

Destiny Resource Manager[™] allows staff (with the appropriate access level) to generate reports that will notify patrons of outstanding obligations

In this tutorial you will learn how to:

Cenerate Reports and Notices

Requirements:

- ** PC or MAC
- ** A web browser such as:
 - Google Chrome 🧿
 - Internet Explorer 🤶
 - Mozilla Firefox 🧕
 - Safari
- ** An Internet connection
- ** An LAUSD Single-Sign on

STEP 1: 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. There are two (2) ways to find your school:
 - a. In the "Search for Site Name" field, type in the name or location code of your school.
 Press the "Enter" key on the keyboard or click on the "Go!" button OR
 - b. Click on the "**Blue Bar**" associated to your school group (*e.g. Middle School*). Then, find and click on your school's link.



4. On the school's "**Home**" screen, click the "**Log In**" link located on the upper-right corner and enter your username and password to login.

STEP 2: CREATE REPORTS AND NOTICES

★ CREATE REPORT:

- 1. Click on the "Reports" Tab
- 2. Click on the "Resource Reports"
- 3. On the "Circulation" section, click on the "Current Checkout/Fines" link

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My Favorities Parkeness Parkeness Parkeness Parkeness Barcoke Exists - Identify used item barcodes. Show More: Detected Resources - Retrieve information about resources that have been detected. Show More: Report Manager Out Resource Value - Examine the current status of your resources and fine amounts. Show More: Lost Resource Value - Examine the current or depreciated value of your resources. Show More: Circulation Class List - List class sections by teacher or student. Show More: Current Checkouts/Fines Identify to book Obligations - Identify tooks that should be returned. Show More: Outstanding Textbook Obligations - Identify tooks that should be returned. Show More: Current Checkouts/Fines Identify tooks that should be returned. Show More: Cutation Labels - Create new or replacement item barcode labels. Show More: Cutation Labels - Create new or replacement locations barcode labels. Show More: Location Labels - Create new or replacement locations barcode labels. Show More: License Assignments - List your software licenses and optionally their assignments. Show More: License Assignments - List your software licenses and optionally their assignments. Show More:		

FORMAT SECTION

- 1. <u>Show</u> section these options determine the type of report you want to generate and the basic information that you want the report to contain.
 - a. Place a check-mark on the "Checked out/overdue materials" option box
 - b. 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 (drop-down 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



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
 - Graduating in 2014 field This option is NOT functional in Destiny
 - <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 your site, you may **uncheck** the box next to this item.
- 2. Once your options are selected, click the "Continue" button

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DETAILS SECTION

Steps for Generating a Report

- 1. On the "Select & Sort by" section, click on the drop-down menu and select how the report should be sorted. (*Patron Name, Grade Level* or *Homeroom*)
- 2. Optional, check "Start a new page for each group" option
- 3. On the "Also Display..." section
 - Title Info
 - Uncheck "Title for library materials"
 - Uncheck "Price of checked out/overdue materials"
 - Patron Info
 - 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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★ <u>CREATE NOTICE</u>:

- 1. Repeat <u>FORMAT</u> SECTION on "<u>STEP 2</u>: CREATE REPORTS AND NOTICES"
- 2. **Format** section These options allow you to determine the output of the data.
 - a. Select "Notices -- Language:"
 - Notices The user (patron), 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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- Repeat <u>LIMIT</u> SECTION on "<u>STEP 2</u>: CREATE REPORTS AND NOTICES" You may limit results to various patron types by appropriately selecting the patron to whom you would like to distribute.
- 5. 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 drop-down menu and select how the notices should be sorted (*Patron Name, Grade Level or Homeroom*)
 - a. On the "Distributed" option, using the radial dial, 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" drop down option
 - Check the "Homeroom" drop down option

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<u>STEP 3</u>: SAVE SETUP AND/OR RUN REPORT/NOTICES

RUN REPORTS/NOTICES BUTTON

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

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, click the "Save Setup" button

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- 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" drop-down menu and select one of the following options:
 - Do Not Schedule
 - Daily
 - Weekly

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4. Click "Save Setup" button. The *Format* screen will be displayed along with all the saved reports/notices.

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

• Add to Favorites, Run, Edit, and Delete

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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" drop-down 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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5. Click on the "**Refresh List**" link to refresh the page

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6. Click on the "View" link to view the report

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