



# What's New in Destiny 11.0





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# Destiny 11.0 Features

Welcome to Destiny® 11.0. This new version incorporates many of your suggestions, and we're confident you'll find that the enhanced features and functions of Destiny 11.0 meet all your database needs. This document introduces you to the Destiny 11.0 features available in Destiny® Library Manager™, Destiny® Textbook Manager™, and Destiny® Asset Manager™. We know you'll want to start using these enhancements right away.

## All Destiny Products

*Push Access Levels:* The Destiny Administrator can push all Access Levels to all or a selected group of sites.

*Follett Destiny Mobile Application:* The Follett Destiny Mobile app, version 1.5, provides more patron search capabilities, more patron information, and access to title details through all the library functions.

*Chrome Sounds/Focus Fix:* An issue with circulation sounds for Windows Chrome users is resolved.

## Library Manager

*RDA Compatibility:* Library Manager is compatible with RDA (Resource Description and Access), the new cataloging standard.

*Dashboard:* The new **Dashboard** tab provides administrators with a graphical view of Library Manager reports.

*Increased Visibility of Homeroom Information:* Homeroom information has been added in several places, allowing a quick view of a student's homeroom supervisor.

*Holds Enhancements:* Not just one but several enhancements improve the management and use of holds.

*Added Label for Series:* The new series label helps patrons quickly identify materials that are part of a series.

*Missouri Report Update:* The Missouri Report has been updated to meet the state of Missouri's new reporting requirements.

*New Icons for FollettShelf EBooks:* A new Material Type icon identifies FollettShelf eBooks.

*Option to Turn Off Direct Access to FollettShelf:* A new permission allows you to disable direct access to FollettShelf for Access Levels you select.

*FollettShelf EBook Search Limiter:* The new search limiter allows you to narrow your search to FollettShelf eBooks.

*FollettShelf EBooks Hidden in FollettShelf are Hidden in Destiny:* eBooks that are hidden on your FollettShelf will be hidden in Destiny as well.

*Destiny Quest Mobile:* Enhancements to eBook, holds, and RDA functionality allow users access to even more features from their mobile phones.

## Digital Content Subscriptions

*Push One Search Configuration to Other Sites:* The Destiny Administrator can now push the configuration of One Search to other sites.

*Multiple Sources and Formats in WebPath Express:* The WebPath Express search results display selected limiters including format types and source types.

*Reading Program Service Update Frequency Option:* You can now choose how often Destiny automatically updates Reading Program Service information.

*Cataloging Update for Fountas and Pinnell Guided Reading:* Library searches limited to Fountas and Pinnell levels now include title records cataloged with the term "Guided Reading" in 521 subfield b.

## Textbook Manager

*Price for Fine Calculations:* You can now use either the Replacement Price from the title record or the Purchase Price from the copy record to calculate fines. Destiny can also factor in the condition of the textbook when calculating fines if you set up automatic conditioning in Textbook Policies.

*Increased Visibility of Homerooms:* You can now configure circulation receipts to contain homeroom information.

## Asset Manager

*Documentation Enhancements:* You can now determine whether any documents are associated with an asset description record or an asset item record, and you can limit who can view, add and edit, and delete the documents.

*Historical Notes Searchable/Visible:* In addition to the Asset History report and the Deleted Asset (detailed version) report, a historical notes search limiter is now available when performing an asset search, when editing an asset item, and when running an asset items report in **Report Builder**.

*Option to Include Checked Out Items in Inventory:* You can choose to include checked-out items in an inventory as well as items checked in after the inventory is started.

*Patron Statistics—Historical Report Enhancements:* You can examine the circulation totals of your patrons with the Patron Statistics-Historical Report.

*Price for Fine Calculations:* You can now use either the Replacement Price from the title record or the Purchase Price from the copy record to calculate fines, and you can also choose to factor in the depreciated value of the asset.

*Update Assets—Individual, Batch, and Global Updates:* The enhanced Update Assets features let you perform individual, batch, and global updates at the district and site level on item record fields without opening individual item records.

*Update Patrons—Excuse/Delete Fines:* You can globally excuse/delete fines and refunds assessed for lost or damaged assets.

This document provides a brief description, along with step-by-step instructions if applicable, of the new and updated features and functions in Destiny 11.0. It also notes the permissions and access levels required to access the updated functionalities.

# Destiny (All Products)





## Destiny (All Products)

# Push Access Levels

### Feature Description:

The Destiny Administrator can now push all access levels to sites. Previously, only the Site Administrator access level could be pushed.

**Note:** Access level configuration cannot be pushed to Media Manager sites.

### Feature Information:

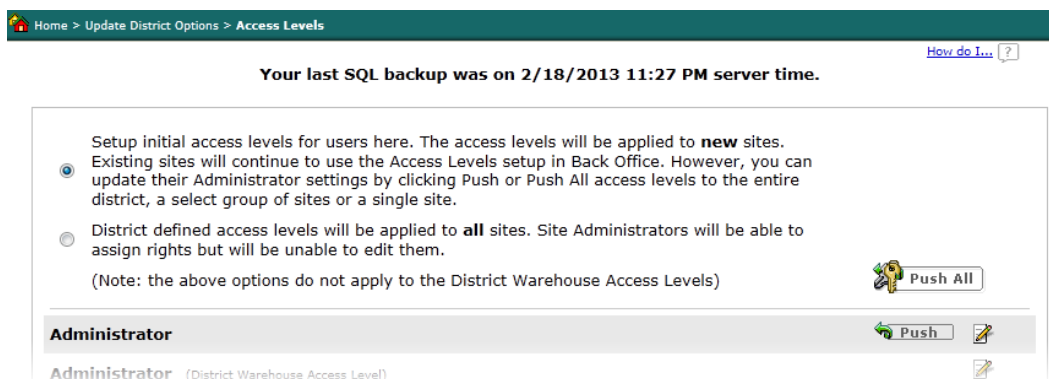
In previous versions of Destiny, a Destiny Administrator had two options for managing access levels:

- Setup initial access levels for users here. The access levels will be applied to new sites. Existing sites will continue to use the Access Levels setup in Back Office. However, you can update their Administrator settings by clicking Push.
- District defined access levels will be applied to all sites. Site Administrators will be able to assign rights but will be unable to edit them.

In version 11.0, the first option has changed. If that option is selected, Destiny Administrators can now push all the access levels (not just the Administrator access level). For this option, a new **Push All** button appears. The on-page text now reads:

**Setup initial access levels for users here. The access levels will be applied to new sites. Existing sites will continue to use the Access Levels setup in Back Office. However, you can update their Administrator settings by clicking Push or Push All access levels to the entire district, a select group of sites, or a single site.**

Navigate to this setting by clicking the **Setup** link on the district welcome screen. On the **Update District Options** screen, click the **District Options** subtab. Click the **Edit** button in the **Access Levels** section.



**Access Level:**

Destiny Administrator

**Importance:**

The District Administrator now has the ability to allow sites to manage their own access levels, but are still able to push district-defined access levels down to all or a selected group of sites. Previously, Destiny allowed either site control with no district interaction (except for pushing the Administrator access level) or district control, which did not allow the sites to add, edit, or delete Access Levels.

## Destiny (All Products)

### Follett Destiny Mobile Application

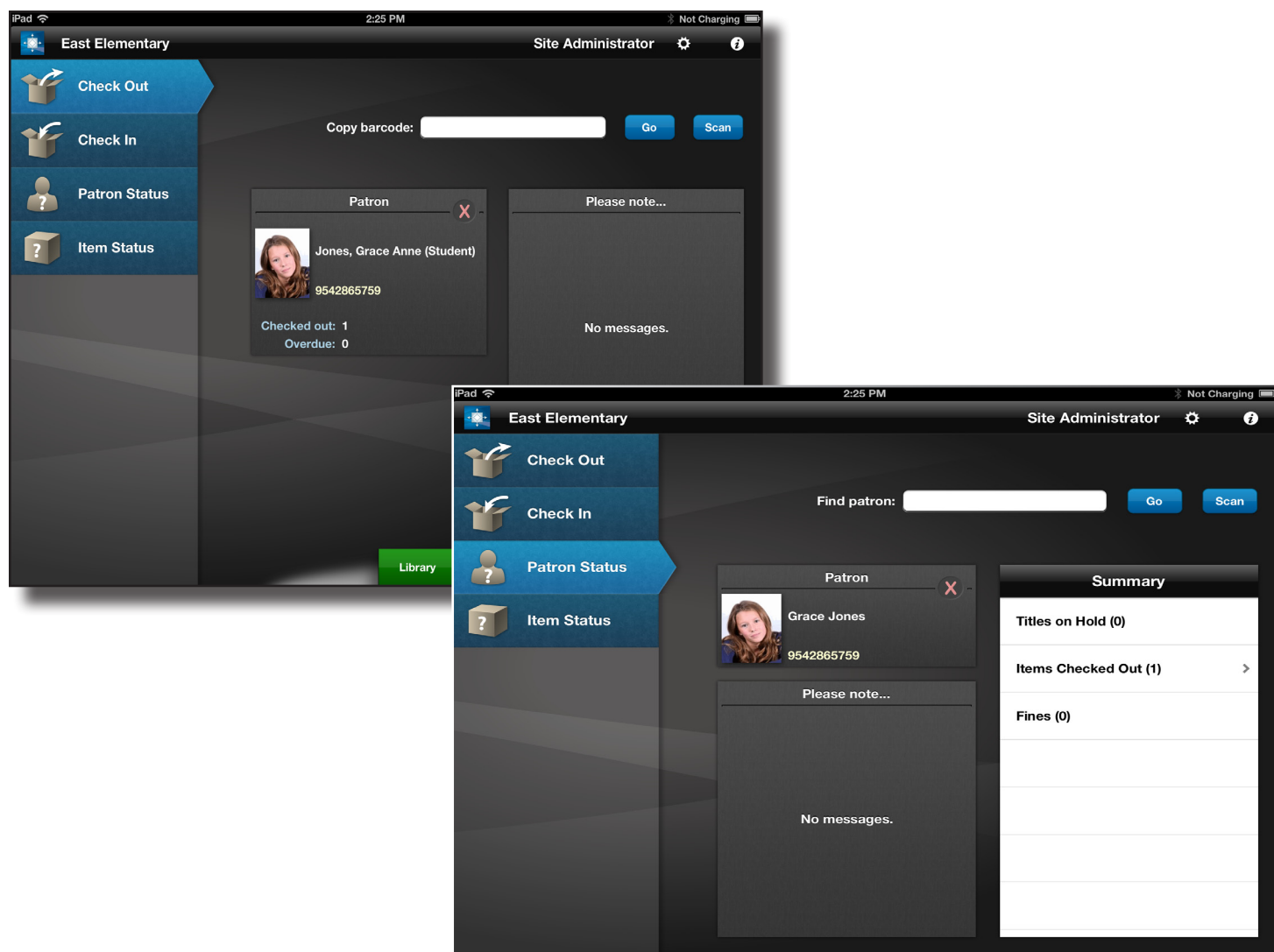
#### Feature Description:

The Follett Destiny Mobile app now allows users to search for patrons by using keywords; toggle between the Check Out and Patron Status functions without losing the current patron record; access title details for library copies through the Check Out, Check In, Item Status, and Patron Status functions; and view patron first and last name, barcode number, homeroom, grade level, and picture, if available.

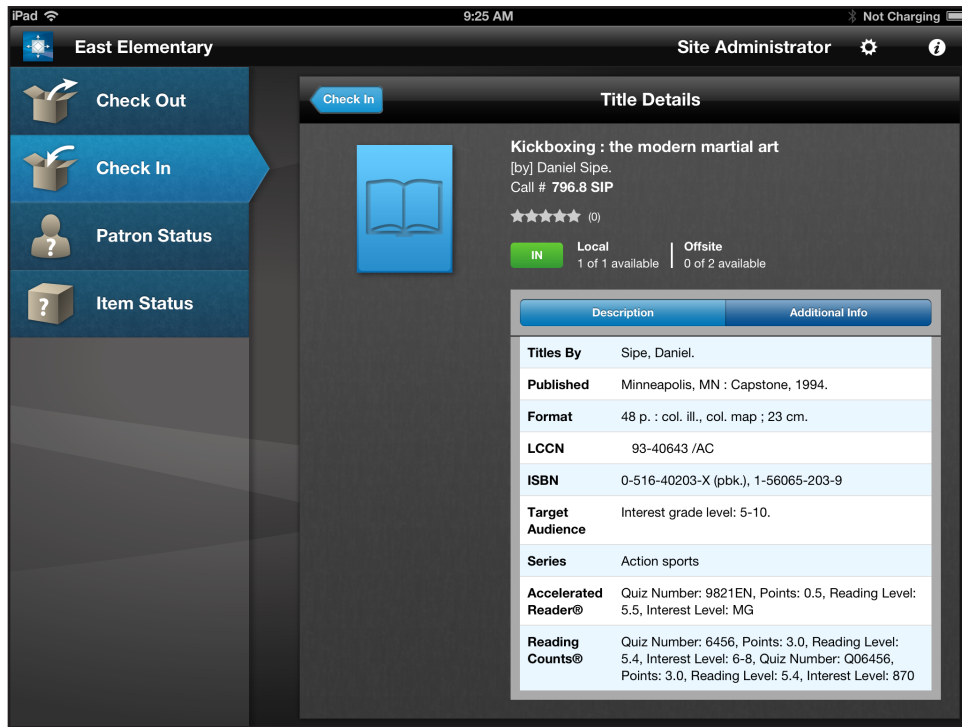
#### Feature Information:

The following features are new in the Follett Destiny Mobile app, version 1.5.

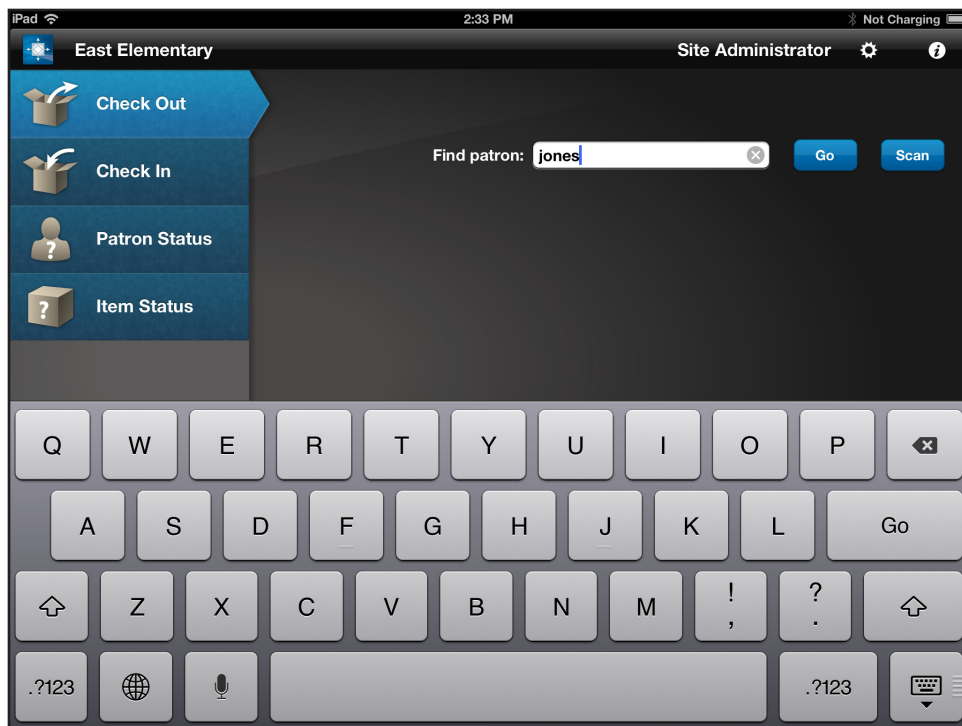
- The current patron record remains on the screen when users toggle from the **Check Out** to the **Patron Status** functions. Important patron notes appear only when the user first retrieves a patron record.



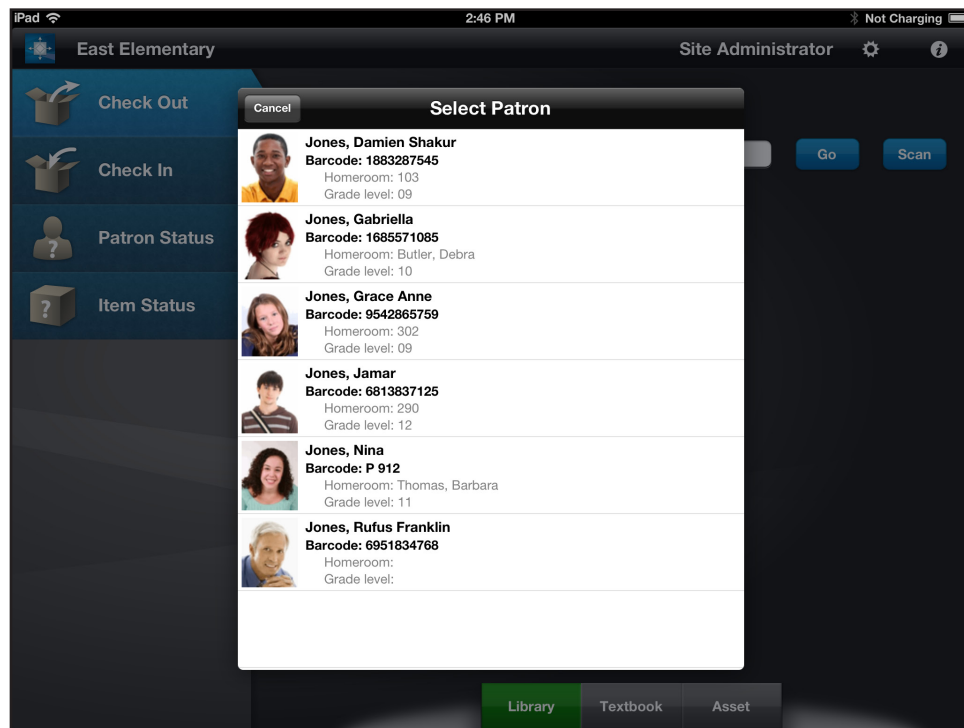
- The **Title Details** for library copies is now accessible in **Check Out**, **Check In**, **Item Status**, and **Patron Status**.



- Users can search for a patron by keyword—namely first, middle, or last name; nickname; grade level; homeroom; username; one of the user-defined fields or District ID—in the **Check Out** or **Patron Status** functions.



- The search results list includes patron pictures, if available. Also, if available, the patron's first name, last name, barcode number, homeroom, and grade level appear in the search results.



## Access Level:

To log in to the Follett Destiny Mobile app, users need at least one of the Destiny permissions below. Once they log in, they see only the functions for the permissions they have in Destiny.

To View Option:	Library Manager Permission	Textbook Manager Permission	Asset Manager Permission
Check In:	Check in library materials	Check in textbooks	Check in assets
Check Out:	Check out library materials	Check out textbooks	Check out assets
Item Status:	View library item status	View textbook item status	View asset item status
Patron Status:	View patron status	View patron status	View patron status

## Importance:

The Follett Destiny Mobile app, version 1.5, provides more patron search capabilities, more patron information, and access to title details through all the library functions.



## Destiny (All Products)

# Chrome Sounds/Focus Fix

### Feature Description:

Customers using Google Chrome for Windows in previous Destiny releases experienced a problem with the cursor not staying in the barcode field for proper scanning in circulation functions. Destiny products use the Chrome QuickTime plug-in to play circulation sounds, and a defect in Chrome's support for QuickTime sounds caused the issue.

With Destiny 11.0, Chrome support under Windows uses a different plug-in (VLC Media Player), which does not expose the Chrome defect and ensures that the cursor stays in the barcode field for proper scanning in circulation transactions.

### Feature Information:

If you use Chrome for Windows, you will want to install this plug-in to ensure that circulation sounds play properly.

To check if it's already installed, type `chrome://plugins` into the address bar in Chrome, find VLC Web Plugin, and make sure it's enabled.

If it is not installed, you can download it from: <http://www.videolan.org/vlc/index.html>

When you install VLC, it asks you to choose which components to install. If you want to use VLC solely as a Chrome plug-in, deselect everything except Media Player, Mozilla Plugin, and ActiveX plugin.

### Access Level:

All Users

### Importance:

This fix corrects the circulation sound issue experienced with previous versions of Destiny and Chrome.





# Destiny Library Manager



## Library Manager

# RDA Compatibility

### Feature Description:

RDA (Resource Description and Access) expands the patrons' ability to find, identify, select, and obtain resources. MARC records in RDA format contain more information as to the content type (Ex. performed music, still image), media type (Ex. audio, video), and carrier type (Ex. videodisc, flipchart). In Destiny Library Manager, you can convert MARC records that follow AACR2 cataloging rules to follow the new RDA cataloging rules.

**Note:** You must convert MARC records one at a time.

### Feature Information:

Several updates to Destiny Library Manager meet the new cataloging standards. All districts that upgrade to Destiny v11.0 will see certain cataloging updates in support of RDA. Districts have the option to choose the RDA cataloging form for additional functionality.

All districts upgrading to Destiny v11.0 will see the following updates:

- Seven additional fields are available in the bibliographic MARC Editor. They appear in the **Add Tag** list.
  - **264 - Production, Publication, Distribution, Manufacture and Copyright Notice (R)** (used instead of a 260 in RDA)
  - **344 - Sound Characteristics (R)**
  - **345 - Projection Characteristics of Moving Images (R)**
  - **346 - Video Characteristics (R)**
  - **347 - Digital File Characteristics (R)**
  - **377 - Associated Language (R)**
  - **883 - Machine-generated Metadata Provenance (R)**
- The **336**, **337**, and **338** fields are added to the bibliographic MARC Editor. The default subfields of **\_a** and **\_2** contain the correct information for each material type.
- The **368**, **378**, and **883** tags are added to the Authority MARC Editor. They appear in the **Add Tag** list.
  - **368 Other Attributes of Person or Corporate Body (R)**
  - **378 Fuller Form of Personal Name (NR)**
  - **883 Machine-generated Metadata Provenance (R)**
- If it is in a title record, the content in the **336**, **337**, and **338** tags appears in the **Publication Info** section of the **Title Details** screen. (Prior to Destiny v11.0, it displayed in the Additional Info section of Title Details screen.) In Destiny Quest and Destiny Quest Mobile, it appears on the **Additional Info** subtab.
- The **Import Titles** logic changed, affecting the merge function.
- The **Import Authority** logic changed.

### Selecting the Preferred Cataloging Form for the District

To change your district's cataloging preference to RDA:

1. Navigate to the district **Back Office** tab, **Configuration** option.
2. Click the **Edit** button next to **Preferred Descriptive Cataloging Form**.
3. Select **RDA**.

**Note:** AACR2 is the default setting.

4. Click the **Save** button.

If the **Preferred Descriptive Cataloging Form** is **RDA**, you will see the following changes:

- A new **Convert** button appears on the **Title Details** and **MARC View** screens of each AACR2 record for users with access to edit titles.
- The tags in the **MARC Editor** are updated to align with RDA.
  - In the Leader, the Cataloging Form, position 18, changes from **a = AACR2** to **i = ISBD punctuation included**.
  - An **040** tag appears, with **rda** in **\_e**. The **\_e** is repeatable.
  - A **264** tag appears in place of the **260** tag. Depending on the information in the **260**, there may be more than one **264** tag.
  - The **336**, **337**, and **338** tags appear, containing content appropriate for the material type. These fields were added to Library Manager v10.0. If you need to change the content, you can select the subfield content from lists. There is no free form text entry for these fields.
- The **Easy Editor** is updated to align with RDA. A new **RDA Types** subtab allows you to manage the **336**, **337**, and **338** tags. This subtab appears for any RDA record, even if your district did not select RDA as the preferred form.
- On the **Title Details** screen, the information in the **336**, **337**, and **338** tags moves from the **Additional Info** section to the **Publication Info** section (except in Destiny Quest).

**Note:** Existing MARC records are not automatically updated to RDA standards. Catalogers can convert existing records to RDA standards one-by-one and import and create new records that comply with RDA (see [Converting an Existing Record to RDA](#) and [Creating a New RDA Record](#) below).

### **Tags for Customers Preferring RDA**

The following RDA bibliographic tags, added in Library Manager v10.0, have been added to the templates for customers who prefer the RDA cataloging form. These three tags contain complete words instead of codes or abbreviations that more fully describe the content, media, and carrier:

**336** tag, RDA **Content Type (R)**, expands on the Form of Item, position 6 of the Leader/06.

**337** tag, RDA **Media Type (R)**, expands on the Category of material, position 00 of the 007, Physical Description.

**338** tag, RDA **Carrier Type (R)**, expands on the Specific material designation, position 01 of the 007, Physical Description. Catalogers can define carrier characteristics further in the newly added **344**, **345**, **346**, and **347** tags.

**Note:** Customers who select RDA, above, do not see any changes in the **Catalog** tab, **Add Title** option, **Edit Templates** subtab. When opening the MARC Editor, however, the Leader is updated, the **245\_h** is gone, the **260** is gone, and the **264**, **336**, **337**, and **338** tags appear.

When a cataloger begins to create a record, selecting the material type, and subtype if necessary, Destiny enters the appropriate content as shown below. The cataloger can change the content by selecting from the list provided. For these fields, there is no free-form text entry.

The other rules are as follows:

- The **336** and **338** are mandatory; the **337** is optional.
- All three tags are repeatable.
- Both indicators are undefined for all three tags.

Here are the default values for each material type:

Artifact	Mixed Material
336 # # _a three-dimensional form _2 rdacontent 337 # # _a unmediated _2 rdamedia 338 # # _a object _2 rdacarrier	336 # # _a other _2 rdacontent 337 # # _a unspecified _2 rdamedia 338 # # _a unspecified _2 rdacarrier
Book	Music (printed)
336 # # _a text _2 rdacontent 337 # # _a unmediated _2 rdamedia 338 # # _a volume _2 rdacarrier	336 # # _a notated music _2 rdacontent 337 # # _a unmediated _2 rdamedia 338 # # _a sheet _2 rdacarrier

Computer File	Picture, Study Print, Photograph, Chart
336 # # _a computer program _2 rdacontent 337 # # _a computer _2 rdamedia 338 # # _a computer disc _2 rdacarrier	336 # # _a still image _2 rdacontent 337 # # _a unmediated _2 rdamedia 338 # # _a other _2 rdacarrier
Electronic Book (eBook)	Sound Recording (musical)
336 # # _a text _2 rdacontent 337 # # _a computer _2 rdamedia 338 # # _a online resource _2 rdacarrier	336 # # _a performed music _2 rdacontent 337 # # _a audio _2 rdamedia 338 # # _a audio disc _2 rdacarrier
Equipment	Sound Recording (nonmusical)
336 # # _a three-dimensional form _2 rdacontent 337 # # _a unmediated _2 rdamedia 338 # # _a object _2 rdacarrier	336 # # _a spoken word _2 rdacontent 337 # # _a audio _2 rdamedia 338 # # _a audio disc _2 rdacarrier
Kit	Serial
336 # # _a other _2 rdacontent 337 # # _a unspecified _2 rdamedia 338 # # _a unspecified _2 rdacarrier	336 # # _a text _2 rdacontent 337 # # _a unmediated _2 rdamedia 338 # # _a volume _2 rdacarrier
Manuscript Language Material	Video
336 # # _a text _2 rdacontent 337 # # _a unmediated _2 rdamedia 338 # # _a volume _2 rdacarrier	336 # # _a two-dimensional moving image _2 rdacontent 337 # # _a video _2 rdamedia 338 # # _a videodisc _2 rdacarrier
Maps, Globes and Atlases	Notes:
336 # # _a cartographic image _2 rdacontent 337 # # _a unmediated _2 rdamedia 338 # # _a volume _2 rdacarrier	# indicates a blank indicator _ indicates a subfield "Unmediated" indicates that no device is required for access.

## Converting an Existing Record to RDA

After selecting **RDA** as the district's preferred cataloging form, you can convert an existing AACR2 record to an RDA record by following the steps below.

1. On the **Title Details** screen for the record you'd like to convert, click the **Convert** button.
2. On the confirmation message, **Are you sure you want to change this record to RDA format?**, click the **Yes** button.

Destiny makes the following changes to the MARC record:

- In the Leader, changes the **Cataloging Form**, position 18, from **a = AACR2** to **i = ISBD** punctuation included.
- Adds an **040** subfield **\_e** (Cataloging Source code) containing **rda**.
- Deletes the **245** subfield **\_h** (Medium).
- Adds a **336** tag with content in subfield **\_a** that is the equivalent of the information that was in the **245** subfield **\_h** and, in subfield **\_2**, **rdacontent**. This tag is required by RDA.
- Adds one or more **338** tags with content in subfield **\_a** that is the equivalent of the information deleted from the **245** subfield **\_h** and enters, in subfield **\_2**, **rdacarrier**. This tag is required by RDA.
- Converts a **260** tag to one or two **264** tags.

**Note:** Whether RDA or AACR2, the subfields **\_a**, **\_b**, and **\_c** basically contain the same information: place of publication, name of publisher, date of publication. For other, less frequently used subfields, please see the Library of Congress website.

- If a **260\_c** contains a single date not preceded by a **c**, the new **264** has a second indicator of **1**, which indicates a publication year.

**Note:** Destiny retrieves the date in this **264\_c** when creating citations in a resource list, generating reports (such as a **Bibliography** or **Collection Age** report), and limiting searches by publication year.

AACR2	RDA
260 ##_a New York : _b Grosset & Dunlap, _c 2010.	264 #1_a New York : _b Grosset & Dunlap, _c 2010.

- If a **260\_c** contains a publication date and a copyright date (such as 2010, c2004), Destiny creates two **264** tags: In addition to the **264** described in the first bullet above, a second **264** contains a second indicator of **4**, which indicates the copyright notice date, and a subfield **\_c** with **copyright <year>**.

**Note:** Destiny retrieves the date in the **264 #4 \_c** for citations in a resource list.

AACR2	RDA
260 ##_a New York : _b Grosset & Dunlap, _c 2010, c2004.	264 #1_a New York : _b Grosset & Dunlap, _c 2010.  264 #4_c copyright 2004.

- If a **260\_c** contains a single date preceded with a c, indicating a copyright date, Destiny creates two **264** tags: The first **264** with a second indicator of **1** has the date enclosed in brackets. The second **264** contains an indicator of **4**, which indicates the copyright notice date, and a subfield **\_c** with **copyright <year>**.

AACR2	RDA
260 ##_a New York : _b Grosset & Dunlap, _c c2010.	264 #1_a New York : _b Grosset & Dunlap, _c [2010]  264 #4_c copyright 2010.

These changes above are all visible in the **MARC Editor**.

- The **Easy Editor** gains a new tab, **RDA Types**, so you can manage the added 336, 337, and 338 tags. The other changes are not visible in the **Easy Editor**.
- To replace the information from the **245\_h** (General Manager Designator) that appeared in brackets after the title on the **Title Details** screen, Destiny retrieves the material type and, if defined, the subtype and inserts it in the same place.

AACR2	RDA
<b>Tom Swift and his electric runabout [Sound recording] by Victor Appleton.</b>	<b>Tom Swift and his electric runabout [Sound / Audio Cassette] by Victor Appleton.</b>

- As noted above, the content in the **336** and **338** tags appear in the **Publication Info** section instead of the **Additional Info** section of the **Title Details** screen.

### Creating a New RDA Record

To create a new RDA compliant title record in the MARC Editor:

- In the MARC editor, select the appropriate **Material Type** and, if applicable, the **Subtype**. If it's not the default, **Book**, Destiny refreshes the content in the **336**, **337**, and **338** fields in addition to that in the Leader and **008**.
- Review the **336**, **337**, and **338** fields. These fields are repeatable. You can add as many as needed to describe the item. To facilitate the new RDA cataloging, the Indicator values, subfields, and subfield contents lists contain only acceptable values, and the subfield information for subfield **\_2** contains the proper RDA entry. You can edit any of these fields or add additional ones:



- a. To edit an existing field, click in the field. The **Edit tag <number>** screen opens. To add a new field, select one from the **Add Tag** list.
  - b. To change the contents of an existing subfield **\_a**, select it from the **Content type term** list. To add another subfield, select the subfield and contents from the lists at the bottom and then click **Add**.
  - c. To rearrange the subfields, click the up and down arrows. To delete one, click the red X. Please note that you cannot delete the last **336** or **338**.
  - d. Click **OK** when you are done.
3. Enter the **Publication Info** in one or more **264** fields, not a **260** field.
  4. Complete the other fields as usual.
  5. Click the **Save Title** button.

Title

Use Easy Editor

Material Type
Book
Subtype
No Subtype Assigned
Add Tag

Leader	000	nam i	
Gen Info	008	130325n	000 0 eng d
LCCN	010	_a Click to add content	Delete
ISBN	020	_a Click to add content	Delete
Cataloging Source	040	_e rda	Delete
Dewey Class Num	082	0 4 _a Click to add content	Delete
ME: Pers Name	100	1 _a Click to add content	Delete
		_d Click to add content	
Title	245	1 0 _a Click to add content	
		_b Click to add content	
		_c Click to add content	
Var Form of Title	246	3 _a Click to add content	Delete
Edition	250	_a Click to add content	Delete
Publication	264	1 _a Click to add content	Delete
		_b Click to add content	
		_c Click to add content	
Phys Description	300	_a Click to add content	Delete
		_b Click to add content	
		_c Click to add content	
Content Type	336	_a text	
		_2 rdacontent	
Media Type	337	_a unmediated	Delete
		_2 rdamedia	
Carrier Type	338	_a volume	
		_2 rdacarrier	
Series Statement	490	1 _a Click to add content	Delete
General Note	500	_a Click to add content	Delete

To create an RDA compliant title record in the **Easy Editor**:

1. On the **Brief Title** subtab of the **Easy Editor**, select the appropriate **Material Type** and, if applicable, the **Subtype**.
2. Complete the fields on the first five tabs, as usual.
3. On the **RDA Types** subtab, review the content for the **Content Type**, **Media Type**, and **Carrier Type**. These fields are repeatable. You can add as many as needed to describe the item. To facilitate the new RDA cataloging, the lists contain only acceptable values. Although not visible on the subtab, Destiny enters the correct indicator values and creates a subfield **\_2**, containing the proper RDA entry, for each. You can add additional fields and delete any existing. To change the existing content, you must create a new field with the desired content and then delete the incorrect one.
  - a. In any of the three fields, select the content for the field, and then click **Add**.
  - b. In the list directly below it, delete the unwanted field by clicking the **delete** icon. Please note that you cannot delete the last **Content Type** or **Carrier Type**.
4. Click the **Save Title** button.

The screenshot shows the 'Easy Editor' interface for creating an RDA compliant title record. The 'RDA Types' subtab is active, displaying three repeatable fields: Content Type, Media Type, and Carrier Type. Each field has a dropdown menu, an 'Add' button, and a list of selected items with a delete icon. The Content Type field has 'text' selected, Media Type has 'unmediated', and Carrier Type has 'volume'. A warning message 'Title has unsaved changes.' is displayed at the top and bottom of the main area. At the bottom right, there are 'Save Title' and 'Cancel' buttons, with 'Check punctuation on Save' checked.

### Editing an Authority Record

To add a new tag to an authority record:

1. Navigate to the **Catalog** tab, **Manage Authority** option.
2. Search for the authority record you wish to edit.
3. Select the **MARC View** subtab.
4. Click the **Add Tag** button.
5. Enter 368, 378, or 883 in the **Insert** box and click the **OK** button.
6. On the **Add tag <number>** screen, select the desired subfield and contents from the lists.
7. Click the **Add** button.
8. Continue adding subfields as needed. To rearrange the subfields, click the up and down arrows. To delete one, click the red X.
9. Click the **Save** button.

### Importing Titles

The only change to the importing titles process is if you are merging records where the incoming record matches an existing record and the best title is not in your preferred MARC cataloging form.

- If the incoming record is not deemed the better record, the existing record remains as is.
- If the incoming record is deemed the better record and the incoming record is in your preferred MARC cataloging form, the incoming record is merged with the existing record as usual.
- If the incoming record is deemed the better record, but the incoming record is not in your preferred MARC cataloging format, the incoming record is converted to the preferred MARC cataloging form and merged with the existing record.
  - If your preferred form is RDA and the incoming record is AACR2, the changes to the record are those described in the Converting an Existing Record to RDA section above.
  - If your preferred form is AACR2 and the incoming record is RDA, the changes to the record are as follows:
    - Position 18 of the Leader, **Cataloging Form**, position 18, changes from i = **ISBD punctuation included** to a = **AACR2**.
    - Any **040\_e rda** subfields are removed.
    - If it is in the existing record, a **245\_h** tag is moved to the incoming record.
    - A **260** tag is added to the incoming record, containing information from the 264.
    - The **264**, **336**, **337** (if existing), and **338** tags remain.

- Any other tags, such as subjects and added entries, are merged in as usual.
- Any copies are moved to the incoming record, as usual.
- The unchosen record is then deleted, as usual.

If the incoming record is not a match, it is added to the database as is, regardless of the preferred cataloging form.

### Merging Duplicate Titles through a Resource List

The only change to the process of merging duplicate titles through a resource list is when the best title is not in your preferred MARC cataloging form.

- If the preferred form is RDA and the best title is AACR2, the changes to the title record are those listed in the Converting an Existing Record to RDA section above.
- If the preferred form is AACR2 and the best title is RDA, the changes to the title record are as follows:
  - Position 18 of the Leader, **Cataloging Form**, position 18, changes from i = **ISBD punctuation included** to **a=AACR2**.
  - Any **040\_e rda** subfields are removed.
  - If it is the unchosen record, a **245\_h** tag is moved to the best title record.
  - A **260** tag is added to the best title record, containing information from the 264.
  - The **264**, **336**, **337** (if existing), and **338** tags remain.
  - Any other tags, such as local subjects and added entries, are merged in as usual.
  - Any copies are moved to the best title record, as usual.
  - The unchosen title records are then deleted, as usual.

### Performing an Alliance Plus Online Recon

There is no change to your procedure. The changes are in the matching of records.

- Alliance Plus tries to match the preferred cataloging form.
- If Alliance Plus has a matching record in the customer's preferred MARC cataloging form, the existing record is replaced as usual.
  - AACR2: If your preferred form is AACR2, the incoming record will be AACR2.
  - RDA: If your preferred form is RDA and the incoming record is AACR2, the changes to the record are those listed above in the Converting an Existing Record to RDA section.

The definition of a brief record—for a recon only—changes for RDA records. Because a brief record converted to RDA gains two or three 33X tags, the existing definition cannot be applied to RDA records. This updated definition appears with the options on the **Recon** page:

- Only brief library records
  - AACR2 records without tags from 305 to 899
  - RDA records without tags from 305 to 321 and from 340 to 899
- All library records

### Adding a Title From Alliance Plus Online

There is no change to your procedure. The changes are in the retrieval and updating of records.

- Along with the search term, Destiny sends Alliance Plus the district's preferred cataloging form.
- Alliance Plus tries to return only matching records that are in your preferred cataloging form.
  - AACR2: Alliance Plus has AACRD versions of all its records and sends those to customers who prefer AACR2.
  - RDA: If Alliance Plus does not have one or more RDA records that match the search term, it sends AACR2. If the returned record is not RDA, you can manually convert the record after saving it.

### Access Level:

#### Selecting the Preferred Cataloging Form for the District

District Library Administrator

Permissions:

**Manage Library Materials for the District**

#### Converting an Existing Record to RDA

District Library Administrator, Site Administrator, Library Administrator

Permissions:

**Manage Titles, Edit** or **Manage Library Materials for the District**

#### Creating a New RDA Record

District Library Administrator, Site Administrator, Library Administrator

Permissions:

**Manage Titles, Edit** or **Manage Library Materials for the District**

#### Editing an Authority Record

District Library Administrator, Site Administrator, Library Administrator

Permissions:

**Manage Authority**

#### Importing Titles

District Library Administrator, Site Administrator, Library Administrator

Permissions:

**Import titles/copies**

Merging Duplicates through Resource Lists

District Library Administrator, Site Administrator, Library Administrator

Permissions:

**Merge copies from duplicated library titles**Performing an Alliance Plus Online Recon

District Library Administrator, Site Administrator, Library Administrator

Permission:

**Enhance records with Alliance Recon**Adding a Title From Alliance Plus Online

District Library Administrator, Site Administrator, Library Administrator

Permission:

**Add Title****Importance:**

On March 31, 2013, the Library of Congress will no longer create MARC records according to AACR2 rules; they will comply with RDA. Destiny Library Manager has been updated for compatibility with the new standards.

## Library Manager

# Dashboard

### Feature Description:

The **Dashboard** tab allows users with appropriate access level permission to view five reports at a glance: **Library Circulation Statistics by Day**, **Library Circulation Statistics by Month**, **Library Circulation Statistics by Year**, **Library Holds**, and **Library Circulation Overdues**.

After you configure the Dashboard to display the reports you select, full-color graphical representations or text versions of the reports appear immediately upon login. Additionally, you can integrate Destiny Library Manager's Dashboard with Destiny Textbook Manager and/or Destiny Asset Manager, if you have those products.

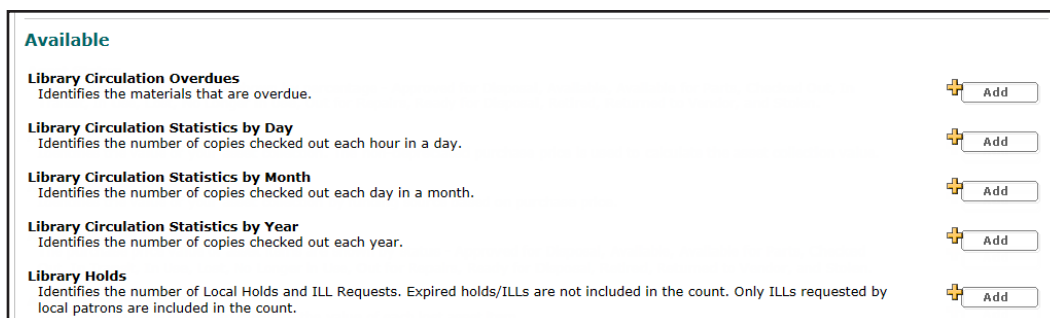
### Feature Information:

The Dashboard reports display the following information:

- **Library Circulation Statistics by Day:** a line graph that displays total checkouts for each hour of the current day.
- **Library Circulation Statistics by Month:** a line graph that displays total checkouts for each day of the current calendar month.
- **Library Circulation Statistics by Year:** a line graph that displays total checkouts for each month of the current statistical year.
- **Library Holds:** a textual display of the number of local requests for pending and ready holds and reserves and ILL requests to other libraries. Below the numbers is a link, **Click here to view requests**, to view and process the local hold, reserve, and ILL requests.
- **Library Circulation Overdues:** a textual display of the number of overdue materials. Below the number is a window that displays the **Overdue Materials** report.

To configure the Dashboard:

1. Navigate to the **Dashboard** tab.
2. Click the **Configure** button.
3. Click the **Add** button for each report you wish to display on the Dashboard.
4. Click the **Save** button to save the changes made to the Dashboard.



To arrange the order of reports on the Dashboard:

1. Navigate to the **Dashboard** tab.
2. Click the **Configure** button.
3. Click the **Move** icons accompanying each report to arrange its position in the Dashboard display. Clicking the up blue arrow moves a report up one position in the list, while clicking the down blue arrow moves the report down one position in the list. The **Item Position** legend shows the arrangement of the reports on the Dashboard.
4. Click the red **X** remove icon to remove a report from the Dashboard.
5. Click the **Save** button to save the Dashboard changes.

Selected

Library Circulation Overdues

Identifies the materials that are overdue.

Library Circulation Statistics by Day

Identifies the number of copies checked out each hour in a day.

Library Circulation Statistics by Month

Identifies the number of copies checked out each day in a month.

Library Circulation Statistics by Year

Identifies the number of copies checked out each year.

Library Holds

Identifies the number of Local Holds and ILL Requests. Expired holds/ILLs are not included in the count. Only ILLs requested by local patrons are included in the count.

Save

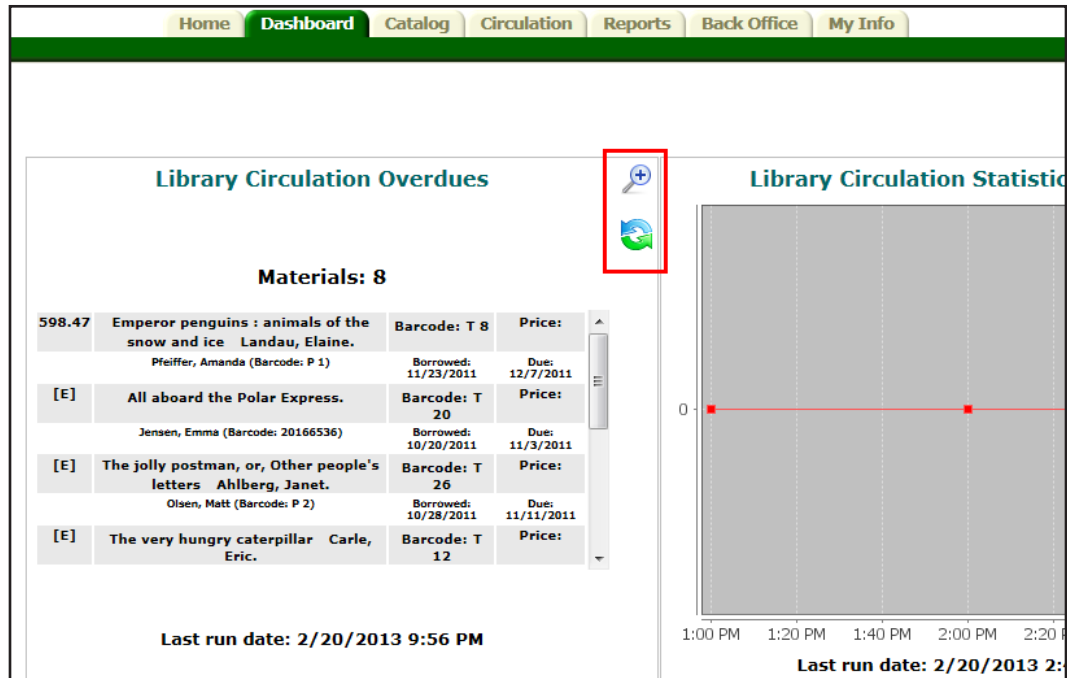
Cancel

Item Position	1	2
	3	4
	5	6
	7	8

To magnify the graphics or to refresh the Dashboard report data:

1. Navigate to the **Dashboard** tab.
2. Click the **Magnify** icon next to the graphic you wish to enlarge. The magnified version displays in a new window.
3. To update a report's data, click the report's **Refresh data** icon. Under the data display, the date and time of the last update appears.





## Access Level:

The Destiny Administrator, Library Administrator, and Site Administrator have access to configure and view the Dashboard by default.

Permission:

## Display Library Dashboard

## Importance:

The Dashboard provides a quick graphical or textual view of the most current circulation statistics, as well as holds and overdue materials information.



## Library Manager

# Increased Visibility of Homeroom Information

### Feature Description:

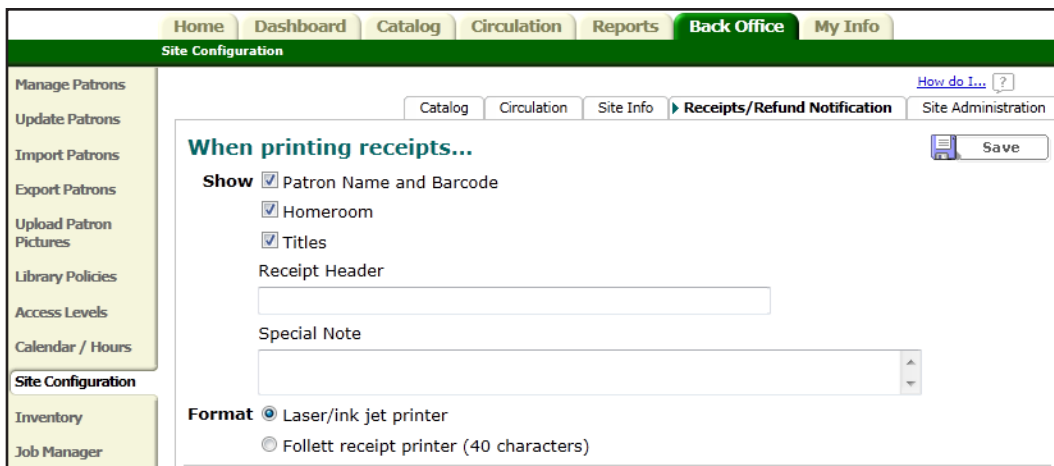
Homeroom information was added in several places. You can now configure circulation receipts to contain homeroom information, add homeroom information to hold notices, view homeroom information in **Check In** alert messages, and email students' ready hold notices to homeroom supervisors.

### Feature Information:

#### Circulation Receipts

To configure circulation receipts to include homeroom information:

1. Navigate to the **Back Office** tab, **Site Configuration** option.
2. Select the **Receipts/Refund Notification** subtab.
3. Select the **Homeroom** checkbox.
4. Click the **Save** button.



The screenshot shows the Library Manager interface. The top navigation bar includes tabs: Home, Dashboard, Catalog, Circulation, Reports, Back Office (selected), and My Info. Below this is the 'Site Configuration' section. On the left is a sidebar menu with options: Manage Patrons, Update Patrons, Import Patrons, Export Patrons, Upload Patron Pictures, Library Policies, Access Levels, Calendar / Hours, Site Configuration (selected), Inventory, and Job Manager. The main content area is titled 'When printing receipts...' and has sub-tabs: Catalog, Circulation, Site Info, Receipts/Refund Notification (selected), and Site Administration. A 'How do I...?' link is in the top right. The 'Show' section has three checked checkboxes: 'Patron Name and Barcode', 'Homeroom', and 'Titles'. Below these are text input fields for 'Receipt Header' and 'Special Note'. The 'Format' section has two radio buttons: 'Laser/ink jet printer' (selected) and 'Follett receipt printer (40 characters)'.

The homeroom information appears under the school name at the top of the receipt.

McHenry Middle School  
 Homeroom: Mrs. James  
 2/22/2013 2:56 PM  
 Daniels, Luke  
 P 21881

Previous Checkouts  
 -----  
 LM: Charley's first night  
 Barcode: T 70  
 Due Date: 2/25/2013  
 LM: Goldilocks and the three dinosaurs  
 Barcode: T 68  
 Due Date: 2/25/2013

### Hold Notices

To include homeroom information when you are printing a hold notice:

1. Navigate to the **Reports** tab, **Library Reports** option, **Hold Notices** link.
2. From the **Select & sort by** drop-down list, select a method for identifying hold notice recipients.
3. Select the **Print Homeroom** checkbox.

**Note:** This checkbox is not available if Homeroom is selected from the **Select & sort by** drop-down list. Homeroom is included by default.

4. Edit the salutation and message, if you wish.
5. Next to **Distributed**, select the **Internally** option.
6. Click the **Run Notices** button.

Home Dashboard Catalog Circulation **Reports** Back Office My Info

Library Reports > Hold Notices

My Favorites

Library Reports

Patron Reports

Report Builder

Report Manager

Select & sort by Patron Name from to

☒ Print Homeroom

☒ Display title for library materials

Message Dear Patron's Name:

One or more of the copies you wanted is available in the library. Please bring this notice to the library as soon as possible.

Distributed ☐ Internally ☒ Via email Homeroom

Send To All Homerooms Update

Provide sender information

Display Name Librarian

Email Jdean@email.com Test Email

Run Notices

The homeroom information appears under the school name at the top of the receipt.

**Ready Hold Notice**

McHenry Middle School 2/11/2013

Homeroom: Mrs. James  
 Emma Jensen  
 Barcode: 20166536

Dear Emma Jensen:

One or more of the copies you wanted is available in the library. Please bring this notice to the library as soon as possible.

Holds ready for pickup

Title	Call Number	Barcode	Hold Expires
So you want to be president?	973/.09/9	T 25	2/11/2013

To include homeroom information when you are emailing a hold notice to homeroom supervisors:

1. Navigate to the **Reports** tab, **Library Reports** option, **Hold Notices** link.
2. Select the **Print Homeroom** checkbox.

**Note:** This checkbox is not available if **Homeroom** is selected from the **Select & sort by** drop-down list. Homeroom will be included by default.

3. Edit the salutation and message, if you wish.
4. Next to **Distributed**, select the **Via email** option. Then select **Homeroom** from the drop-down list.
5. If you are not sending emails to all homerooms, click the **Update** button to select the homeroom(s) to include. Click the **OK** button to return to the **Hold Notices** screen.
6. Click the **Run Notices** button.


**Select & sort by** Patron Name ▼ from  to


☒ Print Homeroom  
☒ Display title for library materials


**Message** Dear  Patron's Name:   

One or more of the copies you wanted is available in the library. Please bring this notice to the library as soon as possible.

**Distributed** ☐ Internally ☒ Via email Homeroom ▼

**Send To** All Homerooms  Update

**Provide sender information**  
 Display Name   
 Email   Test Email ?

 Run Notices

The homeroom supervisor receives an email notice for each student that has a ready hold.

## Check In Alert Messages

Ready hold alert messages now include homeroom information.

**Note:** If a hold notice is printed via the link in the alert message, the homeroom information is included. If the notice is emailed via the email link, the email does not contain homeroom information.

## Access Level:

### Circulation Receipts

Permissions:

To configure circulation receipts to include homeroom information: **Change library site preferences**

To print a circulation receipt: **Check out library materials** and/or **View library fines**

### Hold Notices

Permission:

**Generate library collection reports**

### Check In Alert Messages

Permission:

**Check in library materials**

## Importance:

The addition of homeroom information in several places allows a quicker way to identify the students' homeroom supervisor. The ability to email homeroom supervisors hold notices directly through Destiny is an efficient way to communicate to students that material is available.

## Library Manager

# Holds Enhancements

### Feature Description:

Library Manager v11.0 introduces several enhancements to improve the management and use of holds.

- Patrons can place a hold on multiple copies of the same title if the new access level permission is enabled.
- Patrons cannot place a hold on hidden copies unless they have the appropriate permission. Hidden copies no longer appear in the **Specific Copy** list on the **Hold Request** screen in **Circulation**.
- Patrons cannot place a hold on available copies unless they have the appropriate permission.
- Patrons cannot place a hold on a lost copy, or a title, if all the copies are marked lost.
- Patrons cannot place a hold on off-site copies unless they have the appropriate permission.
- Library staff can relate, or group, title records so any copy of a title in a group can fulfill a hold placed on another title in the group.

### Feature Information:

#### Placing Holds on Multiple Copies of the Same Title in the Catalog

With the appropriate access level permission, patrons can place holds on multiple copies of the same title.

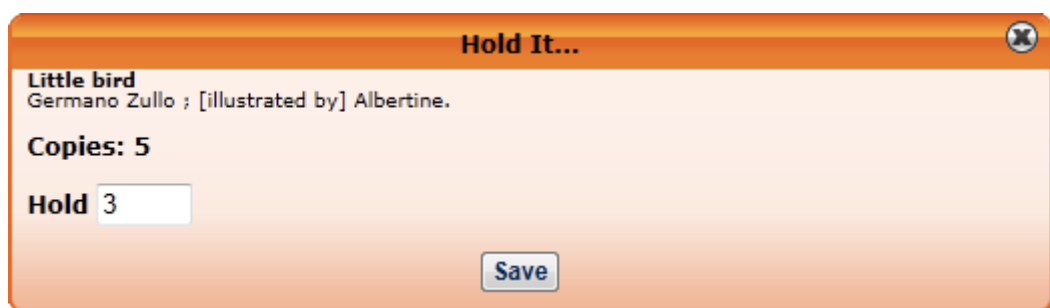
To place a hold on multiple copies of the same title from the Catalog:

1. Click the **Hold It!** button on the **Title Details** screen.
2. Leave the drop-down list selection as **As soon as possible**.
3. Enter the number of copies you wish to hold in the **Hold** field.
4. Click the **Save** button.



To place a hold on multiple copies of the same title in Destiny Quest:

1. Click the **Hold It!** button from the **Title Details** window.
2. Enter the number of copies you wish to hold in the **Hold** field.
3. Click the **Save** button.



**Note:**

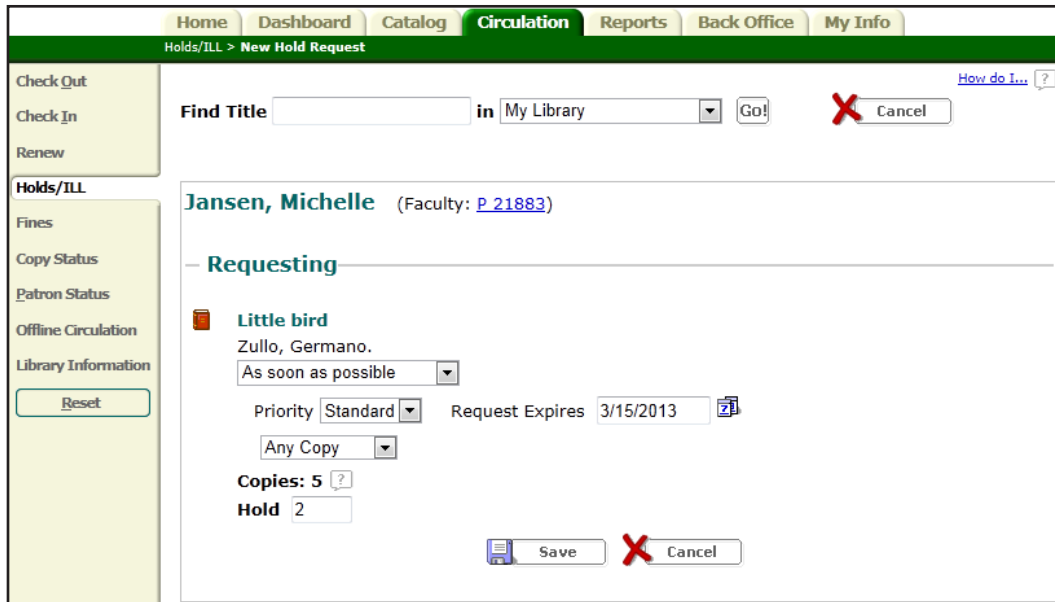
- The **Copies** count does not include lost copies.
- The **Copies** count does not include hidden copies unless the patron has permission to see hidden copies.
- The **Copies** count does not appear at all if all copies of a title are lost. The patron can only place a hold on the title.
- If all copies of the title are lost, the following message appears: **Your hold request could not be placed. All copies of this title are lost. Please contact your librarian to place a hold on this title.**

Placing Holds on Multiple Copies of the Same Title in Circulation

To place a hold on multiple copies from Circulation:

1. From the **Holds/ILL** screen, select the **Add Hold** button.
2. Retrieve the title requested by the patron.  
**Note:** If all copies of a title are lost, library staff cannot retrieve the title, and the following message appears: "**<Title> not found. You may want to repeat your search at "All Participating Libraries."**
3. In the **Requesting** section, leave the drop-down list selection as **As soon as possible**.
4. Adjust the **Priority** drop-down list and **Request Expires** field, if desired.
5. Leave the next drop-down list as **Any Copy**.
6. Enter the number of copies you wish to hold in the **Hold** field.
7. Click the **Save** button.





#### Note:

- The **Copies** count does not include lost copies.
- The **Copies** count does not include hidden copies unless the patron has permission to see hidden copies. Staff cannot retrieve hidden copies if the patron does not have permission to see them.
- The **Copies** count does not appear at all if all copies of a title are lost. Staff can only place a single hold on a title.
- If the library included a title in a related titles group, the **Copies** count includes copies of related titles.

#### Preventing Holds on Hidden, Available, and/or Off-site Copies

If the appropriate permissions are disabled, you can prevent patrons from placing holds on hidden, available, and/or off-site copies.

#### Relating Titles

You can relate, or group, title records, so that any copy of a title in a group can fulfill a hold placed on another title in the group. This functionality is not visible to the patron. Destiny considers all copies of all titles in a **Related Titles** group to be equal candidates for fulfilling a hold request placed on any one of the titles in the group.

To create a group of related titles:

1. Navigate to the **Catalog** tab, **Update Titles** option, **Relate Titles** subtab. In the **Enter new group name** field, enter a name for the group.
2. Click the **Add** button.

The top screenshot shows the 'Relate Titles' interface. The left sidebar contains links: Library Search, Destiny Quest, WebPath Express, Digital Resources, Standards Search, Add Title, Resource Lists, Import Titles, Export Titles, Titlwave, and Update Titles. The main area has a header 'Relate titles to fulfill holds...' and a sub-header 'Enter new group name'. Below this, it says 'There are no groups defined.' At the bottom, there is a search bar with the text 'Oh, the Places You'll Go!' and an 'Add' button.

The bottom screenshot shows the 'Find Titles for "Oh, the places you'll go!"' search results screen. It has a search bar with the text 'Oh, the places you'll go!' and a 'Go!' button. Below the search bar, it says 'Selected Titles' and 'There are no titles in this group.' At the bottom, there are buttons for 'Save' and 'Cancel'.

3. To identify titles for the group, enter a title keyword in the **Find Titles for <group name>** field. Then click **Go** button.

4. In the search results list, click the **Add** button adjacent to the titles you wish to add to the group. The title then moves to the **Selected Titles** list, which contains the title, author, and first ISBN.

**Note:** A title can only belong to one group.

5. Repeat steps 2–5 until you have selected all desired titles to group.

6. To remove a title from the group, click the **delete** icon next to the title.

7. Click the **Save** button.

After a group is set up, the related copies may fulfill pending holds. If so, their hold status becomes **On Hold** and an alert message appears.

During the **Title Import** process when Destiny checks to see whether an incoming copy fulfills a hold, it also looks to see whether the copy can fulfill a hold on a related title, if available.

Related titles information appears on the **Title Details** screen if the title is in a group. A **Manage** button appears for users with the appropriate access level permission. Clicking the **Manage** button brings you to the **Edit <group name>** screen.

The screenshot shows the 'Related Titles' screen. It has a header 'Related Titles' and a sub-header 'Group Name: Oh, the Places You'll Go!'. Below this, there is a 'Manage' button. The main area contains a table with the following data:

Title	Author	ISBN
Oh, the places you'll go!	Seuss, Dr.	

## Access Level:

### Placing Holds on Multiple Copies of the Same Title in the Catalog

The ability to hold multiple copies of a title in the Catalog is enabled by default for the Site Administrator, Library Administrator, and Teacher access levels.

**Note:** The Site Administrator may need to adjust the **Max Holds** setting for those patron types allowed to hold multiple copies. The default setting for **Max Holds** is five copies.

Permissions:

**Place hold for self from Catalog**

**Place multiple holds for self**

### Placing Holds on Multiple Copies of the Same Title in Circulation

The ability to hold multiple copies of a title in Circulation is enabled by default for the Site Administrator, Library Administrator, and Teacher access levels.

Permissions:

**Place multiple holds for patrons**

**Add/edit/delete holds for patrons**

### Preventing Holds on Hidden, Available, and/or Off-site Copies

The ability to place holds on available items is enabled by default for the Destiny Administrator, Site Administrator, Library Administrator, Staff, Teacher, and Patron access levels. The permission must be disabled to prevent holds on Available copies.

The permission that allows ILL requests is enabled by default for the Destiny Administrator, Site Administrator, Library Administrator, Staff, Teacher, and Patron access levels. The permission must be disabled to prevent holds on off-site copies.

Permissions:

**Place holds on available items**

**Place ILL for self from Catalog**

**See local hidden materials**

### Relating Titles

The ability to relate titles is enabled by default for the Destiny Administrator and Site Administrator access levels.

Permission:

**Relate library titles**

**Importance:**

The enhancements to holds functionality allow you to further customize holds options to meet your patron and library needs. The ability to place holds on multiple copies allows patrons such as teachers to hold multiple copies to meet their lesson plan needs. The ability to prevent holds on available copies saves library staff time, because they do not have to pull copies from the shelves. Preventing holds on lost copies prevents issues with patrons in case the copy is not replaced. Similarly, disabling availability of hidden copies for holds prevents issues with patrons placing holds on materials that are not available for checkout. Lastly, the ability to group title records (such as those with the same title and author but different ISBNs) allows more holds to be fulfilled.

## Library Manager

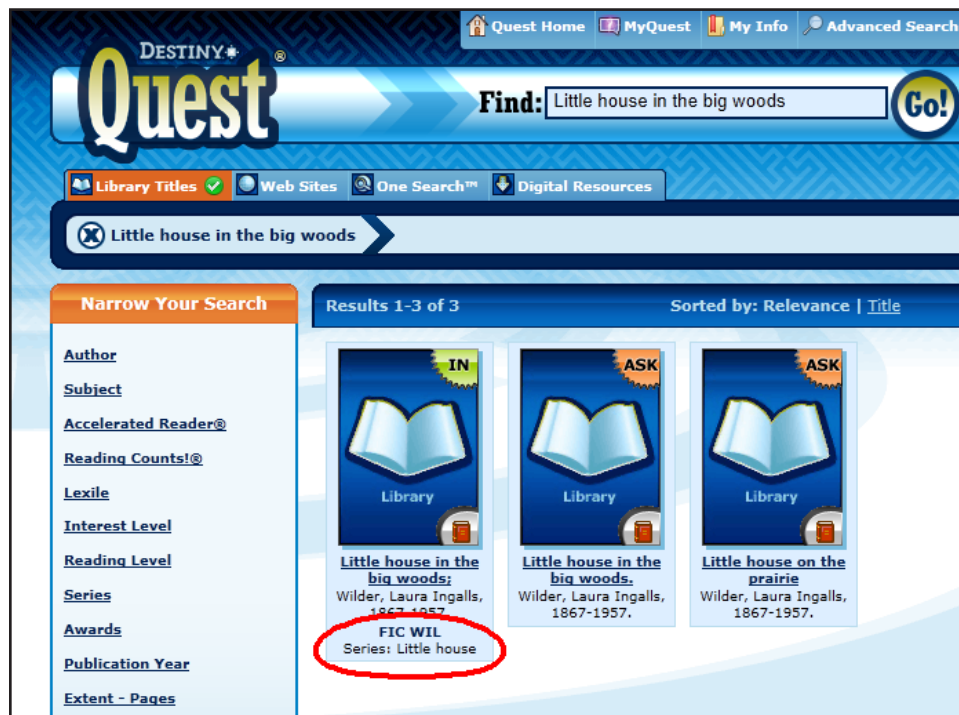
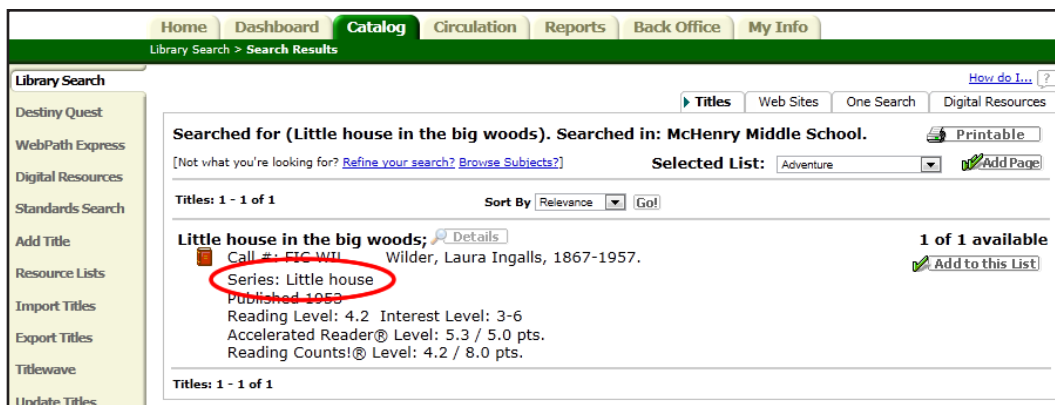
### Added Label for Series

#### Feature Description:

When library materials have information in the 440 (obsolete tag; still supported in Destiny) or 490 MARC tags, the series information displays under the call number in a search results list or resource list. In Destiny v11.0, a series label was added, making the information easier to identify.

#### Feature Information:

Any list that displays a title that is part of a series displays a **Series** label before the series information.



**Access Level:**

All users

**Importance:**

The new label makes it easier to recognize materials that are part of a series in search results and resource lists.

## Library Manager

### Material Type Enhancements

#### Feature Description:

In Destiny Library Manager v11.0, some of the parenthetical descriptions were removed from Material Types and some subtypes were added. In addition, if your district chose **RDA** as the **Preferred Cataloging Form** (see the RDA Compatibility section of this document), the Material Type in the **Title Details** may display differently.

#### Feature Information:

Some parenthetical descriptions have been removed from Material Types:

- For **Book, (monograph)** no longer appears.
- For **Artifact, (fossil, rock, toy, etc.)** no longer appears.
- For **Kit, (book and nonmusical cassette)** no longer appears.
- For **Serial, (printed, periodical, etc.)** no longer appears.
- For **Video, (film, filmstrip, transparency)** no longer appears.

Some Material Type subtypes were added:

- For **Book**, two new subtypes are available: **Large print** and **Braille**.
- For **Computer File**, two new subtypes are available: **Game** and **Interactive Multimedia**.
- For **Video**, three new subtypes are available: **Playaway View**, **Podcast**, and **Streaming Video**.

**Note:** **Podcast** also appears under **Sound Recording** as it can be either audio or video.

If your district's **Preferred Cataloging Form** is **RDA**, the contents of the RDA Title Details Display column below appear in brackets in Destiny in place of the contents of the former **245\_h** tag.

Material Type	Subtype	RDA Title Details Display
Artifact	---	Artifact
Book	No Subtype Assigned	Book
Book	Braille	Book/Braille
Book	Hardcover	Book/Hardcover
Book	Large Print	Book/Large Print
Book	Paperback	Book/Paperback
Book	Picture Book	Book/Picture Book
Book	Reference—Dictionary	Book/Reference—Dictionary
Book	Reference—Encyclopedia	Book/Reference—Encyclopedia
Book	Reference—Other	Book/Reference—Other

Material Type	Subtype	RDA Title Details Display
Book	Other	Book/Other
Computer File	No Subtype Assigned	Computer
Computer File	Archive	Computer/Archive
Computer File	Document	Computer/Document
Computer File	Executable	Computer/Executable
Computer File	Game	Computer/Game
Computer File	Interactive Multimedia	Computer/Interactive Multimedia
Computer File	Media File	Computer/Media File
Computer File	Other	Computer File/Other
Electronic Book (eBook)	---	eBook
Equipment	---	Equipment
Kit	---	Kit
Manuscript Language Material	---	Language
Maps, Globes and Atlases	No Subtype Assigned	Map
Maps, Globes and Atlases	Atlases	Map/Atlases
Maps, Globes and Atlases	Globes	Map/Globes
Maps, Globes and Atlases	Maps	Map/Maps
Maps, Globes and Atlases	Other	Map/Other
Mixed Material	---	Mixed
Music (printed)	---	Music
Picture, Study Print, Photograph, Chart	---	Graphic
Serial	No Subtype Assigned	Serial
Serial	Journal	Serial/Journal
Serial	Magazine	Serial/Magazine
Serial	Newspaper	Serial/Newspaper
Serial	Other	Serial/Other
Sound Recording (musical)	No Subtype Assigned	Recording



Material Type	Subtype	RDA Title Details Display
Sound Recording (musical)	Audio Cassette	Recording/Audio Cassette
Sound Recording (musical)	Compact Disc	Recording/Compact Disc
Sound Recording (musical)	Digital Audio Tape	Recording/Digital Audio Tape
Sound Recording (musical)	DVD-A	Recording/DVD-A
Sound Recording (musical)	MiniDisc	Recording/MiniDisc
Sound Recording (musical)	MP3	Recording/MP3
Sound Recording (musical)	MP4	Recording/MP4
Sound Recording (musical)	Podcast	Recording/Podcast
Sound Recording (musical)	Super Audio CD	Recording/Super Audio CD
Sound Recording (musical)	Other	Recording/Other
Sound Recording (nonmusical)	No Subtype Assigned	Sound
Sound Recording (nonmusical)	Audio Cassette	Sound/Audio Cassette
Sound Recording (nonmusical)	Compact Disc	Sound/Compact Disc
Sound Recording (nonmusical)	Digital Audio Tape	Sound/Digital Audio Tape
Sound Recording (nonmusical)	DVD-A	Sound/DVD-A
Sound Recording (nonmusical)	MiniDisc	Sound/MiniDisc
Sound Recording (nonmusical)	MP3	Sound/MP3
Sound Recording (nonmusical)	MP4	Sound/MP4
Sound Recording (nonmusical)	Playaway	Sound/Playaway
Sound Recording (nonmusical)	Podcast	Sound/Podcast
Sound Recording (nonmusical)	Super Audio CD	Sound/Super Audio CD
Sound Recording (nonmusical)	Other	Sound/Other

Material Type	Subtype	RDA Title Details Display
Video	No Subtype Assigned	Video
Video	Blu-ray Disc	Video/Blu-ray Disc
Video	DVD	Video/DVD
Video	Film	Video/Film
Video	Filmstrip	Video/Filmstrip
Video	HD-DVD	Video/HD-DVD
Video	Playaway View	Video/Playaway View
Video	Podcast	Video/Podcast
Video	Sony ProDATA	Video/Sony ProDATA
Video	Streaming Video	Video/Streaming Video
Video	Transparency	Video/Transparency
Video	VHS	Video/VHS
Video	Vidcast	Video/Vidcast
Video	Video CD	Video/Video CD
Video	Other	Video/Other

**Access Level:**

All users

**Importance:**

These changes better reflect the material types in use in libraries and comply with RDA.

## Library Manager

# Missouri Report Update

### Feature Description:

The state of Missouri changed the reporting requirements for its libraries. A new **Missouri Report** is available in Destiny Library Manager to meet the new reporting requirements. You now need to run only one report. The existing **Missouri Report** was renamed the **Missouri Time Sensitive Dewey Reports**.

### Feature Information:

To configure and generate a **Missouri Report**:

1. Navigate to the **Reports** tab, **Library Reports** option.
2. If you are a district library materials manager, select a library **Site** from the drop-down list.
3. Select the **Configure** subtab.
4. Select the correct collection for each call number prefix.  
**Note:** EBooks can be counted as either Fiction or Visual.
5. If you are a district library materials manager, you can push this setup to one or all library sites in the district. To do so, make your selection from the **Apply these settings at** drop-down list and click the **Push** button.
6. Click the **Save Setup** button.
7. Return to the **Reports** tab.
8. Click the **Run Report** button.

The report includes the average age and copy count for each of the three collections.

- **Fiction:** The Copy Count includes the total number of fiction materials (all countable). Destiny calculates the Average Age by adding copyright dates of all materials included in the count and dividing by the number of volumes reported.
- **Reference and Nonfiction:** The Copy Count includes the total number of materials assigned a Dewey Decimal classification number for Reference/Nonfiction. Destiny calculates the Average Age by adding copyright dates of all materials included in the count and dividing by the number of volumes reported.
- **Visual:** The Copy Count includes the total number of items that require equipment to view. Visuals include materials such as DVDs, video tapes, slides, and digital streaming.

**Note:** Averages include only titles that have copyright dates.

	Age	Collection
	Average Age	Copy Count
Fiction	2003 [10 yrs.]	827
Reference and Nonfiction	2002 [11 yrs.]	432
Visual		-

The table below shows the difference between the new **Missouri Report** and the previous one that has been retained in Destiny, renamed to **Missouri Time Sensitive Dewey Reports**.

Report	Missouri Report	Missouri Time Sensitive Dewey Reports (2008–2011 report for MSDE)
<b>Fiction</b>	<ul style="list-style-type: none"> <li>Total number of fiction materials</li> <li>Average copyright date</li> </ul>	Collection Statistics — Summary
<b>Reference and Nonfiction</b>	<ul style="list-style-type: none"> <li>Total number of materials assigned a Dewey number for Reference/ Nonfiction</li> <li>Average copyright date</li> </ul>	<ul style="list-style-type: none"> <li>Dewey range</li> <li>Total Holdings</li> <li>Holdings with prefix</li> <li>Holdings with Dewey (no more than 5 copies counted per title)</li> <li>Number Older</li> <li>Number Newer</li> <li>% Newer</li> </ul>
<b>Visual</b>	Total number of items that require equipment to be viewed (was included with nonfiction)	<ul style="list-style-type: none"> <li>Dewey range</li> <li>Total Holdings</li> <li>Holdings with Prefix</li> <li>Number Older</li> <li>Number Newer</li> <li>% Newer</li> </ul>
<b>Professional</b>	No requirement	<ul style="list-style-type: none"> <li>Dewey range</li> <li>Total Holdings</li> <li>Holdings with Prefix</li> <li>Number Older</li> <li>Number Newer</li> <li>% Newer</li> </ul>

### Access Level:

Site Administrator, Library Administrator

Permission:

**Generate library collection reports**

### Importance:

This report was updated to help librarians meet new reporting requirements in the state of Missouri.



## Library Manager

# New Icons for FollettShelf EBooks

### Feature Description:

A new Material Type icon for FollettShelf eBooks differentiates FollettShelf eBooks from other eBooks. In addition, to distinguish Unlimited Simultaneous Access FollettShelf eBooks, new availability indicators display.

### Feature Information:

The FollettShelf eBook Material Type icon displays on the **Title Details** screen and any screen that displays a FollettShelf eBook in a list.



The FollettShelf eBook Unlimited Availability icon appears in Destiny Quest search results when unlimited copies are available. In the Destiny Classic interface, the text **Unlimited copies** displays instead of **In**, **Out**, or **Ask**.



### Access Level:

All users

### Importance:

The new FollettShelf eBooks indicators help you and your patrons quickly identify materials as FollettShelf eBooks. You can also quickly see which materials are Unlimited Simultaneous Access FollettShelf eBooks.





## Library Manager

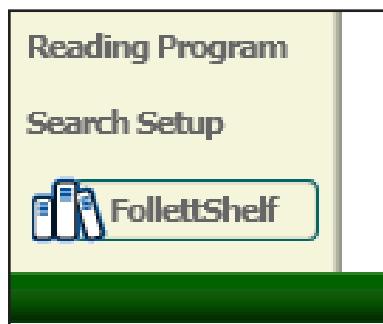
### Option to Turn Off Direct Access to FollettShelf

#### Feature Description:

You have the option to remove the **FollettShelf** button from the **Catalog** side menu and the **FollettShelf** link from the Destiny Quest top menu based on access level.

#### Feature Information:

A new permission was added that gives you the option to remove direct access to FollettShelf by access level.



#### Access Level:

All users

#### Permission:

**Access FollettShelf directly**

#### Importance:

If you don't want some of your patrons, like guests, to access FollettShelf via the **FollettShelf** button in the Destiny Classic interface or the **FollettShelf** link in Destiny Quest, you can now disable those features by access level.



## Library Manager

# FollettShelf EBook Search Limiter

### Feature Description:

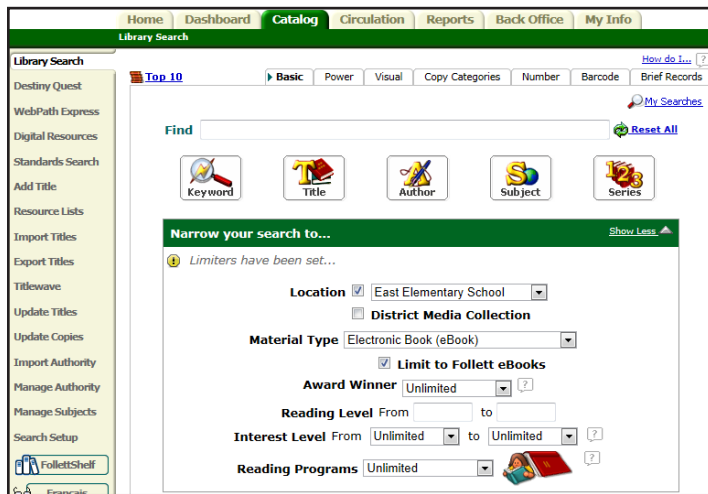
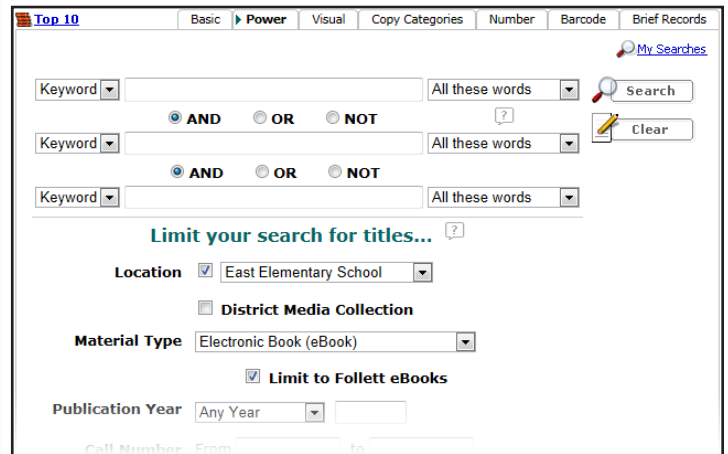
A new limiter is available that allows you to search just for FollettShelf eBooks.

### Feature Information:

Available in Basic and Power searches in Destiny Classic and Basic and Advanced searches in Destiny Quest, the new limiter can also be set up in Visual searches.

To limit a search to FollettShelf eBooks in a Basic or Power search:

1. From the **Library Search** screen, enter a search term.
2. Select **Electronic Book (eBook)** from the **Material Type** drop-down list.
3. Select the **Limit to Follett eBooks** checkbox.
4. Click the **Search** button.

To configure a Visual search button to limit results to FollettShelf eBooks:

1. From the **Search Setup** screen, enter a search term.
2. Select **Electronic Book (eBook)** from the **Material Type** drop-down list.
3. Select the **Limit to Follett eBooks** checkbox.
4. Click the **Save** button.

Home Dashboard **Catalog** Circulation Reports Back Office My Info

Search Setup > Add Button to "Home"

☒ Button is visible in Visual Search ?

**Name**  ?

**Change Image**   ?

**Action** ?

☐ **Website URL**

☐ **Category**  
Select a category ▼

☐ **Public List**  
Select a Public List ▼

☒ **Power Search**

Keyword ▼  All these words ▼

☒ **AND** ☐ **OR** ☐ **NOT** ?

Keyword ▼  All these words ▼

☒ **AND** ☐ **OR** ☐ **NOT**

Keyword ▼  All these words ▼

**Award Winner** Unlimited ▼ ?

**Reading Level** From  to

**Interest Level** From Unlimited ▼ ?

to Unlimited ▼

**Reading Programs** Unlimited ▼ ?

**Limit your search...**

**Look in** East Elementary School ▼

**Material Type** Electronic Book (eBook) ▼

☒ **Limit to Follett eBooks**

**Publication Year** Any Year ▼

**Call Number** From  To

**Circulation Type** All Circulation Types

☐ **Include Online Resources** ?

To limit a search to FollettShelf eBooks in a Destiny Quest search:

1. Enter a search term and click the **Go!** button.
2. From the **Narrow Your Search** options, choose **Format**.
3. From the list that appears, select **Follett eBooks**.



To limit a search to FollettShelf eBooks in a Destiny Quest Advanced search:

1. Enter a search term.
2. In the **Limit my search to...** section, select **Format** from the drop-down list.
3. From the drop-down list that appears, select **Electronic Books**.
4. Select the **Limit to Follett eBooks** checkbox.
5. Click the **Go!** button.



**Access Level:**

All users

**Importance:**

The new search limiter allows you to narrow search results to FollettShelf eBooks.

## Library Manager

# FollettShelf eBooks Hidden in FollettShelf are Hidden in Destiny

### Feature Description:

When a FollettShelf Update takes place, FollettShelf eBook title records that are hidden in FollettShelf and have no local copies in Destiny are removed from that local library's catalog.

### Feature Information:

To remove eBook titles marked as Hidden in FollettShelf from the local library's catalog, you must complete the following:

- Hide the unwanted titles in FollettShelf.
- Delete any local copies of the unwanted FollettShelf eBooks.

The next FollettShelf Update, whether started manually or automatically, removes any hidden FollettShelf ebook title record that has no local copies from that library's catalog.

Keep in mind that removing the title does not delete the title. When a title is removed, Destiny disassociates the title from the library. A disassociated title remains in the district collection for other libraries to use, but it no longer appears in the search results of local searches, which effectively hides FollettShelf eBook titles at sites that do not have copies.

### Access Level:

Site Administrator, Library Administrator

Permissions:

**Allow FollettShelf administration**

**Manage Copies, Delete**

### Importance:

You may wish to hide titles at specific sites. For example, you may not want elementary students to see high school level eBooks. Now books that are hidden in your FollettShelf will be hidden in Destiny, as well.





## Library Manager

### Destiny Quest Mobile v1.6

#### Feature Description:

Enhancements to Destiny Quest Mobile in the areas of eBooks, RDA, and holds allow you to access more functions from your mobile phone. In addition, you can now rate the app in its app store.

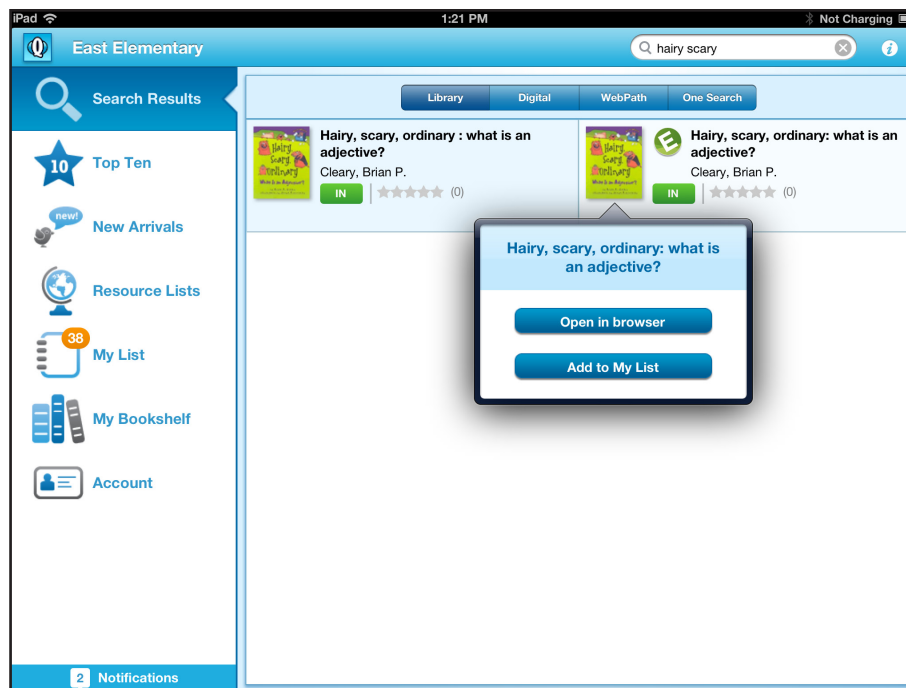
#### Feature Information:

##### EBooks

- In Destiny Quest Mobile search results, the FollettShelf eBook Unlimited Availability icon appears when unlimited copies are available instead of **In**, **Out**, or **Ask**.

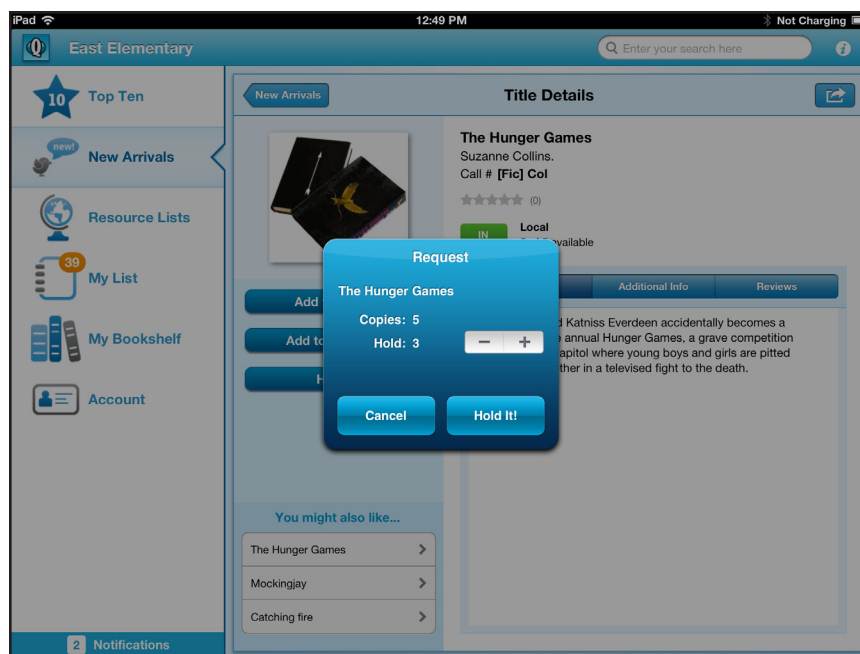


- Patrons can add and remove FollettShelf eBooks in their **My List**.



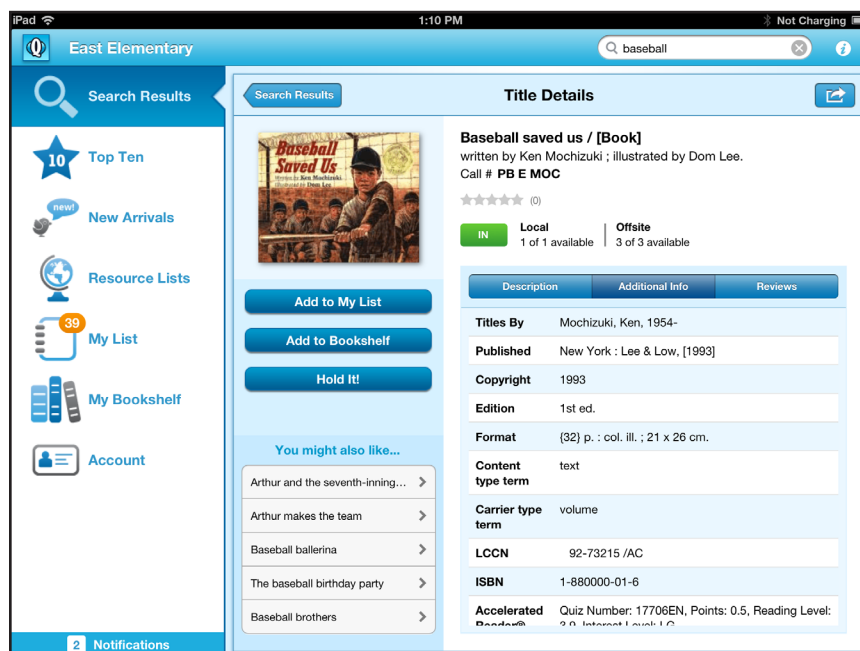
## Holds

Users with the appropriate access level permission can place a hold on multiple copies of the same title.



## RDA

The new RDA information now displays when you tap **Additional Info** from the **Title Details** screen. The information includes: Content type term (336), Media type term (337), and Carrier type term (338). It also displays publishers from the title record because RDA rules now allow for more than one publisher.



### Ratings

You can now rate the Destiny Quest Mobile app in its store. After 10 searches, a message appears asking you to rate the app. You have three options: **Rate the app, No Thanks** (the messages does not reappear), **Remind me later** (the message reappears after another 10 searches). A **Rate Destiny Quest** link also appears on the **About** screen.

### Access Level:

All users

### Importance:

These enhancements reflect the enhancements made in Destiny v11.0 to eBook, holds, and RDA functionality. The Ratings feature allows you to provide valuable feedback about the app.



# Digital Content Subscriptions



## Digital Content Subscriptions

# Push One Search Configuration to Other Sites

### Feature Description:

The Destiny Administrator can configure One Search at one site and push that configuration to other sites.

### Feature Information:

To push One Search configuration, the Destiny Administrator needs to complete the following steps:

1. Log in as the Destiny Administrator.
2. On the district **Welcome** screen, click the **Setup** button in the upper right corner.
3. Select the **District Options** tab.
4. Click the **Edit** button adjacent to One Search Database Information.

Use the drop-down list to select the source site from the first list.

If you need to configure or review the configuration of the source site, click **Configure**.

1. Select the receiving sites, site type, or district from the **Push Configuration to** drop-down list.
2. Click **Go**.
3. A confirmation message appears listing the receiving sites. Click **Yes** to proceed.

A **Push completed** message opens, showing the number of sites processed, the number of successful updates, and the site name as well as the reason if an update fails.

### Access Level:

Only the Destiny Administrator can push a One Search configuration.

Permission:

**Set up One Search**

### Importance:

Many districts purchase subscriptions to various databases for the entire district. The One Search configuration feature provides a simple way to enter authentication information once, and then apply it to all the schools in the district, which eliminates the need for you to enter the same information many times.





## Digital Content Subscriptions

### Multiple Sources and Formats in WebPath Express

#### Feature Description:

The WebPath Express search results display all the format types and source types that are defined for a website. When a user limits the search results by either Format (including animation, eBook, interactive, and video) or Source (including encyclopedias, magazines, and primary source material), the search results include any website with the appropriate selections, including websites with multiple formats or sources, as long as one of the selections is a match.

#### Feature Information:

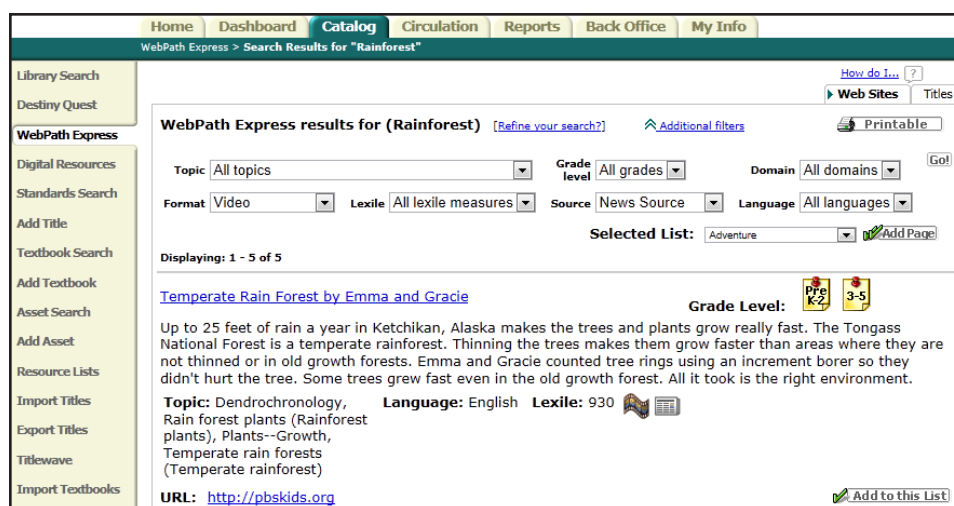
To view multiple format types and source types in WebPath Express or Library Search:

1. Perform a search—Basic, Power, or Standards.
2. Click the **Web Sites** tab when the search results appear.
3. In the limiter section at the top of the Search Results list, select a **Format**, or **Source**, or both.
4. Click **Go**.
















#### In Destiny Quest:

1. Perform a search—Basic or Advanced.
2. Hover over a search result.
3. Select **Format Type** or **Source Type** from the **Narrow Your Search** list.
4. Select the Type you want.
5. When the search results appear, select the other limiter, if desired.

All the websites that are assigned the selected format type or source type appear.



## Format Type and Source Type Icons

Icon	Format Type	Icon	Source Type
	Animation		Dictionary or Thesaurus
	Audio		Encyclopedia
	Biography		Magazine
	eBook		Map/Atlas
	Educational Game		News source
	Image collection		Primary source material
	Interactive		
	Music		
	Video		

### Access Level:

The Site Administrator must activate WebPath Express access.

Permission:

### Search WebPath Express

### Importance:

WebPath Express users can limit their search to websites based on source, format, or both and find all appropriate websites.

## Digital Content Subscriptions

### Reading Program Service Frequency Update Option

#### Feature Description:

If you subscribe to a Reading Program Service (Accelerated Reader, Reading Counts!, Lexile, or Fountas and Pinnell), Destiny automatically enhances library records with reading program information to help students find books and materials that match their reading and comprehension levels. Previously the automatic updates were set to occur once a month. You can now specify the frequency of the updates.


#### Feature Information:

##### Accelerated Reader and Reading Counts!


To change the frequency of Accelerated Reader and/or Reading Counts! updates:

1. Navigate to the **Back Office** tab, **Site Configuration** option, **Site Info** subtab.
2. In the **Days between Accelerated Reader updates** and/or **Days between Reading Counts! updates** field(s), enter a number between 1 and 99.
3. Click the **Save** button at the top of the screen. The **Next Scheduled Update: <date time>** reflects the new interval.


☒ **Use Reading Program Service (RPS) - AR/RC**

☒ **Accelerated Reader Enterprise subscriber** 


Days between Accelerated Reader updates

AR Master Quiz File 

Last Updated: [2/24/2013 2:11 AM](#)  
Next Scheduled Update: 3/6/2013 2:11 AM

☒ **Reading Counts! Enterprise subscriber** 

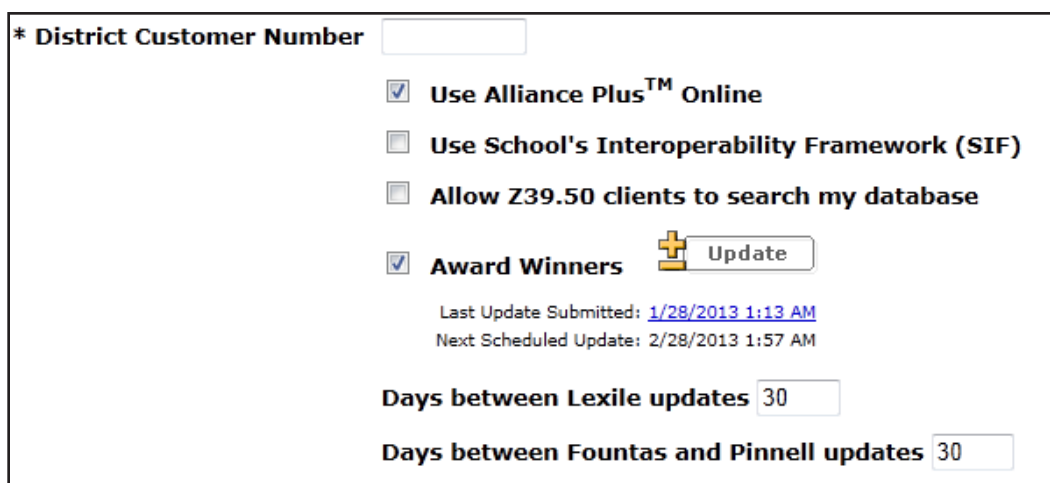
Days between Reading Counts! updates

RC Master Quiz File 

### Lexile and Fountas and Pinnell

To change the frequency of Lexile and/or Fountas and Pinnell updates (must be logged in as the Destiny Administrator):

1. Navigate to the **Setup** link.
2. On the **Update District Sites** screen, click the **Edit** button next to the district name.
3. In the **Days between Lexile updates** and/or **Days between Fountas and Pinnell updates** field(s), enter a number between 1 and 99.
4. Click the **Save** button at the top or bottom of the screen.




\* District Customer Number

☒ Use Alliance Plus™ Online

☐ Use School's Interoperability Framework (SIF)

☐ Allow Z39.50 clients to search my database

☒ Award Winners  Update

Last Update Submitted: [1/28/2013 1:13 AM](#)

Next Scheduled Update: 2/28/2013 1:57 AM

Days between Lexile updates

Days between Fountas and Pinnell updates

### Access Level:

#### Accelerated Reader and Reading Counts!

The Site Administrator has access to perform these configurations.

#### Lexile and Fountas and Pinnell

The Destiny Administrator has access to perform these configurations.

### Importance:

You can now schedule your Reading Program Service(s) to update information more or less frequently.

## Digital Content Subscriptions

# Cataloging Update for Fountas and Pinnell Guided Reading

### Feature Description:

Catalogers have the option of entering the term "Guided Reading" instead of one of the existing options for Fountas and Pinnell terms ("fountas," "pinnell," "fp," "f&p," and "f & p") in subfield **b** of the **521** tag.

**Note:** These terms are case sensitive. The indicators are 8 and #, as usual.

### Feature Information:

Library searches limited to Fountas and Pinnell levels now include title records cataloged with the term "Guided Reading" in **521** subfield **b**.

### Access Level:

All users

### Importance:

Search results include materials that are within the selected level range and that have any of the following in the **521** subfield **b** tag: Guided Reading, fountas, pinnell, fp, f&p, or f & p.



# Destiny Textbook Manager





## Textbook Manager

# Price for Fine Calculations

### Feature Description:

You can now use either the Replacement Price from the title record or the Purchase Price from the copy record to calculate fines. Destiny can also factor in the condition of the textbook when calculating fines if you set up automatic conditioning in Textbook Policies.

### Feature Information:

To select use of the Replacement Price from the title record or the Purchase Price from the copy record to calculate fines:

1. Navigate to the **Back Office** tab, **Site Configuration** option, **Circulation** subtab.
2. Locate the Textbook Options: **Create fines using...** section.
3. Select either the **Replacement price from title**, which is the default selection, or the **Purchase price from copy** radio button.
4. Select the **Prorate fine amount based on copy condition** checkbox if you want Destiny to factor in the condition of the textbook and your school has set up automatic conditioning.
5. Click the **Save** button to save the changes made to the Site Configuration options.

### Textbook Options

#### Circulation

Allow textbooks to be checked out... ?

☒ To Patron  
☒ By Class  
☒ To Teacher

☒ Allow consumable textbooks to be checked out ?  
☒ Allow textbooks to circulate to all patrons in the district ?  
☒ Alert during check out if patron already has current check out of the same textbook ?

#### Fines

☒ Automatically create fine for lost textbook materials ?

Create fines using... ?

☒ Replacement price from title  
☐ Purchase price from copy

☐ Prorate fine amount based on copy condition ?

To turn on automatic conditioning:

1. Navigate to the **Back Office** tab, **Textbook Policies** option, **Loan Periods** subtab.
2. Click the **Edit Policies** button if **Automatically Demote Conditioning** is set to **No**.
3. Check the **Automatically demote the condition of textbooks based on the number of times they are circulated** checkbox.
4. Change the **Demoted After...** fields, as appropriate.
5. Click the **Save** button to save the changes made to the **Textbook Policies** options.

Circulation	
Max Checkouts	999
Overdue to Lost	N/A
Block on Fines/Overdues	No

---

Conditioning	
Automatically Demote Condition	Yes
Condition Value	Demoted After...
New	100% 1 circulation
Good	75% 1 circulation
Fair	50% 1 circulation
Poor	25% 1 circulation
Unusable	0%

The fine amount assessed when you create or assess a fine type based on % **of Cost** reflects the selections made in Site Configuration.

When a copy is marked Lost, a message displays the fine assessment, which is calculated based on the selections in Site Configuration.

For example, if your school selects **Replacement Price** and **Prorate fine amount** in Site Configuration and in the **Back Office** tab, **Textbook Policies** option Automatically Demote Conditioning is set to Yes, a textbook with a Replacement Price of \$100.00 in Fair condition, which depreciates at 50%, has a lost fine amount calculated at \$50.00.

**Note:** If the selected price does not exist in the record, Destiny uses the other price. However, if neither price exists, a fine is not assessed, which is existing functionality.

### Access Level:

The Site Administrator or Textbook Administrator must set up the Site Configuration options. Users who will add textbook fines or assess lost copy fines must have the proper permission enabled.

Permissions:

**Change textbook site preferences**

**Add textbook fines** (requires View textbook fines)

### Importance:

Destiny Textbook Manager, Destiny Library Manager, and Destiny Asset Manager now use the same process to calculate fines.



## Textbook Manager

# Increase Visibility of Homerooms

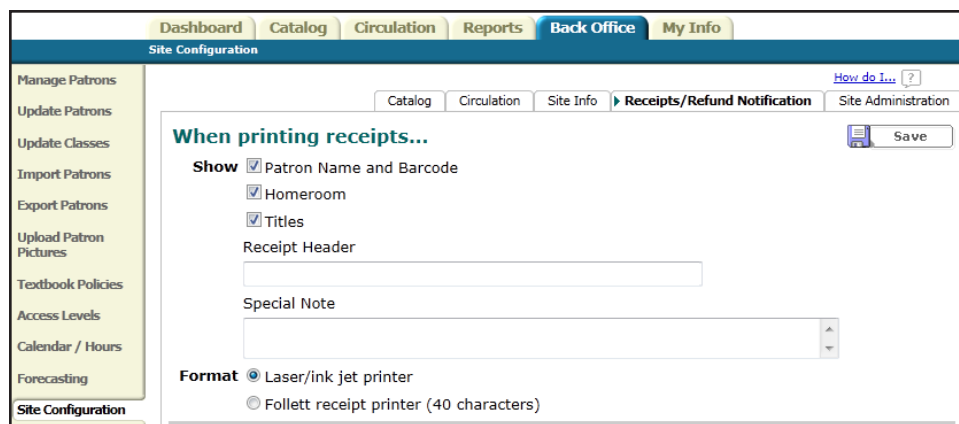
### Feature Description:

You can configure circulation receipts to contain homeroom information.

### Feature Information:

To add homeroom information to circulation receipts:

1. Navigate to the **Back Office** tab, **Site Configuration** option, **Receipts/Refund Notification** subtab.
2. Select the **Homeroom** checkbox in the When printing receipts... section.
3. Click the **Save** button to save the changes made to the Site Configuration options.



When you print a receipt for a patron with a checked-out textbook or a fine, the receipt shows the patron's homeroom.

### Access Level:

The Site Administrator or Textbook Administrator must set up the Site Configuration options. Users who will check out textbooks and be able to view textbook fines must have the proper permissions enabled.

### Permissions:

**Change textbook site preferences**

**Check out textbooks**

**View textbook fines**

### Importance:

Customers now have homeroom information on circulation receipts that are to be handed out later or sent to classrooms for distribution.



# Destiny Asset Manager





## Asset Manager

### Documentation Enhancements

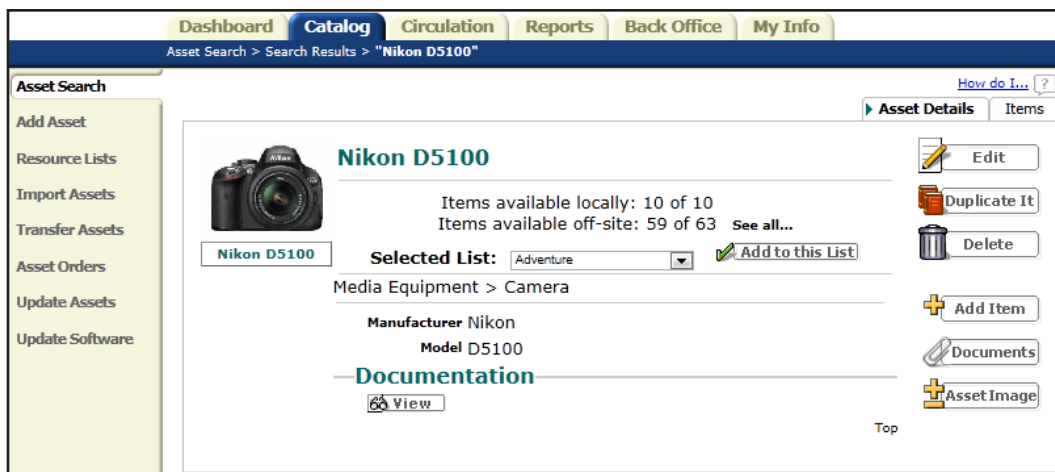
#### Feature Description:

You can now easily determine whether any documents are associated with an asset description record or an asset item record, and you can limit who can view, add and edit, and delete the documents. If documents are attached to an asset, a **Documentation** section appears on the **Asset Details** subtab, which helps draw attention to the fact that documents are attached. New document icons also appear on the **Asset Details** and **Items** subtabs. Users must have a minimum of the View permission to see these icons.

#### Feature Information:

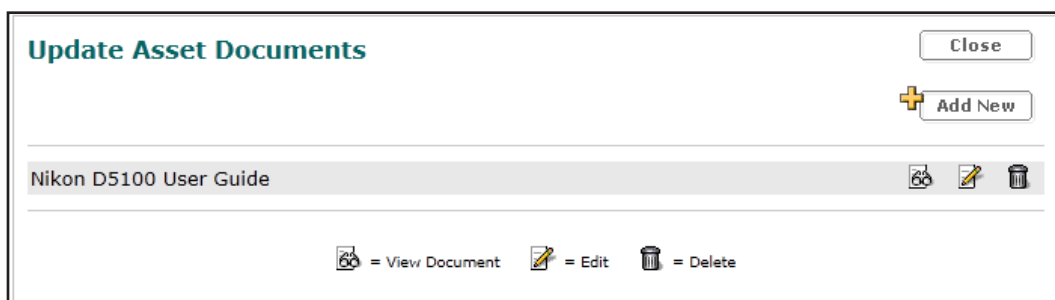
To view, add and edit, and delete documents in the asset description record:

1. Search for an asset.
2. When the search results appear, find the appropriate asset and click the **Details** button.
3. Ensure you are on the **Asset Details** subtab.



4. A Documentation section appears if documents are attached and you have a minimum of the View permission. A **Documents** button also appears on the right side of the page.














5. Click either the **View** button or the **Documents** button.



6. An **Update Asset Documents** page opens.
7. An **Add New** button or **View Document**, **Edit**, or **Delete** icons appear depending on your permissions.

To view, add and edit, and delete documents in the asset item record:

1. Search for an asset.
2. When the search results appear, find the appropriate asset and click the **Details** button.
3. Select the **Items** subtab.
4. A Paper Clip icon appears next to the asset item(s) if you have a minimum of the View permission.

Asset Details				Items
Nikon D5100				
Items at McHenry Middle School				
Barcode (Serial Number)	Status	Condition	Home Location	
000000000000348	<a href="#">Available</a>	Usable		   
000000000000349	<a href="#">Available</a>	Usable		   
000000000000350	<a href="#">Available</a>	Usable		   

5. Click the **Paper Clip** icon.

**Update Item Documents**

Close



6. An **Update Documents** page opens.
7. An **Add New** button or **View Document**, **Edit**, or **Delete** icons appear depending on your permissions.

## Access Level:

The Destiny Administrator, District Asset User, Site Administrator, and Asset Administrator have the permissions to view, add and edit, or delete documentation by default. For other users to view, add and edit, or delete documentation, the proper permissions must be enabled.

Permissions:

**View asset description documentation**

**Add/Edit asset description documentation**

**Delete asset description documentation**

**View asset item documentation**

**Add/Edit asset item documentation**

**Delete asset item documentation**

## Importance:

You can easily determine whether any documents are associated with an asset description record or an asset item record.



## Asset Manager

### Historical Notes Searchable/Visible

#### Feature Description:

In addition to the Asset History report and the Deleted Asset (detailed version) report, historical notes are now available in the following places:

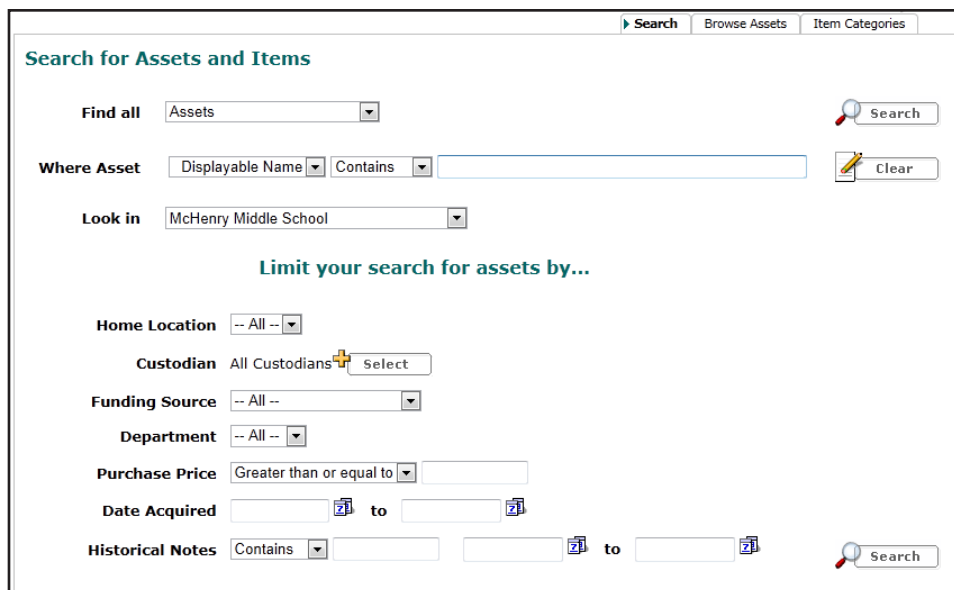
- **Asset Search** includes a historical note limiter.
- The **Edit Item** page shows Historical Notes under the Notes section.
- The **Asset Items** report in **Report Builder** has options to include historical notes and their dates.

Historical notes cannot be edited or deleted.

#### Feature Information:

##### Asset Search

Limit your search for asset items by Historical Note, either a search term or a date range. Choose **Contains** in the **Historical Note** drop-down list, which is the broadest search option. (Use **Starts With** when you know specific content used in the Historical Note.) To find all Historical Notes in April of 2011, for example, either use the Calendar icons or enter 4/1/11 to 4/30/11. All limiters are stand-alone, meaning you can use one, two, three, or all the limiters for your search, and you do not need to choose any search fields from the top of the screen.



The search results list returns only items that contain the limiter term or the date the note was entered or both. In addition to the Barcode number, Status, Condition, and Home Location, the search results list includes the date the note was entered, the note content, the patron adding the note, and the patron's primary site's Site Short Name. The notes appear with the newest at the top by the date they were added.

Historical notes can be up to 120 characters. All 120 characters display in the search results.

### Viewing historical notes

View historical notes either on the **Edit Item** page or the **Asset Status** page. The date added and the user that added the historical note appear along with the content.

To view a historical note from an **Edit Item** page:

1. Search for an asset.
2. When the search results appear, find the appropriate asset and click the **Details** button.
3. Select the **Items** subtab.
4. Click the **Edit** icon adjacent to the appropriate item.
5. Scroll to the bottom of the page.

**Notes**

**Circulation Notes**

There are no circulation notes for this item

**Historical Notes**

Date	User	Note
1/31/2013	admin303 [mms]	This is the official school newspaper camera.

To view a historical note from the **Asset Status** page:

1. Navigate to the **Circulation** tab, **Asset Status** option.
2. Type or scan the item's barcode number. Click **Go!** if you typed in the item's barcode number.
3. When the Asset Status page appears, scroll to the bottom of the page.

**Circulation Notes**

There are no circulation notes for this item

Add Note

**Historical Notes**



Date	User	Note
1/31/2013	admin303 [mms]	This is the official school newspaper camera.

To run a **Report Builder** report that includes historical notes:


1. Navigate to the **Reports** tab, **Report Builder** option.
2. Click **New Report**.
3. Select **Asset** and **Items** from the list and click the green next arrow.
4. In Step 1, include the Historical Note or the Historical Note Date fields.

You will have the option in many of the following steps to group, sort, and limit by the historical note or date.

### Asset - Items Report

**Step 1 of 7:** Choose the information you wish to include in your report.



 **Cancel**

---

#### Template

---



#### Item Information

<input type="checkbox"/> Barcode	<input type="checkbox"/> Funding Source	<input type="checkbox"/> Purchase Price
<input type="checkbox"/> Condition	<input type="checkbox"/> Historical Note	<input type="checkbox"/> Salvage Value
<input type="checkbox"/> Custodian	<input type="checkbox"/> Historical Note Date	<input type="checkbox"/> Serial Number
<input type="checkbox"/> Date Acquired	<input type="checkbox"/> Home Location	<input type="checkbox"/> Status
<input type="checkbox"/> Department	<input type="checkbox"/> Projected Life	
<input type="checkbox"/> District ID	<input type="checkbox"/> Purchase Order	

---

#### Name Information

<input type="checkbox"/> Asset Type	<input type="checkbox"/> Description	<input type="checkbox"/> Replacement Price
<input type="checkbox"/> Depreciable Life (years)	<input type="checkbox"/> Displayable Name	
<input type="checkbox"/> Depreciation Convention	<input type="checkbox"/> Manufacturer	

## Access Level:

The Destiny Administrator, District Asset User, Site Administrator, and Asset Administrator have the new permission, View Historical Notes, by default.

Permissions:

**View Historical Notes** (requires **Add historical notes**)

**Manage asset items: Edit**

**View asset item status**

**Generate asset reports**

**Add/edit/delete Report Builder–asset reports**

## Importance:

You have more options related to historical notes, including limiting a search for historical notes, viewing historical notes through the **Edit Item** and **Asset Status** pages, and creating Report Builder reports.





## Asset Manager

### Option to Include Checked Out Items in Inventory

#### Feature Description:

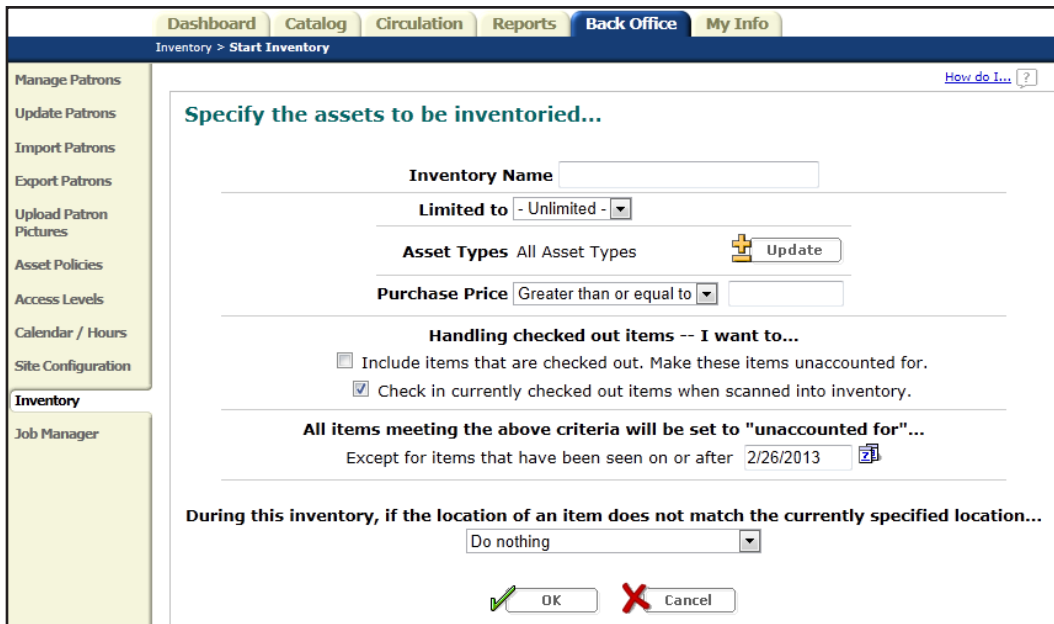
You can now choose to include checked-out items in an inventory as well as items that are checked in after an inventory is started. For example, if your school checks out laptops to students for a full school year, you can periodically run a laptop inventory. After conducting an inventory, run an inventory report to view exactly which students do not still have their laptops, whether midway through the year or more often.

#### Feature Information:

When you start an inventory, a new section with two new options appears. In the **Handling checked out items--I want to...** section, choose one or both of the checkboxes depending on your needs.

To include items that are currently checked out, select the **Include items that are checked out. Make these items unaccounted for** checkbox.

You can also include items as you check them in during the inventory by selecting the **Check in currently checked out items when scanned into inventory** checkbox.



Dashboard Catalog Circulation Reports Back Office My Info

Inventory > Start Inventory

Manage Patrons  
Update Patrons  
Import Patrons  
Export Patrons  
Upload Patron Pictures  
Asset Policies  
Access Levels  
Calendar / Hours  
Site Configuration  
**Inventory**  
Job Manager

How do I... ?

### Specify the assets to be inventoried...

Inventory Name

Limited to - Unlimited -

Asset Types All Asset Types

Purchase Price Greater than or equal to

**Handling checked out items -- I want to...**

☐ Include items that are checked out. Make these items unaccounted for.

☒ Check in currently checked out items when scanned into inventory.

**All items meeting the above criteria will be set to "unaccounted for"...**  
Except for items that have been seen on or after 2/26/2013

**During this inventory, if the location of an item does not match the currently specified location...**

**Access Level:**

The Site Administrator, Asset Administrator, or a limited number of staff usually start an inventory at the site level. Staff members with the Inventory assets permission can perform an inventory without starting an inventory.

Permission:

**Start new/finalize asset inventory**

**Importance:**

You can now run frequent inventories of checked-out items while maintaining their checked-out status, as well as find out who has Unaccounted-for items checked out.

## Asset Manager

# Patron Statistics—Historical Report Enhancements

### Feature Description:

The Patron Statistics—Historical report allows you to examine the circulation totals of your patrons. The report does not include circulations to departments or locations. You can view summary information or individual patron statistics, as well as limit the report to a particular site, time frame, or patron group.

### Feature Information:

To generate a Patron Statistics—Historical Report:

1. Navigate to the **Reports** tab, **Patron Reports** option.
2. Click the **Patron Statistics—Historical** hyperlink.
3. If you are a district patrons manager, select the site from the **For** list. If not, skip to step 4.
4. Enter the date range for which you want the statistics in the **For patron activity** fields.
5. If you have more than one Destiny product, select the material type from the **Circulations of** drop-down list.
6. Select either Summary Only or Details from the **Show** drop-down list. A Summary includes a list of each group, the number of patrons in that group, and total circulations. A Details report adds each patron's name, barcode number, and number of circulations.
7. Decide whether to group information by **Patron Type, Patron Status, Grade Level, Homeroom**, or a user defined field. You can select up to four groups.  
**Note:** Patrons that do not have information in the **Group by** field are listed under Other.
8. In the **Only include the following** checkboxes, clear the checkboxes for the patron types or statuses whose statistics you wish to exclude.
9. After making all your selections, click **Run Report**.

Dashboard Catalog Circulation **Reports** Back Office My Info

Patron Reports > Patron Statistics - Historical

My Favorites

Asset Reports

**Patron Reports**

Report Builder

Report Manager

[How do I...?](#)

### List patron statistics...

For patron activity From  to

Circulations of Assets

Show Summary Only

Group by Patron Type

...then by Homeroom

...then by Patron Status

...and finally by Grade Level

Only include the following:

<input checked="" type="checkbox"/> Faculty	<input checked="" type="checkbox"/> Active
<input checked="" type="checkbox"/> Student	<input checked="" type="checkbox"/> Restricted
	<input checked="" type="checkbox"/> Inactive

Deleted patrons will not be included in the report.

Run Report

### Access Level:

The Site Administrator, Asset Administrator, and a limited number of staff usually have the permission to run patron reports.

Permissions:

**Generate asset reports**

**Manage Patrons for the District**

### Importance:

All Destiny products have the Patron Statistics—Historical report, which provides consistency if you have multiple products.

## Asset Manager

### Price for Fine Calculations

#### Feature Description:

You can use the Replacement Price from the asset record or the Purchase Price from the item record to calculate fines. If depreciation information is set up, you can also factor in the depreciated value of the asset.

#### Feature Information:

To use Replacement Price from the asset record or the Purchase Price from the item record to calculate fines:

1. Navigate to the **Back Office** tab, **Site Configuration** option, **Circulation** subtab.
2. Locate the **Asset Options, Create fines using...** section.
3. Select either the **Replacement price from asset**, which is the default selection, or the **Purchase price from item** radio button.
4. If you select the **Purchase price from item** radio button, the **Prorate fine amount based on depreciated value** checkbox becomes available. Select the checkbox if your school district has set up depreciation information and you want to use the depreciated value of the asset.
5. Click the **Save** button to save the changes made to the Site Configuration options.

#### Asset Options

☐ Allow assets to circulate to any patron/department/location in the district ?

☐ Allow other sites to assign this site's software licenses to their assets

☐ Automatically create fine for lost assets ?

**Create fines using...** ?

☒ Replacement price from asset
 ☐ Purchase price from item

☐ Prorate fine amount based on depreciated value ?

☐ Require explanation when waiving asset fine ?

☐ Require explanation when issuing asset refunds ?

When an item is marked Lost, a message displays the fine assessment, which is calculated based on the Site Configuration selections.

**Access Level:**

The Site Administrator or Asset Administrator must set up the Site Configuration options. Users who will assess lost asset fines must have the proper permissions enabled.

Permissions:

**Change asset site preferences**

**Add asset fines** (requires **View asset fines**)

**Importance:**

Destiny Asset Manager, Destiny Textbook Manager, and Destiny Library Manager now use the same process to calculate fines.

## Asset Manager

# Update Assets—Individual, Batch, and Global Updates

### Feature Description:

You can now perform individual, batch, and global updates at the district and site levels on item record fields without opening individual item records.

#### Individual Update:

- Choose from 8 additional fields; a total of 14 fields are available.
- Define a new Home Location or Department.
- Change item status to Lost or Stolen, even if it is currently checked out.

#### Batch Update:

- Choose from 8 additional fields; a total of 13 fields are available.
- Define a new Home Location or Department.
- Change item status to Lost or Stolen, even if it is currently checked out.

#### Global Update:

- Choose from 8 additional fields.
- Define a new Home Location or Department.
- Change item status to Lost or Stolen, even if it is currently checked out.

### Feature Information:

#### Individual Update:

You can update the existing **Custodian** field by scanning an item's barcode. The following fields, also existing, have added options:

- **Department** (site only)—Use the **Other** button to define a Department not in the list.
- **District Identifier**—If District Identifier is the *only* field you are updating, the cursor toggles between the **Asset Barcode** box and the **District Identifier** box, which allows you to enter record District Identifier numbers rapidly by scanning the barcodes one after the other.
- **Home Location**—Use the **Other** button to define a Home Location not in the list.
- **Serial Number**—If Serial Number is the *only* field you are updating, the cursor toggles between the **Asset Barcode** box and the **Serial Number** box, which allows you to enter serial numbers rapidly by scanning the barcodes one after the other.
- **Status**—Additional Lost and Stolen choices.

The following fields are now available for updates:

- **Condition**: Choose Usable, Damaged, Unusable.
- **Date Acquired**: Enter the date in the blank text box or use the Calendar icon—reflects the Region Format defined on the **Edit District** page.
- **Funding Source**: Choose from the defined Funding Sources or use the **Other** button to define a new Funding Source.
- **Item Categories** (site only): Choose from the defined Item Categories or use the **Other** button to define a new Item Category.

- **Projected Life:** Enter the projected life in number of years in the blank text box.
- **Purchase Order:** Enter the purchase order number in the blank text box.
- **Purchase Price:** Enter the purchase price in the blank text box, which honors the Region Format defined on the **Edit District** page.
- **Salvage Value:** Enter the blank text box, which honors the Region Format defined on the **Edit District** page.

The screenshot shows the 'Update Assets' interface with the 'Individual Update' subtab selected. The main area is titled 'Specify information to change and scan barcode...'. It features a list of fields to update, each with a 'to' field and an 'Update' button. The fields include Condition, Custodian, Date Acquired, Department, District Identifier, Funding Source, Home Location, Item Category, Projected Life, Purchase Order, Purchase Price, Salvage Value, Serial Number, and Status. The 'Condition' field is currently set to 'Usable'. The 'Custodian' field is set to 'Undefined' with a 'Select' button. The 'Date Acquired' field is set to a date picker. The 'Department' field is set to '-- Undefined --' with an 'Other...' button. The 'District Identifier' field is set to a text box. The 'Funding Source' field is set to '-- Undefined --' with an 'Other...' button. The 'Home Location' field is set to '-- Undefined --' with an 'Other...' button. The 'Item Category' field is set to '-- Undefined --' with an 'Other...' button. The 'Projected Life' field is set to a text box. The 'Purchase Order' field is set to a text box. The 'Purchase Price' field is set to a text box. The 'Salvage Value' field is set to a text box. The 'Serial Number' field is set to a text box. The 'Status' field is set to 'Available'.

To update individual asset items:

1. Navigate to the **Catalog** tab, **Update Assets** option, and **Individual Update** subtab.
2. To add a transaction history log, enter up to 120 characters in the **Add historical note** box.
3. From the first list, select a field to update.
4. In the adjacent **to** field that appears, select or enter the new contents of the field.
5. Continue selecting as many fields and contents as needed.
6. After making your selections, place the cursor in the **Asset Barcode** box.
7. Scan the item barcodes, or type them in and click **Update**.

As the asset item records are updated, the displayable name and linked barcode number appear under **Most Recently Updated**. If a patron was fined for a checked-out asset that was marked Lost and the site has configured automatic fines, there is no notification. An entry is made in the Transaction History if Home Location or Status is updated.

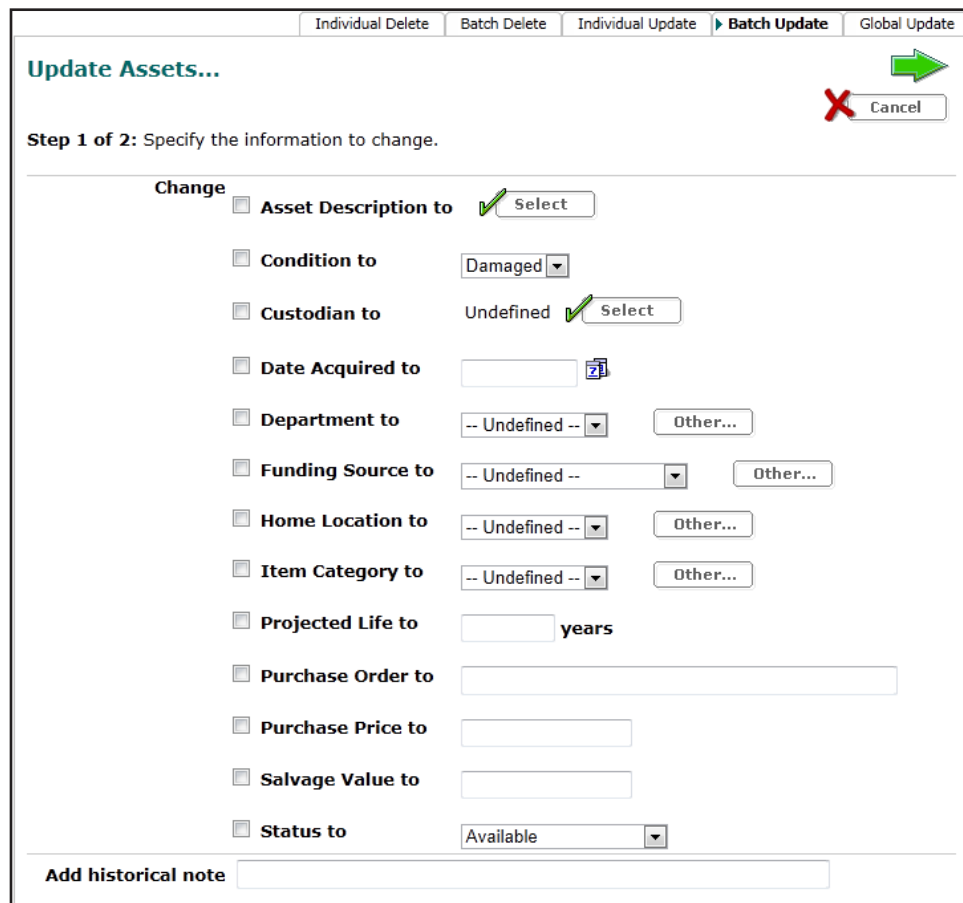


To update just district identifiers or serial numbers:

1. Navigate to the **Catalog** tab, **Update Assets** option, and **Individual Update** subtab.
2. To add a transaction history log, enter up to 120 characters in the **Add historical note** box.
3. From the list, select **District Identifier** or **Serial Number**.
4. Scan the district identifier or serial number barcode.
5. Scan the asset barcode.
6. Repeat steps 3 and 4 until you have updated all the desired items.

#### Batch Update:

You can update the existing **Asset Description** and **Custodian** fields by uploading a barcode list, creating a barcode list on-page, or linking to a resource list containing the assets needing the update. The **Department**, **Home Location**, and **Status** fields, also existing, have the same added options as listed under the individual update. The Batch Update also provides you with the same added fields and functions of those listed under the individual update.



**Update Assets...**

Step 1 of 2: Specify the information to change.

Change

- ☐ **Asset Description to**
- ☐ **Condition to**
- ☐ **Custodian to**
- ☐ **Date Acquired to**
- ☐ **Department to**
- ☐ **Funding Source to**
- ☐ **Home Location to**
- ☐ **Item Category to**
- ☐ **Projected Life to**  **years**
- ☐ **Purchase Order to**
- ☐ **Purchase Price to**
- ☐ **Salvage Value to**
- ☐ **Status to**

**Add historical note**

To update a batch of asset items:

1. Navigate to the **Catalog** tab, **Update Assets** option, and **Batch Update** subtab.
2. In the Change section of Step 1 of 2, select the checkbox for each field to update.
3. Select or enter the new content for the field. To clear a field, leave the box blank or select **Undefined** from the list.
4. To add a transaction history log, enter up to 120 characters in the **Add historical note** box.
5. Click the green arrow to continue.
6. In the **Select by** list, choose a method for identifying the items to update.
7. Browse to an existing file, create a list, or select a resource list.
8. To begin the update, click **Update**.

Destiny updates the items and produces a report that lists each item updated or skipped and the reason. If a patron was fined for a checked-out asset that was marked Lost and the site has configured automatic fines, the item, the item barcode, the patron's name and their barcode number along with the fine assessed appear in the job summary.

Only the Asset Groups you have access to are updated.

An entry is made in the Transaction History if Home Location or Status is updated.

#### Global Update:

You can update the existing **Custodian** field by identifying a qualifying field/content pair. The **Department**, **Home Location**, and **Status** fields, also existing, have the same added options as listed under the individual and batch updates. The Global Update also provides you with the same added fields and functions of those listed under the individual and batch updates.

Individual Delete   Batch Delete   Individual Update   Batch Update   **Global Update**

**Update Assets...**

For every

Whose  is

Change  to

Add historical note

**This process cannot be reversed. Before proceeding, you should have a current backup of your database. Your last SQL backup was on 2/25/2013 11:37 PM server time.**

Update

To update asset items globally:

1. Navigate to the **Catalog** tab, **Update Assets** option, and **Global Update** subtab.
2. If you are a district asset manager, select the district or a single site from the **For** list. If not, proceed to step 3.

3. From the **For every** list, select the asset types to update. This list only shows Asset Groups to which you have access.
4. From the **Whose** list, select the item field, and in the **is** box, select the information in the field that you want Destiny to find. These selections determine the records Destiny updates.
5. From the **Change** list, select the field that you want to change in the item records.
6. In the **to** box, select the new content for the field.
7. To add a transaction history log, enter up to 120 characters in the **Add historical note** box. Adding a note cannot be the only change you make in **Global Update**.
8. After making your selections, click **Update** and then **Yes** on the confirmation message.

Destiny updates the asset items and generates a report summarizing the update and listing all the items changed or skipped and the reason a field was skipped.

If a patron was fined for a checked-out asset that was marked Lost and the site has configured automatic fines, the asset description, item, item's barcode number, the patron's name and their barcode number along with the fine assessed appear in the job summary

An entry is made in the Transaction History if Home Location or Status is updated.

### Access Level:

The Site Administrator, Asset Administrator, or a limited number of staff usually have the permission to manage assets.

Permissions:

#### **Manage asset items: Edit**

To update Item Categories: **Add/edit/delete/assign item categories**

To add historical notes: **Add historical notes**

To add a new Home Location: **Manage locations**

To add a new Department: **Manage Site Administration Options**

To update Status to Lost or Stolen: **Mark asset items "Lost" or "Stolen"**

The district asset manager has access to this page but does not have the site only options.

### Importance:

You can update multiple item record fields at once without opening each individual item record by performing individual, batch, and global updates.



## Asset Manager

### Update Patrons—Excuse / Delete Fines

#### Feature Description:

You can globally excuse/delete fines and refunds assessed for lost or damaged assets.

#### Feature Information:

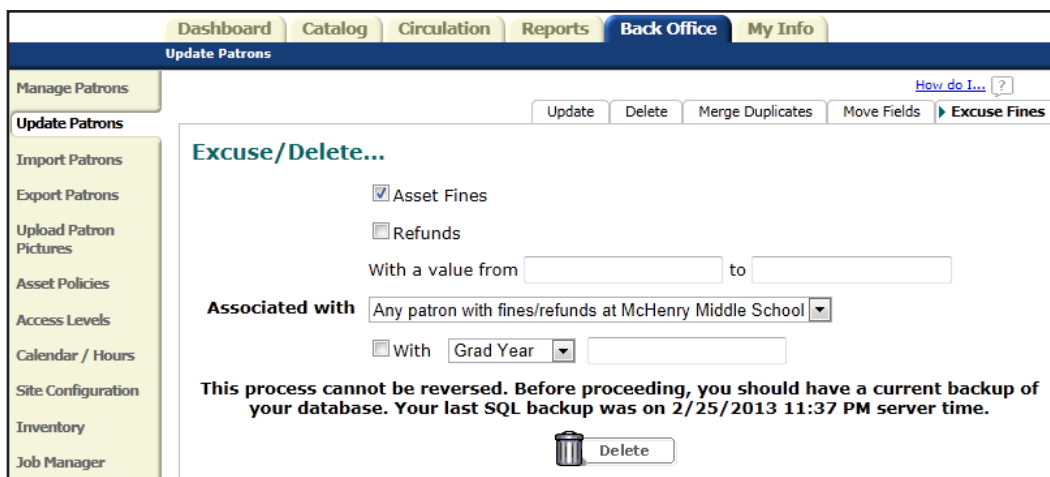
To excuse/delete fines globally:

1. Navigate to the **Back Office** tab, **Update Patrons** option, **Excuse Fines** subtab.
2. Select the **Asset Fines**, **Refunds**, or both checkboxes.
3. If desired, enter a value range to limit the fines or refunds to be deleted in the **With a value from** field.
4. To delete fines for all patrons (including patrons of other schools) who have incurred fines at this school, leave the default **Associated with** option at **Any patron with fines/refunds at <school>**.

To leave fines or refunds for offsite patrons intact, select **My patrons only**.

**Note:** Patrons with both a local and one or more off-site associations are considered local patrons.

5. To limit the deletion to patrons in a certain grade, select the **With** checkbox, select either **Grad Year** or **Grade Level** from the drop-down list, and enter a graduation year or grade level, depending on the previous selection.
6. Click **Delete** and then **Yes** when the confirmation message appears.



Dashboard Catalog Circulation Reports **Back Office** My Info

Update Patrons

Manage Patrons

Update Patrons

Import Patrons

Export Patrons

Upload Patron Pictures

Asset Policies

Access Levels

Calendar / Hours

Site Configuration

Inventory

Job Manager

Update Delete Merge Duplicates Move Fields **Excuse Fines**

**Excuse/Delete...**

☒ Asset Fines


☐ Refunds

With a value from  to

**Associated with** Any patron with fines/refunds at McHenry Middle School

☐ With Grad Year

**This process cannot be reversed. Before proceeding, you should have a current backup of your database. Your last SQL backup was on 2/25/2013 11:37 PM server time.**

 Delete

Destiny does the following:

- Deletes the fines, refunds, or both, as selected.
- Adds a **Fine Deleted** or **Refund Deleted** entry on each patron's **Fine Details** page for fines and refunds deleted through this process. (To view Fine Details, navigate to **Back Office** tab, **Manage Patrons** option. After searching for a patron, click **View History**, and then the **Details** button adjacent to the appropriate fine.)
- Produces an Excuse/Delete Fines report in the Job Manager, which lists the following information for each fine:
  - The type of fine (Asset)
  - The reason for the fine (**Damaged** or **Lost**)
  - The asset description
  - The fine amount
  - The patron's name and barcode number (and Short Site Name for offsite patrons)

### Access Level:

The Site Administrator has this new permission turned on by default.

Permission:

**Globally delete fines** (Previously existing for Destiny Library Manager and Destiny Textbook Manager customers.)

### Importance:

At the end of the school year, you can globally delete fines if your school will not collect the fines from students.