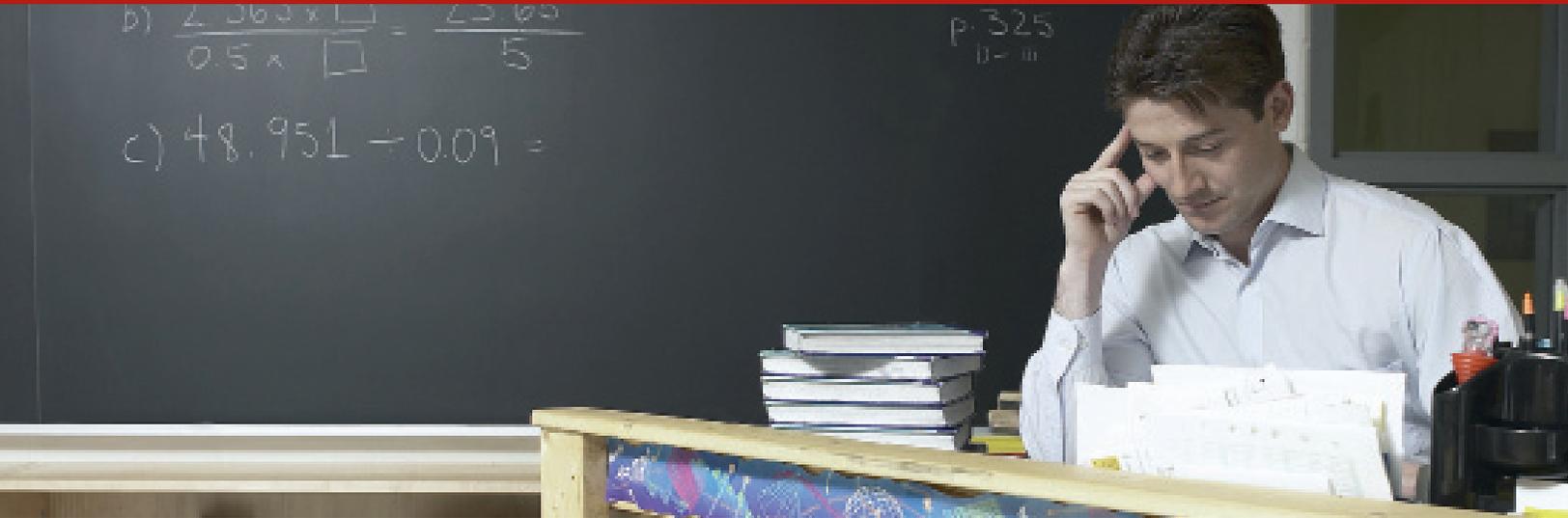




DESTINY 
Textbook Manager

Site Essentials Training | Participant Guide



Thinking Forward...
Connecting information and resources to
support high-performance learning environments.

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Company
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Textbook Manager

Notes

Symbols used in this guide



Hands-On Activity



Talking Points



eLearning Topic

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This session is designed to teach you the basics of the Destiny Textbook Manager application. The topics covered in this session include:

- **Getting Around in Destiny**

In this module, you learn about the navigational tools in Destiny Textbook Manager, and you will have an opportunity to use them to find selected items.

- **Access Level Permissions**

In this module you will learn how Access Level Permissions are used to control access to specific features and functions in Destiny. You will also learn how they often relate to the various roles in textbook management.

- **Site Configuration Options**

In this module, you will learn how to identify the methods of checking out textbooks, how they can be checked out to students from other schools, and how to set up receipts for checkouts and fines.

- **Textbook Loan Policies and Periods**

Setting options in Textbook Manager will allow quick check out and check in during busy times of the school year. Loan periods dictate how many textbooks can be checked out at one time and the length of time for which they are checked out. Textbooks can be set up to automatically “condition” (depreciate) each time they are circulated.

- **Reports**

Textbook Manager offers a variety of preconfigured reports, as well as a custom report builder interface that can fill your specific needs. With the reporting tools, you can easily manage reports by designating favorites, as well as by adding, editing, duplicating, or deleting reports. This module will provide you with the basics of reporting in order to help you measure how effectively textbooks are being managed in your district.

- **Searching Your Database**

Searching your database allows you to locate textbook copies that are in your school's inventory. It is also an integral part of distributing textbooks to students. This module covers how to use Destiny's search tools, to make your searches more efficient and effective.

- **Adding Textbook Copies**

In a previous module, you learned how to search for a textbook and determine how many copies were available at your school. In this module, you will learn how to add copies to your school's inventory.

Textbook Manager

Notes

- **Textbook Copy Reports**

Destiny provides several different reports which allow you to determine the number of copies you have available, their conditions, and their statuses. There are also reports that allow you to print new or replacement barcode labels.

- **Distribution**

Ensuring students receive textbooks is a vital task that takes place at the beginning of each term, semester, or year. This module presents checking out and tracking textbooks effectively by utilizing best practices in your distribution procedures.

- **Collection**

At the end of the school term, you need to collect the textbooks that you distributed at the beginning of the term. This module shows you how to collect these textbooks and keep track of them using Destiny Textbook Manager.

- **Transferring Textbooks**

One of the most powerful features of Textbook Manager is the ability to get textbooks where they are needed, when they are needed. In this module you will learn how to set up a transfer from your school to another, and how to receive books that have been transferred to your school.

- **Inventory**

Conducting an inventory will enhance accountability by identifying where deficiencies exist in the textbook handling processes. By quickly identifying lost textbooks, the district can implement loss prevention measures that address the problem and maximize budget allocations. This module will explain the process of conducting an inventory from both the district and school perspective.

- **Measuring Effectiveness**

Measuring effectiveness regarding the management of textbooks is typically done by running reports or answering questions to ensure all needs are met. In some cases, this is best done by creating a custom report using the Report Builder interface. Cost effectiveness of Textbook Manager can be done by running the Textbook Inventory Change Analysis report.

- **Report Builder**

Destiny's Report Builder allows you to build reports from scratch; you pick the data, the way the report is organized, and how often you want it to run.

Textbook Manager

Notes

Getting Around in Destiny

Duration: 20 minutes

Module Overview

In this module, you learn about the navigational tools in Destiny Textbook Manager, and you will have an opportunity to use them to find selected items.

Module Objective

When given a location in Textbook Manager, you will be able to successfully navigate to it.

Notes

Getting Logged In



The screenshot shows the "Welcome to American Village School District" page. It features a tree logo on the left and a "District Users ... Login" link on the right. The main content is divided into two columns: "Elementary Schools" and "High Schools". Each column contains a list of school names with a small icon to the right of each name.

Elementary Schools	High Schools
Abigail Adams Elementary School	Andrew Jackson High School
Abigail Fillmore Elementary School	Barbara Pierce Bush High School
Abraham Lincoln Elementary School	Charles Curtis High School
Andrew Johnson Elementary School	Charles Fairbanks High School
Anna Harrison Elementary School	Claudia "Lady Bird" Johnson High School
Betty Ford Elementary School	Daniel D. Tompkins High School
Calvin Coolidge Elementary School	Dwight D. Eisenhower High School
Charles Dawes Elementary School	Edith Wilson High School
Edith Roosevelt Elementary School	Frances Cleveland High School



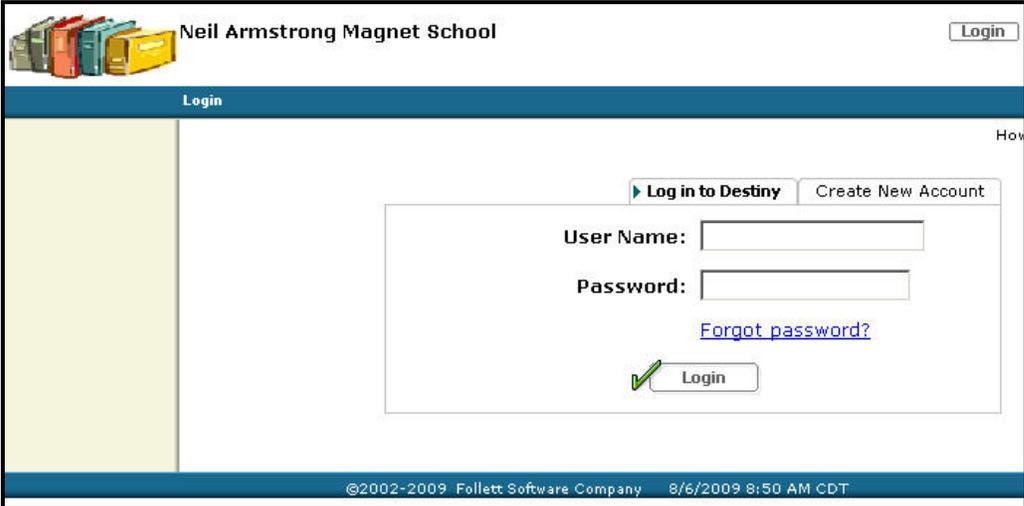
Talking Points

- From the District Page, select your site
- You can bookmark the site as a favorite

Textbook Manager

Notes

Login Page



Neil Armstrong Magnet School Login

Login How

[Log in to Destiny](#) [Create New Account](#)

User Name:

Password:

[Forgot password?](#)

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Talking Points

- User Name
- Password
- Forgot Password? hyperlink



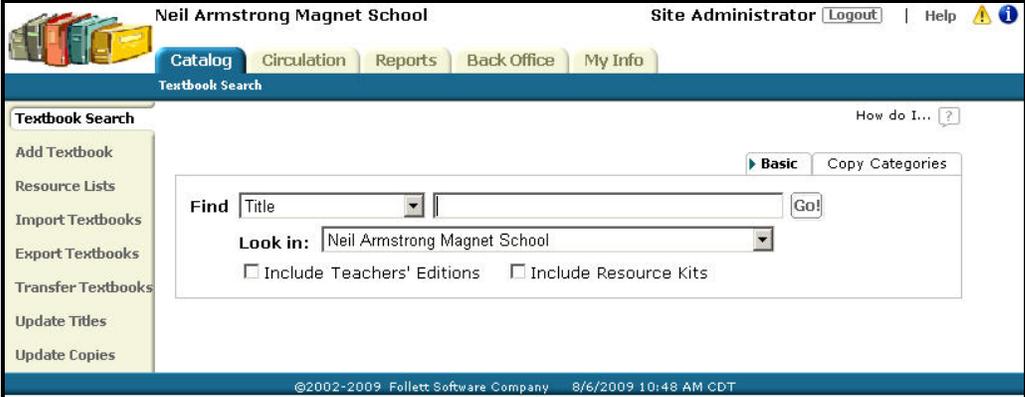
Activity

Locate your school and log in using your username and password.

Textbook Manager

Notes

Navigation



Neil Armstrong Magnet School Site Administrator Logout Help

Catalog Circulation Reports Back Office My Info

Textbook Search

Textbook Search How do I... ?

Add Textbook
Resource Lists
Import Textbooks
Export Textbooks
Transfer Textbooks
Update Titles
Update Copies

Basic Copy Categories

Find Title [Go!]

Look in: Neil Armstrong Magnet School

Include Teachers' Editions Include Resource Kits

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Talking Points

Navigation in Destiny is accomplished by:

- Tabs
- Options
- Subtabs
- Breadcrumbs

Textbook Manager

Notes



Activity

Locate the features listed below and write down where you found each one in Destiny.

1. Search for textbooks
2. Perform an inventory
3. Check out materials
4. **Textbook Checkout Summary** report

Textbook Manager

Notes

Getting Help



Talking Points

Destiny provides two ways to get help with specific issues:

1. On-page Help
2. Online Help

Online Help



Destiny's online Help offers several different ways of getting answers and assistance:

- **Search**, **Contents**, and **Index** tabs
- **Glossary** tab
- **Contact us** tab

Textbook Manager

Notes



Activity

1. This activity will help you test your skills at using on-page help.

Navigate to the **My Favorites** page (**Reports** tab | **My Favorites** option); Click on the on-page help icon.

Using the information contained in the help window, list a couple of the reports that you could save to your **My Favorites** list?

2. Does Destiny's Help provide any quick help sheets that pertain to transferring textbooks? If so, what is the title of one of them?

Yes No _____

Online Resources

Refer to the back of this guide to see a list of online resources relating to this module.

Access Level Permissions

Duration: 10 minutes

Module Overview

In this module you will learn how Access Level Permissions are used to control access to specific features and functions in Destiny. You will also learn how they often relate to the various roles in textbook management.

Module Objectives

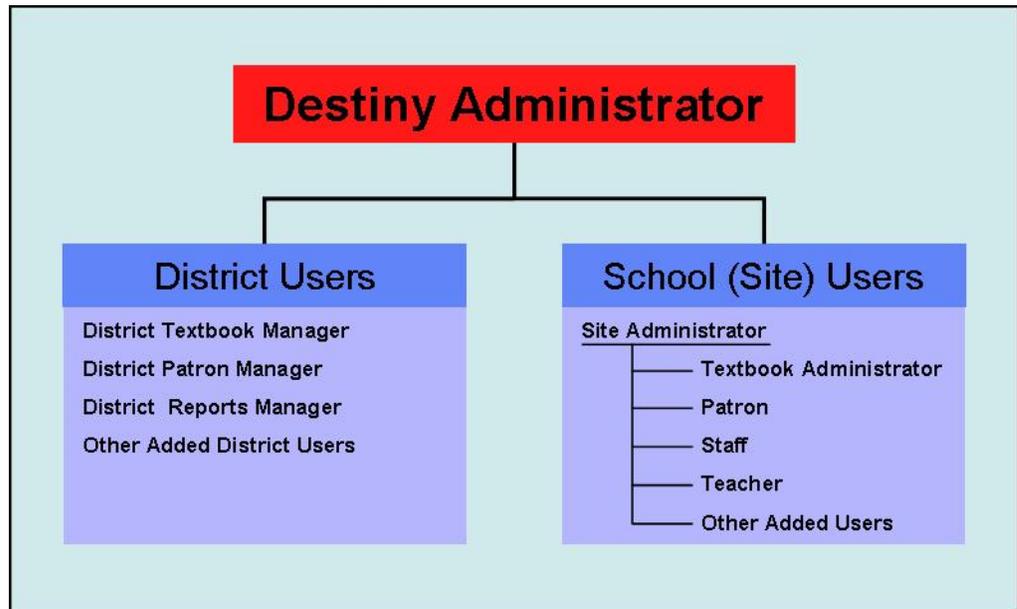
Upon successful completion of this module, you will be able to:

- Explain the purpose of access level permissions
- State their relationship to navigational elements such as tabs, subtabs, and hyperlinks.

Textbook Manager

Notes

Access Level Hierarchy



Talking Points

- The purpose of access levels is to allow or deny access to specific features or functions in Destiny.
- Use the example of a person who only needs only check-in/checkout permissions and thus does not have access to patron data.
- Destiny has a hierarchical structure for the access level permissions.
- Each Destiny user is assigned to a single access level.
- Only the Destiny Administrator and Site Administrator can create new access levels or modify permissions for existing ones.
- Access levels are typically assigned based on a particular role that a Destiny user will play.
- The permissions within an access level allow access to specific feature tabs, subtabs, buttons, and links.

Textbook Manager

Notes

Below are some examples of the different access levels that you will find in Textbook Manager, and their functions:

- **Destiny Administrator**
 - Configures Destiny to operate effectively in a network environment
 - Responsible for technical aspects of the application
 - Creates district-level user accounts
 - Configures permissions granted to the Site Administrator
- **District Textbook Manager**
 - Manages textbook data for the entire district
 - Generates material or item reports for the entire district
- **District Patron Manager**
 - Manages patron data for the entire district
 - Generates patron reports for the entire district
 - Updates Class Schedules
- **District Reports Manager**
 - Generates material, item, and patron reports for the entire district
- **Site Administrators**
 - Granted permissions by the Destiny Administrator
 - Manage (creates, edits, and deletes) the access levels for all other users
- **Textbook Administrator**
 - Manages textbooks at the school/site level
 - Adds copies (as needed), receives transfers, starts and finalizes inventories, and perhaps, distributes and collects textbooks

Textbook Manager

Notes



Activity

Assume you are trying to perform a certain action in Textbook Manager but can't because it appears that you do not have the correct access level permissions; where could you find your Destiny Administrator's contact information?

Online Resources

Refer to the back of this guide to see a list of online resources relating to this module.

Module Overview

In this module, we will discuss some of the more common configuration settings that allow you to better manage your textbooks.

You will learn how to identify the methods of checking out textbooks, how they can be checked out to students from other schools, and how to set up receipts for checkouts and fines.

Module Objectives

At the end of this module you will be able to:

- Identify the three checkout options
- Identify which option lets your textbooks circulate to patrons from other schools
- Set up the information contained on your receipts

Textbook Manager

Notes

Circulation Subtab

The screenshot shows the 'Circulation Subtab' in the Textbook Manager application. The interface includes a navigation menu on the left with options like 'Manage Patrons', 'Update Patrons', 'Update Classes', 'Import Patrons', 'Export Patrons', 'Upload Patron Pictures', 'Textbook Policies', 'Access Levels', 'Calendar / Hours', 'Forecasting', 'Site Configuration', 'Inventory', and 'Job Manager'. The main content area is titled 'Circulation Options...' and contains several configuration options:

- Allow textbooks to be checked out...** (with a help icon):
 - To Patron
 - By Class
 - To Teacher
- Allow textbooks to circulate to all patrons in the district (with a help icon)
- Alert during check out if patron already has current check out of the same textbook (with a help icon)
- Set preferred Follett Classic textbook prefix to "T" (with a help icon)
- Display patron pictures
Select this option if you would like patron pictures to appear by default in Circulation Desk.
- Allow patrons to create their user name and password (with a help icon)
- Require explanation when waiving textbook fine (with a help icon)
- Preferred Barcode Symbologies (with a help icon)

A 'Save' button is located in the top right corner of the options area.

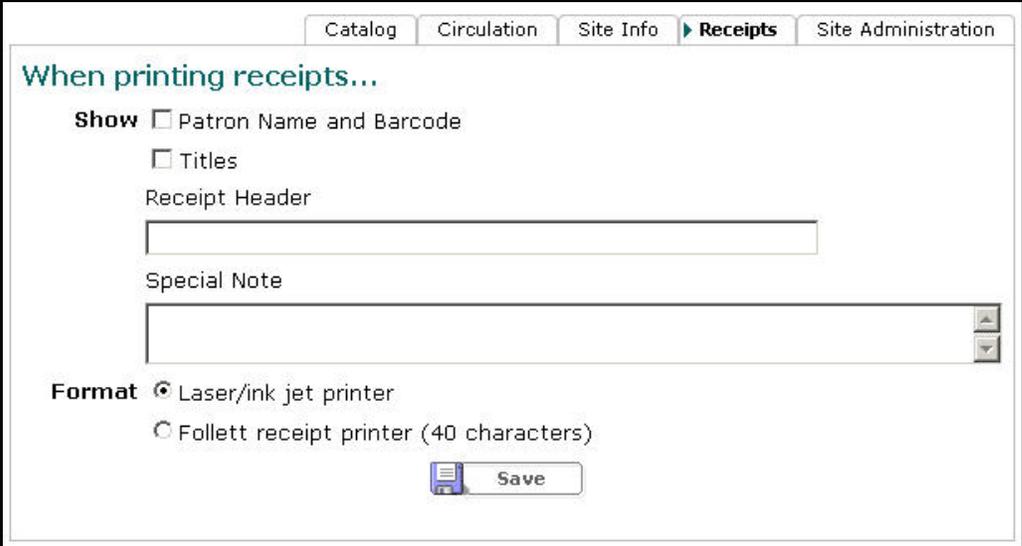


Talking Points

- Destiny provides three methods of checking out textbooks; if only one will be used, the other two can be removed from the **Check Out Text** option.
- If your district is one where students may take classes at several different campuses, you will probably need to allow books to circulate to all patrons in the district.
- Selecting the **Alert during check out...** box will cause a warning to display if a user attempts to check out the same textbook to a patron twice. (**Note:** This does not block the transaction, but serves only as a notice.)
- No doubt your district expects to be reimbursed for lost or damaged books, which is why fines are assessed. If a fine is waved, it is a good idea to require a note explaining why.

Notes

Receipt Subtab



Catalog Circulation Site Info **Receipts** Site Administration

When printing receipts...

Show Patron Name and Barcode
 Titles

Receipt Header

Special Note

Format Laser/ink jet printer
 Follett receipt printer (40 characters)

 Save



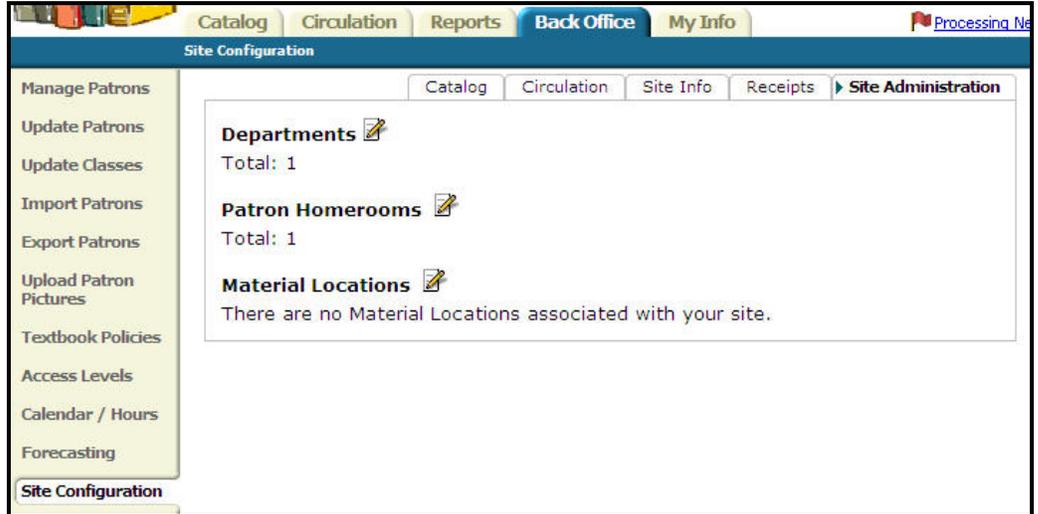
Talking Points

- The **Receipts** subtab provides a place to enter information that will be displayed on receipts
- This information will appear on all receipts that are printed for patrons
- Destiny supports two printer formats

Textbook Manager

Notes

Site Configuration – Site Administration Subtab



The screenshot shows the 'Site Configuration' interface with the 'Site Administration' subtab selected. The left sidebar contains a list of management options: Manage Patrons, Update Patrons, Update Classes, Import Patrons, Export Patrons, Upload Patron Pictures, Textbook Policies, Access Levels, Calendar / Hours, Forecasting, and Site Configuration. The main content area displays three sections: 'Departments' with a total of 1, 'Patron Homerooms' with a total of 1, and 'Material Locations' with a message stating 'There are no Material Locations associated with your site.' The top navigation bar includes 'Catalog', 'Circulation', 'Reports', 'Back Office', and 'My Info'.



Talking Points

- The **Site Administration** subtab contains items that are used by other areas of Destiny to enhance textbook management.
- **Departments** help identify which group provides oversight for a class.
- **Patron Homerooms** can help provide a central point of contact, making mass communication easier.
- **Material Locations** can be helpful for items that are kept in a central location.

Textbook Manager

Notes



Activity

Using Textbook Manager, set up a receipt according to your district or school policy. If your receipt page has already been set up, answer the following questions:

- | | | |
|--|-----|----|
| 1. Will your receipts contain the textbook's title? | Yes | No |
| 2. Is there a special note associated with receipts? | Yes | No |

Online Resources

Refer to the back of this guide to see a list of online resources relating to this module.

Updating Class Schedules and Associations

Duration: 20 minutes

Module Overview

Class schedules and associations are important in ensuring that every student has a textbook and that they have the correct book for each class. They also can make for smoother textbook distribution, and are an integral part of many statistical reports, such as the **Student to Textbook Statistics** report. This module will discuss uploading class schedules, adding classes and sections manually, and assigning teachers, students and textbooks to the sections.

Module Objectives

- Describe how class schedules can be uploaded
- Discuss how to create classes and sections manually
- Discuss the assignment of teachers, students and textbooks to class schedules

Textbook Manager

Notes

Upload Changes

The screenshot shows the 'Upload Changes' subtab in the 'Update Classes' section. The interface includes a navigation menu on the left with options such as 'Manage Patrons', 'Update Patrons', 'Update Classes', 'Import Patrons', 'Export Patrons', 'Upload Patron Pictures', 'Textbook Policies', 'Access Levels', 'Calendar / Hours', 'Forecasting', 'Site Configuration', 'Inventory', and 'Job Manager'. The main content area is titled 'Upload Changes...' and features a dropdown menu for 'Class schedules'. Below this, there is a section for handling missing data, with radio buttons for 'Removed' (selected) and 'Retained'. A note states: 'If section start and end dates are missing, use the dates from the following loan period: Summer AP (6/1/2009 - 10/30/2009)'. There is also an 'Update File' field with a 'Browse...' button and an 'Update' button.



Talking Points

Most likely, your class schedules and associations will be uploaded from a student management system. If this is the case, the **Upload Changes** subtab will allow you to quickly update this information in Destiny.

- Select either the **Class schedules** or **Textbook associations** option from the drop-down box
- Identify how sections and dates missing from the upload file should be handled
- From the **Update File** field, browse to the appropriate upload file and click **Update**

Textbook Manager

Notes

For more information on preparing these files, search Online Help for Update Classes for file specifications.

Locating Classes

Class	Section [Period]	Starts	Ends	Teacher	Enrollment	Status
Essentials of Astronomy	2 [1]	6/1/2009	10/30/2009	Rogers, Mr.	2	Current
Math Prep. AP	AP Prep [4]	6/1/2009	10/30/2009	Rogers, Mr.	1	Current



Talking Points

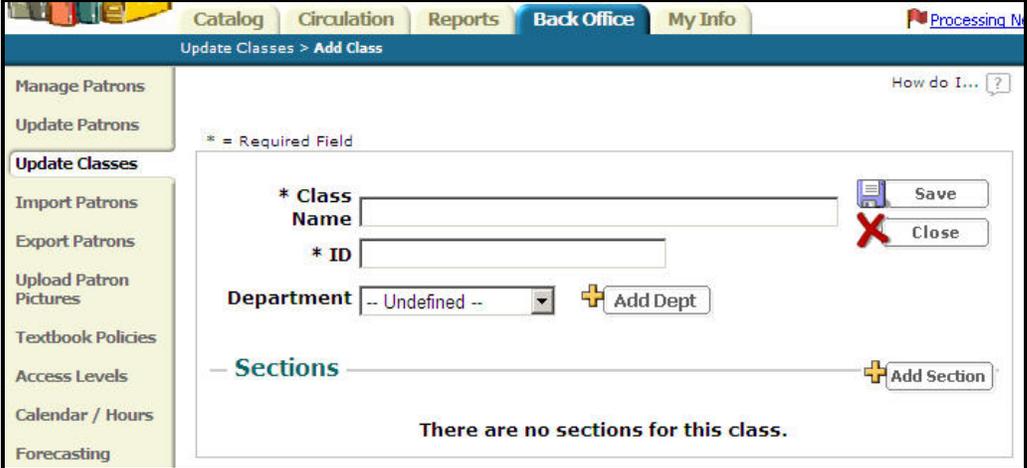
Adding a Class begins at the **Back Office** tab, **Update Classes** option. We will be spending time on the **Class Setup** subtab first.

- By default only the current classes are shown. Other classes can be viewed using the **Customize View** options.
- If the class doesn't exist, you can click on the **Add Class** button to add a new one.

Textbook Manager

Notes

Add Class

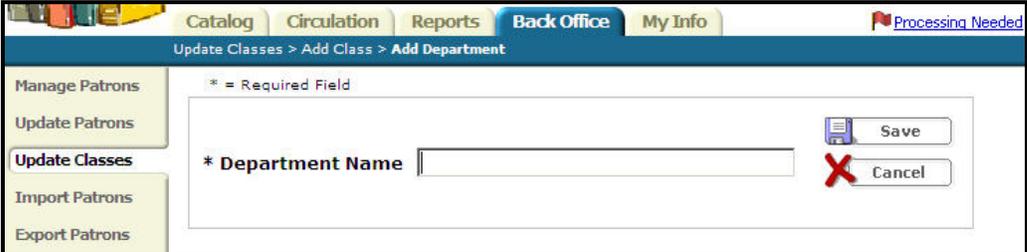


Talking Points

To add a class, enter the following information:

- Class Name, ID, and if applicable, Department.
- If the appropriate Department is not in the drop-down list, you can use the **Add Dept** button to add a new one.

Add Department



Talking Points

From the **Add Department** screen:

- Enter the name of the new department

Textbook Manager

Notes

Adding a Section

Update Classes > Add Class

How do I... ?

* = Required Field

* Class Name AP Science Studies Save

* ID APS 101 Close

Department AP Science Add Dept

Sections Add Section

There are no sections for this class.



Talking Points

Once back on the **Add Class** screen, click the **Add Section** button.

Add Section

Update Classes > Edit AP Science Studies (APS 101) > Add Section Info

How do I... ?

* = Required Field

AP Science Studies (APS 101)

* Section Save

Loan Period Summer AP - Due: 10/30/2009 Other... Cancel

* Period

* Meets Sunday Monday Tuesday Wednesday Thursday Friday Saturday



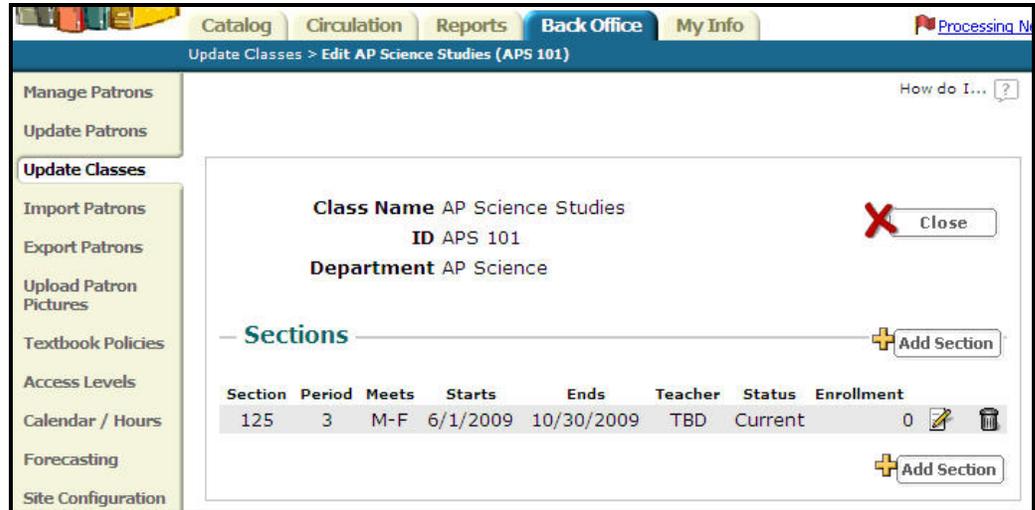
Talking Point

Enter the required information: **Section** number, **Loan Period**, and the days the class **Meets**, then select **Save**.

Textbook Manager

Notes

Textbooks



Update Classes > Edit AP Science Studies (APS 101)

Class Name AP Science Studies
ID APS 101
Department AP Science

Sections

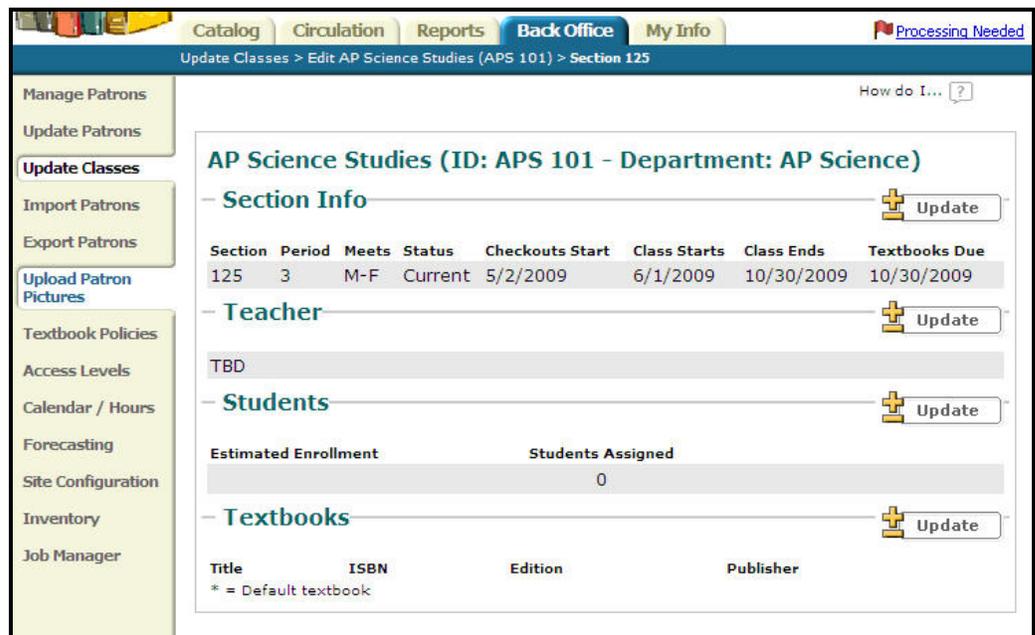
Section	Period	Meets	Starts	Ends	Teacher	Status	Enrollment
125	3	M-F	6/1/2009	10/30/2009	TBD	Current	0



Talking Points

Destiny will bring you back to the **Edit class** page where you can click on the edit icon to assign a teacher, add student enrollment, and add textbook associations, as seen below.

Editing a Section



Update Classes > Edit AP Science Studies (APS 101) > Section 125

AP Science Studies (ID: APS 101 - Department: AP Science)

Section Info

Section	Period	Meets	Status	Checkouts Start	Class Starts	Class Ends	Textbooks Due
125	3	M-F	Current	5/2/2009	6/1/2009	10/30/2009	10/30/2009

Teacher: TBD

Students: Estimated Enrollment 0, Students Assigned 0

Textbooks

Textbook Manager

Notes



Activity

Using your Destiny Textbook Manager, locate the Classes / Sections information, and using the information found there, answer the following questions:

1. How many classes are listed?
2. How many have teachers assigned?
3. How many have students enrolled?
4. Do any have textbook associations?
5. Describe the steps you would take from here to enroll a student in a class.

Online Resources

Refer to the back of this guide to see a list of online resources relating to this module.

Textbook Manager

Notes

Textbook Loan Policies and Periods

Duration: 30 minutes

Module Overview

Setting options in Textbook Manager will allow for quick check out and check in during busy times of the school year. Loan periods dictate how many textbooks can be checked out at one time and the length of time for which they are checked out. Textbooks can be set up to automatically “condition” (depreciate) each time they are circulated.

Module Objective

You will be able to correctly set up loan policies and periods when using the **Textbook Policies** option.

Textbook Manager

Notes

Textbook Policies

The screenshot displays the 'Textbook Policies' page in a web application. The navigation bar includes 'Catalog', 'Circulation', 'Reports', 'Back Office', and 'My Info'. The 'Circulation' tab is active. On the left, a sidebar menu lists various management functions. The main content area shows 'Circulation' and 'Conditioning' settings. Under 'Circulation', the values are: Max Checkouts 15, Overdue to Lost 1 day, and Block on Fines/Overdues No. Under 'Conditioning', 'Automatically Demote Condition' is set to Yes. A table lists condition values and demotion thresholds:

Condition	Value	Demoted After...
New	100%	2 circulation(s)
Good	75%	1 circulation(s)
Fair	50%	1 circulation(s)
Poor	25%	1 circulation(s)
Unusable	0%	



Talking Points

- Loan policies determine circulation parameters such as:
 - Max Checkouts
 - Overdue to Lost
 - Block on Fines/Overdues
 - Conditioning

Textbook Manager

Notes

Edit Policies

Circulation

Max Checkouts

Overdue to Lost **day(s)** 

Block checkouts and renewals if the patron has fines or overdue textbooks (override available)

Conditioning

Automatically demote the condition of textbooks based on the number of times they are circulated

Condition	Value	Demoted After...
New	100%	<input type="text" value="2"/> circulation(s)
Good	75%	<input type="text" value="1"/> circulation(s)
Fair	50%	<input type="text" value="1"/> circulation(s)
Poor	25%	<input type="text" value="1"/> circulation(s)
Unusable	0%	



Talking Points

- **Max Checkouts** and **Overdue to Lost** (fields and check boxes)
- Demoting condition



Activity

Review your site's Loan Policies, to see if they are correct: if not, make a note to edit the policies.

Textbook Manager

Notes

Loan Periods

		Loan Policies	Loan Periods	Patron Types	
Description	Start	End	Due	Status	Loan Period
09 - 10 Full year	9/3/2009	6/1/2010	6/1/2010	Current <input checked="" type="checkbox"/> Default	
Summer	7/1/2009	8/15/2009	8/14/2009	Past	



Talking Points

- **Loan Periods**
 - Populated when schedules are loaded
 - Once the schedules are loaded, do not change the dates or they will be overwritten each time there is an upload
 - Make sure the loan periods are current each and every year

Creating/Editing a Loan Period

* Description	<input type="text"/>	Save
<input type="checkbox"/> Make this the default		Cancel
* Checkouts Start	<input type="text" value="0"/> days before class starts	
* Class Starts	<input type="text"/>	
* Class Ends	<input type="text"/>	
* Textbooks Due	<input type="text"/>	
* = Required Field		

Talking Points

- Checkouts Start

Textbook Manager

Notes



Activity

1. What does default on the Loan Period subtab indicate?
2. What is the best practice for textbooks to go from overdue to lost?
3. How often will a loan period need to be set up?

Online Resources

Refer to the back of this guide to see a list of online resources relating to this module.

Module Overview

Textbook Manager offers a variety of preconfigured reports, as well as a custom report builder interface that can fill your specific needs. With the reporting tools, you can easily manage reports by designating favorites, as well as by adding, editing, duplicating, or deleting reports. This module will provide you with the basics of reporting in order to help you measure how effectively textbooks are being managed in your district.

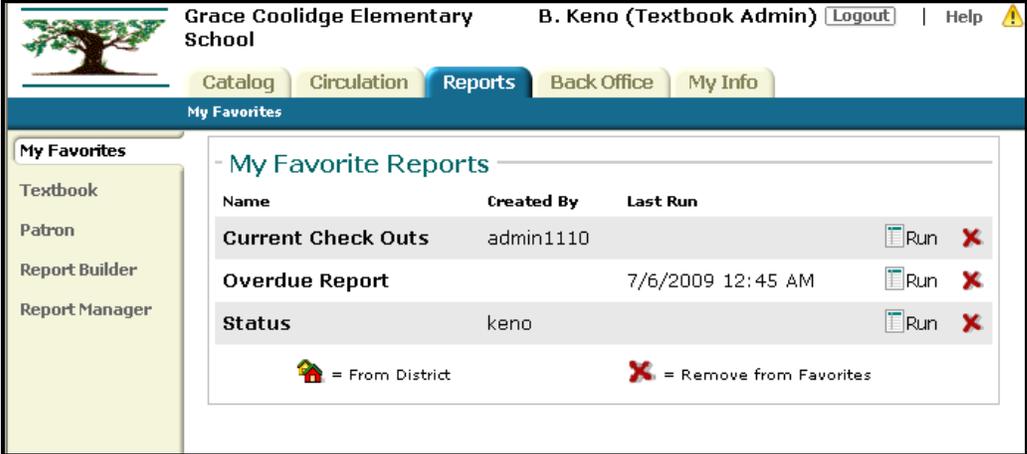
Module Objective

You will be able to successfully navigate in the **Reports** tab and properly setup reports.

Textbook Manager

Notes

Reports: My Favorites



The screenshot shows the 'My Favorites' section of the Textbook Manager interface. At the top, it displays 'Grace Coolidge Elementary School' and the user 'B. Keno (Textbook Admin)' with a 'Logout' link and a 'Help' icon. Below this are navigation tabs for 'Catalog', 'Circulation', 'Reports' (which is active), 'Back Office', and 'My Info'. The main content area is titled 'My Favorite Reports' and contains a table with the following data:

Name	Created By	Last Run	Run	Remove
Current Check Outs	admin1110			
Overdue Report		7/6/2009 12:45 AM		
Status	keno			

Below the table, there are two legends: a house icon followed by '= From District' and a red 'X' icon followed by '= Remove from Favorites'.



Talking Points

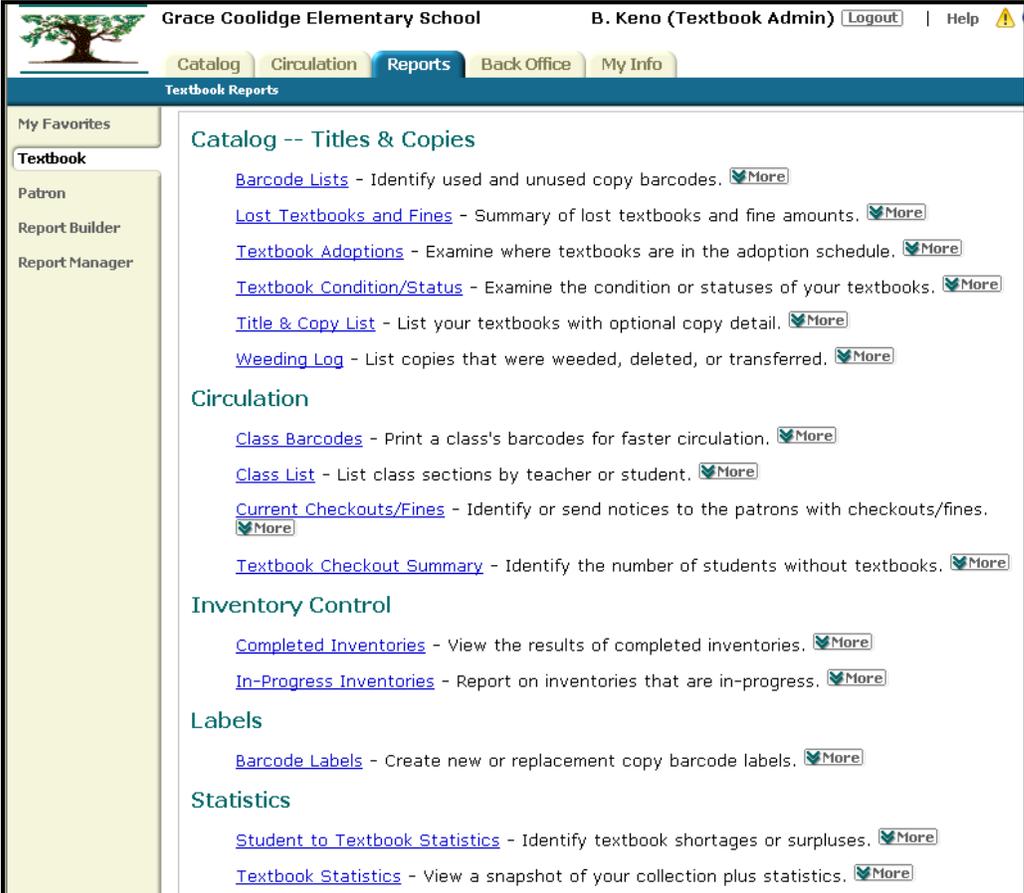
- My Favorites

- Ability to add reports created/saved by other people (if proper permissions are set)
- **Remove from Favorites** does not delete the report
- From District

Textbook Manager

Notes

Reports: Textbook



Grace Coolidge Elementary School B. Keno (Textbook Admin) [Logout] | Help

Catalog Circulation **Reports** Back Office My Info

Textbook Reports

My Favorites

Textbook

Patron

Report Builder

Report Manager

Catalog -- Titles & Copies

- [Barcode Lists](#) - Identify used and unused copy barcodes. [More](#)
- [Lost Textbooks and Fines](#) - Summary of lost textbooks and fine amounts. [More](#)
- [Textbook Adoptions](#) - Examine where textbooks are in the adoption schedule. [More](#)
- [Textbook Condition/Status](#) - Examine the condition or statuses of your textbooks. [More](#)
- [Title & Copy List](#) - List your textbooks with optional copy detail. [More](#)
- [Weeding Log](#) - List copies that were weeded, deleted, or transferred. [More](#)

Circulation

- [Class Barcodes](#) - Print a class's barcodes for faster circulation. [More](#)
- [Class List](#) - List class sections by teacher or student. [More](#)
- [Current Checkouts/Fines](#) - Identify or send notices to the patrons with checkouts/fines. [More](#)
- [Textbook Checkout Summary](#) - Identify the number of students without textbooks. [More](#)

Inventory Control

- [Completed Inventories](#) - View the results of completed inventories. [More](#)
- [In-Progress Inventories](#) - Report on inventories that are in-progress. [More](#)

Labels

- [Barcode Labels](#) - Create new or replacement copy barcode labels. [More](#)

Statistics

- [Student to Textbook Statistics](#) - Identify textbook shortages or surpluses. [More](#)
- [Textbook Statistics](#) - View a snapshot of your collection plus statistics. [More](#)



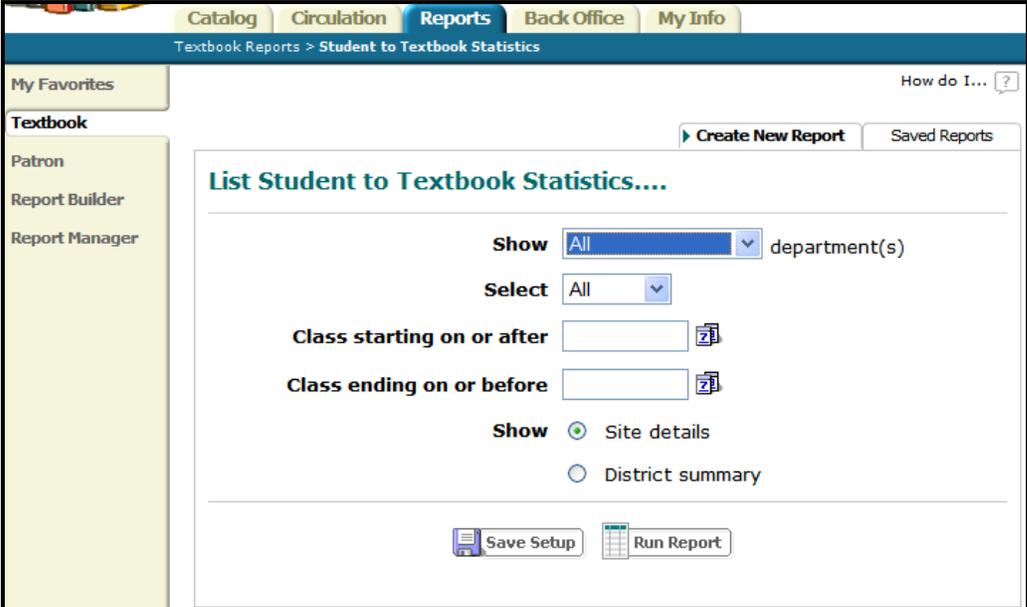
Talking Points

- **Textbook** contains catalog, circulation, inventory, label, and statistics related reports
 - Create a new report

Textbook Manager

Notes

Reports: Textbook



The screenshot shows the 'Reports' section of the Textbook Manager interface. The breadcrumb trail is 'Textbook Reports > Student to Textbook Statistics'. The left sidebar contains 'My Favorites', 'Textbook', 'Patron', 'Report Builder', and 'Report Manager'. The main content area is titled 'List Student to Textbook Statistics....' and includes the following controls:

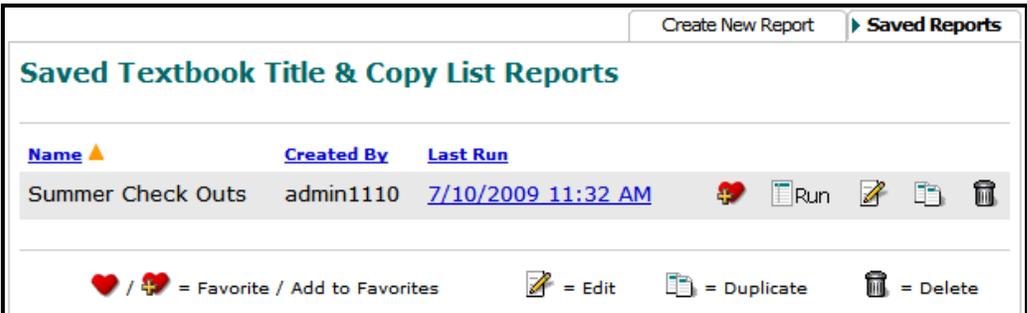
- Show:** A dropdown menu set to 'All' with the text 'department(s)' to its right.
- Select:** A dropdown menu set to 'All'.
- Class starting on or after:** A text input field with a calendar icon.
- Class ending on or before:** A text input field with a calendar icon.
- Show:** Two radio buttons: 'Site details' (selected) and 'District summary'.
- Buttons:** 'Save Setup' and 'Run Report'.



Talking Points

- New Report

Saved Reports



The screenshot shows the 'Saved Reports' section of the Textbook Manager interface. The breadcrumb trail is 'Textbook Reports > Student to Textbook Statistics > Saved Reports'. The main content area is titled 'Saved Textbook Title & Copy List Reports' and contains a table with the following data:

Name ▲	Created By	Last Run	
Summer Check Outs	admin1110	7/10/2009 11:32 AM	    

Below the table, a legend explains the icons:  /  = Favorite / Add to Favorites,  = Edit,  = Duplicate,  = Delete.

- Saved reports: Run, Edit, Duplicate, Delete
- Add to Favorites
- On-page Help a great resource for creating reports

Textbook Manager

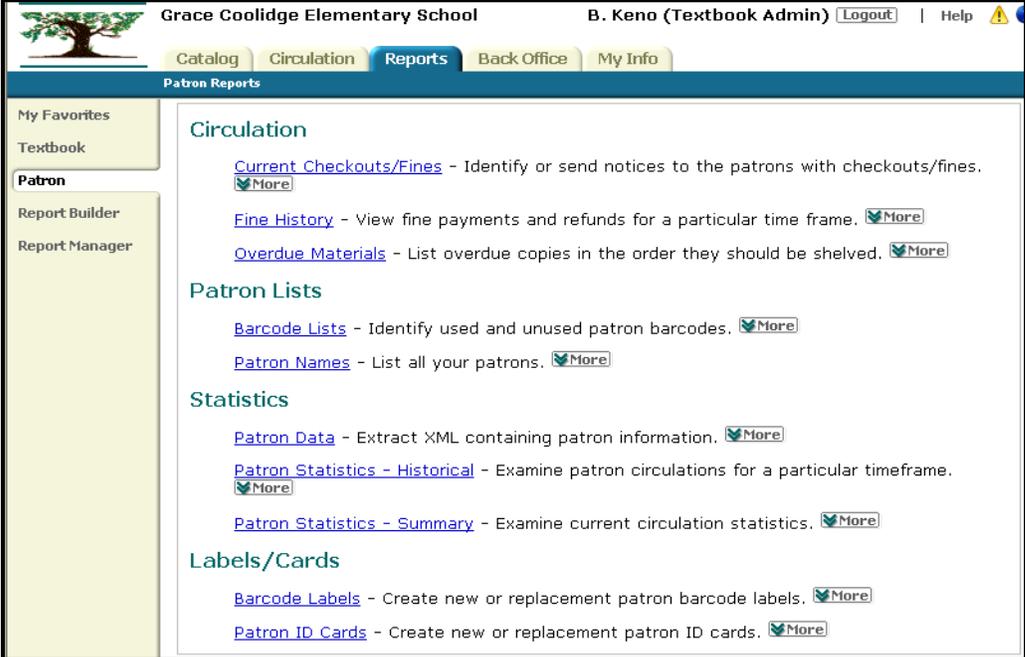
Notes

- Commonly used Textbook Reports:
 - **Textbook Condition/Status**
 - **Title & Copy List**
 - **Class List**
 - **Current Checkouts/Fines**
 - **Textbook Checkout Summary**
 - **Student to Textbook Statistics**

Textbook Manager

Notes

Reports: Patron



The screenshot displays the Textbook Manager interface for Grace Coolidge Elementary School. The user is logged in as B. Keno (Textbook Admin). The main navigation menu includes Catalog, Circulation, Reports, Back Office, and My Info. The Reports section is active, showing a sidebar with My Favorites (Textbook, Patron, Report Builder, Report Manager) and a main content area for Patron Reports. The Patron Reports area is divided into several sections: Circulation (Current Checkouts/Fines, Fine History, Overdue Materials), Patron Lists (Barcode Lists, Patron Names), Statistics (Patron Data, Patron Statistics - Historical, Patron Statistics - Summary), and Labels/Cards (Barcode Labels, Patron ID Cards). Each item includes a 'More' link.



Talking Points

- Patron reports relate to check outs, overdue materials, and fines
 - Circulation - typically used at the beginning or end of the year
 - Lists of your patrons - use for check out or to obtain class information
 - Statistical information - track circulations and patron information
 - Label/Cards – print patron labels or ID cards
- Commonly used Patron Reports:
 - **Current Checkouts/Fines**
 - **Patron Names**
 - **Patron Statistics – Summary**
 - **Barcode Labels** or **Patron ID Cards**

Textbook Manager

Notes

Reports: Report Manager

The screenshot shows the 'Report Manager' interface. The top navigation bar includes 'Catalog', 'Circulation', 'Reports', 'Back Office', and 'My Info'. The left sidebar lists 'My Favorites', 'Textbook', 'Patron', 'Report Builder', and 'Report Manager'. The main content area displays a list of jobs with columns for 'Job' and 'Status'. Three jobs are listed: 'Textbook Status Report', 'Overdue/Fines', and 'Class List - Teachers', all with a status of 'Completed'. Below the list is a 'Delete Jobs...' section with radio buttons for 'All Selected (on this page)' and 'Based on', and a date input field. A 'Delete' button is also present. At the bottom, there are icons for 'Select All' and 'Clear All'.

Job	Status
<input type="checkbox"/> Textbook Status Report	Completed (7/13/2009 4:25 PM)
<input type="checkbox"/> Overdue/Fines	Completed (7/13/2009 12:45 AM)
<input type="checkbox"/> Class List - Teachers	Completed (7/10/2009 3:07 PM)



Talking Points

- **Report Manager** allows users to view and delete previously run reports
 - Reports appear in both **Report Manager** and **Job Manager**
 - Delete selected, all, or by dates

Textbook Manager

Notes



Activity

1. Search online Help for **Textbook Condition/Status** report and read the section called “How Can I Use this Report?”

2. Search on-page or online Help to find out why having classes already imported into Textbook Manager is necessary for the **Student to Textbook Statistics** report?

Online Resources

Refer to the back of this guide to see a list of online resources relating to this module.

Module Overview

Searching your database allows you to locate textbook copies that are in your school's inventory. It is also an integral part of distributing textbooks to students. This module covers how to use Destiny's search tools to make your searches more efficient and effective.

Module Objectives

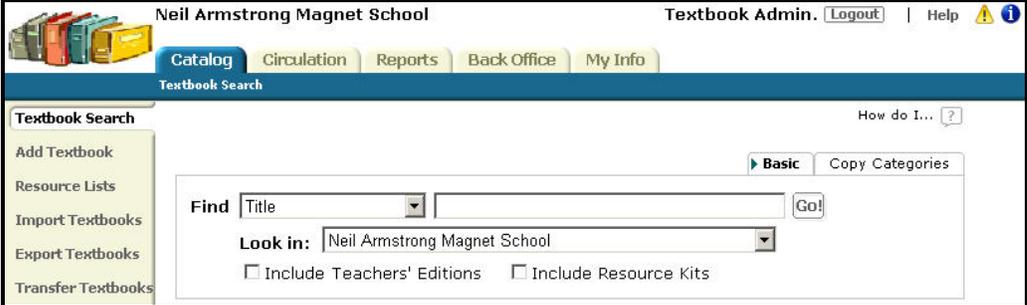
After successfully completing this module, you will have learned:

- How to search your database for a textbook using a title or keyword
- How to search using wildcards
- How to identify the number of copies that are available at your school

Textbook Manager

Notes

Search Textbooks



Neil Armstrong Magnet School Textbook Admin. Logout | Help

Catalog Circulation Reports Back Office My Info

Textbook Search

Textbook Search How do I... ?

Add Textbook

Resource Lists

Import Textbooks

Export Textbooks

Transfer Textbooks

Find Title [input] Go!

Look in: Neil Armstrong Magnet School

Include Teachers' Editions Include Resource Kits

Basic Copy Categories



Talking Points

Destiny provides several different ways to search your database for a textbook title. It also offers some very powerful tools to aid in your searches:

- Search Options
- Search for a Textbook Title
- Wildcards
- Teacher's Editions/ Resource Kits

Textbook Manager

Notes



Activity

1. Perform a keyword or title search for a textbook, restricting the search to your school's database only. How many copies are available at your school?

2. Perform another search for Teacher's Editions and Resource Kits. How many did you find?

Online Resources

Refer to the back of this guide to see a list of online resources relating to this module.

Adding Textbook Copies

Duration: 10 minutes

Module Overview

In a previous module, you learned how to search for a textbook and determine how many copies were available at your school. In this module, you will learn how to add copies both with and without barcodes.

Module Objectives

This module will explain how to:

- Add copies with barcodes
- Add copies without barcodes
- Identify and add consumables

Textbook Manager

Notes

Adding Copies - Search Results

The screenshot shows the 'Neil Armstrong Magnet School' Textbook Admin interface. The top navigation bar includes 'Catalog', 'Circulation', 'Reports', 'Back Office', and 'My Info'. The main content area displays search results for 'Astronomy'. The search criteria are 'Searched titles for "astro*" in Neil Armstrong Magnet School'. The results show one title: 'Astronomy' by SCOTTFORESMAN, published in 1994, with ISBN 978-0-06-500004-7 and a price of \$60.00. The title is available locally (24 of 25 copies) and has no off-site copies. The interface includes buttons for 'Printable', 'Add Page', 'Add to this List', and 'Details'.



Talking Points

Once a textbook title is in the district-wide database, individual schools can add copies to reflect their current collection. This is done by first searching the database to locate the title, and then by opening the title record so the copies can be added to it.

- Title Details

Add Copies

The screenshot shows the 'Astronomy' title details page. The page includes tabs for 'Title Details', 'Copies', and 'Supplements'. The main content area displays the title 'Astronomy' and indicates that 24 of 25 copies are available locally. The page includes buttons for 'Edit Title', 'Delete Title', 'Add Copies', 'Class Info', and 'Cover Image'. The 'Publication Info' section shows the publisher as SCOTTFORESMAN, published in 1994, with ISBN 978-0-06-500004-7 and 0-06-500004-8.

- Add Copies button

Textbook Manager

Notes

Adding Copies with Barcodes

The screenshot shows the 'Add Copies with Barcodes' form in the Textbook Manager interface. The form is for the subject 'Astronomy'. It includes the following fields and options:

- Add Copies:** with Barcodes (dropdown)
- *Number of Copies:** 1 (text input)
- Starting Barcode:** (text input) with a link for '[Generic Code 39, 14 characters total]' and a radio button for 'Assign next barcode' with the next barcode value '[Next: 40705000051820]'. There is also a 'Print labels' checkbox which is checked with a red X.
- Status:** Available (dropdown)
- Condition:** New (dropdown)
- Location:** -- Undefined -- (dropdown) with an 'Other...' button
- Budget Category:** -- Undefined -- (dropdown) with an 'Other...' button
- Date Acquired:** 8/19/2009 (text input)
- Purchase Price:** (text input)
- * = Required Field**
- Copy Categories:** (text input) with an 'Update' button
- Notes:** (text input) with an 'Add Note' button
- Buttons:** Save Copies, Cancel (with a red X), and How do I... ?



Talking Points

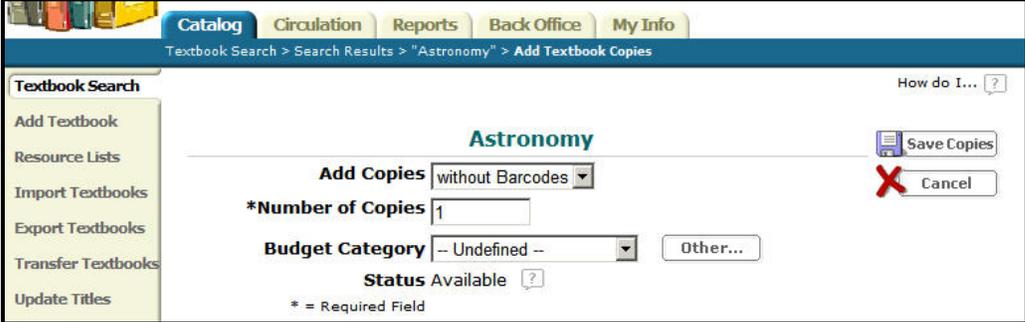
If you are at a school and receiving your textbooks from a district warehouse, they may already have barcodes attached. If you receive them directly from a vendor, you may need to apply the barcodes yourself. In either case, Destiny can assist you in adding the copies and assigning the appropriate barcodes.

- **Add Copies with Barcodes**
- **Number of Copies**
- **Starting Barcode**

Textbook Manager

Notes

Adding Copies without Barcodes



The screenshot shows the 'Add Textbook Copies' form in the Textbook Manager. The breadcrumb trail is 'Textbook Search > Search Results > "Astronomy" > Add Textbook Copies'. The title 'Astronomy' is displayed. The 'Add Copies' dropdown is set to 'without Barcodes'. The '*Number of Copies' field contains '1'. The 'Budget Category' dropdown is set to '-- Undefined --' with an 'Other...' button. The 'Status' is set to 'Available'. There are 'Save Copies' and 'Cancel' buttons. A sidebar on the left lists options like 'Add Textbook', 'Resource Lists', 'Import Textbooks', etc. A 'How do I...?' link is in the top right.



Talking Points

Your district may have a policy of shipping textbooks directly to the schools, but only applying barcodes to the books, as needed. Destiny will allow you to add copies to your inventory without requiring each to have its own barcode.

- **Add Copies without Barcodes**
- **Number of copies**
- Books must have barcodes before they can be distributed



Activity

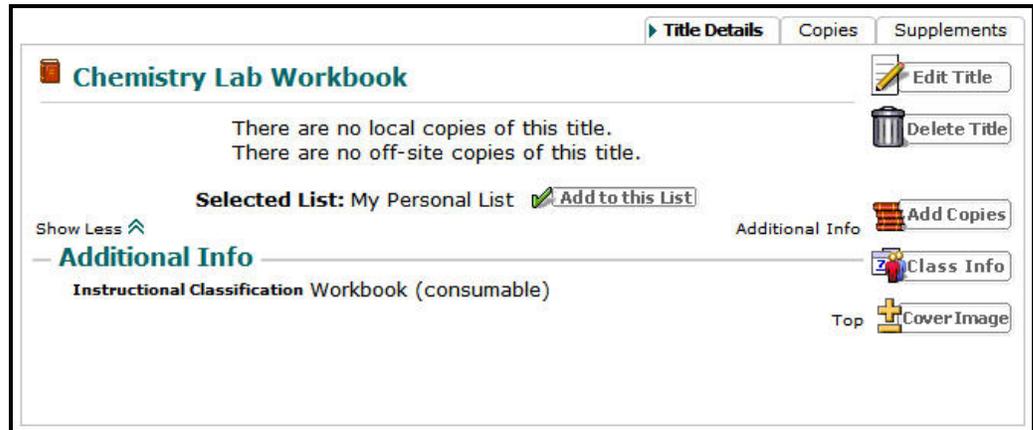
Perform the following actions in your Destiny Textbook Manager.

1. Locate a textbook title in your catalog and then add one or more new copies to it (this may be done with or without barcodes, depending on your district's policy).
2. Confirm that the copies were added by searching for the title and checking the number available locally on the **Title Details** page.

Textbook Manager

Notes

Instructional Classification (Consumables)



► Title Details | Copies | Supplements

Chemistry Lab Workbook

There are no local copies of this title.
There are no off-site copies of this title.

Selected List: My Personal List Add to this List

Show Less ^

Additional Info

Instructional Classification Workbook (consumable)

Additional Info

Top

Edit Title

Delete Title

Add Copies

Class Info

Cover Image

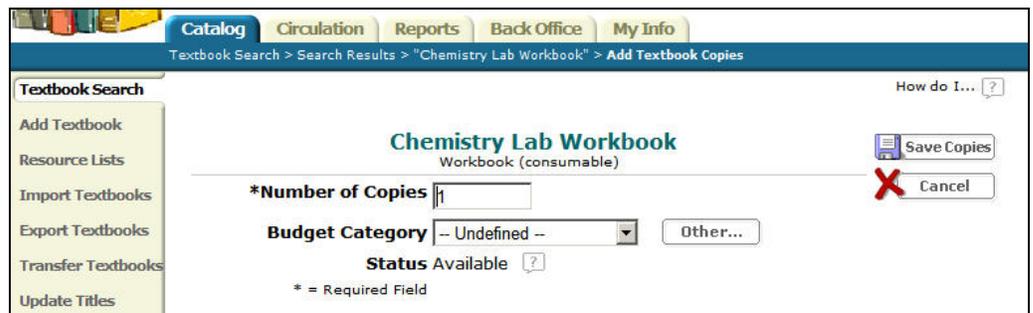


Talking Points

Consumables are typically expendable items such as workbooks, lab supplies, etc. that are used to support a class. The current inventory, or count, of a consumable is usually managed by the school. Adding or depleting consumables is similar to adding a textbook copy.

- Title must have an Instructional Classification of **Consumable**

Consumable



Catalog | Circulation | Reports | Back Office | My Info

Textbook Search > Search Results > "Chemistry Lab Workbook" > Add Textbook Copies

Chemistry Lab Workbook

Workbook (consumable)

*Number of Copies

Budget Category Other...

Status Available ?

* = Required Field

How do I... ?

Save Copies

Cancel

- No barcodes
- Number of copies

Textbook Manager

Notes



Activity

Take a moment to search your database to see if you can find some consumable items. (Hint: remember the options in the **Find** field.) You may wish to try searching for “workbook” since these are often consumables.

Online Resources

Refer to the back of this guide to see a list of online resources relating to this module.

Textbook Copy Reports

Duration: 10 minutes

Module Overview

Destiny provides several different reports that allow you to determine the number of copies you have available, their conditions, and their statuses. There are also reports that allow you to print new or replacement barcode labels.

Module Objectives

This module will explain how to:

- Report on the conditions and statuses of your textbooks
- Identify the barcodes assigned to each copy
- Print barcode labels

Textbook Manager

Notes

Textbook Condition/Status

Neil Armstrong Magnet School Textbook Admin. Logout Help

Catalog Circulation **Reports** Back Office My Info

Textbook Reports > Textbook Condition/Status

My Favorites How do I... ?

Textbook Create New Report Saved Reports

Patron

Report Builder

Report Manager

List textbook information...

Report Condition

Calculate value using Conditioning adjustments

Include Summary

Limit condition to New Good Fair Poor Unusable

Show Title Details

Save Setup Run Report



Talking Points

With this report you can examine either the conditions of your books or the current status of your inventory.

- Condition
- Status

Textbook Manager

Notes

Titles & Copy List



Talking Points

The **Titles & Copies** report provides a snapshot of your textbook inventory and offers a host of limiters to help you customize the report to you needs.

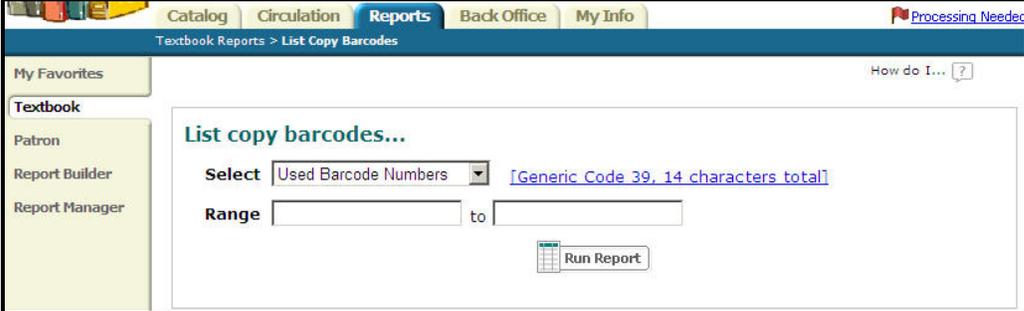
- Report can be used for a variety of purposes:
 - To show available or checked out copies
 - To show copies out for repair
 - To show lost copies (seen below)

Textbook Title & Copy List		Neil Armstrong Magnet School							
By Title "a" to "m" - Only titles with "Lost" copies									
Astronomy									
ISBN: 978-0-06-500004-7									
Copy Info:									
Replacement Price	Total	Available	Checked Out	Loaned Out	On Order	Out for Repairs	Incoming Transfers	Lost	
\$60.00	24	22	0	0	0	0	0	2	
Conditions:									
	New		Good		Fair		Poor	Unusable	
	24		0		0		0	0	
Lost: 2 Copies									
40705000051770	Lost on 10/6/2009 by Aldrin, Edwin (Student: P 1001) - fine was satisfied							Condition	
								New	
40705000051771	Lost on 10/6/2009 by Collins, Eileen (Student: P 1004) - payment pending							Condition	
								New	
List Totals - 1 Title Listed									
Copy Info:									
Replacement Price	Total	Available	Checked Out	Loaned Out	On Order	Out for Repairs	Incoming Transfers	Lost	
\$1,440.00	24	22	0	0	0	0	0	2	
Conditions:									
	New		Good		Fair		Poor	Unusable	
	24		0		0		0	0	

Textbook Manager

Notes

Barcode Lists



Textbook Reports > List Copy Barcodes

My Favorites How do I... ?

Textbook

Patron

Report Builder

Report Manager

List copy barcodes...

Select **Used Barcode Numbers** [\[Generic Code 39, 14 characters total\]](#)

Range to

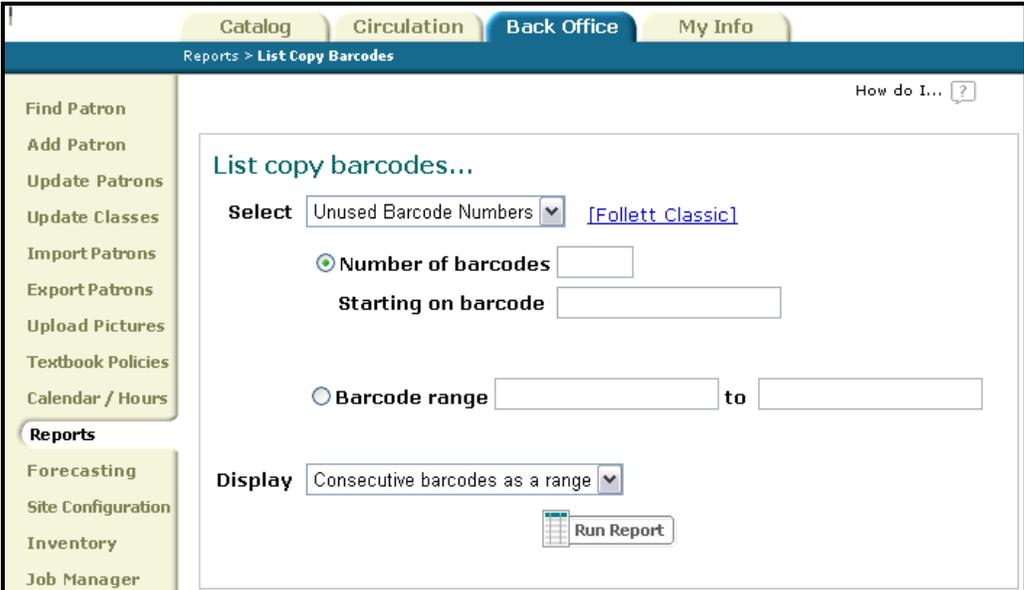


Talking Points

With the **Barcode Lists** report, you can identify both used and unused barcodes in your Textbook Manager.

- Select either **Used Barcode Numbers** or **Unused Barcode Numbers**

Unused Barcode List



Reports > List Copy Barcodes

Find Patron

Add Patron

Update Patrons

Update Classes

Import Patrons

Export Patrons

Upload Pictures

Textbook Policies

Calendar / Hours

Reports

Forecasting

Site Configuration

Inventory

Job Manager

List copy barcodes...

Select **Unused Barcode Numbers** [\[Follett Classic\]](#)

Number of barcodes

Starting on barcode

Barcode range to

Display **Consecutive barcodes as a range**

- The **Unused Barcode Numbers** report can help identify blocks of barcodes available for new books, and numbers that have become available because books have been deleted.

Textbook Manager

Notes

Print Barcode labels

Used Unused

Print used textbook copy barcodes...

Select by

Selected List: My Personal List

Copies Added From AM

To AM

Include the following on each

Title

Author

Location

Use label stock

Start on label

Printer offset Horizontal: Vertical:

In addition to adjusting your printer offsets, you must also configure Adobe Reader so that your labels are properly aligned.

For assistance configuring Adobe Reader or the printer offsets, see [Troubleshooting](#)



Talking Points

If you need to barcode new textbooks as they are put into circulation, or if you come across a textbook that has a lost or damaged barcode, Destiny provides a means of printing barcode labels right at your school.

- Select by
- Copies Added
- Include
- Printer setup

Textbook Manager

Notes



Activity

1. Run a Barcode List report in Textbook Manager that will identify the first 100 barcodes in use.

2. If you have a textbook with a barcode handy, use it to determine what kind of information should appear on the barcode label. If you do not have one, then think about what information you believe it should contain.

Using this information, see if you can set up your system's Barcode Labels report to print a label that looks like the ones you now use or that contain the information you felt was important.

Online Resources

Refer to the back of this guide to see a list of online resources relating to this module.

Textbook Manager

Notes

Distribution

Duration: 30 minutes

Module Overview

Ensuring students receive textbooks is a vital task that takes place at the beginning of each term, semester, or year. This module presents checking out and tracking textbooks effectively by utilizing best practices in your distribution procedures.

Module Objective

When given a scenario, you will be able to correctly distribute textbooks.

Notes



Policies Regarding the Distribution of Textbooks

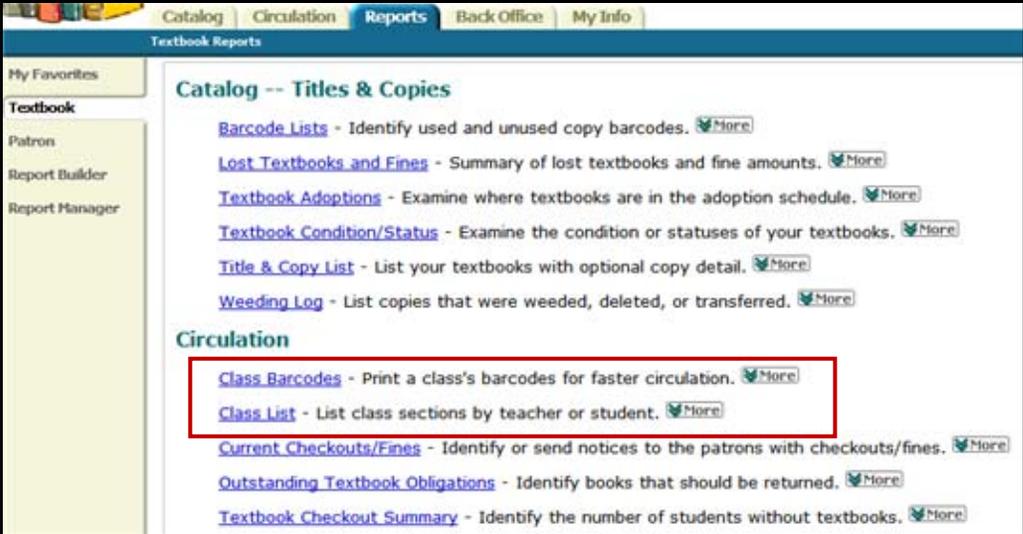
Talking Points

- Policies should be established at the district and communicated to all schools.
- Inform students and teachers of policies and stress they are accountable for the textbooks checked out to them.
 - IDs will be scanned to ensure accountability
 - Textbook due dates should be provided at the time of distribution, or shortly after.
 - Potential fines for lost or damaged textbooks should be provided before or during distribution.
- Decide where textbooks will be distributed from (central location or classroom) and when (during registration or after school starts)
- Make sure textbooks are arranged by title

Textbook Manager

Notes

Preparing to Distribute Textbooks with Circulation Reports



Catalog -- Titles & Copies

- [Barcode Lists](#) - Identify used and unused copy barcodes. [More](#)
- [Lost Textbooks and Fines](#) - Summary of lost textbooks and fine amounts. [More](#)
- [Textbook Adoptions](#) - Examine where textbooks are in the adoption schedule. [More](#)
- [Textbook Condition/Status](#) - Examine the condition or statuses of your textbooks. [More](#)
- [Title & Copy List](#) - List your textbooks with optional copy detail. [More](#)
- [Weeding Log](#) - List copies that were weeded, deleted, or transferred. [More](#)

Circulation

- [Class Barcodes](#) - Print a class's barcodes for faster circulation. [More](#)
- [Class List](#) - List class sections by teacher or student. [More](#)
- [Current Checkouts/Fines](#) - Identify or send notices to the patrons with checkouts/fines. [More](#)
- [Outstanding Textbook Obligations](#) - Identify books that should be returned. [More](#)
- [Textbook Checkout Summary](#) - Identify the number of students without textbooks. [More](#)



Talking Points

- Can make checking out textbooks easier
- Must have schedules loaded in order for reports to contain data
- Students are included if they have been assigned to the class

- Textbooks are included if they have been assigned to the class or section and checked out to the student
- **Class Barcodes**
 - List of student and teacher barcodes for each class section
 - Print the list and use it to scan barcodes to quickly distribute textbooks
- **Class List**
 - Teachers and classes they teach
 - Students and the classes in which they are enrolled

Textbook Manager

Notes



Activity

1. Run a **Class List** report for teacher and student. Try running a couple of reports using different limiter options.

2. Compare the differences between each of these reports.

Textbook Manager

Notes

Checking Out Textbooks

The screenshot displays the 'Check Out Text' interface. At the top, there are navigation tabs: 'Catalog', 'Circulation', 'Reports', and 'Back Office'. Below these is a sub-header 'Check Out Text' and a 'How do I...?' help link. A left-hand menu contains the following items: 'Check Out Text', 'Check In Text', 'Renew', 'Fines', 'Copy Status', 'Patron Status', 'Offline Circulation', and 'Textbook Info'. A 'Reset' button is located at the bottom of this menu. The main content area features three tabs: 'To Patron', 'By Class', and 'To Teacher'. Below the tabs is a search section with a 'Find' label, an input field, a 'Go!' button, and two icons: 'Find Patron' and 'Find Copy'. A checkbox labeled 'Only search Patron Names' is checked, and a dropdown menu is set to 'Patron Names'. The footer of the interface reads: '©2002-2009 Follett Software Company 8/4/2009 9:31 AM CDT'.



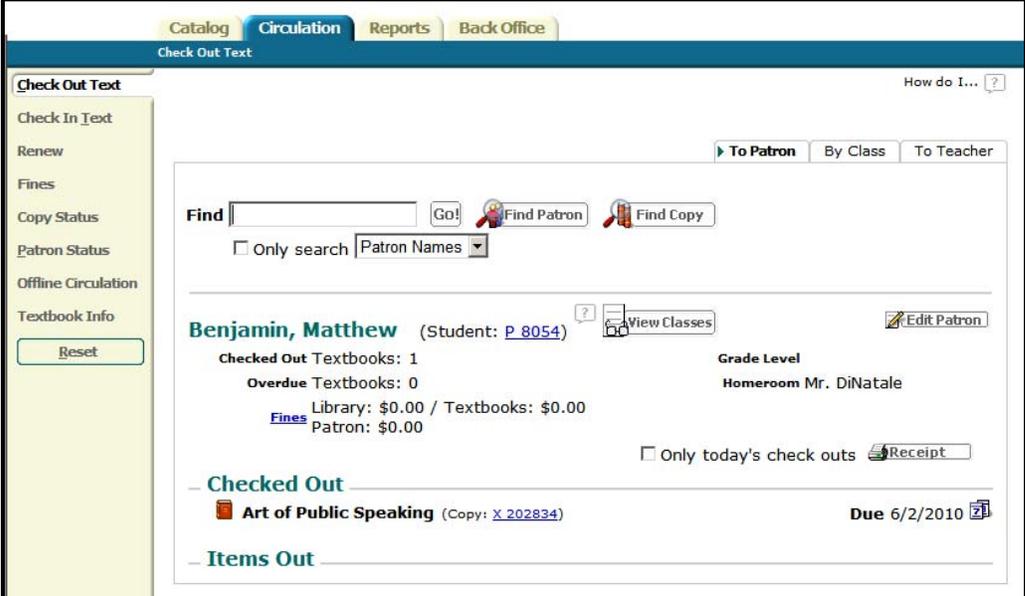
Talking Points

- Check out **To Patron**
 - Best practice is to use the **To Patron** subtab
- Scan barcodes (Patron + Copy)

Textbook Manager

Notes

Completed Checked Out



Talking Points

- Books are checked out when they appear under the **Checked Out** area
- All books checked out appear under the **Items Out** area
- Changing the due date

Textbook Manager

Notes

Printing Receipts

Catalog Circulation Reports Back Office

Check Out Text

How do I... ?

Check Out Text
Check In Text
Renew
Fines
Copy Status
Patron Status
Offline Circulation
Textbook Info
Reset

To Patron By Class To Teacher

Find [] Go! Find Patron Find Copy

Only search Patron Names

Benjamin, Matthew (Student: P_8054) View Classes Edit Patron

Checked Out Textbooks: 1
Overdue Textbooks: 0
Library: \$0.00 / Textbooks: \$0.00
Patron: \$0.00

Grade Level
Homeroom Mr. DiNatale

Only today's check outs Receipt

Checked Out
Art of Public Speaking (Copy: X_202834) Due 6/2/2010

Items Out



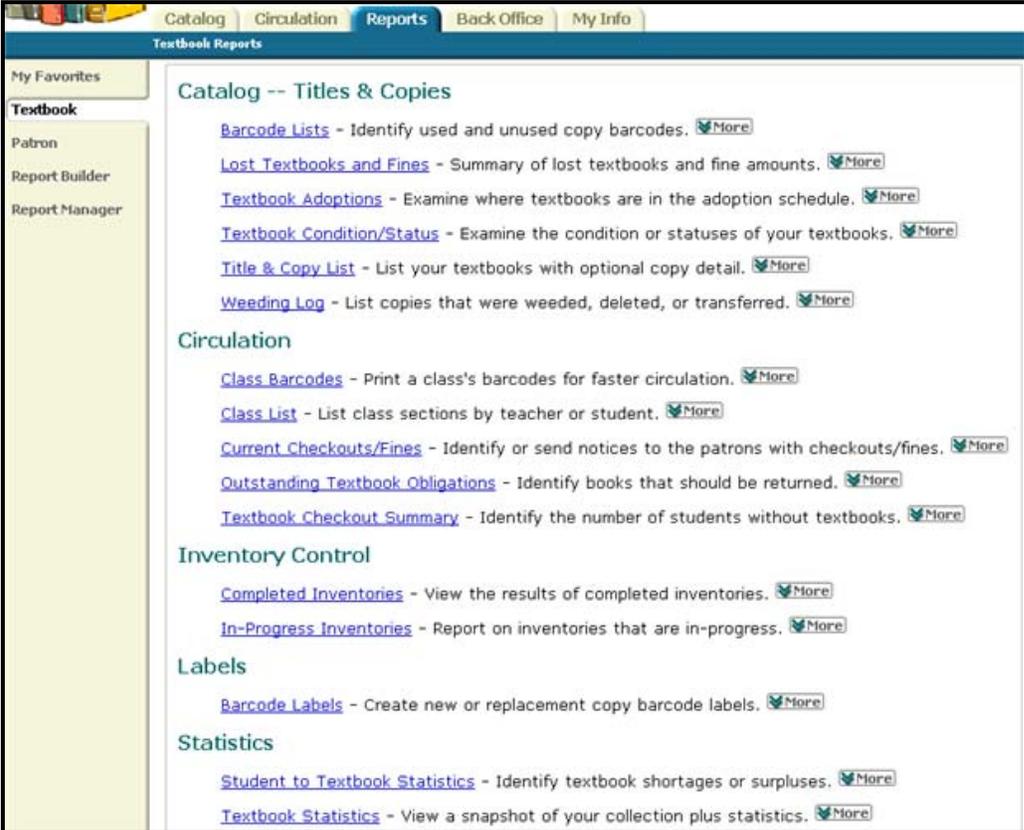
Talking Points

- Print receipts after a transaction
 - Ensures accountability
 - Provides written record of due dates

Textbook Manager

Notes

Reports



Catalog -- Titles & Copies

- [Barcode Lists](#) - Identify used and unused copy barcodes. [More](#)
- [Lost Textbooks and Fines](#) - Summary of lost textbooks and fine amounts. [More](#)
- [Textbook Adoptions](#) - Examine where textbooks are in the adoption schedule. [More](#)
- [Textbook Condition/Status](#) - Examine the condition or statuses of your textbooks. [More](#)
- [Title & Copy List](#) - List your textbooks with optional copy detail. [More](#)
- [Weeding Log](#) - List copies that were weeded, deleted, or transferred. [More](#)

Circulation

- [Class Barcodes](#) - Print a class's barcodes for faster circulation. [More](#)
- [Class List](#) - List class sections by teacher or student. [More](#)
- [Current Checkouts/Fines](#) - Identify or send notices to the patrons with checkouts/fines. [More](#)
- [Outstanding Textbook Obligations](#) - Identify books that should be returned. [More](#)
- [Textbook Checkout Summary](#) - Identify the number of students without textbooks. [More](#)

Inventory Control

- [Completed Inventories](#) - View the results of completed inventories. [More](#)
- [In-Progress Inventories](#) - Report on inventories that are in-progress. [More](#)

Labels

- [Barcode Labels](#) - Create new or replacement copy barcode labels. [More](#)

Statistics

- [Student to Textbook Statistics](#) - Identify textbook shortages or surpluses. [More](#)
- [Textbook Statistics](#) - View a snapshot of your collection plus statistics. [More](#)



Talking Points

- Track the distribution process after it is complete by running reports
 - **Class List Report**
 - **Current Checkouts/Fines**
 - **Textbook Checkout Summary**

Textbook Manager

Notes

Class List Report

Class List - Teachers				Current sections		
Including transactions				Grace Coolidge Elementary School		
Andreoni, Glenn S (Faculty: P 2001)				Class Starts	Class Ends	Textbooks Due
Period 1	Section 1a	Environmental Science	Science	9/3/2009	6/1/2010	6/1/2010
Attemeler, Maria M (Student: P 1000)						
Environment (Copy: X 9992201)						6/1/2010
Alwater, Annette M (Student: P 2000)						
Environment (Copy: X 9992202)						6/1/2010
Burkey, Brenda (Student: P 120799)						
Environment (Copy: X 9992203)						6/1/2010
Coffman, Chad (Volunteer: P 1005)						
Environment (Copy: X 9992204)						6/1/2010
Darby, Sandra L (Student: P 120809)						
Environment (Copy: X 9992205)						6/1/2010
Eberspacher, Brad (Student: P 120780)						
Hammer, Oliver (Student: P 120806)						
Environment (Copy: X 9992206)						6/1/2010



Talking Points

- Lists classes by student or teachers, the dates classes start and end, and when textbooks are due

Current Checkouts/Fines Report

Oliver Hammer				Barcode: P 120806		
Checked Out/Overdue Materials & Unpaid Fines Notice						
Dear Oliver Hammer:						
You are responsible for turning in the following items that have been checked out to you by the due date.						
Textbooks						
Due	Barcode	Title	Est. Fine			
6/1/2010	X 1453	ALGEBRA 1				
8/14/2009	X 9992162	Spelling 6				
6/1/2010	X 9992206	Environment				
0 Items Overdue						

- Send notices to students and teachers regarding checkouts/fines

Textbook Manager

Notes

Textbook Checkout Summary Report

Textbook Checkout Summary	Grace Coolidge Elementary
Class: ES100 - Environmental Science	
Section: 1a	Enrollment: 19
Title: Environment	
Students with textbooks: 15	
Students without textbooks: 4	
1. Eberspacher, Brad (P 120780)	
2. Neumann, Glen J (P 2026)	
3. Olcott, Bonnie L (P 2028)	
4. Reese, Dona A (P 2034)	
Class: GCAL - Algebra	
Section: AL100	Enrollment: 18
Title: ALGEBRA 1	
Students with textbooks: 10	
Students without textbooks: 8	
1. Attermeier, Maria M (P 1000)	
2. Higareda, Jeehyun (P 1016)	
3. Nakagawa, Jeremy J (P 1026)	
4. Neal, Bev (P 120781)	
5. Novak, Bruce A (P 2027)	
6. Reese, Dona A (P 2034)	
7. Sanchez, Maria A (P 1034)	
8. Sarelas, Abigail (P 1051)	



Talking Points

- Identify the number of students without textbooks
- Find out if every student has received the appropriate textbook(s)
- Classes should be set up, and both textbooks and student schedules loaded (or entered)



Activity

Take a minute to look over the reports and decide which reports your school can utilize and why you would want to utilize them.

Textbook Manager

Notes



Activity

Using the scenario below, check the items needed to distribute textbooks and the reports to generate after distribution has been completed.

Scenario: Textbooks will be checked out to students at a central location during registration. Each student has an identification card with a barcode number. Class schedules have been imported into Destiny Textbook Manager.

- Class Barcodes report
- Class List report
- Current Checkouts/Fines report in a notice format
- Receipt paper
- Set up loan policies
- Student to Textbook Statistics report
- Textbook Checkout Summary
- Use the **Check Out Text** option | **To Patron** subtab

Online Resources

Refer to the back of this guide to see a list of online resources relating to this module.

Textbook Manager

Notes

Collection

Duration: 25 minutes

Module Overview

At the end of the school term, you need to collect the textbooks that you distributed at the beginning of the term. This module shows you how to collect these textbooks and keep track of them using Destiny Textbook Manager.

Module Objective

You will be able to collect textbooks by properly preparing, checking in, and tracking textbooks at the end of a school year or semester.

Textbook Manager

Notes



Collection Policies

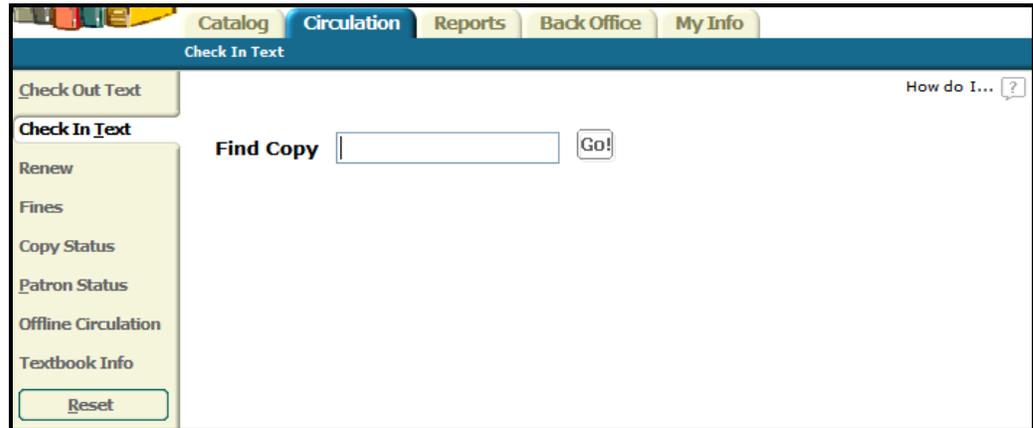
Talking Points

- Decide how textbooks will be organized and stored
- Collect textbooks from both teachers and students
- Collecting options
 - Collect by class or by patron
 - Teachers can collect textbooks from students during each class period
 - Students can go to a central location during each class period with the corresponding textbook
 - Students can return all textbooks issued to them in a central location
- During collection
 - Bill students replacement costs if textbooks are not found
- Damaged textbooks
 - Check condition of each textbook
 - Note conditions in the software
 - Assess fines to students or teachers
- Charging for and handling lost textbooks
 - Full replacement or depreciated value can be charged
 - Mark books lost after one day when not returned by due date
- Start an inventory prior to textbook collection

Textbook Manager

Notes

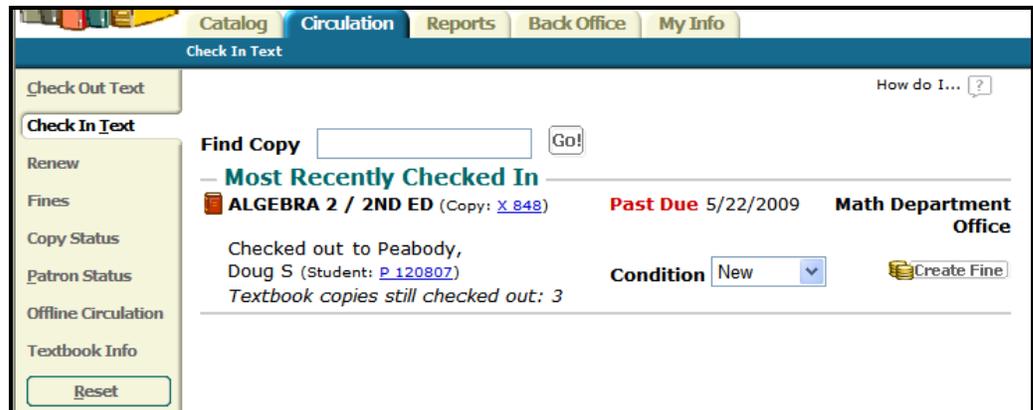
Checking In Textbooks



Talking Points

- Scan or type barcode in the **Find Copy** field, and click **Go!** or press **Enter**

Assessing Fines



Talking Points

- Assessing fines

Textbook Manager

Notes

Assessing Fines

Peabody, Doug S (Student: [P_120807](#))  

Reason

 **ALGEBRA 2 / 2ND ED** (Copy: [X_848](#))

Replacement Price \$30.00

Amount

Waive

Pay

Fine Note

Print Receipt



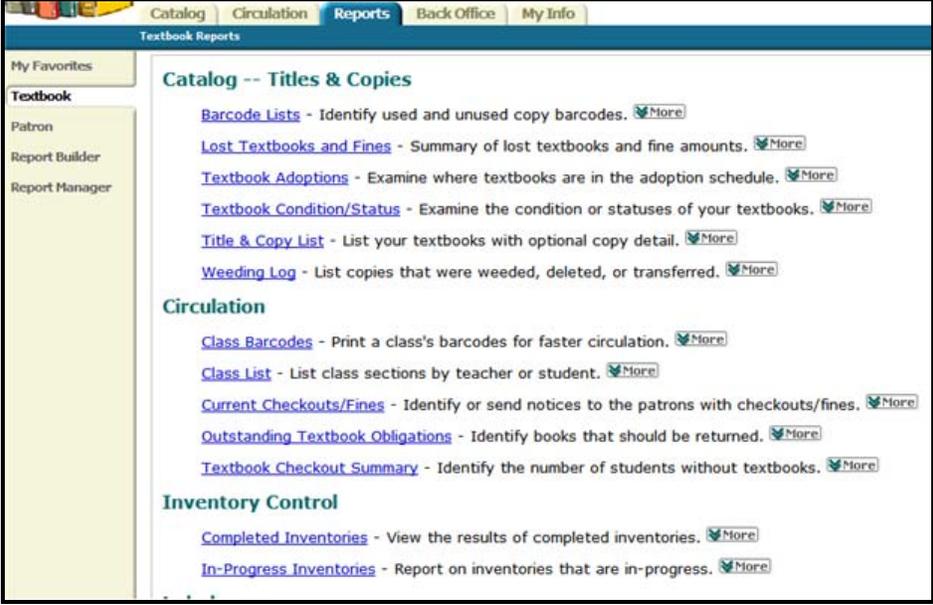
Talking Points

- Enter the appropriate information: fine **Amount**, amount being **Waived** or amount being **Paid**
- Select reason for fine
- Include a fine note

Textbook Manager

Notes

Collection Reports



The screenshot shows the 'Textbook Reports' page in a web application. The navigation bar includes 'Catalog', 'Circulation', 'Reports', 'Back Office', and 'My Info'. The page is titled 'Textbook Reports' and features a sidebar with 'My Favorites' and a 'Textbook' menu containing 'Patron', 'Report Builder', and 'Report Manager'. The main content area is divided into three sections: 'Catalog -- Titles & Copies', 'Circulation', and 'Inventory Control'. Each section lists several reports with brief descriptions and 'More' links.

Catalog -- Titles & Copies

- [Barcode Lists](#) - Identify used and unused copy barcodes. [More](#)
- [Lost Textbooks and Fines](#) - Summary of lost textbooks and fine amounts. [More](#)
- [Textbook Adoptions](#) - Examine where textbooks are in the adoption schedule. [More](#)
- [Textbook Condition/Status](#) - Examine the condition or statuses of your textbooks. [More](#)
- [Title & Copy List](#) - List your textbooks with optional copy detail. [More](#)
- [Weeding Log](#) - List copies that were weeded, deleted, or transferred. [More](#)

Circulation

- [Class Barcodes](#) - Print a class's barcodes for faster circulation. [More](#)
- [Class List](#) - List class sections by teacher or student. [More](#)
- [Current Checkouts/Fines](#) - Identify or send notices to the patrons with checkouts/fines. [More](#)
- [Outstanding Textbook Obligations](#) - Identify books that should be returned. [More](#)
- [Textbook Checkout Summary](#) - Identify the number of students without textbooks. [More](#)

Inventory Control

- [Completed Inventories](#) - View the results of completed inventories. [More](#)
- [In-Progress Inventories](#) - Report on inventories that are in-progress. [More](#)



Talking Points

- Ensure textbooks are collected before students depart for the year
- Run them soon after collection to identify which textbooks were not returned

Textbook Manager

Notes

Lost Textbooks and Fines Report

The screenshot shows a web application interface for generating a report. At the top, there are navigation tabs: Catalog, Circulation, Reports (selected), Back Office, and My Info. A 'Processing Needs' indicator is visible in the top right. Below the navigation is a breadcrumb trail: 'Textbook Reports > Lost Textbooks and Fines'. On the left, there is a sidebar with 'My Favorites' and a list of items: 'Textbook', 'Patron', 'Report Builder', and 'Report Manager'. The main content area is titled 'Lost Textbooks and Fines from 8/1/2009' and includes a 'Printable' button. The report data is organized into four sections:

- Lost Textbooks:**
 - Copies: 0
 - Replacement Value: \$0.00
- Total Assessed Fines:**
 - Total: [\\$15.00](#)
- Lost Fines:**
 - Fines: 0
 - Paid: \$0.00
 - Waived: \$0.00
 - Outstanding: \$0.00
- Damaged Fines:**
 - Fines: 1
 - Paid: \$0.00
 - Waived: \$0.00
 - Outstanding: \$15.00

At the bottom of the report area, there is a section titled 'Lost Textbooks and Fines...' with a date range selector. The 'from' date is set to '8/1/2009' and the 'to' date is empty. There are 'Print' and 'Update' buttons next to the date range.

- **Class List**
 - Run before and after collection to determine which textbooks students have checked out to them and which ones still need to be collected
- **Current Checkouts/Fines**
 - Use of report

Textbook Manager

Notes

Textbook Statistics Report

Textbook Snapshot [Printable](#)

Circulations

- Checked Out: 42
 - Overdue: 42
- Lost: 1

Unpaid Fines

- Textbook: 3
 - Amount due: \$30.00
- Other: 0
 - Amount due: \$0.00

Materials

- Titles: 100
- Copies: 1,822
 - Includes Teachers' Editions and Kits

Patrons

- Total: 119
 - Active: 119
 - Restricted: 0
 - Inactive: 0

Statistics Snapshots...

View current statistics

View statistics for the last Years

View statistics from to

- Provides a snapshot of overdue books and unpaid fines

Online Resources

Refer to the back of this guide to see a list of online resources relating to this module.

Transferring Textbooks

Duration: 30 minutes

Module Overview

One of the most powerful features in Textbook Manager is the ability to get textbooks where they are needed, when they are needed. To do this, Destiny allows you to transfer books from one location to another. In this module you will learn how to set up a transfer from your school to another, and how to receive books that have been transferred to your school.

Module Objectives

- Identify the subtab used to set up a transfer
- Identify the subtab used to monitor transfers
- List the different way that copies can be received

Textbook Manager

Notes

Transfer Textbooks

The screenshot displays the 'Transfer Textbooks' interface. At the top, there are navigation tabs: 'Catalog', 'Circulation', 'Reports', 'Back Office', and 'My Info'. A 'Processing Needed' flag is in the top right. The left sidebar contains a 'Textbook Search' section and a 'Transfer Textbooks' section with options: 'Add Textbook', 'Resource Lists', 'Import Textbooks', 'Export Textbooks', 'Update Titles', and 'Update Copies'. The main area is titled 'Track Textbooks' and has tabs for 'Track', 'Upload', 'Requests', and 'Notices'. Below the tabs, there is a 'Track Textbooks' section with a 'Customize View' link and a 'Receive' button. A table titled 'Incoming Transfers (1)' shows one entry: 'Lincoln (admin115)' with a 'Transfer Date' of '10/5/2009 2:17 PM' and a 'Status' of '0 of 10 Received Geometry'. Below the table are icons for 'View' and 'Delete from list'. A 'Customize View' section allows filtering transfers by date and location, and includes checkboxes for 'Incoming Transfers', 'Outgoing Transfers', 'Completed Incoming Transfers', and 'Completed Outgoing Transfers'. An 'Update' button is at the bottom of the customize section.



Talking Points

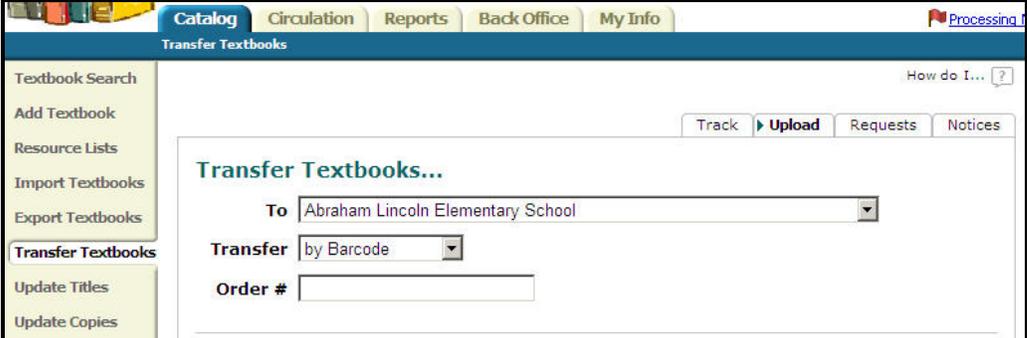
The transfer feature has subtabs that allow you to set up transfers, track in progress transfers, or, if your District Textbook Manager coordinates transfers, to request a transfer. There is also an alert mechanism that let you know when you have transfer activity from the district or from another school.

- **Upload** – Sets up a transfer
- **Track** – Tracks in-progress transfers
- **Requests** – Place and Monitor requests to the district
- **Processing Needed** flag

Textbook Manager

Notes

Upload



Talking Points

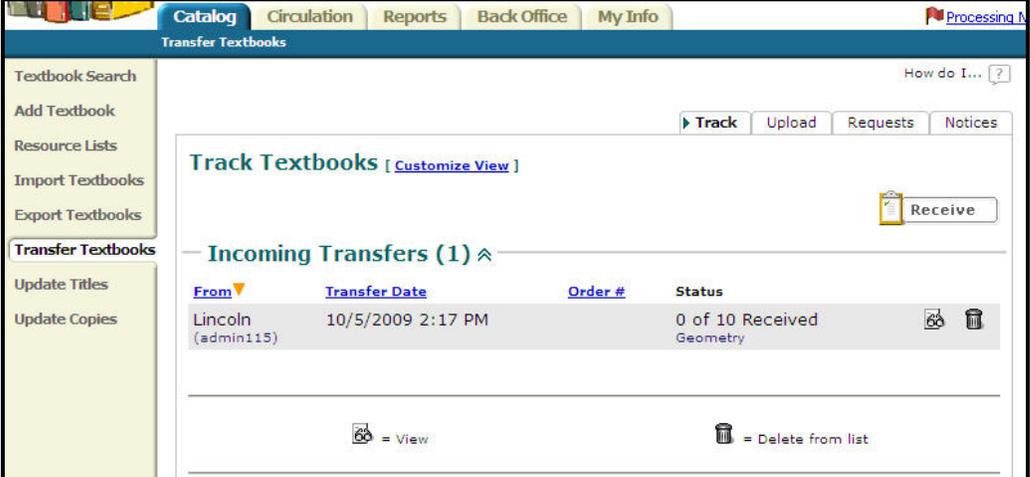
Setting up a transfer from your school to another is done through the **Upload** subtab, and there are several ways that you can identify the books to be transferred. The most common are:

- **By Barcode**
- **By copy count**

Textbook Manager

Notes

Receiving a Transfer



The screenshot shows the 'Track Textbooks' interface. On the left is a navigation menu with options like 'Textbook Search', 'Add Textbook', 'Resource Lists', 'Import Textbooks', 'Export Textbooks', 'Transfer Textbooks', 'Update Titles', and 'Update Copies'. The main area has tabs for 'Track', 'Upload', 'Requests', and 'Notices'. Below the 'Track' tab, there's a 'Receive' button. The main content area is titled 'Track Textbooks [Customize View]' and shows 'Incoming Transfers (1)'. A table lists the transfer details:

From	Transfer Date	Order #	Status
Lincoln (admin115)	10/5/2009 2:17 PM		0 of 10 Received Geometry

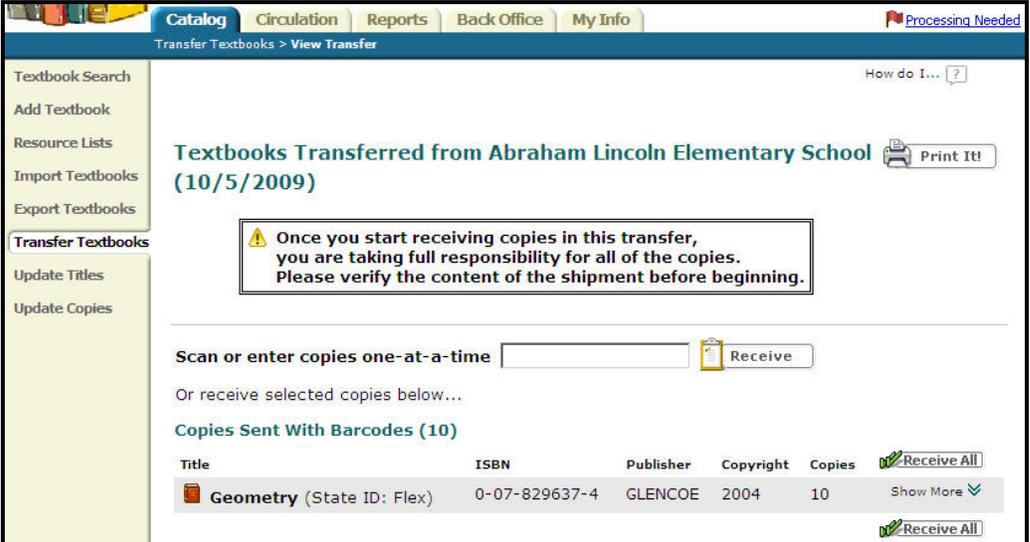
At the bottom, there are icons for 'View' and 'Delete from list'.



Talking Points

To receive an incoming transfer, you would first click on the view icon associated with the transfer.

Receiving a Transfer



The screenshot shows the 'View Transfer' page. The main heading is 'Textbooks Transferred from Abraham Lincoln Elementary School (10/5/2009)'. A warning message states: 'Once you start receiving copies in this transfer, you are taking full responsibility for all of the copies. Please verify the content of the shipment before beginning.' Below the warning, there's a 'Scan or enter copies one-at-a-time' input field and a 'Receive' button. The page also shows 'Copies Sent With Barcodes (10)' in a table:

Title	ISBN	Publisher	Copyright	Copies	Receive All
Geometry (State ID: Flex)	0-07-829637-4	GLENCOE	2004	10	Show More

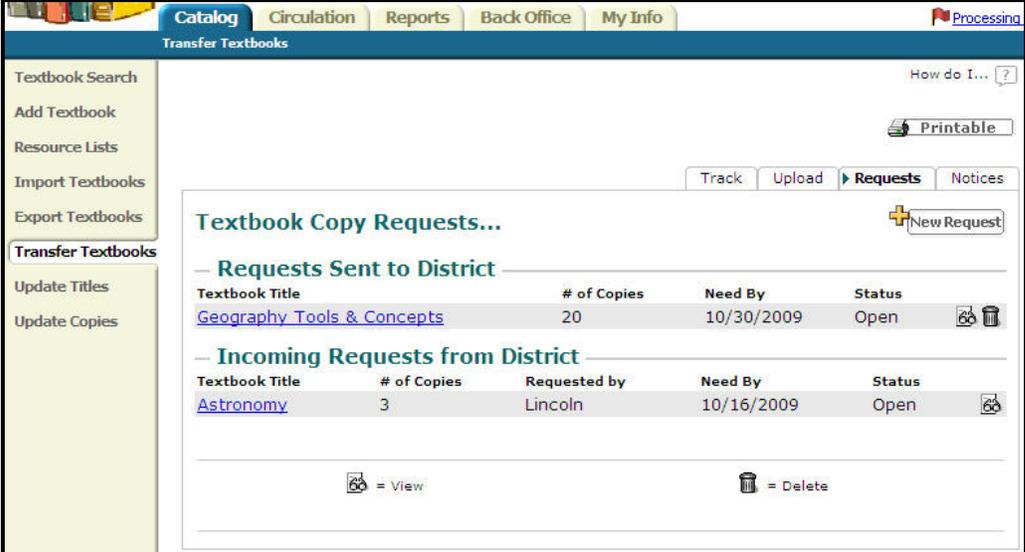
At the bottom, there's another 'Receive All' button.

This will open the **View Transfer** page, where you can receive the books by several different means.

Textbook Manager

Notes

Receiving a Transfer



Textbook Manager interface showing the 'Requests' subtab. The interface displays 'Textbook Copy Requests...' with two tables:

Requests Sent to District			
Textbook Title	# of Copies	Need By	Status
Geography Tools & Concepts	20	10/30/2009	Open

Incoming Requests from District				
Textbook Title	# of Copies	Requested by	Need By	Status
Astronomy	3	Lincoln	10/16/2009	Open



Talking Points

If your district prefers to set up and coordinate transfers, you can place and monitor request to the district from the **Requests** subtab.

- New Request
- Request sent to district
- Incoming requests

Textbook Manager

Notes



Activity

Answer the following questions about transferring textbooks.

1. Under what subtab would find information about all of the transfer that your school is involved in?
2. How could you receive all of the copies contained in a transfer with the click of a single button?
3. What subtab would you use to set up a transfer?

Online Resources

Refer to the back of this guide to see a list of online resources relating to this module.

Module Overview

Conducting an inventory will enhance accountability by identifying where deficiencies exist in the textbook handling processes. By quickly identifying lost textbooks, the district can implement loss prevention measures that address the problem and maximize budget allocations. This module will explain the process of conducting an inventory from both the district and school perspective.

Module Objectives

- Discuss the steps to prepare for an inventory
- Describe how textbooks are accounted for during an inventory
- Correctly set up an inventory when given a scenario

Textbook Manager

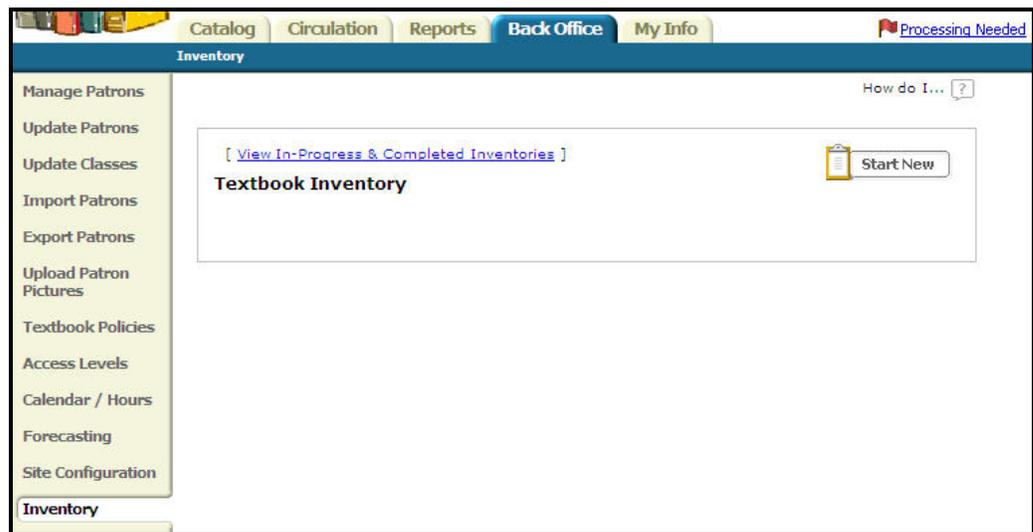
Notes



Talking Points

The purpose of conducting an inventory is to ensure that the data in Destiny accurately reflects the actual number of textbooks assigned to each school, and the availability of those textbooks.

It is a best practice to perform an inventory on your collection at least once a year to ensure that all your books are accounted for, and that you have visibility to which titles you may need to add or remove.



Talking Points

A District Textbook Manager (TM) can start an inventory across the whole district, or at any individual school. However it is more common for the District TM to establish an inventory schedule, and then direct the schools to start the inventory locally.

- To start a new inventory, click the **Start New** button.

Textbook Manager

Notes

The screenshot shows the 'Start Inventory' form in the Textbook Manager application. The form is titled 'Specify the copies to be inventoried...'. It includes several sections: 'Inventory Name' with a text input field; 'Locations' with a dropdown menu set to 'All Locations' and an 'Update' button; 'Additional Options' with two text input fields for 'Adoption End from' and 'to'; 'Include' with three checkboxes: 'Copies with barcodes' (checked), 'Copies without barcodes', and 'Consumables'; 'Handling checked out copies -- I want to...' with two checkboxes: 'Include copies that are checked out. Make these copies unaccounted for.' (unchecked) and 'Check in currently checked out copies when scanned into inventory.' (checked); a date input field for 'Copies with barcodes that have been seen on or after' set to '9/28/2009'; and 'Verify Copy Location' with a dropdown menu set to 'Do nothing'. At the bottom are 'OK' and 'Cancel' buttons.

- Identify this specific inventory by entering a name in the **Inventory Name** field.
- If your textbooks were assigned locations when they were added to Destiny, you can select a specific location or locations to be inventoried by clicking on the **Update** button.
- If you want to perform an inventory of books for a specific adoption period, enter the beginning and ending years of the adoption period in the **Additional Options** fields; otherwise, leave these fields blank.

Textbook Manager

Notes

Inventory Job Manager	Additional Options Adoption End from <input type="text" value="2005"/> to <input type="text" value="2010"/> Include <input checked="" type="checkbox"/> Copies with barcodes <input checked="" type="checkbox"/> Copies without barcodes <input checked="" type="checkbox"/> Consumables <input type="button" value="?"/>
---------------------------------	--

- Check the appropriate boxes to include:
 - a. **Copies with barcodes**
 - b. **Copies without barcodes**
 - c. **Consumables**

Consumables and copies without barcodes do not circulate or have a location on record, so these will only be included if you select one or both check boxes. When included, these types of items must be manually counted during an inventory, and their numbers manually entered into the system.

Throughout the inventory process, textbooks will be in one of the three states listed below; at the beginning, all books in the selected groups will be automatically set to *Unaccounted for*. As the items are scanned or entered into Destiny, their statuses will change to *Accounted for*.

- Unaccounted for
- Accounted for
- Lost

Textbook Manager

Notes

	<p>Handling checked out copies -- I want to...</p> <p><input type="checkbox"/> Include copies that are checked out. Make these copies unaccounted for.</p> <p><input checked="" type="checkbox"/> Check in currently checked out copies when scanned into inventory.</p>
--	---

- To account for copies currently checked out and include them in the inventory, check the box **Include copies that are checked out**.
- Check the box next to **Check in currently checked out** if you want books currently checked out to be included in the inventory.

	<p>Copies with barcodes that have been seen on or after <input type="text" value="8/11/2009"/> </p> <p>don't need to be scanned. Make them "accounted for".</p>
--	--

- To help reduce the amount of work involved in accounting for textbooks that have been handled recently, you can enter the date that the copies were last seen. These copies will automatically be set to *Accounted for*, so they will not need to be scanned.

	<p>Verify Copy Location</p> <p>During this inventory, you can specify your current scanning location. If the location assigned to the copy does not match your current location...</p> <p><input type="text" value="Do nothing"/></p> <p> <input type="button" value="OK"/>  <input type="button" value="Cancel"/></p>
--	---

- In the event that you encounter a textbook assigned to a different location while conducting an inventory, you can choose to have the system ignore the assigned location, or have the system perform one of several other actions, as seen above.
- Once you have set all the desired parameters, start your inventory by clicking the **OK** button.



Textbook Manager

Notes

- You can monitor the progress of your inventory by its **% Complete** line on the Inventory page. Additional details can be obtained by clicking the **Details** button, or by clicking on the **View In-Progress & Completed Inventories** hyperlink.

– **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

- Textbooks can be accounted for by scanning their barcodes individually or by uploading a text file that includes their barcodes.

Catalog Circulation Reports **Back Office** My Info Processing Needed

Inventory How do I... ?

Manage Patrons
Update Patrons
Update Classes
Import Patrons
Export Patrons
Upload Patron Pictures
Textbook Policies

[[View In-Progress & Completed Inventories](#)] Start New
 Finalize

Textbook Inventory

Copies with barcodes 37.41% Complete as of 7:55 AM Refresh

Details

- When it is time to close out an inventory, click the **Finalize** button.
- To view a completed inventory, click the **View In-Progress & Completed Inventories** hyperlink.

Textbook Manager

Notes

The screenshot shows the 'Textbook Reports' page in the Textbook Manager application. The page is organized into three main sections:

- Catalog -- Titles & Copies**
 - [Barcode Lists](#) - Identify used and unused copy barcodes. [More](#)
 - [Lost Textbooks and Fines](#) - Summary of lost textbooks and fine amounts. [More](#)
 - [Textbook Adoptions](#) - Examine where textbooks are in the adoption schedule. [More](#)
 - [Textbook Condition/Status](#) - Examine the condition or statuses of your textbooks. [More](#)
 - [Title & Copy List](#) - List your textbooks with optional copy detail. [More](#)
 - [Weeding Log](#) - List copies that were weeded, deleted, or transferred. [More](#)
- Circulation**
 - [Class Barcodes](#) - Print a class's barcodes for faster circulation. [More](#)
 - [Class List](#) - List class sections by teacher or student. [More](#)
 - [Current Checkouts/Fines](#) - Identify or send notices to the patrons with checkouts/fines. [More](#)
 - [Outstanding Textbook Obligations](#) - Identify books that should be returned. [More](#)
 - [Textbook Checkout Summary](#) - Identify the number of students without textbooks. [More](#)
- Inventory Control**
 - [Completed Inventories](#) - View the results of completed inventories. [More](#)
 - [In-Progress Inventories](#) - Report on inventories that are in-progress. [More](#)
 - [Textbook Inventory Change Analysis](#) - Report on changes to your collection. [More](#)

- The **Completed Inventories** report provides a list of all inventories that have been finalized.
- The **In-Progress Inventories** report list all inventories that have not been finalized.

Textbook Manager

Notes



Activity

Read the scenario below and indicate the features you would select or enter information into by drawing on the graphic.

As the school's textbook manager, you have been asked to start an inventory. Here are the details:

1. The current date is September 30, 2009
2. The inventory should be named Fall 2009
3. Both copies with barcodes and consumables are to be included
4. Books should be checked in when inventoried
5. Books that have been seen by Destiny after August 01, 2009, should be automatically marked as *Accounted for*
6. If a copy isn't in the correct location, Destiny should ask if you want to change it

Specify the copies to be inventoried...

Inventory Name

Locations All Locations  Update

Additional Options Adoption End from to

Include Copies with barcodes
 Copies without barcodes
 Consumables 

Handling checked out copies -- I want to...

Include copies that are checked out. Make these copies unaccounted for.
 Check in currently checked out copies when scanned into inventory.

Copies with barcodes that have been seen on or after 
don't need to be scanned. Make them "accounted for".

Verify Copy Location

During this inventory, you can specify your current scanning location. If the location assigned to the copy does not match your current location...

OK Cancel

Textbook Manager

Notes

Online Resources

Refer to the back of this guide to see a list of online resources relating to this module.

Module Overview

Measuring effectiveness regarding the management of textbooks is typically done by running reports or answering questions to ensure all needs are met. In some cases, this is best done by creating a custom report using the Report Builder interface. Cost effectiveness of Textbook Manager can be done by running the **Textbook Inventory Change Analysis** report.

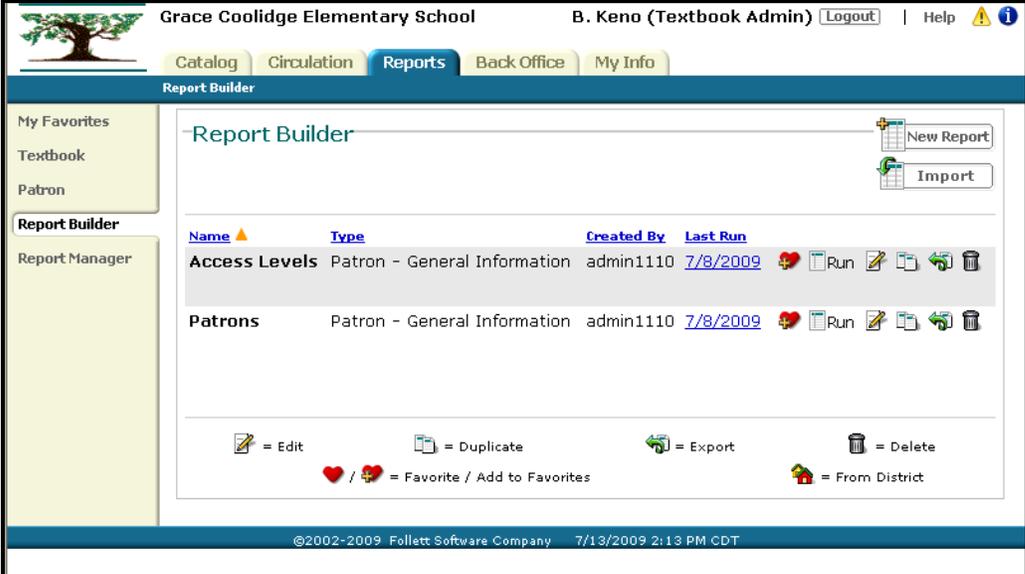
Module Objectives

Upon completion of this module, you will be able to successfully utilize reports and ask the right questions in order to measure the effectiveness of Textbook Manager.

Textbook Manager

Notes

Reports: Report Builder



The screenshot shows the 'Report Builder' interface for Grace Coolidge Elementary School. The user is logged in as B. Keno (Textbook Admin). The interface includes a navigation menu with 'Catalog', 'Circulation', 'Reports', 'Back Office', and 'My Info'. The 'Reports' section is active, showing a list of reports:

Name	Type	Created By	Last Run	Actions
Access Levels	Patron - General Information	admin1110	7/8/2009	Run, Edit, Duplicate, Export, Delete, Favorite
Patrons	Patron - General Information	admin1110	7/8/2009	Run, Edit, Duplicate, Export, Delete, Favorite

Legend for actions:

- ✎ = Edit
- 📄 = Duplicate
- 📤 = Export
- 🗑️ = Delete
- ❤️ / 📌 = Favorite / Add to Favorites
- 🏠 = From District

Footer: ©2002-2009 Follett Software Company 7/13/2009 2:13 PM CDT



Talking Points

- **Report Builder** is a step by step “wizard” that helps users create custom reports

Textbook Manager

Notes

Inventory Change Analysis Report

The screenshot shows the 'Inventory Change Analysis Report' interface. At the top, there are navigation tabs for 'Catalog', 'Circulation', 'Reports', 'Back Office', and 'My Info'. Below the tabs, the breadcrumb path is 'Textbook Reports > Outstanding Textbook Obligations'. On the left side, there is a sidebar with 'My Favorites' and a 'Textbook' section containing 'Patron', 'Report Builder', and 'Report Manager'. The main content area has a 'Create New Report' button and a 'Saved Reports' link. The report title is 'Inventory Change Analysis...'. Below the title, there is a 'Report on changes' section with 'From' and 'to' date pickers. Further down, there are three dropdown menus: 'Show' set to 'Summary', 'Sort by' set to 'Title', and 'Format' set to 'PDF'. At the bottom of the form, there are two buttons: 'Save Setup' and 'Run Report'.



Talking Points

- Find out how inventory has changed over a specific period of time
 - Quantity and value of textbooks
 - Transfers into and out of a site
 - Textbooks lost during inventory or circulation
 - Textbooks added to and deleted from your collection
- Sort information by detail or summary
- Provides a tool to show that tracking textbooks has saved district/school money

Notes



Activity – Looking Back at Reports

1. Which report will provide a teacher with a quick and easy reference for each class they teach?
2. Which report will provide a list of graduating students?
3. Which report is a snapshot of how many books are either checked out or overdue?
4. Which report is the primary report to see who still has materials checked out to them, and can be used to send home notices?
5. You want to ensure all students have the required textbooks they need for their classes, which report would you run?

Notes



Measuring Effectiveness of Textbook Management

Talking Points

- Has the school ensured that all copies of all textbooks are barcoded and entered into Textbook Manager?
- Is the school using Textbook Manager to record distribution of all textbooks to students and staff? Are reports run and receipts printed to inform students and staff which textbooks they are accountable for?
- Are textbooks checked in promptly? Is there adequate follow-up on outstanding obligations? How many lost textbook fines have been assessed and how many are outstanding?
- Has an annual inventory been completed to ensure the system accurately reflects the availability of textbooks in relation to any losses that occurred?
- At the end of the year, review the number of books marked as **Lost**. Is the number higher than expected? Is it due to students losing textbooks, or were books in storage lost?
- Does the school (or district) take advantage of available excess inventory at other schools rather than purchasing new textbooks?
- Does the school control the storage of textbooks that are not in use to ensure that losses are minimized?

Online Resources

Refer to the back of this guide to see a list of online resources relating to this module.

Module Overview

Although Destiny gives you many tailored reporting options, sometimes you will want to create a customized report. Destiny's Report Builder allows you to build reports from scratch; you pick the data, the way the report is organized, and how often you want it to run.

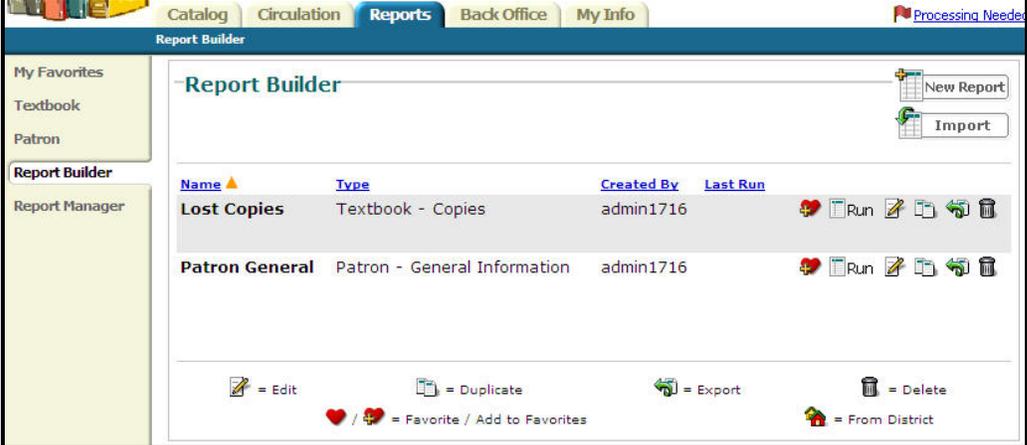
Module Objectives

- Navigate to **Report Builder**
- Identify the key elements included in **Report Builder**
- Outline the process for creating a new report

Textbook Manager

Notes

Navigate To Report Builder



The screenshot shows the 'Report Builder' interface within the 'Reports' tab of the Textbook Manager application. The interface includes a navigation menu on the left with 'My Favorites' (Textbook, Patron), 'Report Builder', and 'Report Manager'. The main area displays a table of reports:

Name	Type	Created By	Last Run	Actions
Lost Copies	Textbook - Copies	admin1716		Run, Edit, Duplicate, Export, Delete, Favorite
Patron General	Patron - General Information	admin1716		Run, Edit, Duplicate, Export, Delete, Favorite

Below the table, a legend defines the icons: Edit (pencil), Duplicate (two documents), Export (arrow), Delete (trash), Favorite/Add to Favorites (heart), and From District (house).



Talking Points

- Navigate to the **Reports** tab, **Report Builder** option.
- **Report Builder** uses 7 steps to help you pick the information you want in a report and organize it the way you want.

Textbook Manager

Notes

Choosing Information – High Level

The screenshot shows the 'Report Builder' interface. At the top, there are tabs for 'Catalog', 'Circulation', 'Back Office', and 'My Info'. Below these is a breadcrumb trail 'Reports > Report Builder'. On the left is a vertical menu with options: 'Find Patron', 'Add Patron', 'Update Patrons', 'Update Classes', 'Import Patrons', 'Export Patrons', 'Upload Pictures', 'Textbook Policies', 'Access Levels', 'Calendar / Hours', 'Reports', 'Forecasting', 'Site Configuration', 'Inventory', and 'Job Manager'. The main content area is titled 'Report Builder' and contains the text 'Select the type of information on which you wish to report.' Below this is a dropdown menu with 'Patron' selected, and a list of options: 'General Information', 'Transaction Summary', 'Current Checkouts', 'Current Fines/Refunds', and 'Current Holds/Bookings'. To the right of the dropdown is a green arrow pointing right and a 'Cancel' button with a red 'X' over it. At the bottom right of the interface, it says '©2002-2007 Follett Software Company 12/6'.



Talking Points

- Choose the basic information you would like to report on: **Textbook** or **Patron**.
- The access levels report relates to patrons, so the **Patron** option is chosen.

Notes

Step 1: Select the information: last name, first name, access level, and patron type.

How to Create a Report

Access Levels for MJES

Report generated on 11/13/2007 9:21 AM

Access Level: Administrator

Name - Last	Name - First	Barcode - Patron	Patron Type
Administrator	Site	SITEADMIN	Faculty

Access Level: Patron

Name - Last	Name - First	Barcode - Patron	Patron Type
Anderson	Lee	P 1001	Faculty
Arient	Dawn	P 4000	Student
Armstrong	Corey	P 4001	Faculty
Assets	Michele	P 190052	Faculty
Attermeier	Marla	P 1000	Student
Beckley	Clark	P 4004	Student
Beda	John	P 4002	Student
Bee	Stewart	P 1003	Student
Beebe	Allen	P 4003	Student
Brown	James	P 1004	Student
Coffman	Chad	P 1005	Faculty
Coffman	Chad	P 4005	Faculty
Deihl	William	P 1006	Student
Desk	Circ	CIRC DESK	Student
Diekman	Clinton	P 4006	Student
Dierks	Troy	P 4007	Faculty
Doerner	Nicole	P 1007	Faculty



Talking Points

- A completed **Report Builder** report has the information you have selected, organized in the format you have specified.

Step 1: Pick the information you want in the report. This report uses patron barcode, last name, first name, access level, and patron type.

Textbook Manager

Notes

Step 2: Group the Items

Access Levels for MJES
Report generated on 11/13/2007 9:21 AM

Access Level: Administrator

Name - Last	Name - First	Barcode - Patron	Patron Type
Administrator	Site	SITEADMIN	Faculty

Access Level: Patron

Name - Last	Name - First	Barcode - Patron	Patron Type
Anderson	Lee	P 1001	Faculty
Arient	Dawn	P 4000	Student
Armstrong	Corey	P 4001	Faculty
Assets	Michele	P 190052	Faculty
Attermeier	Marla	P 1000	Student
Beckley	Clark	P 4004	Student
Beda	John	P 4002	Student
Bee	Stewart	P 1003	Student
Beebe	Allen	P 4003	Student
Brown	James	P 1004	Student
Coffman	Chad	P 1005	Faculty
Coffman	Chad	P 4005	Faculty
Deihl	William	P 1006	Student
Desk	Circ	CIRC DESK	Student
Diekman	Clinton	P 4006	Student
Dierks	Troy	P 4007	Faculty
Doerner	Nicole	P 1007	Faculty

Step 2: Grouping the report by access levels.

Grouped by access level

Step 2: Pick the headings. This report has **Access Level** as the main heading.

Textbook Manager

Notes

Putting Information in Columns and Sorting

Access Levels for MJES
Report generated on 11/13/2007 9:21 AM

Access Level: Administrator

Name - Last	Name - First	Barcode - Patron	Patron Type
Administrator	Site	SITEADMIN	Faculty

Access Level: Patron

Name - Last	Name - First	Barcode - Patron	Patron Type
Anderson	Lee	P 1001	Faculty
Arient	Dawn	P 4000	Student
Armstrong	Corey	P 4001	Faculty
Assets	Michele	P 190052	Faculty
Attermeier	Marla	P 1000	Student
Beckley	Clark	P 4004	Student
Beda	John	P 4002	Student
Bee	Stewart	P 1003	Student
Beebe	Allen	P 4003	Student
Brown	James	P 1004	Student
Coffman	Chad	P 1005	Faculty
Coffman	Chad	P 4005	Faculty
Deihl	William	P 1006	Student
Desk	Circ	CIRC DESK	Student
Diekman	Clinton	P 4006	Student
Dierks	Troy	P 4007	Faculty
Doerner	Nicole	P 1007	Faculty

Step 3: Columns specified as name last, name, first, barcode patron, and patron type.

Step 4: Sort the information alphabetically from A to Z.

Step 3: Pick the order of the columns. Last name, first name, patron barcode, patron type is the order, as pictured above.

Step 4: Sorting the report means you will specify if you want the report in forward or reverse alphabetical order.

Textbook Manager

Notes

Counting, Limits, and Creating a Name

Access Levels for MJES			
Report generated on 11/13/2007 9:21 AM			
Access Level: Administrator			
Name - Last	Name - First	Barcode - Patron	Patron Type
Administrator	Site	SITEADMIN	Faculty
Access Level: Patron			
Name - Last	Name - First	Barcode - Patron	Patron Type
Anderson	Lee	P 1001	Faculty
Arient	Dawn	P 4000	Student
Armstrong	Corey	P 4001	Faculty
Assets	Michele	P 190052	Faculty
Attermeier	Marla	P 1000	Student
Beckley	Clark	P 4004	Student
Beda	John	P 4002	Student
Bee	Stewart	P 1003	Student
Beebe	Allen	P 4003	Student
Brown	James	P 1004	Student
Coffman	Chad	P 1005	Faculty
Coffman	Chad	P 4005	Faculty
Deihl	William	P 1006	Student
Desk	Circ	CIRC DESK	Student
Diekman	Clinton	P 4006	Student
Dierks	Troy	P 4007	Faculty
Doerner	Nicole	P 1007	Faculty
Grand Total			
Access Level Count: 2			

Step 7: Creating a district-wide unique name and description.

Step 6: No limiters selected for this report.

Step 5: Counting the groups. There are two access levels: administrator and patron in this report.

Step 5: Count result numbers. In this example, you can count the number of access levels included in the report.

Step 6: Set limiters. Limiters are a great way to keep information you do not want out of your report. This example does not use any limiters.

Step 7: Create a unique name and description.

Textbook Manager

Notes



Activity

Now, you are going to build a report using **Report Builder**. Use the following information to help you create a report.

You would like to create a list of all of the textbooks due including the class name, department, and teacher. This will help you track when textbooks are due based on each department so you can send the teachers a reminder to give to their students.

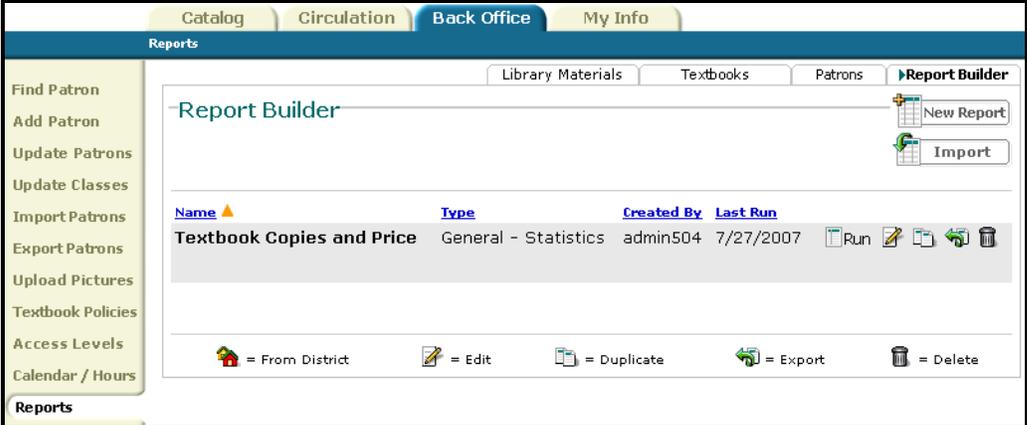
The report should be organized similar to this screen shot when you are complete.

<u>Department Name: Art</u>		
Teacher Name	Class Name	Textbooks Due
Carrol, Glen	Art History	6/4/2007
<u>Department Name: Business Ed</u>		
Teacher Name	Class Name	Textbooks Due
Sidney, Boyd J	Economics	6/4/2007
<u>Department Name: English</u>		
Teacher Name	Class Name	Textbooks Due
Efren, Quin B	English	6/4/2007
<u>Department Name: Language Arts</u>		
Teacher Name	Class Name	Textbooks Due
Efren, Quin B	Mass Communications	6/4/2007

Textbook Manager

Notes

More Options for Report Builder



The screenshot shows the 'Report Builder' interface within the 'Back Office' section of the Textbook Manager. The interface includes a navigation menu on the left with options like 'Find Patron', 'Add Patron', 'Update Patrons', 'Update Classes', 'Import Patrons', 'Export Patrons', 'Upload Pictures', 'Textbook Policies', 'Access Levels', and 'Calendar / Hours'. The main area displays a table of reports with columns for 'Name', 'Type', 'Created By', and 'Last Run'. A report titled 'Textbook Copies and Price' is shown, created by 'admin504' on '7/27/2007'. Below the table are icons for 'From District', 'Edit', 'Duplicate', 'Export', and 'Delete'. The top navigation bar includes 'Catalog', 'Circulation', 'Back Office', and 'My Info'. The 'Report Builder' section has sub-tabs for 'Library Materials', 'Textbooks', 'Patrons', and 'Report Builder', with 'Report Builder' selected. There are 'New Report' and 'Import' buttons in the top right corner.



Talking Points

- Choose a variety of actions on the right side of the page.
- Running the report sends it to the **Report Manager**
- Editing the report allows you to change any or all of the 7 setup options.
- The duplicate icon allows you to duplicate the settings.
- Export allows you to export a report setup to your desktop or another location.
- When you export a report setup, you are saving it as an .xml file. In order for the receiver to use this file, the receiver must import the data file in their **Report Builder**.
- **Import** allows you to share report set ups between sites.

Resources

- **Getting Started with Report Builder** describes how to use **Report Builder** step-by-step.
- **Self paced e-learning module** teaches the basics of creating a report in Report Builder with interactive learning activities.

Online Resources

To further enhance your understanding of Textbook Manager, Follett has created a number of supplemental resources such as white papers, Quick Help sheets, step-by-step procedures, and eLearnings. Below is a list of the resources that apply to each module within this training guide.

Getting Around in Destiny

eLearning Modules:

- Online Help for Textbook Manager (eTBAS150a)
- Getting Around in Destiny Textbook Manager (eTBAS151a)

Online Help:

- Getting Started with Destiny Textbook Manager
- Getting Started as a District Textbook Coordinator

Access Level Permissions

eLearning Modules:

- Access Level Basics (eTADM151b)

Online Help:

- Access Levels Reference Guide
- Access Level Worksheets

Site Configuration Options

eLearning Modules:

Online Help:

- Site Configuration Overview
- Setting up a receipt printer
- Receipt Window

Notes

Updating Class Schedules and Associations

eLearning modules:

- Class Schedules and Textbook Associations
- Class Schedule over Running the class import converter
- Importing Class Schedules

Online Help:

- Setting up Classes
- Assigning a textbook to a class
- Uploading class schedules
- Uploading textbook associations
- Getting started managing class relationships
- Managing departments

Textbook Loan Policies and Periods

Online Help:

- Setting up textbook loan policies
- Quick Help for conditioning textbooks

Reports

eLearning Modules:

- Overdue Notices and Fine History
- Creating Class Lists
- Textbook Checkout Summary
- Creating a Report in Report Builder

Online Help:

- Managing My Favorites
- Generating a Class List
- Generating a Student to Textbook Statistics Report
- Generating a Textbook Checkout Summary
- Generating a Textbook Condition or Status Report
- Generating a Textbook Title and Copy List
- Reports and Notices for Checkouts, Overdues, and Fines

Notes

Searching Your Database

eLearning Modules:

Searching for Textbooks (eTADD150a)

Online Help:

Finding Textbooks in your collection

Adding Textbook Copies

eLearning Modules:

Adding Textbooks at the Site Level (eTDIS150b)

Online Help:

Use the keywords *textbook manager* to access the following documents:

T²-Textbook Titles.pdf

Add-Images to TB and MM.pdf

Distribution

eLearning Modules:

Best Practices for Distributing Textbooks (eTDLU251a)

Searching for Textbooks (eTADD150a)

Check Out to Patrons (eTDIS151b)

Creating Class Lists (eTDIS250a)

Textbook Checkout Summary (eTDIS250b)

Online Help:

Reports and notices for checkouts, overdues, and fines

Checking out textbooks

Setting up classes

Generating a class list

Textbook statistics

Current Checkouts/Fines Report

Setting up textbook loan policies

Quick Help for Checkout to Patron

Notes

Collecting Textbooks

eLearning Modules:

- Best Practices for Collecting Textbooks (eTDLU251a)
- Planning Your Inventory (eTDLU254a)
- Conducting Inventory (eTDLU254b)
- Check In Textbooks (eTDIS151a)
- Managing Textbook Fines (eTDIS152a)
- Overdue Notices and Fine History (eTDIS152b)
- Creating Class Lists (eTDIS250a)

Online Help:

- Reports and notices for checkouts, overdues, and fines
- Generating a Student to Textbook Statistics report
- Checking in textbooks
- Managing fines
- Generating a class list
- Textbook statistics
- Current Checkouts/Fines Report
- Setting up textbook loan policies
- Working with the Patron Status page
- Checking out textbooks (To pay, waive, edit fines)
- Quick Help for assessing textbook fines
- Quick Help for overdue lists
- Quick Help for overdue notices
- Quick Help for textbook inventory

Transferring Textbooks

eLearning Modules:

- An Introduction to Transferring Textbooks (eTDLU252a)
- Performing Textbook Transfers (eTDLU252b)

Online Help:

- Transferring textbooks from one school to another
- Managing your textbook transfers
- Requesting a textbook transfer

Notes

Inventory

eLearning Modules:

- Planning Your Inventory (eTDLU254a)
- Conducting Inventory (eTDLU254b)

Online Help:

- Conducting a textbook inventory
- Textbook inventory reports
- Managing the Lost Copies list
- Including consumables in the inventory
- Quick help for textbook inventory

Measuring Effectiveness

eLearning Modules:

- Building a custom report
- Getting Started with Report Builder – Textbook Reports
- Getting Started with Report Builder – Patron & General Reports

Online Help:

- Creating a Report in Report Builder
- Creating Custom Reports for Textbooks

Report Builder

eLearning Modules:

- Creating a Report in Report Builder
- Creating Custom Reports for Textbooks (eTDLU255a)

Online Help:

- Getting Started with Report Builder

Training Evaluation

<http://www.follettsoftware.com/contactdata>

Textbook Manager

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