



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:

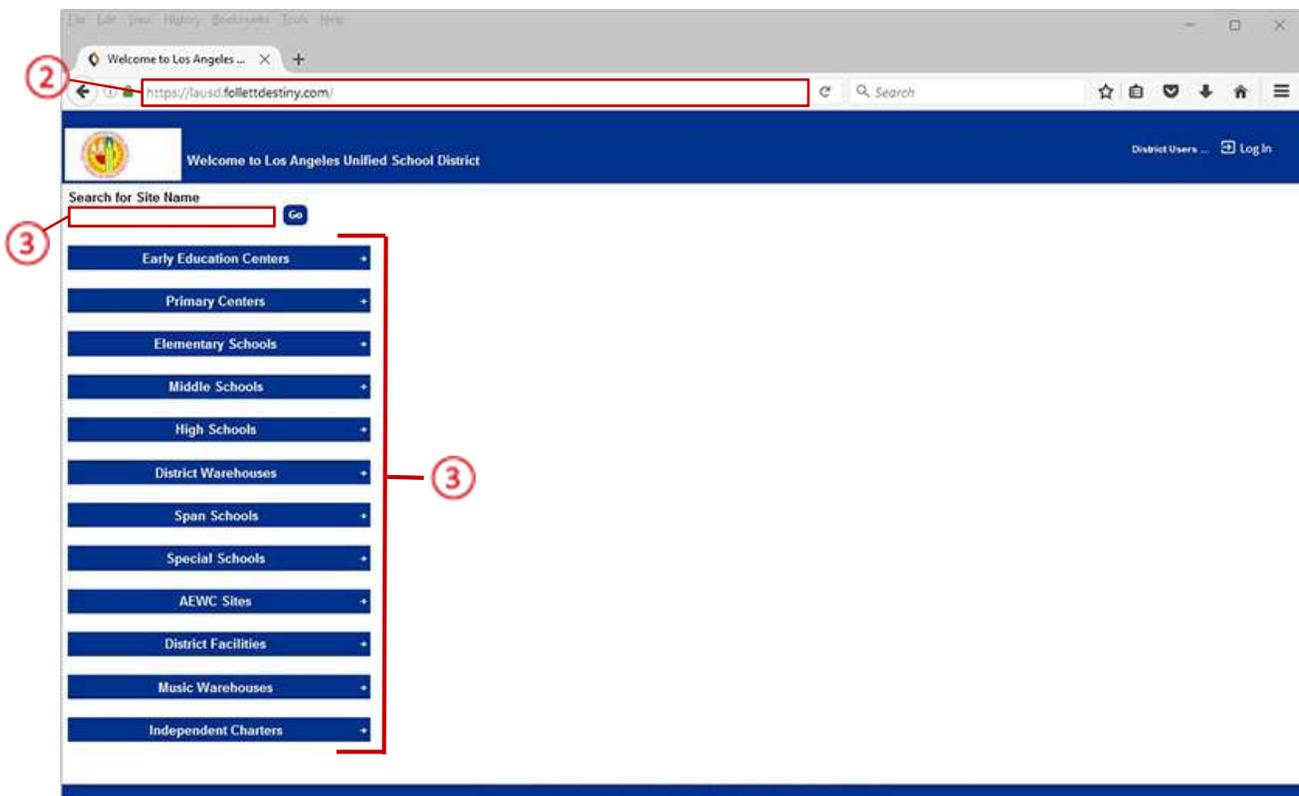
- ✱✱ Generate Reports and Notices

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:
  - <http://lausd.follettdestiny.com>
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.

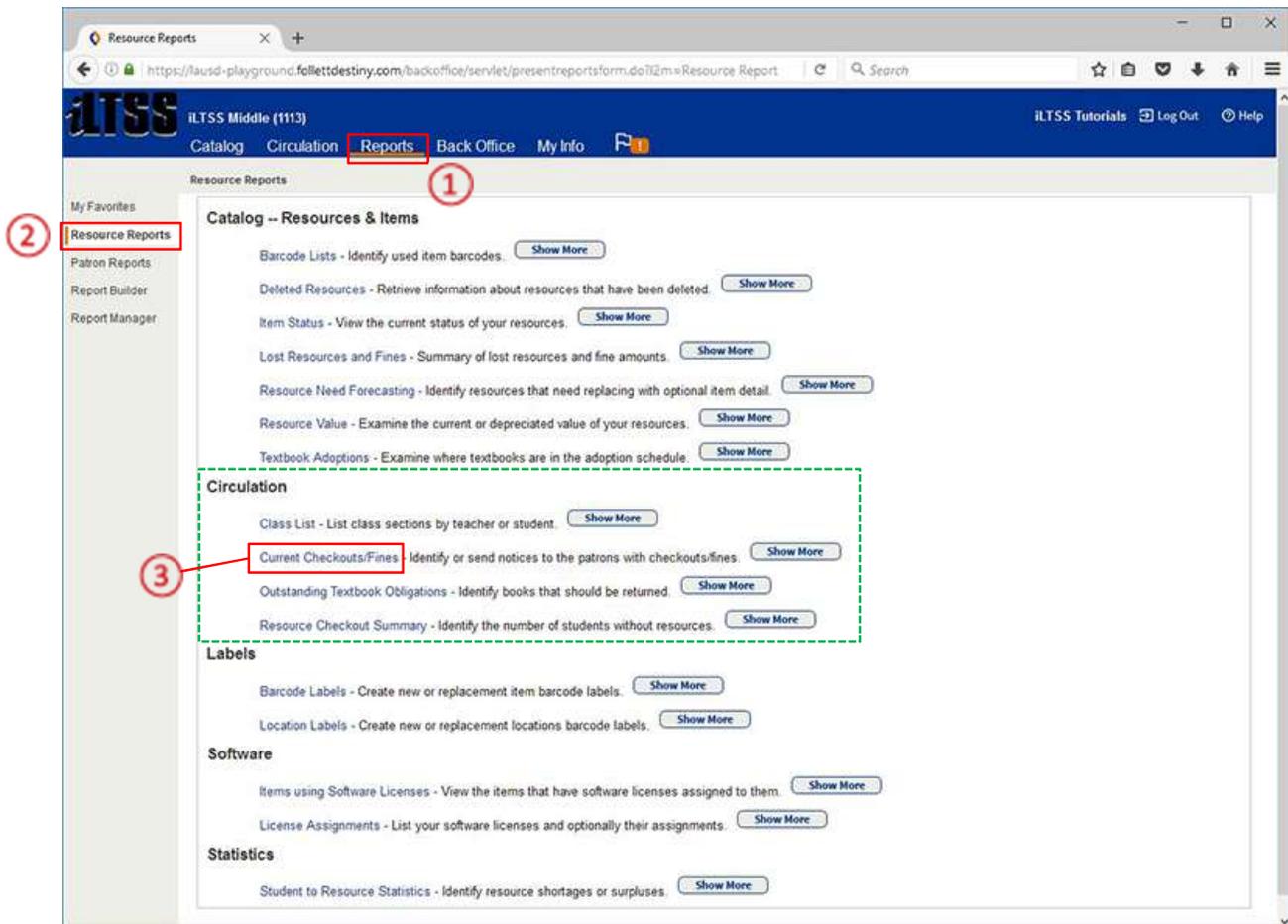


4. On the school’s “Home” screen, click the “Log In” link located on the upper-right corner and enter your username and password to login.

## 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



## FORMAT SECTION

1. **Show** 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

## D.R.M: RESOURCE CHECKOUT, FINES REPORT, AND NOTICES

- **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

The screenshot shows the 'Current Checkouts/Fines' report builder interface. The 'Format' section is highlighted with a red dashed box and contains the following options:

- 1. Format
- 2. Limit
- 3. Details

The 'Format' section is highlighted with a red dashed box and contains the following options:

- Show  Checked Out/Overdue Materials
  - All that are currently overdue
  - That are overdue by  to  days
  - That are due from  to
  - All that are checked out
- Resources Assigned to a Custodian
- Unpaid Library Fines
- Unpaid Textbook Fines
- Unpaid Resource Fines
- Unpaid Patron Fines

The 'Format' section is highlighted with a red dashed box and contains the following options:

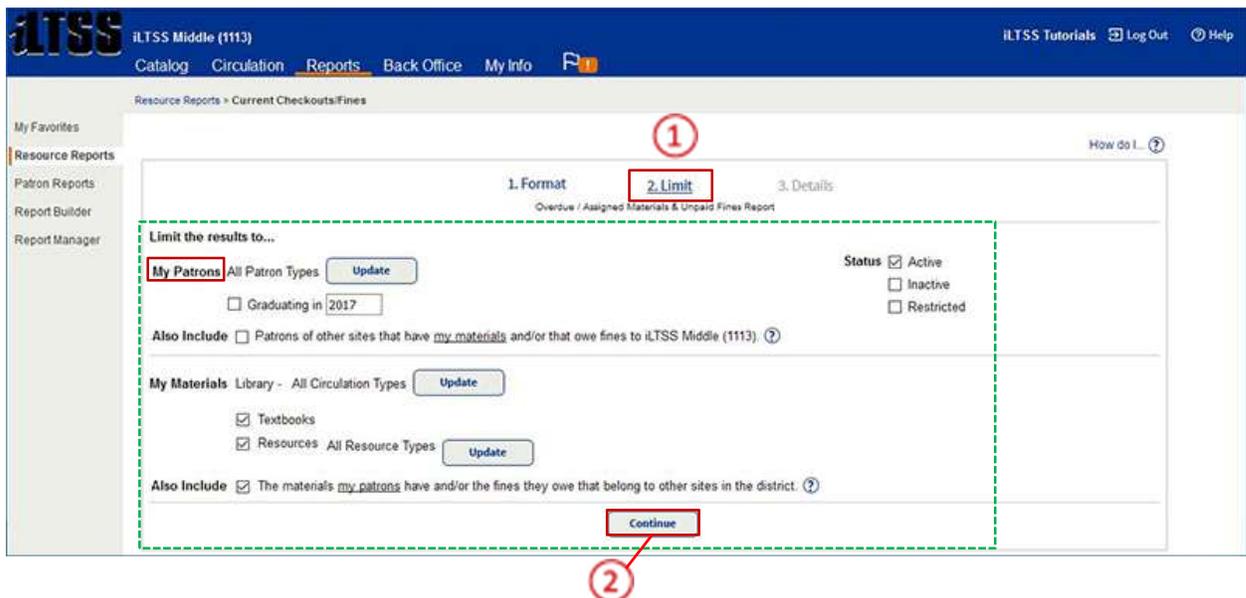
- Format  Report - Output PDF
- Notices -- Language: English

The 'Continue' button is located at the bottom right of the form.

LIMIT SECTION

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

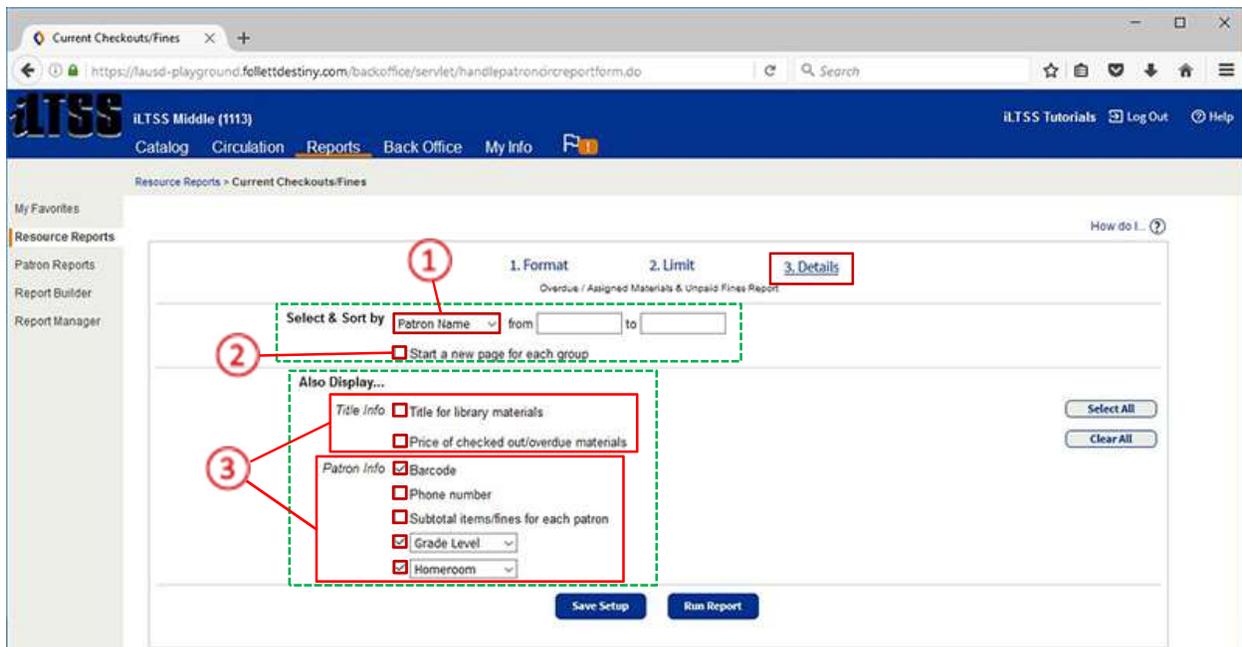
1. The following options can be selected under the “Limit the results to...” section:
  - **My Patrons** — Patron types will typically include *faculty* and *students*.
    - To uncheck a patron type, click on the “Update” button
    - Options on the “Update” screen are “Select All” or “Clear All” Once you have selected the patron types, click the “OK” button
  - **Graduating in 2014** field — This option is NOT functional in Destiny
  - **Also Include** 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.
  - **My Materials** — 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
  - **Also Include** 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



## DETAILS SECTION

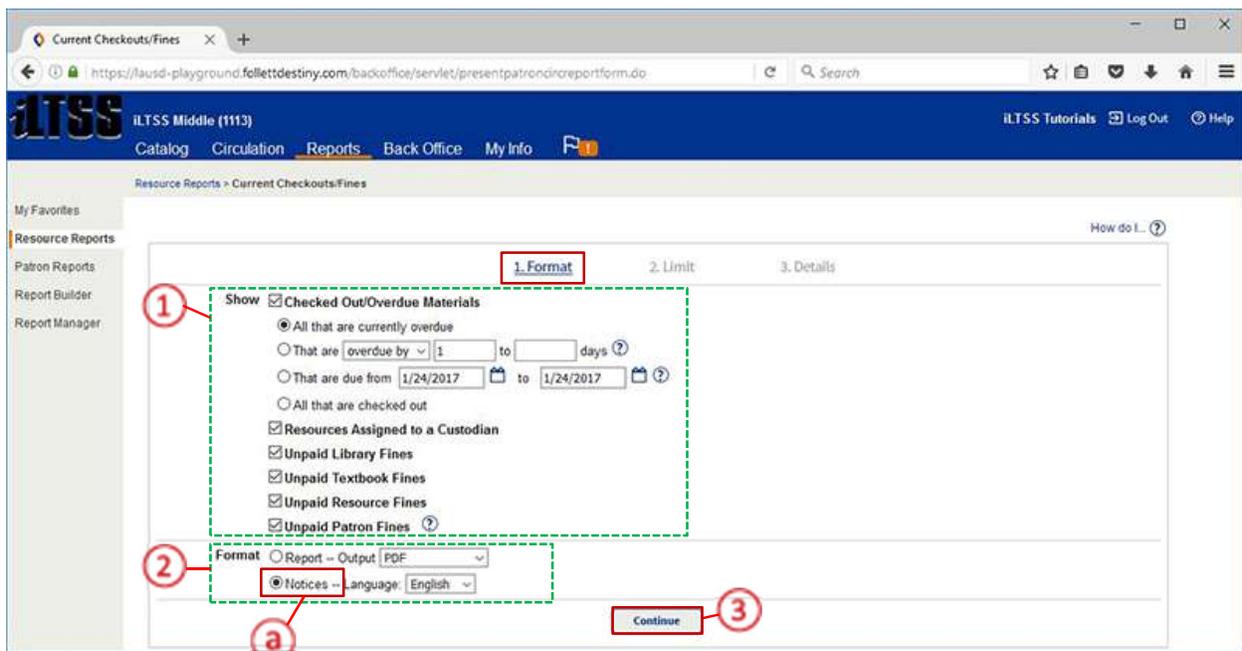
### Steps for Generating a Report

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



★ CREATE NOTICE:

1. Repeat FORMAT SECTION on “**STEP 2: 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



4. Repeat LIMIT SECTION on “**STEP 2: 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

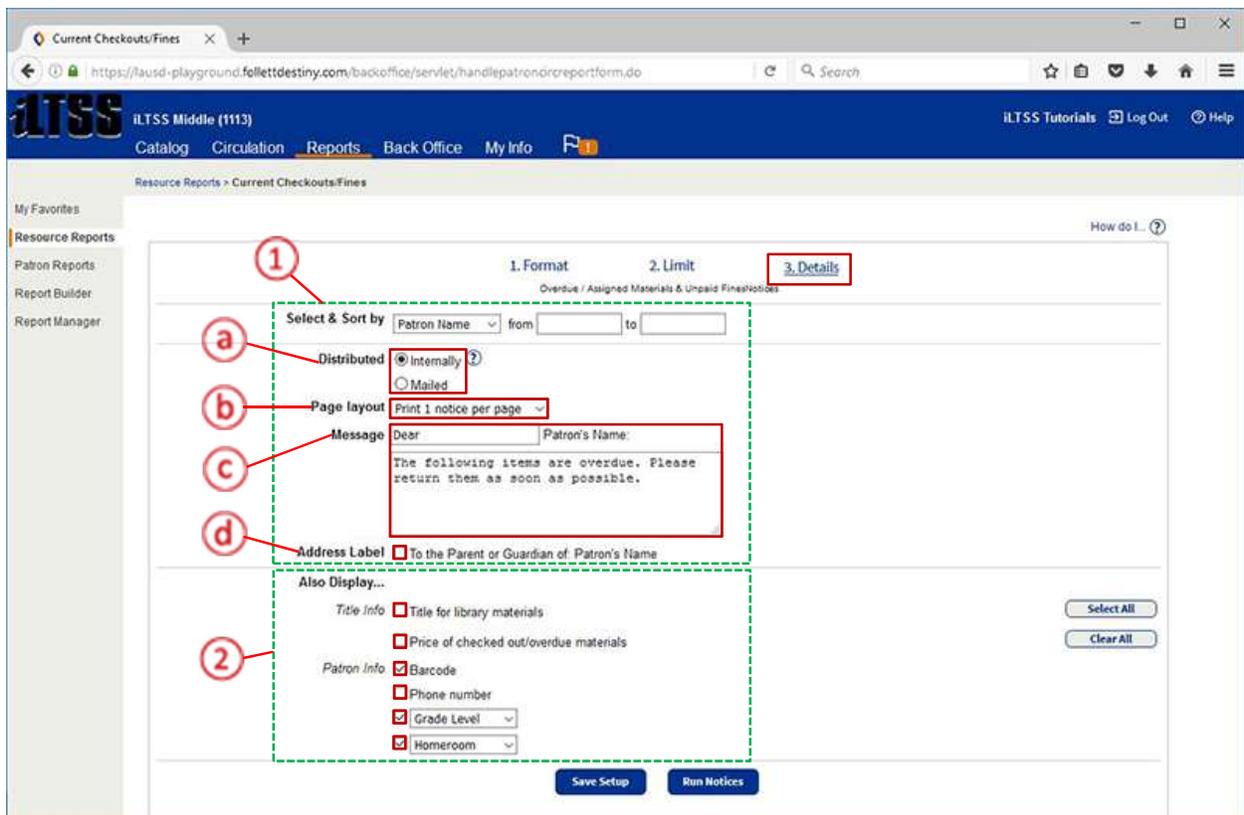
Steps for Generating Notices

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. **Page layout** — Determine how you will print the notices:
  - Print 1 notice per page
  - Print 2 notices per page
  - Print 4 notices per page
- c. **Message** — Decide if you will use the Destiny generic language OR if you will utilize parts of the LAUSD Restitution Policy Bulletin
- d. **Address Label** — 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



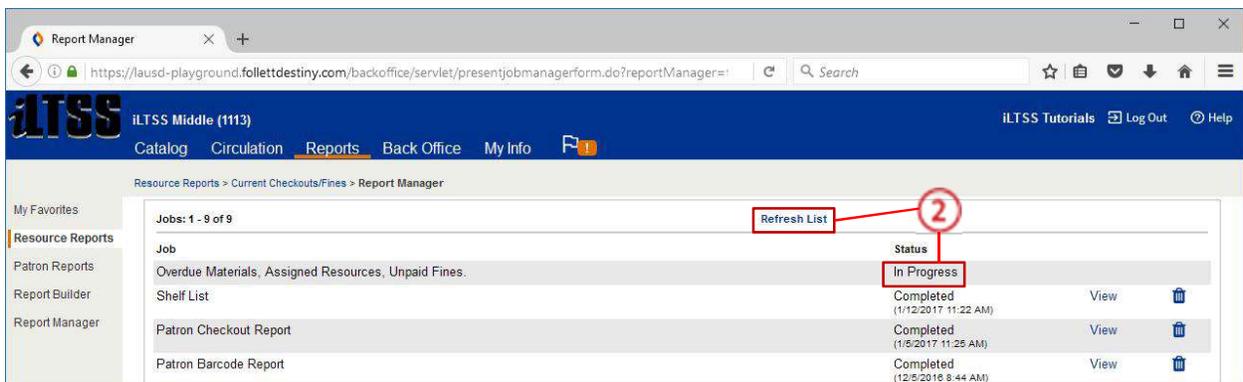
**STEP 3: SAVE SETUP AND/OR RUN REPORT/NOTICES**

RUN REPORTS/NOTICES BUTTON

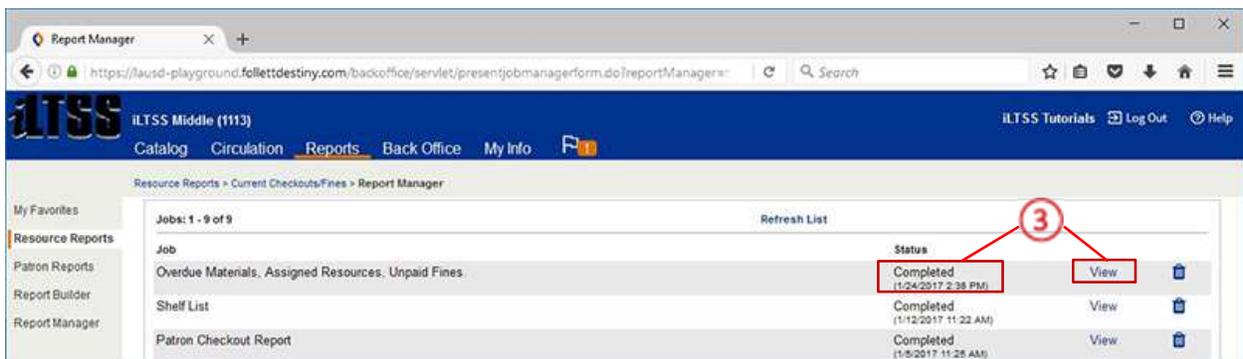
1. To Run the report, click on the “Run Notices” button



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



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



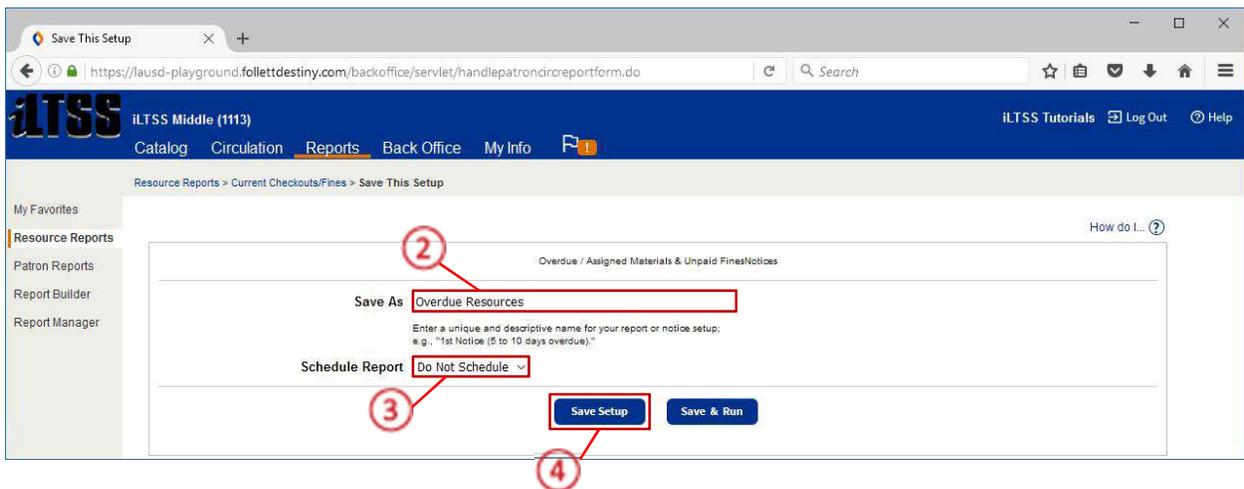
## SAVE SETUP BUTTON

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 “**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:

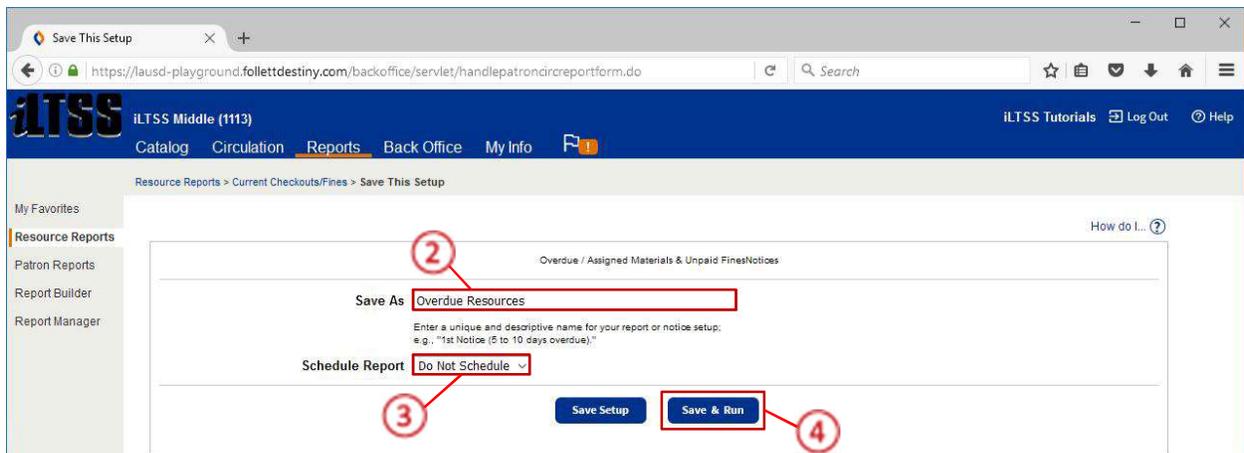
- *Add to Favorites, Run, Edit, and Delete*



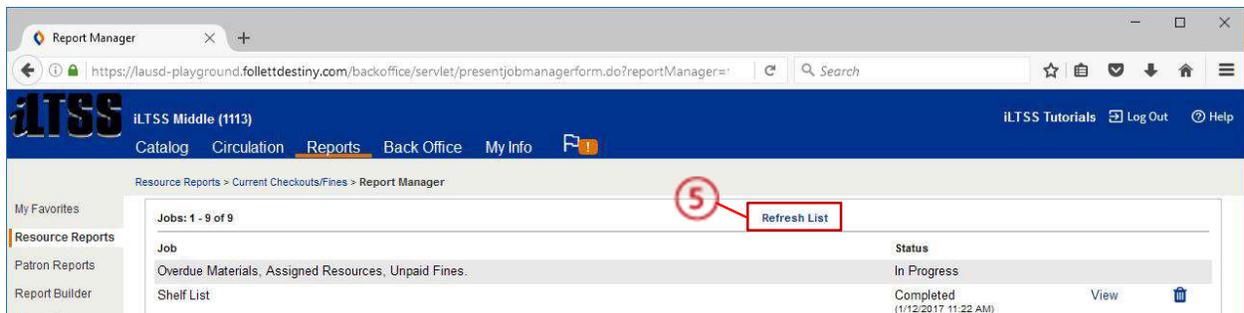
## D.R.M: RESOURCE CHECKOUT, FINES REPORT, AND NOTICES

### 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



5. Click on the **“Refresh List”** link to refresh the page



6. Click on the **“View”** link to view the report

