What's New in Destiny 11.0

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What’s New in Destiny 11.0

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.


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.
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.

<table>
<thead>
<tr>
<th>To View Option:</th>
<th>Library Manager Permission</th>
<th>Textbook Manager Permission</th>
<th>Asset Manager Permission</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check In:</td>
<td>Check in library materials</td>
<td>Check in textbooks</td>
<td>Check in assets</td>
</tr>
<tr>
<td>Check Out:</td>
<td>Check out library materials</td>
<td>Check out textbooks</td>
<td>Check out assets</td>
</tr>
<tr>
<td>Item Status:</td>
<td>View library item status</td>
<td>View textbook item status</td>
<td>View asset item status</td>
</tr>
<tr>
<td>Patron Status:</td>
<td>View patron status</td>
<td>View patron status</td>
<td>View patron status</td>
</tr>
</tbody>
</table>

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.

   ![Preferred Descriptive Cataloging Form](image)

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 \texttt{a = AACR2} to \texttt{i = ISBD punctuation included}.
  - An **040** tag appears, with \texttt{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:

<table>
<thead>
<tr>
<th>Artifact</th>
<th>Mixed Material</th>
</tr>
</thead>
<tbody>
<tr>
<td>336 # # _a three-dimensional form _2 rdacontent</td>
<td>336 # # _a other _2 rdacontent</td>
</tr>
<tr>
<td>337 # # _a unmediated _2 rdamedia</td>
<td>337 # # _a unspecified _2 rdamedia</td>
</tr>
<tr>
<td>338 # # _a object _2 rdacarrier</td>
<td>338 # # _a unspecified _2 rdacarrier</td>
</tr>
<tr>
<td><strong>Book</strong></td>
<td></td>
</tr>
<tr>
<td>336 # # _a text _2 rdacarrier</td>
<td>336 # # _a notated music _2 rdacarrier</td>
</tr>
<tr>
<td>337 # # _a unmediated _2 rdamedia</td>
<td>337 # # _a unmediated _2 rdamedia</td>
</tr>
<tr>
<td>338 # # _a volume _2 rdacarrier</td>
<td>338 # # _a sheet _2 rdacarrier</td>
</tr>
<tr>
<td>Music (printed)</td>
<td></td>
</tr>
<tr>
<td>336 # # _a notated music _2 rdacarrier</td>
<td></td>
</tr>
<tr>
<td>337 # # _a unmediated _2 rdamedia</td>
<td></td>
</tr>
<tr>
<td>338 # # _a sheet _2 rdacarrier</td>
<td></td>
</tr>
<tr>
<td>Computer File</td>
<td>Picture, Study Print, Photograph, Chart</td>
</tr>
<tr>
<td>--------------------------------------------------</td>
<td>----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>336 # _a computer program _2 rdaccontent</td>
<td>336 # _a still image _2 rdacontent</td>
</tr>
<tr>
<td>337 # _a computer _2 rdamedia</td>
<td>337 # _a unmediated _2 rdamedia</td>
</tr>
<tr>
<td>338 # _a computer disc _2 rdacarrier</td>
<td>338 # _a other _2 rdacarrier</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Electronic Book (eBook)</strong></td>
<td><strong>Sound Recording (musical)</strong></td>
</tr>
<tr>
<td>336 # _a text _2 rdacontent</td>
<td>336 # _a performed music _2 rdacontent</td>
</tr>
<tr>
<td>337 # _a computer _2 rdamedia</td>
<td>337 # _a audio _2 rdamedia</td>
</tr>
<tr>
<td>338 # _a online resource _2 rdacarrier</td>
<td>338 # _a audio disc _2 rdacarrier</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Equipment</strong></td>
<td><strong>Sound Recording (nonmusical)</strong></td>
</tr>
<tr>
<td>336 # _a three-dimensional form _2 rdacontent</td>
<td>336 # _a spoken word _2 rdacontent</td>
</tr>
<tr>
<td>337 # _a unmediated _2 rdamedia</td>
<td>337 # _a audio _2 rdamedia</td>
</tr>
<tr>
<td>338 # _a object _2 rdacarrier</td>
<td>338 # _a audio disc _2 rdacarrier</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Kit</strong></td>
<td><strong>Serial</strong></td>
</tr>
<tr>
<td>336 # _a other _2 rdaccontent</td>
<td>336 # _a text _2 rdacarrier</td>
</tr>
<tr>
<td>337 # _a unspecified _2 rdamedia</td>
<td>337 # _a unmediated _2 rdamedia</td>
</tr>
<tr>
<td>338 # _a unspecified _2 rdacarrier</td>
<td>338 # _a volume _2 rdacarrier</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Manuscript Language Material</strong></td>
<td><strong>Video</strong></td>
</tr>
<tr>
<td>336 # _a text _2 rdacarriend</td>
<td>336 # _a two-dimensional moving image _2 rdacontent</td>
</tr>
<tr>
<td>337 # _a unmediated _2 rdamedia</td>
<td>337 # _a video _2 rdamedia</td>
</tr>
<tr>
<td>338 # _a volume _2 rdacarrier</td>
<td>338 # _a videot disc _2 rdacarrier</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Maps, Globes and Atlases</strong></td>
<td><strong>Notes:</strong></td>
</tr>
<tr>
<td>336 # _a cartographic image _2 rdacarriend</td>
<td># indicates a blank indicator</td>
</tr>
<tr>
<td>337 # _a unmediated _2 rdamedia</td>
<td>_ indicates a subfield</td>
</tr>
<tr>
<td>338 # _a volume _2 rdacarrier</td>
<td>&quot;Unmediated&quot; indicates that no device is required for access.</td>
</tr>
</tbody>
</table>

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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, rdacarrier. 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.

<table>
<thead>
<tr>
<th>AACR2</th>
<th>RDA</th>
</tr>
</thead>
<tbody>
<tr>
<td>260 ##_a New York :</td>
<td>264 #1_a New York :</td>
</tr>
<tr>
<td>_b Grosset &amp; Dunlap,</td>
<td>_b Grosset &amp; Dunlap,</td>
</tr>
<tr>
<td>_c 2010.</td>
<td>_c 2010.</td>
</tr>
</tbody>
</table>

- 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.
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>.

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.

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:

1. 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.

2. 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.

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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.
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.
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.

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

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

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.

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.

![Hold It...](image)

**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.

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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.
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.
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.

![Series Label Example](image1)

![Series Label Example](image2)
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.

<table>
<thead>
<tr>
<th>Material Type</th>
<th>Subtype</th>
<th>RDA Title Details Display</th>
</tr>
</thead>
<tbody>
<tr>
<td>Artifact</td>
<td>---</td>
<td>Artifact</td>
</tr>
<tr>
<td>Book</td>
<td>No Subtype Assigned</td>
<td>Book</td>
</tr>
<tr>
<td>Book</td>
<td>Braille</td>
<td>Book/Braille</td>
</tr>
<tr>
<td>Book</td>
<td>Hardcover</td>
<td>Book/Hardcover</td>
</tr>
<tr>
<td>Book</td>
<td>Large Print</td>
<td>Book/Large Print</td>
</tr>
<tr>
<td>Book</td>
<td>Paperback</td>
<td>Book/Paperback</td>
</tr>
<tr>
<td>Book</td>
<td>Picture Book</td>
<td>Book/Picture Book</td>
</tr>
<tr>
<td>Book</td>
<td>Reference—Encyclopedia</td>
<td>Book/Reference—Encyclopedia</td>
</tr>
<tr>
<td>Book</td>
<td>Reference—Other</td>
<td>Book/Reference—Other</td>
</tr>
<tr>
<td>Material Type</td>
<td>Subtype</td>
<td>RDA Title Details Display</td>
</tr>
<tr>
<td>---------------------------------------</td>
<td>-----------------------------------</td>
<td>-----------------------------------</td>
</tr>
<tr>
<td>Book</td>
<td>Other</td>
<td>Book/Other</td>
</tr>
<tr>
<td>Computer File</td>
<td>No Subtype Assigned</td>
<td>Computer</td>
</tr>
<tr>
<td>Computer File</td>
<td>Archive</td>
<td>Computer/Archive</td>
</tr>
<tr>
<td>Computer File</td>
<td>Document</td>
<td>Computer/Document</td>
</tr>
<tr>
<td>Computer File</td>
<td>Executable</td>
<td>Computer/Executable</td>
</tr>
<tr>
<td>Computer File</td>
<td>Game</td>
<td>Computer/Game</td>
</tr>
<tr>
<td>Computer File</td>
<td>Interactive Multimedia</td>
<td>Computer/Interactive Multimedia</td>
</tr>
<tr>
<td>Computer File</td>
<td>Media File</td>
<td>Computer/Media File</td>
</tr>
<tr>
<td>Computer File</td>
<td>Other</td>
<td>Computer File/Other</td>
</tr>
<tr>
<td>Electronic Book (eBook)</td>
<td>---</td>
<td>eBook</td>
</tr>
<tr>
<td>Equipment</td>
<td>---</td>
<td>Equipment</td>
</tr>
<tr>
<td>Kit</td>
<td>---</td>
<td>Kit</td>
</tr>
<tr>
<td>Manuscript Language Material</td>
<td>---</td>
<td>Language</td>
</tr>
<tr>
<td>Maps, Globes and Atlases</td>
<td>No Subtype Assigned</td>
<td>Map</td>
</tr>
<tr>
<td>Maps, Globes and Atlases</td>
<td>Atlases</td>
<td>Map/Atlases</td>
</tr>
<tr>
<td>Maps, Globes and Atlases</td>
<td>Globes</td>
<td>Map/Globes</td>
</tr>
<tr>
<td>Maps, Globes and Atlases</td>
<td>Maps</td>
<td>Map/Maps</td>
</tr>
<tr>
<td>Maps, Globes and Atlases</td>
<td>Other</td>
<td>Map/Other</td>
</tr>
<tr>
<td>Mixed Material</td>
<td>---</td>
<td>Mixed</td>
</tr>
<tr>
<td>Music (printed)</td>
<td>---</td>
<td>Music</td>
</tr>
<tr>
<td>Picture, Study Print, Photograph, Chart</td>
<td>---</td>
<td>Graphic</td>
</tr>
<tr>
<td>Serial</td>
<td>No Subtype Assigned</td>
<td>Serial</td>
</tr>
<tr>
<td>Serial</td>
<td>Journal</td>
<td>Serial/Journal</td>
</tr>
<tr>
<td>Serial</td>
<td>Magazine</td>
<td>Serial/Magazine</td>
</tr>
<tr>
<td>Serial</td>
<td>Newspaper</td>
<td>Serial/Newspaper</td>
</tr>
<tr>
<td>Serial</td>
<td>Other</td>
<td>Serial/Other</td>
</tr>
<tr>
<td>Sound Recording (musical)</td>
<td>No Subtype Assigned</td>
<td>Recording</td>
</tr>
<tr>
<td>Material Type</td>
<td>Subtype</td>
<td>RDA Title Details Display</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>------------------</td>
<td>--------------------------------</td>
</tr>
<tr>
<td>Sound Recording (musical)</td>
<td>Audio Cassette</td>
<td>Recording/Audio Cassette</td>
</tr>
<tr>
<td>Sound Recording (musical)</td>
<td>Compact Disc</td>
<td>Recording/Compact Disc</td>
</tr>
<tr>
<td>Sound Recording (musical)</td>
<td>Digital Audio Tape</td>
<td>Recording/Digital Audio Tape</td>
</tr>
<tr>
<td>Sound Recording (musical)</td>
<td>DVD-A</td>
<td>Recording/DVD-A</td>
</tr>
<tr>
<td>Sound Recording (musical)</td>
<td>MiniDisc</td>
<td>Recording/MiniDisc</td>
</tr>
<tr>
<td>Sound Recording (musical)</td>
<td>MP3</td>
<td>Recording/MP3</td>
</tr>
<tr>
<td>Sound Recording (musical)</td>
<td>MP4</td>
<td>Recording/MP4</td>
</tr>
<tr>
<td>Sound Recording (musical)</td>
<td>Podcast</td>
<td>Recording/Podcast</td>
</tr>
<tr>
<td>Sound Recording (musical)</td>
<td>Super Audio CD</td>
<td>Recording/Super Audio CD</td>
</tr>
<tr>
<td>Sound Recording (musical)</td>
<td>Other</td>
<td>Recording/Other</td>
</tr>
<tr>
<td>Sound Recording (nonmusical)</td>
<td>No Subtype Assigned</td>
<td>Sound</td>
</tr>
<tr>
<td>Sound Recording (nonmusical)</td>
<td>Audio Cassette</td>
<td>Sound/Audio Cassette</td>
</tr>
<tr>
<td>Sound Recording (nonmusical)</td>
<td>Compact Disc</td>
<td>Sound/Compact Disc</td>
</tr>
<tr>
<td>Sound Recording (nonmusical)</td>
<td>Digital Audio Tape</td>
<td>Sound/Digital Audio Tape</td>
</tr>
<tr>
<td>Sound Recording (nonmusical)</td>
<td>DVD-A</td>
<td>Sound/DVD-A</td>
</tr>
<tr>
<td>Sound Recording (nonmusical)</td>
<td>MiniDisc</td>
<td>Sound/MiniDisc</td>
</tr>
<tr>
<td>Sound Recording (nonmusical)</td>
<td>MP3</td>
<td>Sound/MP3</td>
</tr>
<tr>
<td>Sound Recording (nonmusical)</td>
<td>MP4</td>
<td>Sound/MP4</td>
</tr>
<tr>
<td>Sound Recording (nonmusical)</td>
<td>Playaway</td>
<td>Sound/Playaway</td>
</tr>
<tr>
<td>Sound Recording (nonmusical)</td>
<td>Podcast</td>
<td>Sound/Podcast</td>
</tr>
<tr>
<td>Sound Recording (nonmusical)</td>
<td>Super Audio CD</td>
<td>Sound/Super Audio CD</td>
</tr>
<tr>
<td>Sound Recording (nonmusical)</td>
<td>Other</td>
<td>Sound/Other</td>
</tr>
<tr>
<td>Material Type</td>
<td>Subtype</td>
<td>RDA Title Details Display</td>
</tr>
<tr>
<td>--------------</td>
<td>----------------------</td>
<td>-----------------------------------</td>
</tr>
<tr>
<td>Video</td>
<td>No Subtype Assigned</td>
<td>Video</td>
</tr>
<tr>
<td>Video</td>
<td>Blu-ray Disc</td>
<td>Video/Blu-ray Disc</td>
</tr>
<tr>
<td>Video</td>
<td>DVD</td>
<td>Video/DVD</td>
</tr>
<tr>
<td>Video</td>
<td>Film</td>
<td>Video/Film</td>
</tr>
<tr>
<td>Video</td>
<td>Filmstrip</td>
<td>Video/Filmstrip</td>
</tr>
<tr>
<td>Video</td>
<td>HD-DVD</td>
<td>Video/HD-DVD</td>
</tr>
<tr>
<td>Video</td>
<td>Playaway View</td>
<td>Video/Playaway View</td>
</tr>
<tr>
<td>Video</td>
<td>Podcast</td>
<td>Video/Podcast</td>
</tr>
<tr>
<td>Video</td>
<td>Sony ProDATA</td>
<td>Video/Sony ProDATA</td>
</tr>
<tr>
<td>Video</td>
<td>Streaming Video</td>
<td>Video/Streaming Video</td>
</tr>
<tr>
<td>Video</td>
<td>Transparency</td>
<td>Video/Transparency</td>
</tr>
<tr>
<td>Video</td>
<td>VHS</td>
<td>Video/VHS</td>
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<tr>
<td>Video</td>
<td>Vidcast</td>
<td>Video/Vidcast</td>
</tr>
<tr>
<td>Video</td>
<td>Video CD</td>
<td>Video/Video CD</td>
</tr>
<tr>
<td>Video</td>
<td>Other</td>
<td>Video/Other</td>
</tr>
</tbody>
</table>

**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.
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**.

<table>
<thead>
<tr>
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<tbody>
<tr>
<td>Fiction</td>
<td>• Total number of fiction materials</td>
<td>Collection Statistics — Summary</td>
</tr>
<tr>
<td></td>
<td>• Average copyright date</td>
<td></td>
</tr>
<tr>
<td>Reference and</td>
<td>• Total number of materials assigned a Dewey number for Reference/Nonfiction</td>
<td>• Dewey range</td>
</tr>
<tr>
<td>Nonfiction</td>
<td>• Average copyright date</td>
<td>• Total Holdings</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Holdings with prefix</td>
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<td></td>
<td></td>
<td>• Holdings with Dewey (no more than 5 copies counted per title)</td>
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<td></td>
<td>• Number Older</td>
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<td>• % Newer</td>
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<tr>
<td>Visual</td>
<td>Total number of items that require equipment to be viewed (was included with</td>
<td>• Dewey range</td>
</tr>
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<td></td>
<td>nonfiction)</td>
<td>• Total Holdings</td>
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<td>• Holdings with Prefix</td>
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<td>• % Newer</td>
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<tr>
<td>Professional</td>
<td>No requirement</td>
<td>• Dewey range</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Total Holdings</td>
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<td>• Holdings with Prefix</td>
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<td>• Number Newer</td>
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<tr>
<td></td>
<td></td>
<td>• % Newer</td>
</tr>
</tbody>
</table>
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.
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.

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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

<table>
<thead>
<tr>
<th>Icon</th>
<th>Format Type</th>
<th>Icon</th>
<th>Source Type</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Animation Icon" /></td>
<td>Animation</td>
<td><img src="image" alt="Dictionary Icon" /></td>
<td>Dictionary or Thesaurus</td>
</tr>
<tr>
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<td><img src="image" alt="Encyclopedia Icon" /></td>
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<tr>
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<td><img src="image" alt="Primary source material Icon" /></td>
<td>Primary source material</td>
</tr>
<tr>
<td><img src="image" alt="Interactive Icon" /></td>
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<td><img src="image" alt="Music Icon" /></td>
<td>Music</td>
</tr>
<tr>
<td><img src="image" alt="Video Icon" /></td>
<td>Video</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## 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](image)
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.

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.
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.

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.

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

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.

![Search for Assets and Items](image)

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.

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.

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.
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.
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, timeframe, 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.
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.

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.

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.
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.

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.

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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.
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.