- 1. Click on the "Upload" sub tab
- 2. Click on the "To" drop-down menu and select the site which will receive the transferred items
- 3. Click on the "Transfer" drop-down menu and select "by Barcode"
  - **by Barcode** Enables resource managers to scan one barcode at a time OR upload a list of barcodes
  - by List Option <u>NOT</u> recommended
  - by Item Category Option <u>NOT</u> usable
- 4. In the "Create a barcode list" field, type or scan the barcode of the book. (If the number was manually entered, click on the "Add" button. Scanning the barcode will automatically add it to the list.)
- 5. Once all the barcodes have been typed or scanned in, click the "**Transfer**" button to upload the resource(s)

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	Upon transfer, ownership will be immediately changed to the receiv	ving site.

**NOTE:** <u>DO NOT</u> scan too quickly when scanning one barcode at a time, as the screen needs time to refresh.

- 6. To transfer resources in bulk, use the "Select a barcode file" option. Follow the steps listed below:
  - a. Open a text application such as Notepad (PC) or Text Edit (Mac)
  - b. Save the .txt file with a name associated with the transfer (e.g. *resource transfer\_to\_VAAS.txt*)
  - c. Scan all of the resource barcodes to be transferred into the file and save it once completed
  - d. On the "Transfer Resources..." screen, select the "Browse" button next to the "Select a barcode file" field
  - e. Find and select the newly created .txt file. (it will appear on the screen)
  - f. Click on the "Transfer" button to upload the resource(s)

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### <u>Receiving a Resource Transfer</u> (From one of the District Warehouse facilities)

To receive a resource transfer, you must be logged in to your Destiny site. In the upper-right corner you will see an icon of a red flag next to a button with an exclamation mark.

**NOTE**: the red flag icon denotes an incoming resource transfer in the queue.

- 1. Click on the "**Red flag**" link. On the "**Track Resources**" screen, you will see a list of resources awaiting processing
- 2. Click on the "**View**" icon to see a detailed list of the resources in the queue and to receive the transfer

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	Upon transfer, ownership will be immediately changed to the receiving site	e.

**NOTE:** Once the view icon has been clicked, a message with a red box around it will appear notifying you of the change of ownership of the devices (from the outgoing school to the incoming school)

Receiving the Resources:

1. On the "Transfer Resources" screen, click on the "Red Flag" icon located at the top of the navigation next to the "*My Info*" tab.

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- 2. Click on the "**View**" icon to see a detailed list of the resources in the queue and to receive the transfer
- Click inside the "Scan or enter..." field and either type the resource barcode then click the "Receive" button or scan each resource barcode one at a time (This is the <u>Recommended</u> method of receiving resources)
- 4. Click on the "Receive All" button (This is <u>NOT</u> Recommended method for receiving resources)
- 5. Click on the "**Receive**" button to the right of the resource to accept one item at a time

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### UPDATE RESOURCES OPTION

#### Changing the Home Location

1. Click on the "Update Resources" option,

**NOTE:** Be sure that you are working under the "Individual Update" sub tab.

- 2. Place your cursor in the "**Resource Barcode**" field, and either type or scan the resource barcode number
- 3. Click on the "Select Item" field drop-down menu and select the "Home Location" option
- 4. A "**to**" field will appear, click on the drop-down menu and select a new home location from the options

**NOTE:** At the bottom of the page, you will see the "Add Historical Note" field. Per the ITI group, this field will <u>ONLY</u> be used for students who are not currently showing in Destiny (e.g., new students to the District). If and when you encounter this, please input the following information into the field:

- Patron's name (Last name, First name)
- *Birthdate (mm/dd/yyyy)*
- Grade level (e.g., grade 8)

Example: Doe, John, 02/20/2001, Grade 8

5. Once all the information has been entered, click on the "Update" button.

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6. A "**Most Recently Updated**" note will appear at the bottom of the screen. To check the history and verify that the changes were made, click on the "**barcode number link**" of the resource, which will take you to the "**Resource Status**" page. You will see the update made to the "**Home Location**" and the "**Historical Notes**" field.

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### **STEP 3: CIRCULATION TAB**

You will be able to view the following:

<u>Options</u>	<u>Sub tabs</u>
Check Out Resources	To Patron
Check in Resources	To Department
Item Status	To Location
Reset button	

### TO PATRON SUB-TAB

### Check Out Items:

- 1. Click on the "Circulation" tab
- 2. Click the "Check Out Items" option located on the left-side of the screen
- 3. Click on the "To Patron" sub-tab located on the right-side of the screen
- 4. Click inside the "Find" field and scan OR type in one of the following identifiers:
  - Patron Barcode ID
  - Patron Last name, First name

**<u>NOTE</u>**: If the name was typed in, either hit the "**Enter**" key on the keyboard or click on the "**Go!**" button. Then click on the patron's name.

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5. Click inside the "Find" field and scan OR type in the resource ID (barcode)

**NOTE:** If the ID was typed in, either hit the "Enter" key on the keyboard on click on the "Go!" button.

6. The resource will appear in the "Checked Out" section of the screen

#### To Department:

**<u>NOTE</u>**: This sub tab will not allow check outs.

To Location:

- 1. From the "Circulation" tab, click the "To Location" sub tab located on the right side of the screen
- 2. Click inside the "Find" field and scan OR type in the location barcode identifier (ex. 123456)

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3. Once the item populates on the screen, scan or type in the resource ID

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**<u>NOTE</u>**: If you do not have a resource ID available, you may search the resource catalog by using a keyword search, e.g. iPad.

- 4. If a barcode for the location is unavailable, you may search for one by doing the following:
  - a. Click on the "Pick Location" button
  - b. Click on the drop-down menu, select a specific location and click the "OK" button
  - c. Follow steps 1 2 from the previous page

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### Check In Resources

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- 1. From the "Circulation" tab, click the "Check In Items" option located on the left-side of the screen
- 2. Click inside the "Find Item" field and scan or type in the resource ID for each item you would like to return to the site's resource collection

**NOTE:** If the ID was typed in, either press the "Enter" key on the keyboard or click the "Go!" button.

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Check Out Rems Find Item CS40072 Got			H	ow do I		
Fines Most Recently Checked In Apple 7702 iPad Air (Item: 5540022)	Past Due 6/1/2015			CAR	T 123	45
Item Status Checked out 8/6/2015 to McDonald, Jim (Student: P 100101)				1 Cr	eate Fir	ne

b

### **FINES**

- 1. From the circulation tab, click on the "Fines" option located on the left-side.
- 2. Click in the "Find Patron" field
- 3. Scan the ID or type in the patron's name into the "Find Patron" field

The following options may be used as keyword searches:

- ✓ Patron names (default option)
- ✓ First name
- ✓ Middle name
- ✓ Last name
- ✓ Barcode
- ✓ Grade-level
- ✓ Homeroom
- ✓ Username
- ✓ District ID

**NOTE**: If the info was typed in, either press the "**Enter**" key on the keyboard or click the "**Go!**" button, then click on the Patron's name link

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**NOTE**: To search patrons enrolled at your school site, check the "only my patrons" box. To conduct a "district-wide" search, uncheck the box.

- 4. From the "Fines" screen, you will be able to use the following buttons:
  - Add Fine
  - View History (fines)
  - Print It! (receipt: this button appears after a fine is assessed.)

**NOTE**: Destiny Resource Manager is <u>NOT</u> the official financial record keeper. Please see your administrator for clarification of protocols regarding reporting financial transactions.

### Add Fine button

**NOTE**: If you have previously marked a resource as "lost", a fine will be assessed.

- 1. From the "Circulation" tab, click on the "Fines" option located on the left-side of the screen
- 2. Click inside the "Find Patron" field and scan the ID or type in the patron's name and either press the "Enter" key on the keyboard or click on the "Go!" button.
- 3. Click the "Add fine" button

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Item Status Patron Status Offline Circulation Beset	McDonald, Jim (Student: <u>P 100101</u> ) Fines Resources: \$0.00	Grade Level Nomeroom	
10 P. C.	- Fines	Add Fine	listory

4. Use the "Reason" dropdown, to document the reason for the assessment

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Sheck Out Reggs Sheck Ig Rems Fines Rem Status Satron Status Sfiline Greulation Beset	AcDonald, Jim (Student: P 10010) Reason Damaged Uther Broken Binding Resourc Damaged Col Excessive Writing Missing Barcode Overdue Tom Pages Water Damage	4		Cause - Cause		Cancel		

- 5. Click inside the "**Resource item**" field and type or scan the barcode of the item and press "**Enter**" on the keyboard or click the "**Go!**" button
- 6. Click on the "Amount" field and type a dollar amount
- 7. Click inside the "Fine Note" field to add one (not mandatory)
- 8. Place a check mark on the "Print Receipt" option to print a receipt (not mandatory)
- 9. Click on the "Save" button to save the fine assessed or the "Cancel" button to go back to the fines "Find Patron" screen.

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Status Status Groulation Resource Item CS40072 Apple 7702 iPad Air (Item: <u>CS40072</u> ) CART 12345								
6 Amount \$0.00 Waive \$0.00 Pay \$0.00								

#### View History button

With full access, you may **view** all fines assessed to the student: LIBRARY/TEXTBOOK/RESOURCE and PATRON. To view the resource fine history of the student, click on the **"View History**" button.

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em Status atron Status	McDonald, Jim (Student: P_100101)		
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Beset	- Fines	Add Fine	Print It
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Beset	Fines Reason ?     PRM ② Apple 7702 iPad Air (Item: <u>C540022</u> )     ✓ Include off-site fines in totals ?	Annount Payable 7 Annount Payable 7 Annount Payable 550.00 00 Annount Payable \$50.00 Local	Print IU
Beset	Fines Reason ⑦     # RM ⓓ Apple 7702 iPad Air (Item: <u>C540022</u> )     ✓ Include off-site fines in totals ⑦	Amount Payable T Amount Payable S50.00 Amount Payable \$50.00 Local \$0.00 Off-site	Print IU
Baset	Fines Reason ⑦     # RM	Amount Payable S50.00 % Amount Payable S50.00 Local \$0.00 Off-site \$50.00 Total Payable	Print IU

### Print It! Button

You have the option of printing a receipt by clicking the "Print It!" button

Patron Status	McDonald, Jim (Student: P 100101)	
Offline Circulation	Fines Resources: \$50.00	Grade Level
		Homeroom
Baser	- Fines	Add Fine View History 🚔 Print It
	Reason ?	Amount Payable ?
	RM Apple 7702 iPad Air (Item: <u>C\$40072</u> )	\$50.00 🖋 🔗 😫

#### Fine Management

1. To edit a fine, click on the "Edit" icon

**NOTE**: The trashcan icon will permanently delete the fine and the fine history

McDonald, Jim (Student: <u>P100101</u> ) Fines Resources: \$50.00	Grade Level Homeroom
- Fines	Add Fine
Reason 7	Amount Payable ?
RM Apple 7702 iPad Air (Item: <u>C540072</u> )	\$50.00 #
	McDonald, Jim (Student: <u>P-100101</u> ) Fines Resources: \$50.00 - Fines Reason Reason Reason Apple 7702 iPad Air (Item: <u>C540022</u> )

- 2. On this screen, you will be able to:
  - Waive a fine
  - Pay the amount due OR apply a partial payment
- 3. You have the option of adding a "Fine Note" in the field provided
- 4. Use the "**Pay**" field to apply full or partial payments
- 5. Click on the "**Save**" button to save the fine assessed or the "**Cancel**" button to go back to the fines "Find Patron" screen.

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heck Ig Items	McDonald, Jim (Studen Reason Damaged <sup>JCDetails</sup> Apple 7702 iPad Air (Item)	t: <u>P 100101)</u> ]] ] ; <u>cs40072)</u> CART 1234	. 2										
Beset	Fine Assessed 8/7/2015	Fined \$50.00 Waived \$0.00 Paid \$0.00	Amount Due Waive Pay	\$50 \$0.00	.00	4			0				
3	Cracked screen. Patron	paid fine in full		4				-	(5)	ᡝ			

#### Item Status

Allows an overview of a specific resource

- 1. On the "Circulation" tab, click the "Item Status" option located on the left-side of the screen
- 2. Click inside the "Find Item" field and scan or type the barcode ID of the item (click the "Go!" button if the ID was typed in)

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Check Out Rems Check In Rems Find Item CS40072 (Col	Hawdo Lu ()
Fines The Status	

- 3. This screen allows you to do one of the following:
  - Edit Item button: *Please* only use this button when inputting the information necessary to update the police report, model/item field or the School Managed Inventory (SMI) field.
  - Mark Lost button: allows you to mark an item lost
  - Mark Stolen button: allows you to mark an item stolen
  - View History button: allows you to view the history of the device
  - Add Note button: allows you to add notes regarding the device

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Item Status Patron Status Offline Circulation	Barcode CS40072 Date Acquired Condition New District ID [OS0000016011 Purchase Order Serial Number DMPM6605FK11 Purchase Price	Home Location CART 12345 Custodian Undefined Department Undefined Projected Life Undefined Funding Source CCTP Status Available	(3) Wark Lost Stark Stolen View History Print Labels
	Current Checkout None	Previous Check (Returned: 0/6/20 User McDonald, Jim [Stu Barcode p 100101 Grade Level Homercom Checked In by Tutorials	out 13) udent]
	Notes	Checked In by Tutorials	3 Add Note

**NOTE**: You are able to add a note to the resource by clicking on the "Add Note" button.

### PATRON STATUS

1. On the "Circulation" tab, click on the "Patron Status" option located on the left-side of screen

**NOTE**: With full access, you will be able to view detailed information regarding the patron in question. You will be able to do the following from this screen:

- View History—this option is viable when the patron has an active/in progress checkout
- Add Fine—allows you to assess fines for various types of damage to the device

Patron Status	× \ +			
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Patron Status	1im McDonald [Student]			
Offline Circulation	Barcod	Print Label		Nickname
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	Gende	" Unspecified		Homeroom
	Card Expire	15		
	Grad Yes Birthdat	ar ta		
	District I	P P0100101		
	Acceptable Use Policy on File	*7 No		
	- Items Out			View History
	Resources		_	
	There ar	e no resources checked out for this patron.		
	- Fines	20 - 2 CPAC 5 1		View History
		there are no fines for this patron		
	- Current Transactions	2.2		
	Library: 0	Library: 0		
	Textbook: 0	Textbook: 0		
	Resource: 0	Resource: 0		
	- Library Circulation Statistics		1251-1110-010-1120	
	Lifetime Previous Year	Current Year	Current Month	
	Contract Information	0	0	
	Address 1	Address 2		
	Email 1	Email 2		

• Add Note—allows you to create and display patron notes

### STEP 4: MARKING AN ITEM LOST OR STOLEN

MARKING A RESOURCE LOST

Resource Status:

- 1. On the "Circulation" tab, click on the "Item Status" option located on the left-side of the screen
- 2. Click inside the "Find Item" field, and type in the Barcode ID for the lost resource, then click the "Go!" button.

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3. Click the "Mark Lost" button on the right-side of the screen

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Item Status Patron Status Offline Circulation	Barcode CS40072 Date Acquired Condition New	Home Location CART Custodian Unde Department Unde	12345 fined fined	3	Mark Lost

4. A pop-up box will be displayed on the screen. Click the "OK" button to mark the resource lost



### Patron Status:

- 1. Click on the "Circulation" tab, click on the "Patron Status" option
- 2. Click inside the "Find Patron" field, and scan or type in the patron's Barcode ID

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3. The patron details will appear on the screen and the items checked out to him/her will appear on the "**Items Out**" section. Click on the "**Lost**" button

	Patron Status	
heck Out Items heck In Items ines tem Status	Find Patron Gol	How do I.u (?
atron Status ffline Circulation geset	Jim McDonald [Student] Barcode p 100101 [dtPrintLabel] Status Active Cender Unspecified Card Expires Grad Year Birthdate District ID P0100101 Acceptable Use Policy on Pile? No	Nickname Grade Level Homeroom
	Items Out Resources Due Date Resource Name 6/1/2015 Apple 7702 iPad Air (Item: <u>\$140072</u> ) Fines There are no fines for this patron	Home Location CART 12345 8/7/2015 Lost Stolen

- 4. A pop-up box will display requesting to add a fine to the lost resource. The default fine for the resource will then display.
  - a. If the fine is correct, click on the "OK" button
  - b. If a fine is charged and is different from the default, type in the dollar amount and click the "**OK**" button
  - c. If a fine is NOT assessed, type in a \$0.00 dollar amount and click the "**OK**" button

	now do Tru (C)
A The item will be marked as lost. Jim McDonald (Barcode: P 100101) will be charged a fine of \$0.00	If you do not want to assess a fine, set the fine amount to zero.
(a)	

**NOTE:** If you choose **NOT** to assess a fine, and if the resource was assigned to a patron, the associated patron <u>will not</u> be assessed a fine.

### MARKING A RESOURCE STOLEN

### Item Status:

- 1. On the "Circulation" tab, click on the "Item Status" option
- 2. Click inside the "Find Resource" field and type in the Barcode ID of the lost resource and click on the "Go!" button

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3. Click the "Mark Stolen" button on the right-side of the screen

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Check Out Items Check In Items Fines Item Status Patron Status	Find Item Gol Apple 7702 Barcode CS40072 Date Acquired	iPad Air D Home Location CART 12345 Custodian Undefined	Edit Item
Check Out Items Check In Items Fines Item Status Patron Status Offline Orculation	Find Item Gol Apple 7702 Barcode CS40072 Date Acquired Condition New	iPad Air Home Location CART 12345 Custodian Undefined Department Undefined	Edit item
Check Out Regis Check Ig Rems Fines Rem Status Patron Status Offline Orculation Reset	Find Item Gol Apple 7702 Barcode CS40072 Date Acquired Condition New District ID [DS0000016011 Berchas Order	iPad Air Home Location CART 12345 Custodian Undefined Department Undefined Projected Life Undefined Evadue Surge CCTU	Edit Item

4. A pop-up box will display on the screen. Click the "**OK**" button to mark the resource stolen (*a fine will not be automatically assessed*)

🥂 The item will	be marked as stolen.
OK	X Cancel
(4)	

#### Patron Status:

- 1. On the "Circulation" tab, click on the "Patron Status" option
- 2. Click inside the "Find Patron" field, and scan or type in the patron's Barcode ID

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	Patron Status	
Check Out Items Check In Items Fines Item Status Patron Status	Find Patron P 100101 Col Only my patrons Only search Patron Names V	Hom do I (?)

3. The patron details will appear on the screen and the items checked out to him/her will appear on the "*Items Out*" section. Click on the "**Stolen**" button

Patron Status	×  +									
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	6/1/2015	Apple 7702 iPad Air (Item: G	40072)	Home Locatio CART 1234	5 8/7/2015		Lost Stolen			
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4. A pop-up window will display on the screen requesting a confirmation that the resource has been stolen (*a fine will not automatically be assessed*). Click on the "**OK**" button



### View History:

**NOTE**: Use this function to view the checkout history of the device.

- 1. On the "Circulation" tab, click on the "Item Status" option
- 2. Click inside the "Find Item" field and type or scan the barcode ID of the item

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3. Click the "View History" button

	Item Status			
Check Out Regis Check Ig Rems Fines	Find Item Gol Apple 7702	iPad Air 🔎		How de Inu 📝
Item Status	Barcode CS40072	Home Location C	ART 12345	Mark Lost
Patron Status	Date Acquired	Custodian U	ndefined	Mark Stolen
Offline Circulation	Condition New	Department U	ndefined	
- December	District ID IOS0000016011	Projected Life U	ndefined	
Beset	Purchase Order	Funding Source C	СТР	Unew restory
	Senal Number DMPM660SFK11 Purchase Price	Status D	ue: 6/1/2015 [?]	Print Labels
	Current Checkout (Duet 6/1/2013)		Previous C (Returned) 8	heckout (6/2015)
	Checked Out 8/7/2015 1:39 PM		User McDonald, Jim	[Student]
	User McDonald, Jim [Student]		Barcode p 100101	

4. On this screen, you will be able to view the *Transaction*, the Date of the transaction, and who *Performed* the transaction

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Beset	Checked in Status: Available	8/6/2015	Tu	torials			

### **<u>STEP 5</u>**: DOCUMENTING THE BUSINESS PRACTICES

Once the resource has been declared "Lost" or "Stolen", it is incumbent upon the school's resource instructional device manager (IDM) to document the following in the Destiny application:

- **Cost Center** This number is comprised of your school's location code plus three additional digits (see the LAUSD website for the school's cost center number)
- Service Request Number This is the number assigned to the ITD service request you generate regarding the lost/stolen resource
- **Police Report Number** This is the number provided by the LASPD once they have been notified of the theft/loss
- Police Report Date This is the date the report was filed
- Model Item This is the device type
- Grade Level (for ITI devices) The grade for which the device was provisioned

To notate the above fields, please follow the steps documented below:

- 1. On the "Circulation" tab, click on the "Item Status" option
- 2. Click inside the "Find Item" field and type in the barcode ID for the Lost or Stolen resource

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3. The resource details will be displayed. Click on the "Edit Item" button located on the right-side of the screen

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Check Out Begs Check Ig Bens Fines	Find Item Go	Apple 7702	iPad Air 👂		(3		How de	eda 16	m	
Item Status Patron Status Offline Groulation	Barcode CS40072 Date Acquired Condition New District ID JOS00000016011	Home Location CART 12345 Custodian Undefined Department Undefined Projected Life Undefined						Mark St	tory	

- 4. Under the "**Item Categories**", towards the bottom of the screen, enter the information into the following fields:
  - a. **Cost Center:** Type in your school's cost center ID number into the field (this can be located on the LAUSD website on the school finder page for your site)
  - b. **Service Request Number:** Type in the service request number from the ITD Service Request you generated once the resource was lost/stolen (this can be found in the email that is automatically generated once the ticket is submitted)
  - c. **Police Report Number:** Type in the police report number in the field (this should be on the copy of the report that the reporting officer provides)
  - d. Model Item Type in the type of device
  - e. **Grade Level** (*for ITI devices*): Type in the grade level for which the device was provisioned (this should correlate to the student's grade)
- 5. Click on the "Save" button

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	Service Request Number	
	Police Report Number	
	Police Report Date	
	Grade Level2 SMI	
	* = Required Field	

#### Reset button

To clear the screen click on the "Reset" button located on the left-side of the screen

### **<u>STEP 6</u>**: REPORTS TAB

### Resource Reports Option:

- 1. Click on the "Reports" tab located on the top navigation
- 2. Click on the "Resource Report" option located on the left-side of the screen
- 3. You have access to the following types of reports:
  - Catalog—Resource & Items
  - Circulation
  - Labels
  - Software (*NOT Applicable*)
  - Statistics

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**<u>NOTE</u>**: For a detailed description of the available reports, please click on the "**More**" button

#### Item Status Report

- 1. Click on the "Reports" tab
- 2. Locate and click on the "Resource Reports" option
- 3. Click on the "Item Status" link

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Hy Favorites Resource Reports Patron Reports Report Builder Report Hanager	Catalog Resources & Items Barcode Lists - Identify used item barcodes. More Deleted Resources - Retrieve information about resources that have been deleted. More Item Status - View the current status of your resources. More Lost Resources and Fines - Summary of lost resources and fine amounts. More Resource Need Forecasting - Identify resources that need replacing with optional item detail. More Resource Value - Examine the current or depreciated value of your resources. More Circulation Resource Checkout Summary - Identify the number of students without resources. More Current Checkouts/Fines - Identify or send notices to the patrons with checkouts/fines. More Location Labels - Create new or replacement item barcode labels. More Location Labels - Create new or replacement locations barcode labels. More Software Items using Software Licenses - View the items that have software licenses assigned to them, More License Assignments - List your software licenses and optionally their assignments. More							

- 4. You will see various limiters to include by checking the "update" button next to the field:
  - Resource types generates a "resource type" data report
  - Custodian generates a report of items assigned to the principal
  - Departments n/a
  - Home location generates a report of where devices are assigned
  - Funding source n/a
  - Purchase price n/a
  - Status generates a report detailing various statuses for the equipment at your site
  - Sort organizes the report by:
    - o Custodian
    - o Department—n/a
    - o Home Location

- 5. Click on the "Show" dropdown menu
- 6. From the dropdown menu select the output of the report:
  - Summary only
  - Details (full)
- 7. Once the parameters have been set, click on the "Run Report" button

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		Sort results by Department	
		Show Summary Only V	5)

- 8. Retrieve your report via the "Report Manager"
- 9. Click on the "Refresh List" link

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Resource Reports	You may continue to use the application as normal. To ch	eck on your report's progress at any time, select the Report Manager from Reports.	
Patron Reports Report Builder	Jobsi 1 - 9 of 9	(9) RefreshList	
Report Manager	Job	Status	
	Item Status Report	Pending 🕄	
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10. Once the report has been run, click the "view" link

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	Resource Reports > Item Status > Report Manager		
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Report Manager	Item Status Report	Completed (8/6/2015 1:13 PM)	View B

- 11. From the Job Summary page, locate the "Summary" subheading
- 12. Click on the link of the format you would like to retrieve the report:
  - View PDF
  - Download XML File (Excel)

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### Resource Checkout Summary

- 1. Click on the "Resource Reports" option
- 2. Locate the "Resource Checkout Summary" report link



- 3. Under the "List Resource Checkouts..." subheading, you should see the following:
  - FOR contains your school's name
  - OF RESOURCE TYPE Includes all resource types—by clicking on the "update" button you will be able to specify which of the devices assigned at your site will be included in the report
  - CURRENT CLASSES populates a dropdown field detailing the classes offered at your site
  - LIMIT BY you are given three limiters:
    - o Class ID
    - o Class name
    - o Teacher
    - o The "from" "to" fields can be used to further narrow your search
  - INCLUDE select the fields you want included in the output of the report:
    - o Names of students w/o resources (default)
    - o Teacher
    - o Period
    - o Off-site resources associated with the class
    - o Page break
    - o Signature line (used for William's certification)
- 4. Click the "Run Report" button

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5. On the "Reports Manager", click on the "Refresh List" link

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Report Manager	Job	Status	
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6. Once the report has run, click the "View" link

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Report Manager	Item Status Report	Completed (8/10/2015 1:59 PM)	<u>View</u>

7. The report will generate in a PDF format

#### PATRON REPORTS OPTION

### A: Current Check out and Fines

#### Format Section

- 1. <u>Show</u> section these options determine the type of report you will generate and the basic information that you want the report to contain.
  - a. On the "**Report**" tab, click on the "**Patron Reports**" option located on the left-side of the screen
  - b. Click on the "Current Checkouts/Fines" link



- c. Place a check-mark on the "Checked out/overdue materials" option box
- d. Select one of the radial dial options:
  - All that are currently overdue: This option will generate report or notices of all of the resources that were not returned by the specified return date
  - That are overdue by (dropdown menu) to (*specified number*) days: This option allows you to generate a report/notices based upon targeted days
  - That are due from (calendar dates) to (calendar dates): This option allows you to generate a report/notices based upon targeted dates

- All that are checked out: This option requires you to select which of the materials/fines you want to include on the report:
  - Resources assigned to custodian (principal)
  - Unpaid Library Fines
  - Unpaid Textbook Fines
  - Unpaid Resource Fines
  - Unpaid Patron Fines
- 2. Format section these options allow you to determine the output of the data.
  - a. Select "Report -- Output"
    - **Report** the user (patron), for reference data purposes, typically uses this format. The output options are in either PDF or Microsoft Excel formats.
- 3. Once your options are selected, click the "Continue" button

Reports     Is the report or notice you'd like to generate listed below? If so, dick its "Run" option. Otherwise you can <u>sat up a new one</u> .     Is the report or notice you'd like to generate listed below? If so, dick its "Run" option. Otherwise you can <u>sat up a new one</u> .     Is she report / Notices     Last Run     Scheduled Daily 8:00 AM     Scheduled Daily 8:00 AM			n ve im ((
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Overdue Resources 6/10/2015 8:22 AM	9	Run	1
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All that are checked out			
Resources Assigned to a Custodian			
☑ Unpaid Library Fines			
Unpaid Textbook Fines			
Unpaid Resource Fines			
Unpaid Patron Fines			

#### Limit Section

You may limit results to various patron types by appropriately selecting the patron to whom you would like to distribute.

- 1. The following options can be selected under the "Limit the results to..." section:
  - <u>My Patrons</u> Patron types will typically include *faculty* and *students*.
    - To uncheck a patron type, click on the "Update" button
    - Options on the "Update" screen are "Select All" or "Clear All". Once you have selected the patron types, click the "OK" button
  - <u>Graduating in</u>... field This option is NOT functional in Destiny \*(please see the "Details" section to run grade-level reports)
  - <u>Also Include</u> check box If you decide to view obligations that your patrons owe to *OTHER* schools, you have the ability to include this on your data report, if you check the box.
  - <u>My Materials</u> This will include materials from ALL three of the Destiny modules: Library, Textbook and Resource. For the purposes of generating Resource manager data, it is recommended that you do the following:
    - Library Click on the "Update" button and Select the "Clear All" circulation types and click the "OK" button to return to the "Limit" screen
    - **Textbooks** Uncheck the box next to this item
    - **Resources** Check the box next to this item
  - <u>Also Include</u> check-box If you **only** want to focus on the materials that your patrons owe to <u>your site</u>, you may **uncheck** the box next to this item
- 2. Once your options are selected, click the "Continue" button

atron Reports		Overdue / Assigned Materials & Unpaid Fines Report
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teport Manager	My Patrons All Patron Types	Status 🗹 Active
	infrances intraces the state	Inactive
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_	My Materials Library - All Circulation Types 🔮	Update
	Also Include	and/or the fines they owe that belong to other sites in the district.

Details Section: Steps for Generating a Report

- 1. On the "<u>Select & Sort by</u>" section, click on the drop-down menu and select how the report should be sorted:
  - Patron Name generates an alpha list of all of the patrons at your site
  - Grade level generates grade specific reports \*(this is where you can run reports for the "graduating in...")
  - Homeroom—generates homeroom reports
- 2. Check "Start a new page for each group" (optional)
- 3. On the "Also Display..." section
  - <u>Title Info</u>
    - Uncheck "Title for library materials"
    - Uncheck "Price of checked out/overdue materials"
  - <u>Patron Info</u>
    - Check *Barcode* item
    - Uncheck Phone number item
    - Uncheck Subtotal items/fines for each patron item
    - Check the *Grade Level* drop-down option
    - Check the *Homeroom* drop-down option

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	Patron Info 🗹 Barcode							
	Phone number							
	Subtotal items/fines for each patron	n						
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### B: Create Notices

- 1. Repeat Form Section on "STEP 6: REPORTS TAB"
- 2. **Format** section These options allow you to determine the output of the data.
  - a. Select "Notices -- Language:"
    - **Notices** —The user will select this format as a means to communicate delinquencies to patrons. Language options available are English, Spanish and French.
- 3. Once your options are selected, click the "Continue" button

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Format Organization PDF				
ONDERS Language: English Language: Engli				

- 1. Repeat Limit Section, #1 2 (See "STEP 6: REPORTS TAB")
- 2. Once your options are selected, click on the "Continue" button

**Details Section:** Steps for Generating Notices

- 1. On the "Select & Sort by" section, click on the dropdown menu and select how the notices should be sorted (*Patron Name, Grade level or Homeroom*)
  - a. On the "Distributed" option, using the radio button, select either
    - Internally To be distributed in house (usually through homeroom)
    - **Mailed** To be sent home via US mail (this will require an envelope with two windows)
  - b. <u>Page layout</u> Determine how you will print the notices:
    - Print 1 notice per page
    - Print 2 notices per page
    - Print 4 notices per page
  - c. <u>Message</u> Decide if you will use the Destiny generic language OR if you will utilize parts of the LAUSD Restitution Policy Bulletin
  - d. <u>Address Label</u> Check the "To Parent or Guardian..." option if you selected the mailed item above
- 2. On the "Also Display..." section
  - Title Info
    - Uncheck title for library materials
    - Uncheck the price of checked out/overdue materials
  - Patron Info
    - Check the *Barcode* item
    - Uncheck the Phone number item
    - Check the Grade Level dropdown option
    - Check the *Homeroom* dropdown option

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Page layout	Print 1 notice per page 💙	
Message	Dear Patron's Name:	
	The following items are overdue. Please	
	return them as soon as possible.	
	A	
Address Label	To the Parent or Guardian of: Patron's Name	
(2) Also Display		
Title Info	Title for library materials	Select All
	Price of checked out/overdue materials	d Clear All
Patron Info	Barcode	
	Phone number	
	Grade Level 👻	
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### **<u>STEP 7</u>**: SAVE SETUP AND/OR RUN REPORT/NOTICES

### Run Report/Notices button

1. To Run the report click on the "Run Notices" button

Patron Info Barcode	e number			
Grade I	Level 🗸		0	
I Homere	oom 🗸			
		Save Setup	Run Notices	

2. On the "**Report Manager**" the status of the report will indicate "*In Progress*", click on the "**Refresh** List" link to refresh the page

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3. Once the status indicates "Completed", click on the "View" link to view the report

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#### Save Setup button

1. To save the setup for the next time, you need to run the report then click the "Save Setup" button

Patron Info	Barcode	
	Phone number	
	Grade Level 🗸	
	Homeroom V	
	1 Save Setup	

- 2. In the "Save As" field, type in a name for the report, e.g. Overdue Resources
- 3. To automate this report, click on the "Schedule Report" dropdown menu, and select one of the following options:
  - Do Not Schedule
  - Daily
  - Weekly
- 4. Click "Save Setup" button. The *Format* screen will display along with all of the saved reports/notices

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My Favorites			How do I ?
Resource Reports		Overdue / Assigned Materials & Unpaid FinesNotices	
Patron Reports Report Builder	Save As	Overdue Resource	
Report Manager	3 Schedule Report	e.g., "1st Notice (5 to 10 days overdue)." Do Not Schedule Do Not Schedule Daily Weekly Weekly Save Setup	

**NOTE:** This view will allow you to mark the reports/notices as follows:

• Add to Favorites, Run, Edit, and Delete

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My Favorites				How do I ?
Resource Reports		1. Format 2. Limit	3. Details	
Patron Reports	Is the report or notice you'd like to genera	e listed below? If so, click its "Run" option. Otherwise you can	set up a new one.	
Report Builder	Saved Report / Notices	Last Run		
Report Manager	Overdue Resources Scheduled <u>Every Monday 7:00 AM</u>			🦈 🗍 Run 🖉 🛍

#### Save & Run button

- 1. To save the setup for the next time you need to run the report, click the "Save Setup" button
- 2. In the "Save As" field, type in a name for the report, e.g. Overdue Resources
- 3. To automate this report, click on the "Schedule Report" dropdown menu and select one of the following options:
  - Do Not Schedule
  - Daily
  - Weekly
- 4. Click the "Save and Run" button. The Report Manager screen will be displayed

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My Favorites		How do I ?
Resource Reports	Overdue / Assigned Materials & Unpaid FinesNotices	
Patron Reports Report Builder Report Manager	Save As Overdue Resource Enter a unique and descriptive name for your report or notice setup: e.g. "1st Notice (5 to 10 days overdue)." Do Not Schedule V Do Not Schedule V Daily Weekly Weekly	

- 5. Click on the "Refresh List" link to refresh the page
- 6. Click on the "View" link to view the report

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<u>Report Builder Option</u>: Allows you to view resource reports that the Destiny Resource Administrator (*District Access*) has pushed down to the schools

- 1. Click on the "Report Builder" option located on the left-side of the screen
  - To run a report, click on the "**Run**" icon
  - To make a report a "favorite", click on the "**Heart**" icon

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Report Manager Option: Allows you to view any report run for your site

- 1. Click on the "Report Manager" option located on the left-side of the screen
  - To access a report, click on the "View" link
  - To permanently delete a report, click on the "Trash" icon

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NOTE: If a generated report is not on the list, click on the "Refresh List" link to update the list

#### BARCODE LABELS REPORT

### Patron Barcode Report

- 1. On the "**Reports**" tab, click on the on the "**Patron Reports**" option located on the left-side of the screen
- 2. Click on the "Barcode Labels" link under the heading "Labels/Cards"



- 3. On the "Select by" field, click on the dropdown menu and select to "Patron Name"
  - a. Leave the "From" and "To" fields blank
- 4. Under "Sort by", click on the second radio button then click on the dropdown arrow and select "*Homeroom*" "and then by" select "*Grade Level*"



5. Under "Include the following", make sure the "Barcode Number" box is checked

- 6. Under "Formatted for", click the radio button "Use at circulation desk" and make sure "Start a new page for each group" is checked
- 7. Click on the "Run Report" button. You will be taken to the Report Manager screen.

5 Include the following	Barcode number
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	Start on labe
	Printer offset - Horizontal: 0 Vertical: 0
(6)	Use at the circulation desk
	Start a new page for each group
	Include Library V Circulation command barcodes
In addition to adjusting your p	rinter offsets, you must also configure Adobe Reader so that your labels are properly aligned.
For assi	stance configuring Adobe Reader or the printer offsets, see Troubleshooting
	7 Run Report

8. Click on the "Refresh List" link to see if your report has completed

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My Favorites Resource Reports	Job s You may continue to use the application as normal. To	ubmitted: Patron Barcode Labels check on your report's progress at any time, select the	Report Manager from Repo	rts.	
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Report Builder	Jobs: 1 - 11 of 11 (8	Befresh List			
Report Manager	Job	Status			
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9. Click on the "View" link to view/print the report

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### STEP 8: BACK OFFICE TAB

Allows you to view or delete the reports in the queue

- 1. Click on the "Back Office" tab
- 2. Click on the "Job Manager" option on the left-side of the screen
  - To access a report, click on the "View" link
  - To permanently delete a report, click on the "Trash" icon

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### STEP 9: MY INFO TAB

Destiny tracks all users and their transactions under this tab

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