



Participant Guide

Destiny[®] Resource Manager[™]

Site Essentials
Webinar

v13.0

Participant Guide



Site Essentials Webinar Participant Guide

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

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Printed in the United States of America.

12211A v13.0 7/15

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Special Notes to Participants

Course Description

Welcome to the Resource Manager Site Essentials webinar. This training provides the tools you need to begin incorporating Destiny® into your daily routine using a simple 'plan, apply, and assess' methodology. Each module, and supporting quick reference guides or videos, guides you step-by-step through some of the basic features. You can easily transfer the knowledge you gain and the skills you develop in this training to your school or classroom, and participation in the *Plan* and *Apply* activities will enable you to use Destiny immediately.

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

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

Who Should Take This?

Principals, assistant principals, curriculum directors, department chairs, librarians, lead teachers, information technology personnel, and others assigned a role using Resource Manager.

Destiny Training Module Descriptions

Description

Locating Your Resources

When a teacher needs to check out a laptop, how do you locate the resource in Resource Manager? You just noticed a projector on a cart in the hallway. How can you find who is responsible for it? Resource Manager gives you two ways to quickly search and browse for these and all your other resources.

Tracking Individual Resources

Resource item records represent the actual physical items—one item record for each resource. You can add and track specific information regarding each resource to an item record, such as the serial number, purchase order and price, date acquired, textbook barcode, lens type for cameras, and VIN for vehicles.

Each item record is tied to a specific description record. While there should only be one resource description record per district for a single resource type, that one description record can have multiple item records tied to it. For example, if your district purchases 115 desktop computers, there will be one description record and 115 item records tied to it—one for each desktop. In this lesson, you will learn how to add resource item records.

Distributing and Collecting Resources

As your school integrates technology into the classroom, teachers and students use more than just textbooks as learning resources. They also use devices that support 1:1 initiatives, STEM equipment, and eTextbooks. Resource Manager's easy-to-use circulation features let you check out, check in, and track circulating resource items quickly and efficiently.

Gathering Resource Data

Providing timely information to administrators will help your district and school measure the effectiveness of your resource use and management practices. Destiny Resource Manager has many preconfigured reports that can confirm the status of your resources, and identify any patrons who have overdue materials or outstanding fines. You can print reports or save them as a PDF file or spreadsheet. The Dashboard lets you personalize a graphical, at-a-glance view of your most commonly used reports. In this lesson, you will investigate Resource Manager's preconfigured reporting features.

Locating Resources

Description

When a teacher needs to check out a laptop, how do you locate the resource in Resource Manager? You just noticed a projector on a cart in the hallway. How do you find who is responsible for it?

In this training, you will learn how to use Resource Manager to quickly search and browse for resources.

Participant Objectives

- Search for a resource.
- Browse for a resource.

Activities

- Answer questions about how you search for resources.
- Search for a resource.
- Browse to find a resource.

Resources

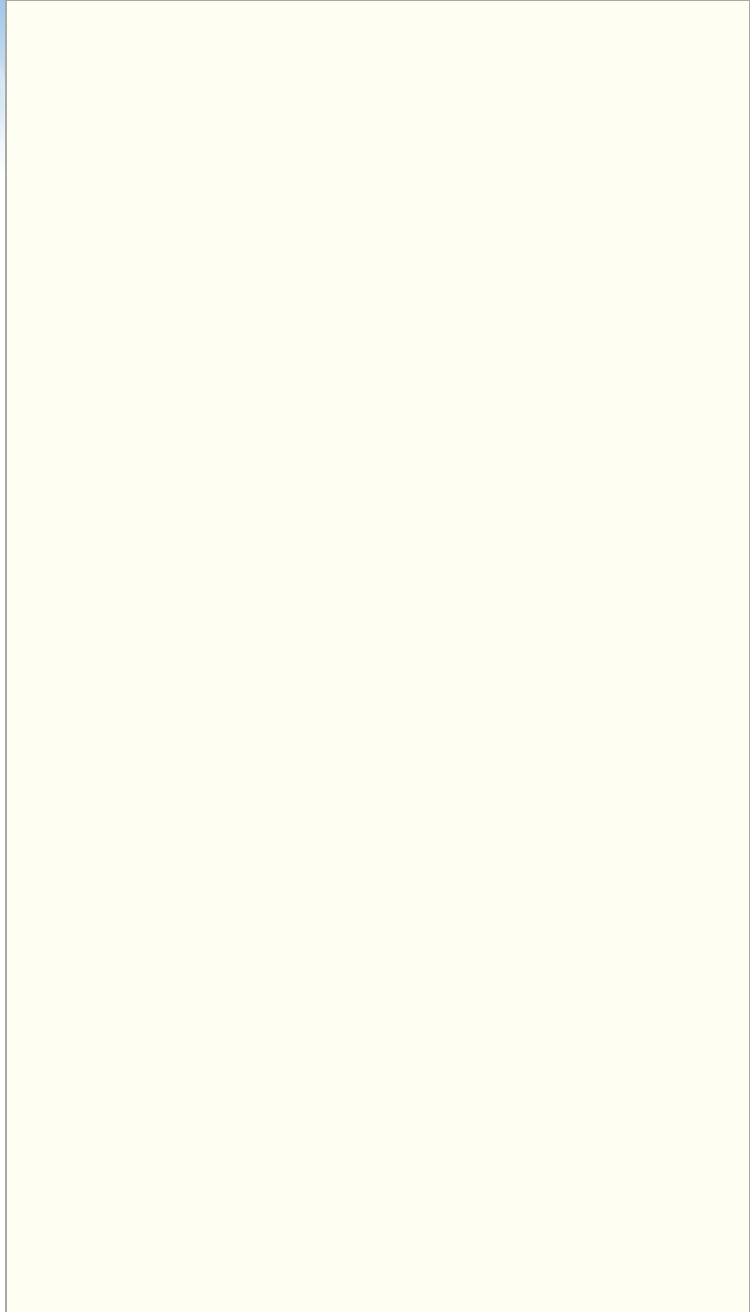
For more information on the topics in this training guide and to complete the Plan and Apply sections, refer to following resources:

Videos:

- Finding Resources*

*Recommended viewing prior to the lesson

Notes



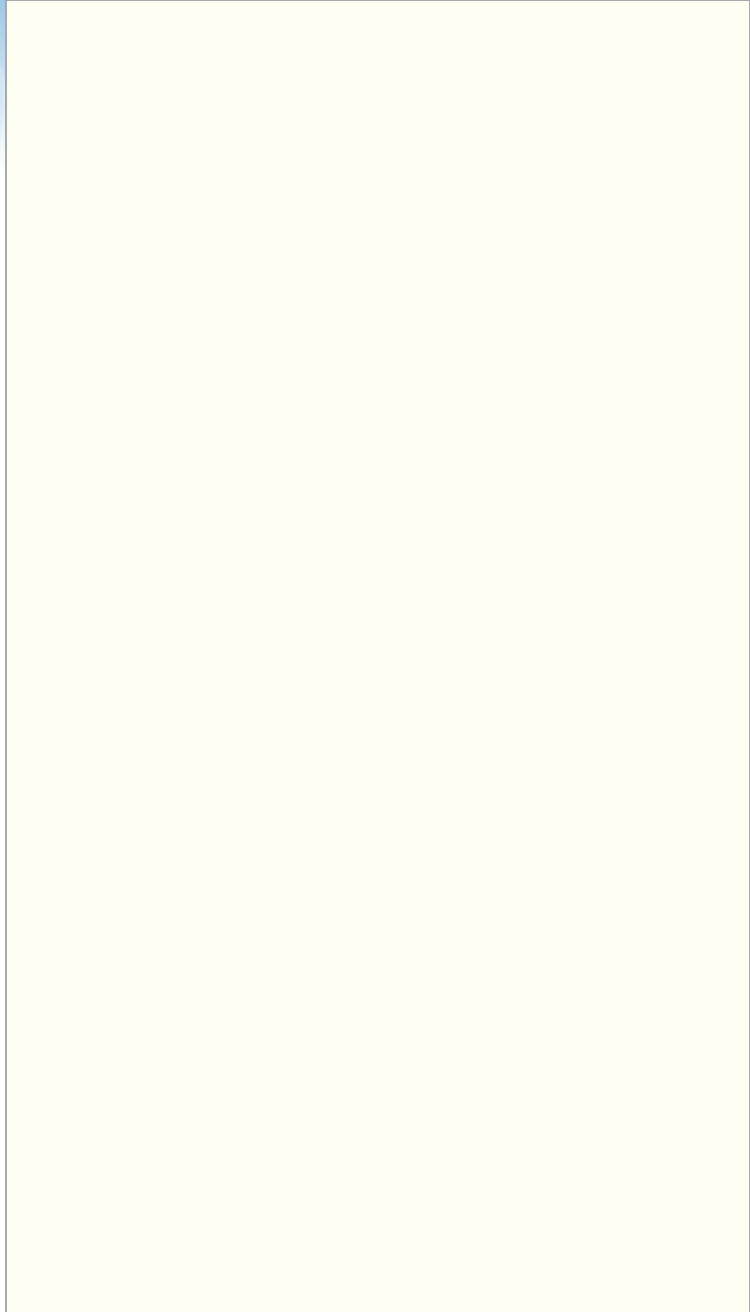
Plan

Use the space provided to record your answers to the following questions.

1. When looking for a specific resource, do you prefer to browse a list of resources or use a keyword search?

2. What type of resources do you search for most often?

Notes



Guided Exercises

Follow along with your Destiny trainer, or use the quick reference guide and video resources to practice the following skills. Mark the checkboxes as you complete each task to help you keep your place.

- 1. Browse **Catalog > Resource Search > Browse Resources**.
- 2. Search for different types of resources.

Notes

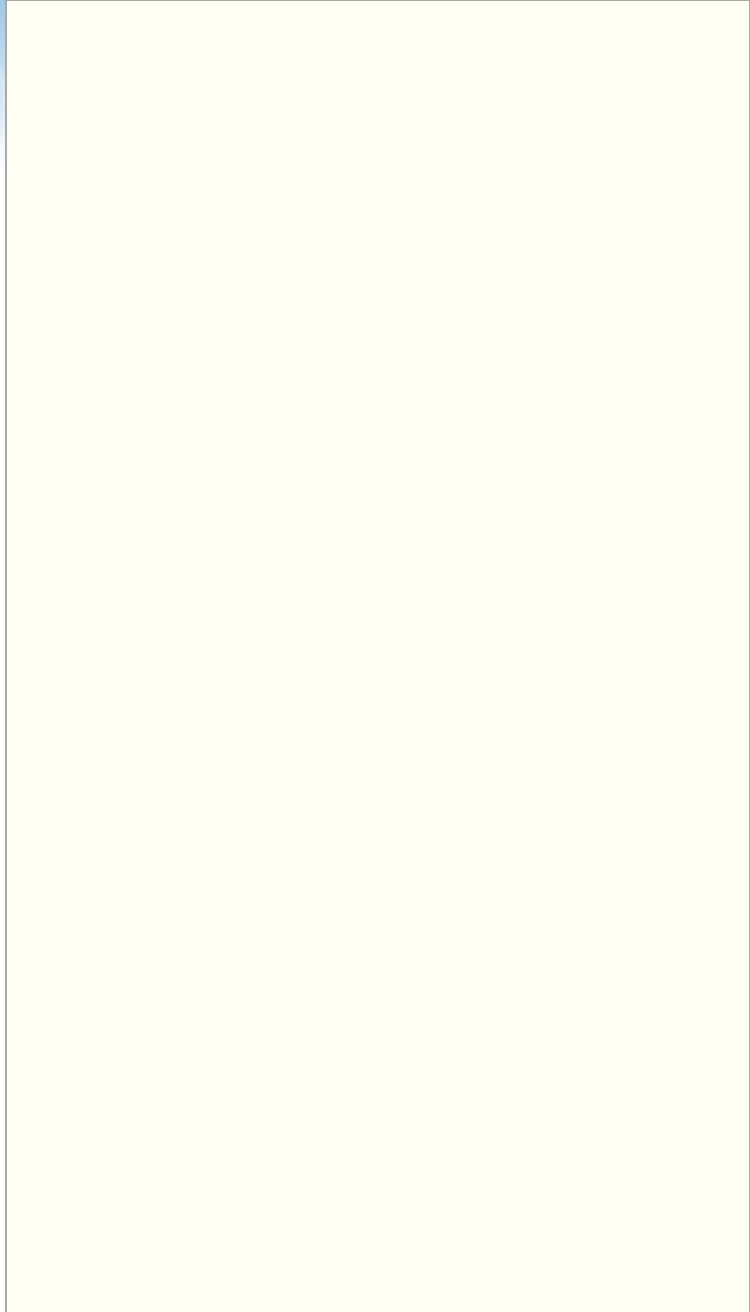
Apply

Now that you've done the guided exercises, complete the following:

- 1. Search for a non-textbook resource in your district. Write down your search term and the search results.

- 2. Browse for a resource of your choosing. Write down what you searched for and how many items of that resource are available.

Notes



Assess

Use the following rating scale to assess your level of understanding of the learning outcomes covered in this training.

Rating Scale:

- 1 - I need more help.
- 2 - I think I can figure it out with more practice.
- 3 - I am comfortable doing this on my own.
- 4 - I am proficient and can teach others.

Rating (1-4)	Learning Outcome
	Search for a resource.
	Browse for a resource.

Notes

Tracking Individual Resources

Description

Resource item records represent the actual physical items—such as books, microscopes, and calculators—in your school or district.

Each item record is tied to a specific description record. For example, if your district buys 115 desktop computers, there will be one resource description record identifying the computer manufacturer and model number and 115 item records—one for each desktop, identifying details such as serial number, purchase order and price, and date acquired.

In this training, you will learn how to add resource item records.

Prerequisites

Be sure you have completed the following training guide:

Cataloging Your Resource Types

Participant Objectives

- Describe a resource item record.
- Add resource item records.
- Edit resource item records.
- Delete resource item records.

Notes

Activities

- Answer questions about how your school adds new resources to your catalog.
- Define and describe the purpose of resource item records.
- Add and delete a resource item record.

Resources

For more information on the topics in this training guide and to complete the Plan and Apply sections, refer to following resources:

Videos:

- Adding Resource Item Records
- *Recommended viewing prior to the lesson

Quick Reference Guides:

- Adding a Resource Item Record

Guided Exercises

Follow along with your Destiny trainer, or use the quick reference guide and video resources to practice the following skills. Mark the checkboxes as you complete each task to help you keep your place.

- 1. Get familiar with **Catalog > Add Resource**.
- 2. Explore the different fields when you add a resource item record for different resource types.
- 3. Create a resource item record.

Notes

Apply

Now that you've done the guided exercises, complete the following:

- 1. In groups of 2-3 people, write down a definition for a resource item record. Be sure you can explain the purpose of a resource item record to the group.

- 2. Write the names of the people who will manage the description records of each resource listed for your school or district. You can use the empty rows for additional resources you will track.

Resource	Person Responsible
Laptops/tablets	
Athletic equipment	
Band uniforms and instruments	
Textbooks	
Microscopes	
Projectors	

Notes

Notes

- 3. If you have a resource you want to add to Resource Manager, add a resource item record to your catalog. Otherwise, describe to a partner the steps to add an item record.
- 4. Write a scenario where you would need to edit a resource item record.
- 5. Edit the resource item record you just added to your catalog by changing the home location.
- 6. Describe how to delete a resource item record.

Assess

Use the following rating scale to assess your level of understanding of the learning outcomes covered in this training.

Rating Scale:

- 1 - I need more help.
- 2 - I think I can figure it out with more practice.
- 3 - I am comfortable doing this on my own.
- 4 - I am proficient and can teach others.

Rating (1-4)	Learning Outcome
	Describe a resource item record.
	Add a resource item record.
	Edit a resource item record.
	Delete a resource item record.

Notes

Resource item records identify your physical items and include information about a specific resource, such as serial number, barcode, and brand.

Individual item records are associated with a resource description record. For example, if your district owns 25 HP laptops, those laptops will have 25 item records identifying their serial number and barcode. Those 25 item records are associated with the same description record.

Searching for a Resource Description Record

Before you can create a resource item record, you need to find its description record. To search for the description record:

1. Select **Catalog > Resource Search > Search**.
2. From the **Find all** drop-down, select the resource type.
3. Use the second **Where Resource** drop-down to select one of the following:
 - a. **Contains:** Performs a keyword search for one or more words that are part of the Resource Displayable Name. This is the broadest search.
 - b. **Starts With:** Searches for resources that begin with the letters or words you type. Select this option only when you know the resource's exact name.

Note: If you select **Textbooks** from the **Find all** drop-down, Follett recommends you select **ISBN** from the **Where Resource** drop-down.

4. Type your search term.

The screenshot shows the 'Resource Search' interface. At the top, there are navigation tabs: Dashboard, Catalog, Circulation, Reports, and Back Office. Below these is a search bar with 'Search', 'Browse Resources', and 'Item Categories' options. The main area is titled 'Search for Resources and Items'. It features a 'Find all' dropdown menu set to 'Resources'. Below that is a 'Where Resource' section with a dropdown set to 'Displayable Name/Title' and a 'Contains' operator. The 'Look in' dropdown is set to 'George Washington High School'. A section titled 'Limit your search for resources by...' contains several filters: 'Home Location' (All), 'Custodian' (All Custodians), 'Funding Source' (All), 'Department' (All), 'Purchase Price' (Greater than or equal to), 'Date Acquired' (to), and 'Historical Notes' (Contains). A 'Search' button is located in the top right corner of the search area.

5. From the **Look in** drop-down, select where you want to search.
6. Select any other limiters you want to use.
7. Click **Search**.

Adding a Resource Item Record

Adding an Item Record

To add a resource item record:

1. From the search results, click **Details** next to the correct description record.

Searched "Resources" for Displayable Name/Title containing "Dell". Searched in: George Washington High School. [Printable](#)
[Not what you're looking for? [Refine your search](#)] Selected List: My Personal List [Add Page](#)

Resources: 1 - 4 of 4 Sort By: Resource Name [Go!](#)

Dell Latitude XT Details Equipment and Furniture > Computer Equipment > Laptops	9 of 10 available locally 12 of 24 off-site Add to this List
Dell PowerEdge R805 Server Details Equipment and Furniture > Computer Equipment > Servers	0 of 2 available locally 0 of 5 off-site Add to this List
Dell Precision T5400 Details Equipment and Furniture > Computer Equipment > Desktops	4 of 51 available locally 10 of 165 off-site Add to this List

2. From either the **Resource Details** or **Items** sub-tab, click **+Add Item**.
3. From the **Add Items** drop-down, select if you are adding items with or without barcodes.

Note: This drop-down is only available for resources that have an instructional classification that allows barcoding items.

4. In the **Number of Items** field, type the number of items you want to add.

Dell Precision T5400 [Save](#)
[Add historical note](#) [Cancel](#)

Add Items: without Barcodes

*Number of Items: 1

Status: Available

Condition: Usable

Home Location: -- Undefined -- Other...

Custodian: Undefined Select

Department: -- Undefined -- Other...

Funding Source: -- Undefined --

District Identifier:

Purchase Price:

Date Acquired: 6/4/2015

Purchase Order:

Serial Number:

Salvage Value: \$0.00

Projected Life: years

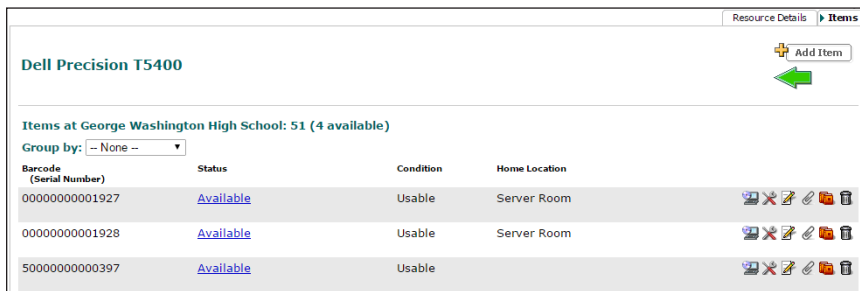
5. If you are adding items with barcodes, type the first barcode, or assign the next available barcode in the **Starting Barcode** field.
6. Enter the appropriate data in the available fields.
Note: Reports are more accurate and useful if you complete most of the fields.
7. To print barcode labels after adding the items to your catalog, select the **Print labels** checkbox.
8. Once you have completed as many fields as you can, click **Save**.

Adding a Resource Item Record

Duplicating an Item Record

When you acquire new items, you can duplicate an item record you already added instead of starting from scratch. For example, if you buy five laptops of the same make and model as the ones purchased last year, you can modify an existing item record to save time. To duplicate and edit a resource item record:

1. From the search results, click **Details** next to the correct resource.
2. Click **Items**.



3. Next to the item record you want to duplicate, click the icon.
4. Enter the details of your new item.
5. To print barcode labels after adding the items to your catalog, select the **Print labels** checkbox.
6. Click **Save**.

For more information on cataloging digital resources, see the [Cataloging and Circulating Digital Resources](#) video.

Distributing and Collecting Resources

Description

As your school integrates technology into the classroom, teachers and students use more than just textbooks as learning resources. They also use mobile devices, STEM equipment, and eTextbooks.

In this training, learn how to use Resource Manager's circulation features to quickly and efficiently check out, check in, and track circulating resource items.

Participant Objectives

- Distribute resources.
- Collect resources.
- Display resource status information.
- Generate overdue reports and notices.

Activities

- Answer questions about your circulation policies and practices.
- Circulate resources.
- View an item's status information.

Resources

For more information on the topics in this training guide and to complete the Plan and Apply sections, refer to following resources:

Videos:

- Checking Out Resources*
- Checking In Resources*
- Generating Overdue Reports and Notices*
- Creating Resource Fines*
- Cataloging and Circulating Digital Resources*

*Recommended viewing prior to the lesson

Quick Reference Guides:

- Circulating Resources
- Setting Loan Policies - Loan Periods
- Setting Loan Policies - Departments/Location
- Setting Loan Policies - Patron Types
- Setting Loan Policies - Textbook Loan Policies

Notes

Plan

Use the space provided to record your answers to the following questions.

1. How do you quickly identify patrons during checkout? For example, do you scan student and teacher IDs, look them up by name, or ask them for their district ID number?
2. Who will check resources in and out?
3. If you have classes that use digital resources, such as eTextbooks, how and when do you circulate them to students?
4. How do you make sure patrons know exactly which resources they checked out and are responsible for? How do they know when the items are due?

Notes

Guided Exercises

Follow along with your Destiny trainer or use the quick reference guide and video resources to practice the following skills. Mark the checkboxes as you complete each task to help you keep your place.

- 1. Explore **Circulation > Check Out Items**.
- 2. Explore **Circulation > Check In Items**.
- 3. Get familiar with the Current Checkouts/Fines report on **Reports > Patron Reports**.

Notes

Apply

Now that you've done the guided exercises, complete the following:

- 1. Check out resources to yourself, a department, and a location.
- 2. Write down some reasons you would edit a due date during a checkout. For example, maybe a teacher needs a projector in her classroom during an upcoming month-long unit. Change the due date for the resource you checked out to yourself to one month from today.
- 3. Look at your patron status. Identify any fines you currently owe.
- 4. Look at the item status of the resource you just checked out. How many times has the item circulated this month? When is the resource due?
- 5. Check in the resource you just checked out.
- 6. Run a Current Checkouts/Fines report. How many resources in your catalog are currently overdue?

Notes

Assess

Use the following rating scale to assess your level of understanding of the learning outcomes covered in this training.

Rating Scale:

- 1 - I need more help.
- 2 - I think I can figure it out with more practice.
- 3 - I am comfortable doing this on my own.
- 4 - I am proficient and can teach others.

Rating (1-4)	Learning Outcome
	Distribute resources.
	Collect resources.
	Display resource status information.
	Generate overdue reports and notices.

Notes

Destiny Resource Manager has easy-to-use circulation features that help you check out, check in, and track resources quickly and efficiently.

Checking Out Resources

Resource Manager empowers you with three different checkout options—To Patron, To Department, and To Location. These options help you track each item and ensure that patrons get the resources they need.

Checking Out to a Patron

The To Patron checkout option is ideal for when students or teachers are checking out resources for their own use. Use the following steps to check out resources to a patron:

1. Select **Circulation > Check Out Items > To Patron**.
2. In the **Find** field, scan or type the patron's barcode. If you typed the barcode, select the patron from the search results.

The steps to check out a resource to a patron depend on whether the item is barcoded or not. You can check out barcoded items, consumables, and unbarcoded items to a patron in the same session.

Checking Out A Barcoded Resource

3. In the **Find** field, scan the first item's barcode. The item appears in the Checked Out section. Scanning a second item moves the first item to the Items Out section.

The screenshot shows the 'Check Out Items' page in the Follett Destiny Resource Manager. The page is titled 'Check Out Items' and has a navigation bar with tabs for Dashboard, Catalog, Circulation, Reports, Back Office, and My Info. The 'Circulation' tab is active, and the 'Check Out Items' sub-tab is selected. The page is divided into several sections:

- Check In Items:** Includes links for 'Check In Items', 'Fines', 'Item Status', 'Patron Status', and 'Offline Circulation'. There is a 'Reset' button.
- Find:** A search field with a 'Go!' button and 'Find Patron' and 'Find Item' buttons. A dropdown menu is set to 'Patron Names'.
- Albert, Kyle (Student: P.8):** A profile section with an 'Edit Patron' link. It shows 'Checked Out Resources: 4', 'Grade Level 12', 'Overdue Resources: 0', and 'Homeroom 201'. There is a small photo of the patron.
- Checked Out:** A section showing a list of checked out items. The first item is 'Texas Instruments Voyage™ 200 Graphing Calculator' (Item: 00000000000788) with a due date of 12/25/2014 and a 'Change' link.
- Items Out:** A table showing items that have been moved to the 'Items Out' section. The table has columns for 'Due Date', 'Resource Name', 'Home Location', 'Checked Out', and 'Lost Stolen'.

Due Date	Resource Name	Home Location	Checked Out	Lost Stolen
5/22/2015	English Literature (Item: X 2109000)		10/17/2014	Lost Stolen
5/22/2015	English Literature (Item: X 2109001)		10/27/2014	Lost Stolen
6/1/2015	Apple iMac (Item: 50000000000096)		10/17/2014	Lost Stolen

Note: To edit the due date for the item in the Checked Out section, click **Change**. Select the new due date and whether it is for this item, this patron, or the rest of this session.

Circulating Resources

Checking out an Unbarcoded Resource or Consumable

Before you can circulate unbarcoded items and consumables, you need to select the appropriate checkboxes in **Back Office > Site Configuration > Circulation**.

Resource Options

- Allow consumable resources to be checked out
- Allow unbarcoded resources to be checked out
- Allow resources to circulate to any patron/department/location in the district
- Alert during check out if patron already has current check out of the same resource
- Allow other sites to assign this site's software licenses to their resources
- Automatically create fine for lost resources

Important: If the resource you are trying to circulate has barcoded and unbarcoded items, you can only circulate the barcoded resources.

- To check out an unbarcoded item or consumable, type a keyword for the item in the **Find** field, and then click **Find Item**.

Note: If the unbarcoded item is a textbook, you can also scan its ISBN.

- Click **Check Out** next to the item you want to check out.
- Click **Reset** to clear the completed checkout and begin checking out a new patron.

Checking Out to a Department

The To Department checkout option lets you track temporary loans and relocations of resources. For example, you might check out basketballs and soccer balls to the Math department when they are working on a geometry lesson. Use the following steps to check out materials to a department:

- Select **Circulation > Check Out Items > To Department**.
- From the **Department** drop-down, select the appropriate department.

To Patron | **To Department** | To Location

Department Science

Find Item Find Item

Science

Checked Out Resources: 0
Overdue Resources: 0

Items Out

There are no items checked out to this department

- In the **Find Item** field, scan the first item's barcode. The item appears in the Checked Out section. Scanning a second item moves the first item to the Items Out section.

Note: To edit the due date for the resource item in the Checked Out section, click **Change**. Select the new due date and whether it is for this item, this department, or the rest of this session.

- To check out resources to a different department, click **Reset** and make your selection from the **Department** drop-down.

Circulating Resources

Checking Out to a Location

The To Location checkout option makes it easy to track resources that you temporarily loan or relocate. For example, you might check out a computer cart to the library when the librarian is hosting a computer club meeting. Use the following steps to check out materials to a location:

1. Select **Circulation > Check Out Items > To Location**.
2. In the **Find** field, scan the barcode or type the name of the location you want to check out resources to, and click **Find Location**. Then click the name of the location.

Note: You can also pick the location from a drop-down by clicking **Pick Location**.



The screenshot shows a web interface for checking out resources to a location. At the top, there are three tabs: 'To Patron', 'To Department', and 'To Location' (which is selected). Below the tabs is a 'Find' input field, a 'Go!' button, a 'Find Location' button with a magnifying glass icon, and a 'Pick Location' button with a checkmark icon.

3. In the **Find** field, scan the first item's barcode. The item appears in the Checked Out section. Scanning a second item moves the first item to the Items Out section.

Note: To edit the due date for the resource item in the Checked Out section, click **Change**. Select the new due date and whether it is for this item, this location, or the rest of this session.

4. To check out resources to a different location, click **Reset** and repeat steps 2 and 3.

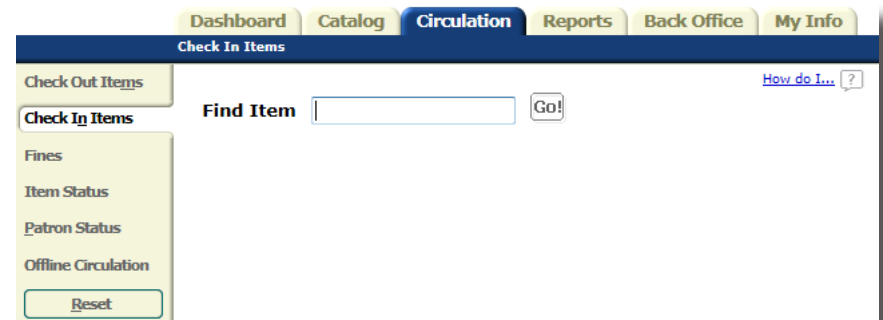
Checking In Resources

Properly checking in resources lets you track materials and assess any necessary fines. The steps to check in a resource depend on whether the item is barcoded or unbarcoded.

Checking In A Barcoded Resource

1. Select **Circulation > Check In Items**.
2. In the **Find Item** field, scan or type the barcode number of an item.

Note: The Most Recently Checked In section shows the item's name or title, barcode number, due date, and other information.



The screenshot shows the 'Check In Items' page in a library system. The top navigation bar includes 'Dashboard', 'Catalog', 'Circulation' (selected), 'Reports', 'Back Office', and 'My Info'. Below the navigation bar, there are several menu items: 'Check Out Items', 'Check In Items' (selected), 'Fines', 'Item Status', 'Patron Status', and 'Offline Circulation'. A 'Reset' button is located at the bottom of the menu. The main content area has a 'Find Item' input field and a 'Go!' button. A 'How do I...?' help link is visible in the top right corner.

3. Click **Go!**.
4. To continue checking in resources, scan the next item's barcode in the **Find Item** field, and then click **Go!**.

Checking In an Unbarcoded Resource

1. Select **Circulation > Patron Status**.
2. In the **Find Patron** field, scan or type the patron's barcode and click **Go!**. If you typed the barcode, select the patron from the search results.
3. Click **Check In** next to the items you want to check in.

Note: You do not have to check in consumable resources as they are automatically deleted from the patron's record at the end of the loan period. However, if necessary, you can check them in early by following the previous steps. Consumables that are checked in early are added back to the inventory with a status of Available.

You might have different due dates for different resource types. For example, textbooks circulate for an entire school term, and laptops are checked out for a day. You can set up customized loan periods in Destiny Resource Manager.

Adding a New Loan Period

1. Select **Back Office > Resource Policies > Loan Periods > +Loan Period.**

Description	Start	End	Due	Status
2015 - Spring Semester	1/5/2015	5/22/2015	5/22/2015	Future
Q3- Calculators	10/1/2014	12/31/2014	12/19/2014	Current
Q4- Calculators	1/1/2015	3/31/2015	3/24/2015	Future
School Year 2014-2015			6/1/2015	Current
Two Week Loan Period			Days: 14	Current
Video Equipment			Days: 5	Current

2. In the **Description** field, type the name of the new loan period.
3. Do one of the following to select the length of the loan period:
 - a. To pick the exact due date for the loan period, select the first option; then type a date for the loan period to end, or click to select a date.
 - b. To create a loan period with a specific number of days, select the second option, and then type the number of days of the loan period.

Note: This is the only option that lets you renew checked-out resources.
- c. To create a loan period that does not have a due date, select **Unlimited**.

- d. To create a loan period ideal for checking out resources for use in a class, select **by Class Date Range**. For example, to check out textbooks, calculators, and other instructional resources for an entire school term, enter the term start date, end date, and due date.

4. Click **Save**.

* Description

Save Cancel

Choose desired loan interval

days

Unlimited (no return date)

by Class Date Range

* = Required Field

Editing a Loan Period

1. Select **Back Office > Resource Policies > Loan Periods.**
2. Next to the loan period you want to edit, click .
3. Update the loan period.
4. Click **Save**.

* Description

Save Cancel

Choose desired loan interval

6/1/2015

days

Unlimited (no return date)

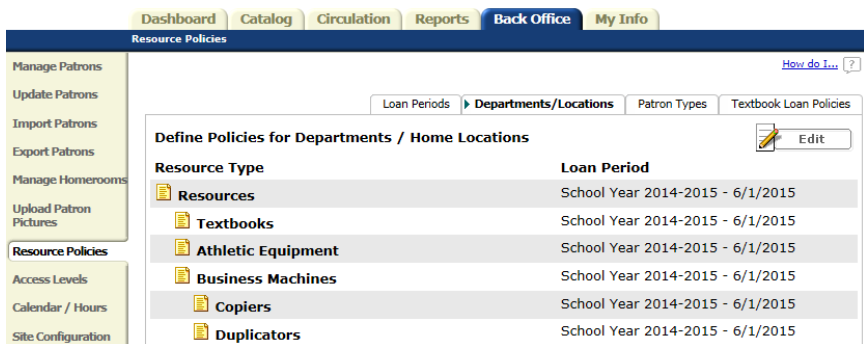
by Class Date Range

* = Required Field

Loan periods let you have different due dates for different resource types. For example, textbooks circulate for an entire school term, and laptops are checked out for a day. Once you create the different loan periods, you need to assign them to the different resource types.

Defining Policies for Departments and Locations

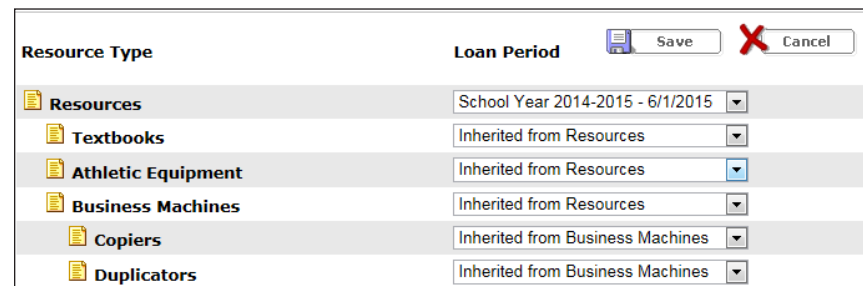
1. Select **Back Office > Resource Policies > Departments/ Locations > Edit.**



2. Select the appropriate loan period for each of your resource types from the drop-downs.

Note: By default, resource types inherit their loan period from the resource types above them in the tree hierarchy. You can change any of the loan periods.

3. Click **Save.**

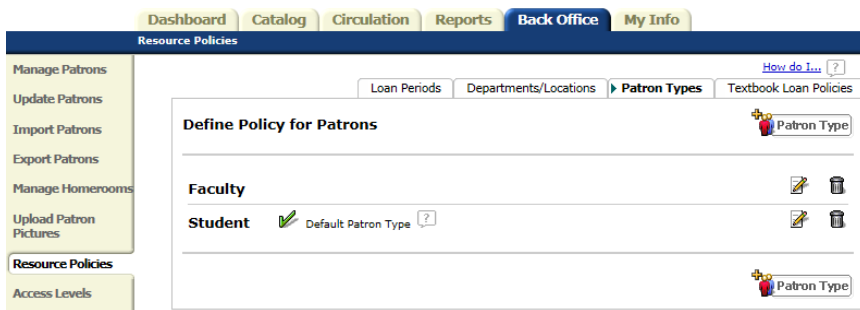


Do you have different loan policies for different groups of patrons in your school or district? For example, you might have audiovisual or athletic equipment that you only check out to faculty and staff. Destiny Resource Manager lets you set up customized patron types to meet your school's needs.

Note: The Resource Manager installation provides two patron types: Faculty and Student (the latter is the default patron type).

Adding a New Patron Type

1. Select **Back Office > Resource Policies > Patron Types > +Patron Type**.



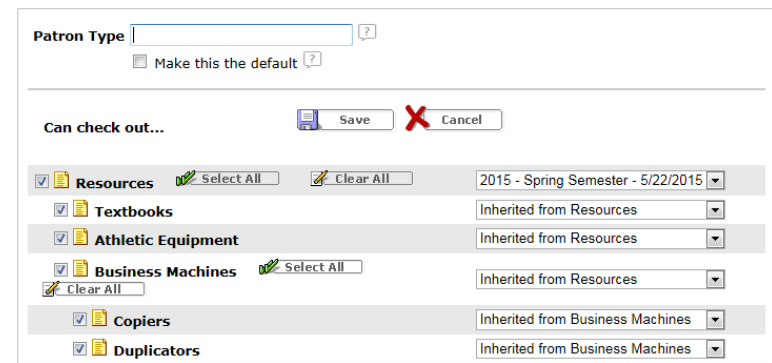
2. In the **Patron Type** field, type the name of the new patron type.
3. To make this patron type the default when you import a patron record that does not have one, select the **Make this the default** checkbox.
4. Select the checkboxes for the resource types this patron type can check out.

5. Select the appropriate loan period for each resource type you selected.

Note: When you select a loan period for a resource type, any resource types nested under that resource in the tree will inherit the loan period you selected.


6. Deselect the checkboxes for any resource types you do *not* want the patron type to be able to check out.

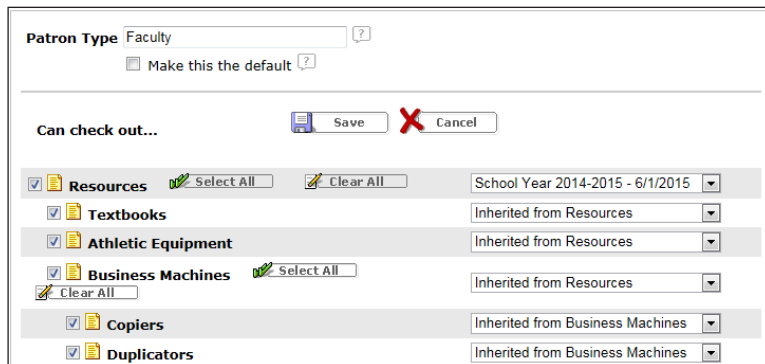
7. Click **Save**.



Setting Loan Policies—Patron Types



Editing a Patron Type

1. Select **Back Office > Resource Policies > Patron Types**.
2. Next to the patron type you want to edit, click .
3. To make this patron type the default when importing patron records, select the **Make this the default** checkbox.
4. Select or deselect any of the resource type checkboxes to limit the type of resources this patron type can check out.
5. Select the appropriate loan period for each resource type you selected.
6. Click **Save**.



Patron Type Faculty ?

Make this the default ?

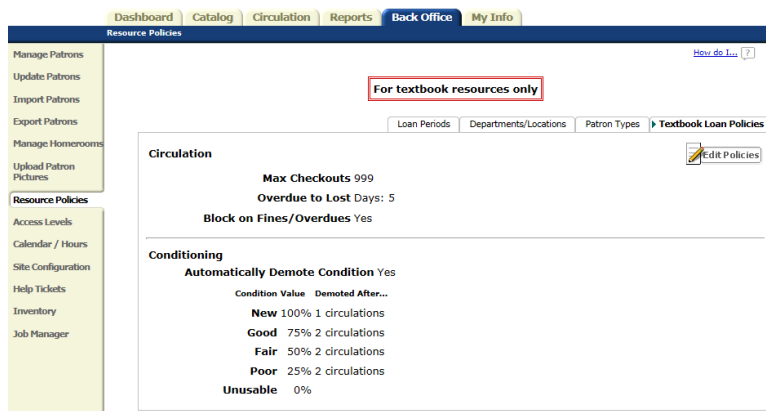
Can check out...  Save  Cancel

Resources	Select All	Clear All	School Year 2014-2015 - 6/1/2015
<input checked="" type="checkbox"/> Textbooks			Inherited from Resources
<input checked="" type="checkbox"/> Athletic Equipment			Inherited from Resources
<input checked="" type="checkbox"/> Business Machines	<input checked="" type="checkbox"/> Select All		Inherited from Resources
<input checked="" type="checkbox"/> Copiers			Inherited from Business Machines
<input checked="" type="checkbox"/> Duplicators			Inherited from Business Machines

Because textbooks are one of your district's biggest costs, it is important to manage your investment. With Resource Manager, you can set loan policies, especially for textbooks.

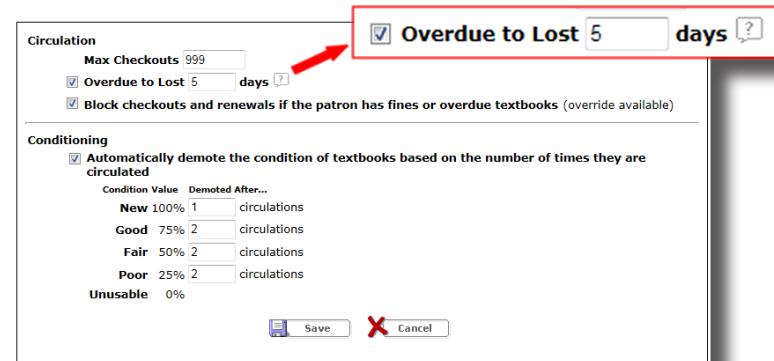
Defining Textbook Loan Policies

1. Select **Back Office > Resource Policies > Textbook Loan Policies > Edit Policies**.



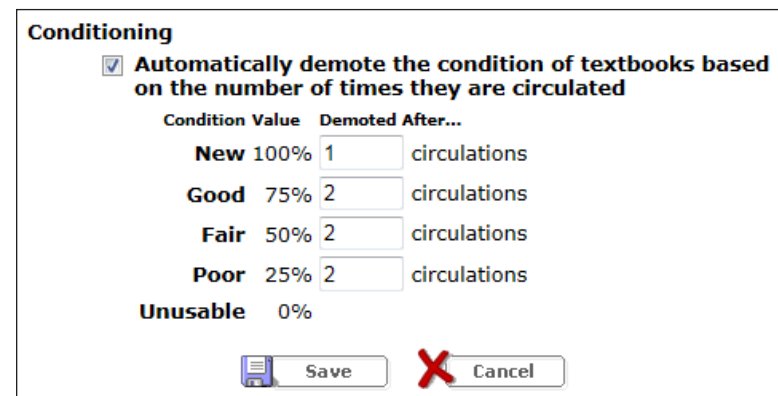
2. Type the total number of textbook resources a patron can check out in the **Max Checkouts** field.
3. To automatically change the status of an overdue copy to Lost after a certain number of days, select the **Overdue to Lost** checkbox, and type the number of calendar days.

4. To block checkouts and renewals for patrons having fines or overdue textbooks, select the second checkbox.



Note: You can override the block at checkout with the access level permission, "Override resource blocks".

5. To have Destiny automatically change the condition of your textbooks in Resource Manager based on number of circulations, select the **Conditioning** checkbox. Then, type the number of circulations for each condition level.



6. Click **Save**.

Generating Resource Data

Description

Providing timely information to administrators will help your district and school measure the effectiveness of your resource use and management practices. Destiny Resource Manager has many preconfigured reports that confirm the status of your resources, and identify patrons who have overdue materials or outstanding fines.

You can print reports or save them as PDF files or spreadsheets. The Dashboard lets you personalize a graphical, at-a-glance view of your most commonly-used reports.

In this training, you will investigate Resource Manager's preconfigured reporting features.

Participant Objectives

- Run preconfigured reports.
- View preconfigured reports.
- Save preconfigured reports.

Activities

- Answer questions in the *Plan* section as to the types of reports you would like to create about your collection.
- Run an Items Status report.
- Run a Deleted Resources report.
- Explore reports not discussed during the training.
- Configure the Dashboard.

Resources

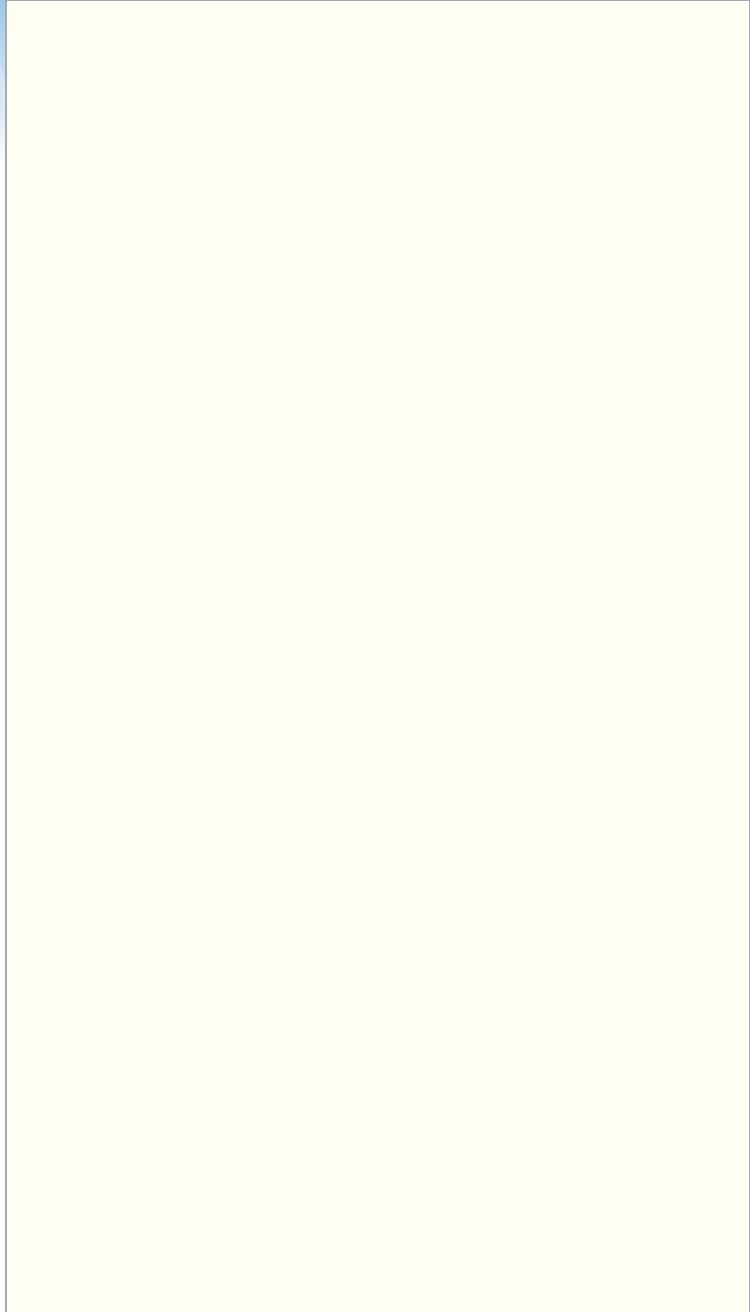
For more information on the topics in this training guide and to complete the Plan and Apply sections, refer to following resources:

Videos:

- Configuring the Dashboard*
- Generating Overdue Notices and Reports*

*Recommended viewing prior to the lesson

Notes



Plan

Use the space provided to record your answers to the following questions.

1. What resource data do you need to collect and evaluate on a regular or daily basis? For example, you might need to know who has overdue resources, or where your budget dollars could best be used to enhance your collection.

2. What information do administrators ask you to report on regarding your resources?

Notes

Guided Exercises

Follow along with your Destiny trainer, or use the quick reference guide and video resources to practice the following skills. Mark the checkboxes as you complete each task to help you keep your place.

- 1. Familiarize yourself with **Reports > Resource Reports**.
- 2. Explore the different reports available on **Reports > Patron Reports**.
- 3. Familiarize yourself with the **Dashboard**.

Notes

Apply

Now that you've done the guided exercises, complete the following:

- 1. Run an Items Status report for available and lost resources. How many resources do you have available? Lost?

- 2. Run a Deleted Resources report. How many of your resources were deleted in the last three months?

- 3. Explore the reports the training did not cover, and write the names of the ones that will be useful in your school or district:

- 4. Go to the **Dashboard** tab. Click the **Configure** button to add and remove reports from your Dashboard or to rearrange their order.

Notes

Assess

Use the following rating scale to assess your level of understanding of the learning outcomes covered in this training.

Rating Scale:

- 1 - I need more help.
- 2 - I think I can figure it out with more practice.
- 3 - I am comfortable doing this on my own.
- 4 - I am proficient and can teach others.

Rating (1-4)	Learning Outcome
	Run preconfigured reports.
	View preconfigured reports.
	Save preconfigured reports.

Notes

Wrap-up

Thank you for participating in the Follett Destiny training today. Follett greatly appreciates your business and that you took time out of your day to participate in this training. Please do not hesitate to ask any questions that the training did not fully address. Your facilitator is happy to answer your questions.

You can get more information and resources on these and other topics through the **Videos and more...** link in Destiny Help or from Follett Community at <http://www.follettcommunity.com>.

Technical Support

For help with Destiny configuration, operational issues, or troubleshooting, contact Technical Support via phone at 800.323.3397 or email at techsupport@FollettSoftware.com.

Course Survey

Follett greatly appreciates your time and feedback. The feedback you provide helps us improve current and future courses and better meet your needs. Please take a few minutes to complete a brief survey regarding the training today.

Course Survey: www.follettsoftware.com/contactdata

Course Task ID (provided by instructor): _____

Zip Code (confirm with instructor): _____