

# **Destiny Resource Procedures**



**2016-2017**

# Destiny Resource Circulation (Check In/Check Out) Instructions

## LOG-IN

- Go to Destiny Resource Manager <https://destiny.dmps.k12.ia.us> and select your school.
- “Log-in” from the Destiny Quest screen use district email address and password
- If Destiny opens to the screen below you are ready to begin the circulation process.
- If the screen remains on the Destiny Quest screen, click on word “Exit” upper right corner to move to the screen below.
- Select Resource View from the drop down menu at the top of the page if an option, if there is no dropdown then the program is in Resource View.



## CHECK OUT

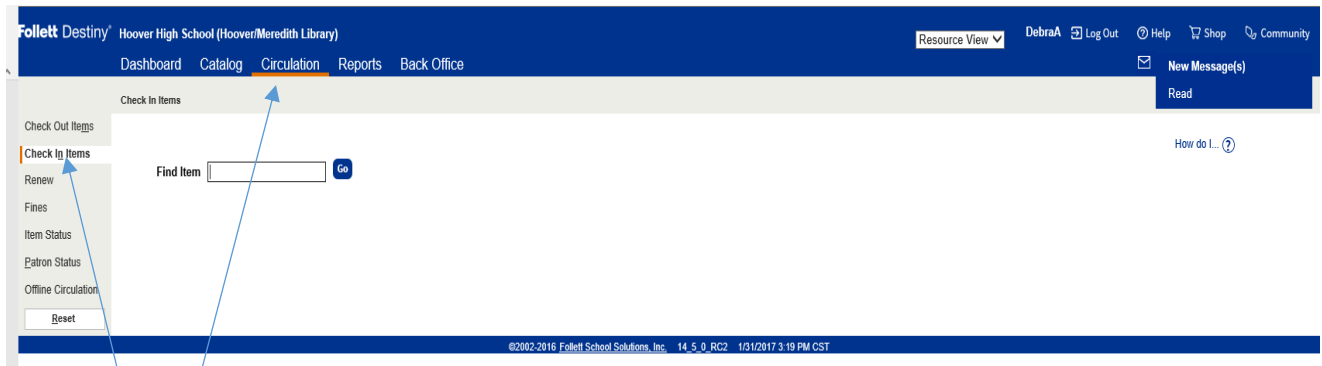
Select the **Circulation** tab on the top of the screen

Select **Check Out Items** along the left side

Scan or type in Patron District ID number or type in patron name (select patron name from list of patrons)

Scan District Resource barcode

Resource is now checked out (before moving to next item the due date can be changed)



## CHECK IN

Select the **Circulation** tab at the top

Select **Check In Item** along the left side

Scan the District Resource barcode

Resource is now checked in

## Circulation Tab

### Check Out Items

1. Select **Circulation>Check out items>to Patron**
2. In the **Find** field, scan or enter the patron's barcode or enter the patrons name and then click **Find Patron** or press enter. Select the patron from the search results.
3. In the **Find** field, scan the item barcode, the item is checked out to the patron using the loan period defined in Resource Policies.
4. The item then appears in the **Checked Out** section of the page. When you check out another item to the same patron, the previous checkout moves to the **Items Out** section.
5. To print a receipt that includes current checkouts and outstanding fines-click **Print Receipt**

**Note: To edit the due date** for the item in the **Checked Out** section

1. Click **Change**. The Due Date page appears.
2. Select the new due date and whether it is for this item, this patron or the rest of this session, then click **Save**. To change the due date of any of the items listed under **Items Out**, you need to check them out again.

### Check in Items

1. Select **Circulation>Check in items**
2. In the **Find Item** field, scan or enter the item barcode number of an item.
3. Click **Go** or press enter.
4. Note: The Checked in section shows the item's name, barcode number, due date, and item's Home Location. Only 10 of the most recent check-ins are listed.

### Renew checked-out resources

Resources checked out **To Patron** can be renewed one at a time if they have a due date. From **Check Out Items**, search for the patron who has a resource that needs to be renewed. When the desired patron record appears, click **Renew**. The item is renewed.

Resource items can also be renewed from **Patron Status**. Search for the desired patron by entering a search term in the Find text box in Manage Patrons. The Patron Status page displays the items checked out to the patron. Click the **Renew** button for the item. The item is now renewed.

### In-hand transfers (from one site to another)

You can perform in-hand transfers only if the district has selected the Allow sites to receive by barcode scan permission. An in-hand transfer is when an item from another site in your district is scanned at your site; you are given an option to immediately transfer the item to the site it is being scanned at.

If the item already has a status, such as *checked out*, selecting **Yes** to the in-hand transfer message resolves any previous statuses.

**Items Status-** or other identifier. You can view information about any particular item, such as its site, status, or home location. You can also print a replacement barcode label.

1. In the **Find Item** field, enter the item barcode or enter the first letter/number of the item with an asterisk (\*) if you do not have identifying info on the item
2. Click **Go** or press **enter**.
3. Find the item you want, and then click the link.
4. At this screen you can Edit item (update item info- home location, condition, add notes, etc.), Mark Lost, Mark Stolen, Print Labels

### Patron Status

In the Patron Status page view and manage information about a particular patron: checkouts, fines, holds and reserves, their current transaction summary, circulation statistics, and so on.

To open the patron record, scan the patron's barcode in the *Find Patron* box, or type it in and click **Go!** or press Enter.

If you do not have the patron's barcode use one of the following options:

- Search the database by entering the patron's first, middle, or last name, nickname, grade level, homeroom, user name, a value in one of the User Defined fields, or a District ID.  
If you do not have the whole name or word, enter part of it, followed by \*.
- To search other schools in your district, clear the **Only my patrons** check box.
- To speed the search, select the **Only search** check box and select the field from the list.

Then, click **Go**.

If a list appears, select the correct name.

## Catalog Tab

### Resource Search

1. Use the **Search** screen to search for and select a resource.
2. Use the **Find all** drop-down to select a resource template.
3. **Where Resource** drop-down - limit your search to a resources Displayable Name/keyword or searching an item an exact value is required.
4. Enter your search term.
5. Select where you want to search using the **Look in** drop-down.
6. Select any other limiters you want to use.
7. Click **Search**.

Find the resource you want, and then click **Details**.

1. Use the **Browse Resources** screen to view all resources
2. Narrow your search by selecting on the resource tree the item name you want to view (example: Music > Instruments > String > Violin)
3. Select the item that matches your search and click the item name or Details to view any additional information available on the item
4. Click items to view the listing of the items locally or off-site and their status/condition/home location

## Update Resources

Use the Individual Update tab to update one or more fields in a few item records.

### To update individual items

1. To update a field, use one of the **Select an item field** drop-down. Repeat as needed.
2. Depending on your selection, another drop-down appears. Select accordingly.
3. When you have completed your selections from the drop-downs, put the cursor in the **Resource Barcode** field and scan the applicable items barcode.
4. To add historical notes, populate the **Add historical note** field. Historical notes are added to the item's permanent Transaction History.
5. Click **Update**.

As each record is processed, the displayable name and barcode number appears in the Most Recently Updated section.

To verify the changes, click the barcode number of the updated item.

## Reports Tab

### Resource Reports –preconfigured reports

#### Catalog-Resources & Items

**Items Status**-view the status of your resources. Narrow the report by selecting from different item info including resource types, home location, and status.

**Lost Resources and Fines**- Summary of lost resources and fine amounts. Limit lost resources and fines by date. Displays lost resources, lost fines and damaged fines.

**Resource Value**- Examine the current or depreciated value of your resources.

### Patron Reports- preconfigured reports

#### Circulation-Current Checkouts/Fines **(DO NOT DELETE SAVED REPORTS THAT YOU DID NOT CREATE!)**

Include all checkouts, overdue items only, or what will be due within a set timeframe. This report includes checked out/overdue materials from the Library, Textbook and Resources databases.

**Format** screen -Fines from the different databases can be deselected and you can choose the format of the report – Report (PDF/Excel) or Notices.

**Limit** screen you can select the patron types to include in the report (students/teachers) and also what materials to include under Library-All Circulation Types (update) deselect all types and just select Resources and by clicking update you can limit the Resourced types to include. You may want to select/deselect the Also Include selections.

**Details** screen you can limit your report by your options in Select and Sort by field. **Save setup** (name)-to save this report at the top of the Format screen for future use. You can edit/run or delete the report from the Format screen. **Run Report** will create the report and can be viewed in the **Reports>Report Manager or Back Office >Job Manager**. Refresh the report and when the status notes the report is completed you can view or delete the results.

## Report Builder

Create additional reports by choosing the information to include in the report from the options in **Step 1-7**. If you have received a custom report setup in an XML format –Import it into Report Builder. Click Browse to locate report setup file, Click Import. Report is now in your list of custom reports in Report builder. You can then run or edit the report.

## Back Office Tab

Job Manager- listing of generated reports for Library, Textbook and Resource databases. View and delete only reports that you have created.

## Resource Items Inventory

A Resource inventory will be completed yearly in Destiny software. The period and scope of resources to be inventoried will be communicated out from the District. The Resource team will be responsible for scanning /accounting for all resources listed in a member's school or schools in the Destiny Resource database. Reports can be created to review the items that have barcodes and will need to be scanned to complete the inventory. The goal would be to account for 100% of the items. Additional information will be communicated to help in the inventory process.

1. Set up a schedule before you start. This will help you keep track of what you have done and what you still need to inventory.
2. If you are verifying or updating the Home Location of the items you account for, select your current scanning location.
3. Scan, enter, or upload the barcode numbers for your items (review the Destiny Resource Inventory instructions)
4. When you have /scanned/entered the barcode numbers for all of your items, review the list of unaccounted-for items by clicking **% Complete** beneath *Resource Inventory*, and then **See Details** next to *Unaccounted for*:
  - a. If you can locate any of the items on the list, scan them in Inventory to account for them.
  - b. If you cannot locate an item, leave the status as unaccounted for. When the District Finalizes your inventory the unaccounted items status will be changed to Lost.
5. Review the *Lost Items* list from previous year's inventories. If you locate any of the items that had been Lost, scan/enter the barcode directly on the *Inventory* page to make it Accounted-for and change its Status to Available.
6. **When you are not able to find any additional items listed on the unaccounted list click Finished and Yes to the confirmation message and the results of your inventory is sent on to the Resource Manager.**
7. The Resource manager after your inventory data is reviewed will **Finalize** your inventory and the items unaccounted for will be marked lost. If later the items are found or scanned the items will change status from Lost to Available.
8. Reports sent to the District's Business and Finance Office will include the Percentage of items accounted for, the number/cost of items lost and other data requested.

## Resource Items Reports (inventory)

Report Builder example -Resource Music Totals report shows resources listed by Displayable names and the total number of each item. This report can be created and downloaded as a XLS (Excel) File. This report was created in Report Builder (setups can be shared by exporting and sharing the file and then importing it into your school's Report Builder.) Report Builder can be used to create a number of different reports.

Resource Music Totals			
Report generated on 1/24/2017 9:25 AM			
Displayable Name: AMPLIFIER-BASS			
Current Available	Current Checked Out	Current In Use	Current Lost
4	0	0	0
<hr/>			
4 - Total	0 - Total	0 - Total	0 - Total
Displayable Name: AMPLIFIER-GUITAR			
Current Available	Current Checked Out	Current In Use	Current Lost
1	0	0	0
<hr/>			
1 - Total	0 - Total	0 - Total	0 - Total

The **Item Status** report (**Reports-Resources Reports-Item Status**) can list each item with barcode number or totals. This report is especially helpful if the field- Home locations is used in an item record. NOTE: This report has multiple options that can be selected /deselected to create a report with different results/information. The report listed is just one of those options.

Item Status		Hoover High School (Hoover/Meredith Library)		
Limited by Resource Type (for selection details, see the final page of the report)				
Sorted by Department				
Resource Name	Barcode	Department	Status	
Home Location	Condition	Custodian	Checked Out To	
Chair Rack JV Pro Inc gym closet	ATH000915 Good	Principal	In Use	
High Jump Pit press box / shed	ATH000913 Good	Principal	In Use	
Jump Boxes gym closet	ATH000921 Good	Principal	In Use	
Jump Boxes gym closet	ATH000922 Good	Principal	In Use	
Lane Rope Spool Anti Manufacturing Company pool	ATH000924 Good	Principal	In Use	
Net - Ball Stop softball field	ATH000927 Fair	Principal	In Use	

# Destiny Resource Inventory

## LOG-IN

- To access Destiny Resource Manager go to <https://destiny.dmps.k12.ia.us> and select your school.
- “Log-in” from the Destiny Quest screen use district email address and password
- From the Destiny Quest screen, click on word “Exit” upper right corner
- **Athletic Dept:** Select **Resource View** from the drop down menu at the top of the page (if not already selected) to open the **Catalog screen** below.
- **Music Dept:** Destiny will open to the **Catalog screen** below.

Follett Destiny Cowles Montessori School

Resource View Debra Augspurger Log Out Help

Catalog Circulation Reports Back Office My Info

Resource Search

Search for Resources and Items

Find all Resources Search

Where Resource -- Displayable Name/Title Contains Clear

Look in Cowles Montessori School

Limit your search for resources by...

Home Location -- All --

Custodian All Custodians Select

Funding Source -- All --

Department -- All --

Purchase Price Greater than or equal to

Date Acquired to

Search

To access the Resource Inventory Screen –  
Click on **Back Office>Inventory**

Follett Destiny Cowles Montessori School

Resource View Debra Augspurger Log Out Help

Catalog Circulation Reports Back Office My Info

Inventory

Job Manager

[View In-Progress & Completed Inventories]

Resource Inventory Cowles test - Started 4/4/2017 Refresh

Items with barcodes 100.00% Complete as of 2:37 PM

Details

Account for each Barcode

Current scanning location: Unspecified Update

Scan or enter one-at-a-time Account For

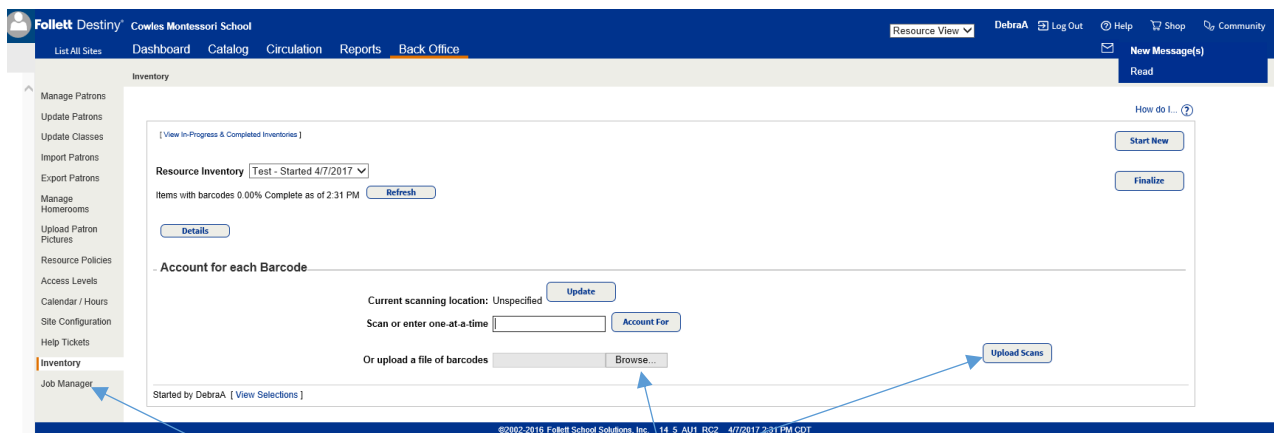
Or upload a file of barcodes Browse... Upload Scans

Started by DistrictRM [View Selections]

Scan or hand enter the resources barcode into the **Scan or enter one-at-a-time** field. Any scanning issues that will be noted by a different scanning sound and message on the screen. (Verify that your computer volume is on) The last 10 items scanned will appear on the screen. The percentage on this screen reflects items accounted for, to view a list of items still unaccounted for click on **Details** and to the right of **Unaccounted for** click on **(see details)**. From this screen, reports can be generated.



## Inventory with no Internet Access (use only when necessary)



### Import Scanned Barcoded Items from a TEXT FILE

1. Scan/save barcode numbers into a text editor like Notepad.
2. Upload file- select **Back Office > Inventory**.
3. Next to- **Or upload a file of barcodes** click **Browse**, locate and load the .txt file -click **Upload scans**.
4. Check the inventory job summary in **Job Manager** to review any exceptions. When importing barcodes using a text editor the status of items will not change. Change of status will need to be done manually (Checked out to Checked in/Lost to Available

**RESOURCES Not Barcoded**- contact your Department Coordinator to determine if an item needs to be barcoded and the steps to follow.