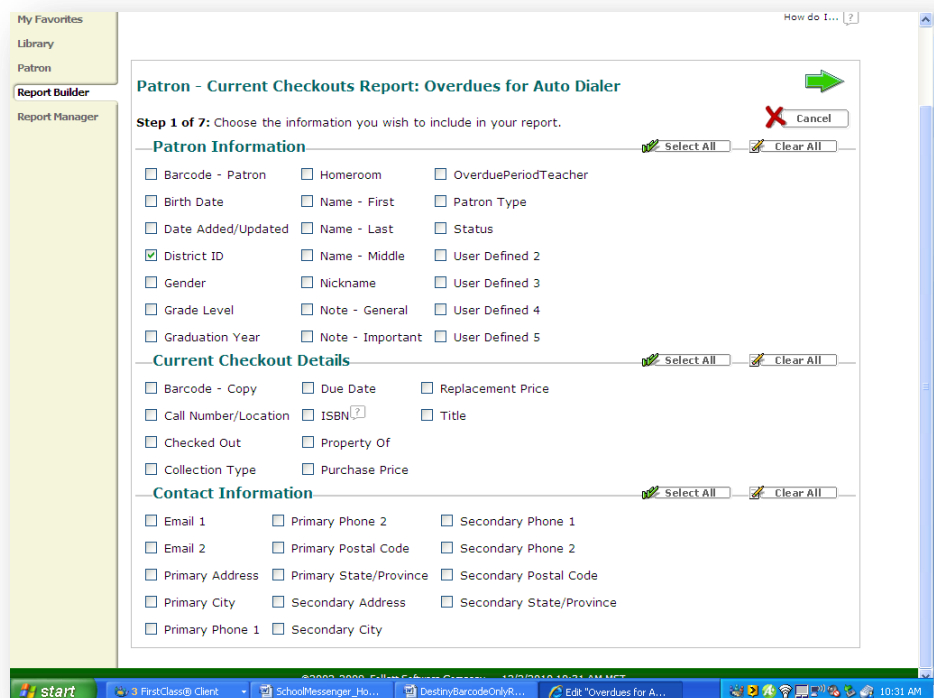
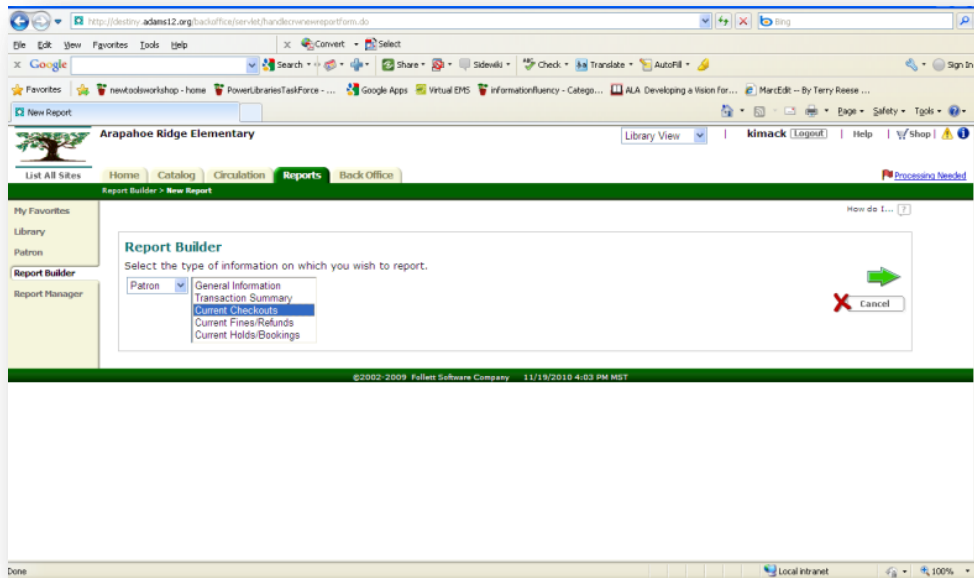


This report shows you how to run the two Destiny reports needed to upload in to School Messenger for Overdues and Fines.

1. Run the Destiny Barcode only report for OVERDUES:

Go to the Report Tab, then Report Builder on the left. Click New Report (top right)

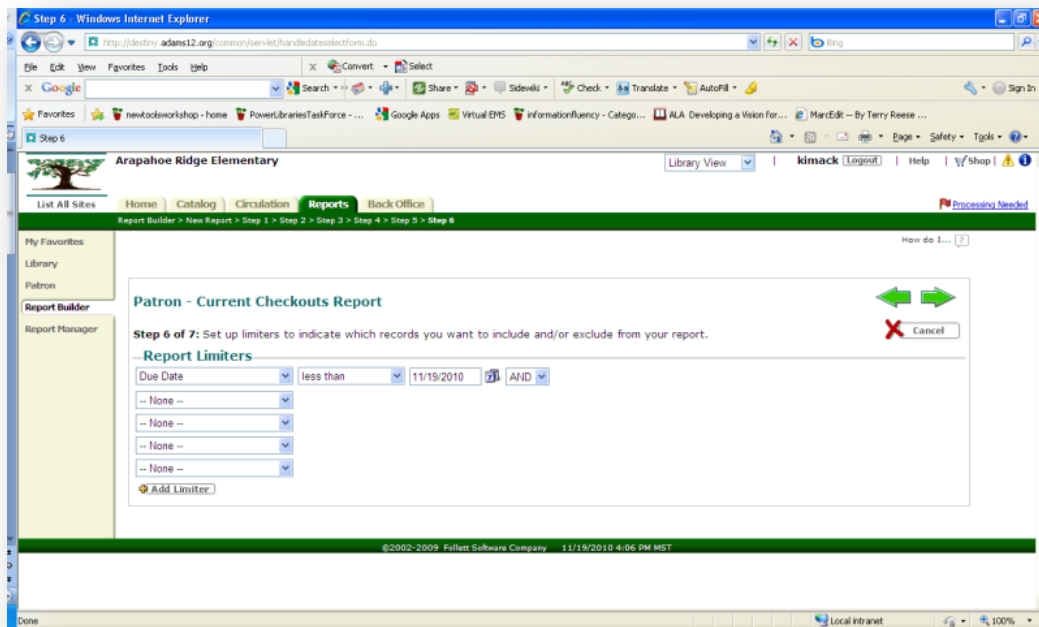
Choose Patron, then Current Checkouts, then click Green Arrow on right.

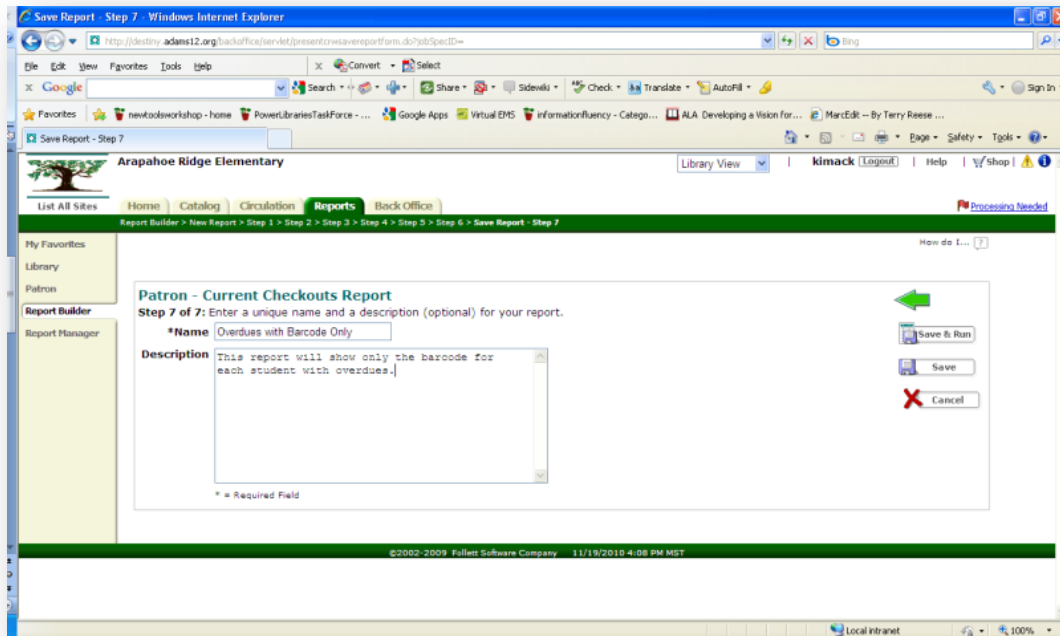


On Step 1 of 7, under Patron Information, click the **District ID**. (Do not select Barcode) Don't select anything else. Click the Green Arrow .

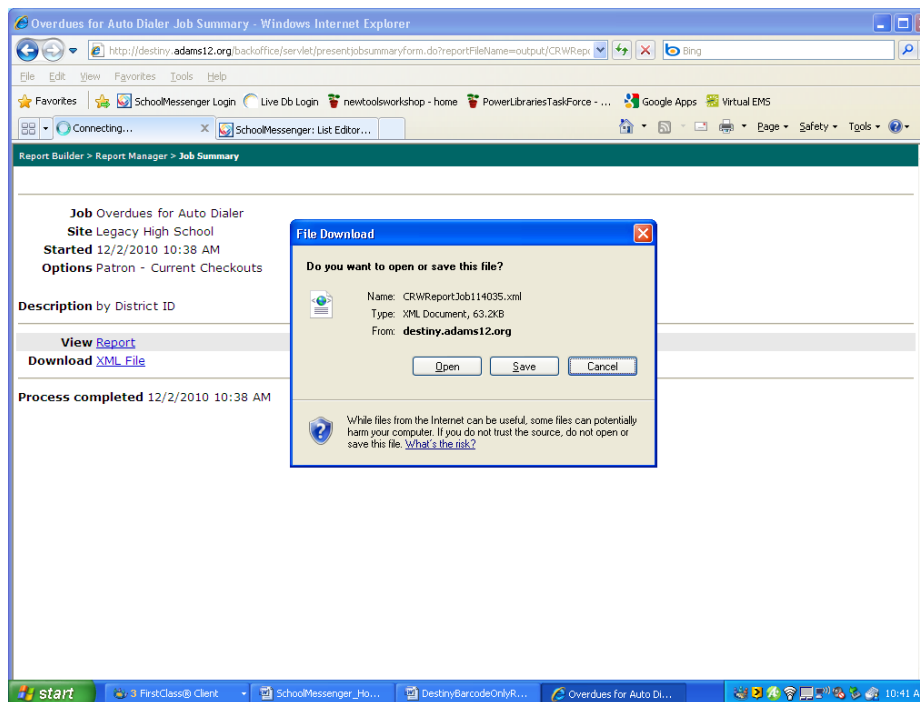
Click the Green Arrows to bypass steps 2, 3, 4, & 5.

On Step 6, choose the drop-down arrow on the first Report Limiter. Select Due Date, then use the calendar to select today's date. This will run the report to show all books due before today (those that are overdue as of today). Click Green Arrow.



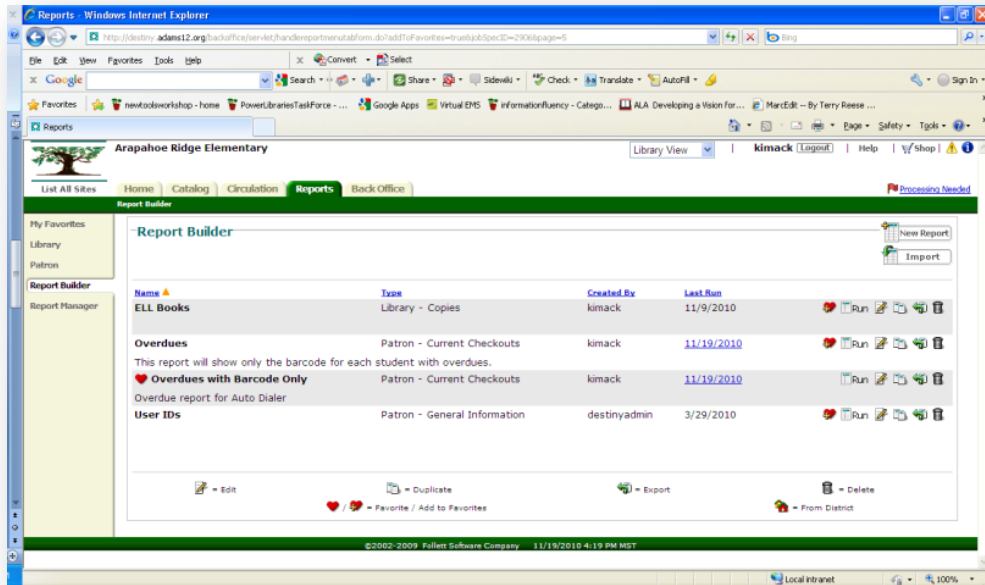


Name your report and write a description. Then click Save & Run button.



The report will show up just like any Destiny report. Click Refresh List until you see Status: Completed and you get the link to View.

Click the **Download** link XML File. **Save** the file to your desktop.



Do you want to save this report in your Favorites? Click on the breadcrumb back to Report Builder. You will see the report you just ran. Click the red heart on the right. The Heart will move to the beginning of your report, which shows you it is now in your Favorites. When you click My Favorites on the left, the report is always there.

2. Run the Destiny Barcode only report for FINES:

Directions for the Fines Report: (same as above but with more limiters)

- Go to the “Reports” tab.
- On the left menu, choose “Report Builder.” In the top right hand corner, select “New Report.”
- Choose "patron" in the pull down menu, and "current fines/refunds." Then click on the green arrow.
- On Step 1 of 7, check “District ID” and nothing else. Then click the green arrow.
- Use the green arrows to move through Steps 2-5. You don’t make any changes to those screens.
- On Step 6 of 7, you are going to set LIMITERS.
 - In the first limiter, use the pull down menu and under Patron Information, choose **Patron Type**, then leave **equals** in the middle box, then choose **Student** and leave **AND** in the last box
 - In the second limiter, use the pull down menu and under Patron Information, choose **Status**, then leave **equals**, **active**, and **AND**.
 - In the third limiter, use the pull down menu and under Current Fines, choose **Amount Finned**, then change “less than” to **greater than**, then put **\$0** in the next box, and leave **AND** in the last box

- In the fourth limiter, use the pull down menu and under Current Fines, choose **Fine Type**, then leave **equals** in the middle box, then choose **Library** in the last box, and leave **AND** in the last box.
- In the fifth limiter, use the pull down menu and under current Fines, choose **Fine Assessed Date**, choose **Less than or equal to** in the middle box, then choose **Today's Date** in the next box. Then click the green arrow.
-
- Name your Report (Kristen uses the date), then click "Save and Run."

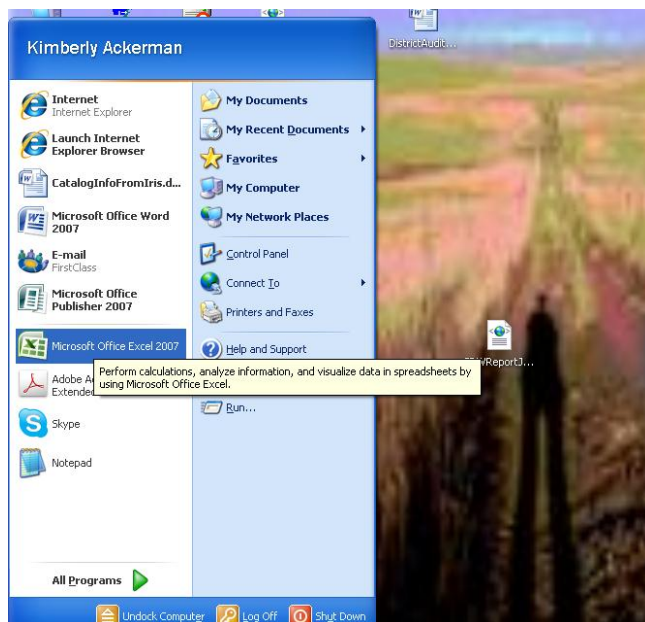
Tricia runs both the Overdue Report and the Fines Report and then copies the information to create one csv file. Then she uploads it into School Messenger.

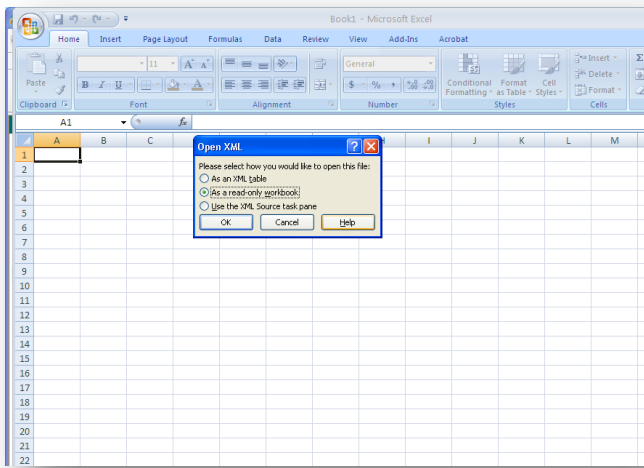
You could upload the reports separately and schedule the calls in School Msgr. separately also.

3. FORMAT the reports:

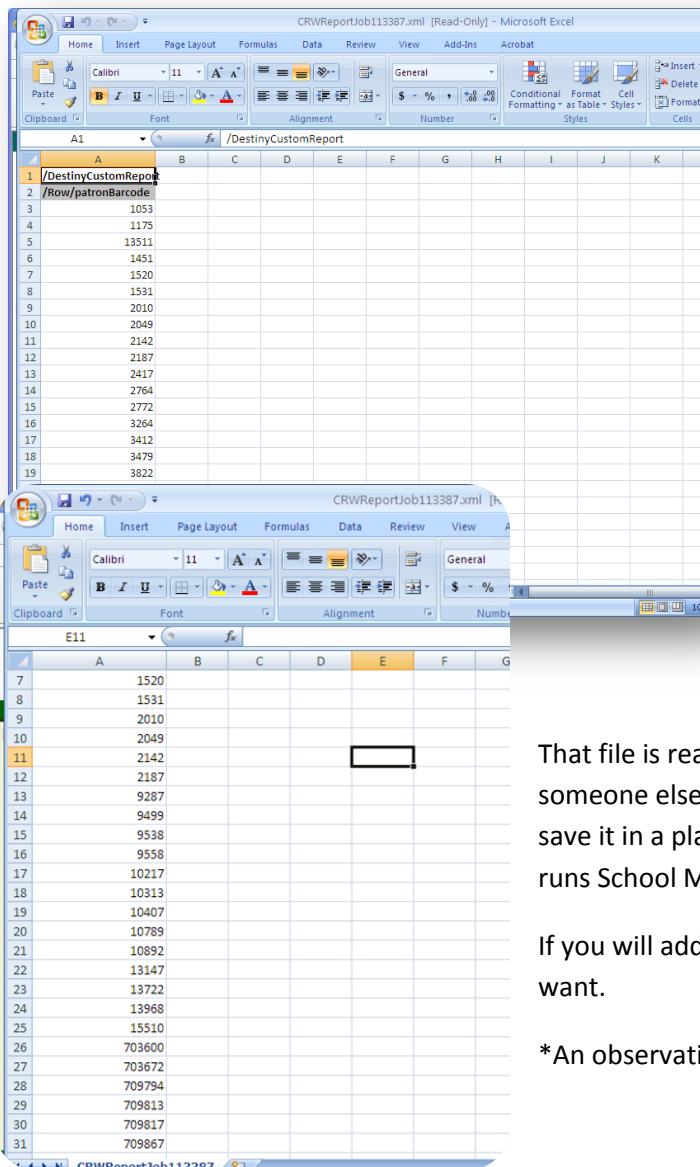
Now that the Destiny Barcode Only reports for Fines and for Overdues are saved to your desktop, you have to do a couple of things to them to get them ready to import into School Messenger.

Open Excel. In Excel, go to OPEN and browse for the .xml file on your desktop. Open that file in Excel.z
On my desktop, you can see the saved .csv file which I'm going to open in Excel.





You will have the choice of how to open the file. Choose As a read-only workbook (middle choice).



Your results will have some words in the first two rows. Click on the row # to highlight the row and press your Delete key on your keyboard to get rid of the words.

You have edited the file to get rid of everything but the barcodes.

Save the file again but choose to save it as File Type .csv.

That file is ready to be imported into the auto-dialer. If someone else in your school will put it in the auto-dialer, save it in a place that will be accessible to the person who runs School Messenger, as she will have to import the file.

If you will adding it to the auto-dialer, save it wherever you want.

*An observation about the barcode report I ran for Legacy:

The leading zeroes are missing from the excel spreadsheet (that's OK). I found that any of these ID#s that are 4 digits or 5 digits belong to staff. Anything with 6 digits belongs to a student.

School messenger will skip any barcodes that belong to staff. So you will get some skipped records that School Messenger can't find a phone number or email for. These are either students who are no longer at your school, or they are staff members.

Example of Unmatched ID#s in School Messenger. You can search these in Destiny to see who the number belongs to. You can also search it in IC. If the number belongs to a student who is no longer active or who has no home information in IC, you will get the Status ****Not Found****.

SchoolMessenger: Upload List: Overdue Library Books 11/30 - Windows Internet Explorer

https://asp.schoolmessenger.com/adams12fivestarschools/uploadlistpreview.php

File Edit View Favorites Tools Help

★ Favorites Welcome to Adams 12 Five ... Suggested Sites Free Hotmail Web Slice Gallery

Renew SchoolMessenger: Upload... X

Lists Messages Jobs

Upload List: Overdue Library Books 11/30

Save Select Different File Cancel

Unmatched ID#s

ID#	Status
709794	### Not Found ###
709813	### Not Found ###
709867	### Not Found ###
709869	### Not Found ###
710087	### Not Found ###
710225	### Not Found ###
710311	### Not Found ###
710598	### Not Found ###

Matched ID#s

ID#	First Name	Last Name	Phone Number
703600	Amanda	Pfister	(303) 252-9084
703672	Scott	Bryant	(303) 464-0800
709817	Stephanie	Silva	(720) 224-1331

① Please review your list then click Save.

Save Select Different File Cancel

Logged in as Heather Kovene Legacy (kov009630)
Current system time is November 30th, 2010 10:33 am (US/Mountain)

Service & Support: support@schoolmessenger.com | 800.920.3897
Use of this system is subject to the [Privacy Policy](#) and [Terms of Service](#)
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Done

start SchoolMessenger: Up... Infinite Campus - Win... 2 FirstClass@ Client Document1 - Microsof... Internet 100% 10:39 AM

