

Destiny Reports:
Created by Kristen Loesel, Teacher Librarian at Malley Drive Elementary

End of the month reports:

1. Circ Statistics—

Reports Tab

Patron (left menu)

Patron Statistics- Historical

Patron Activity from ____ to ____ (use calendar toggle)

Circ of "Library Materials"

Show "Summary"

Group by "Patron Type" (pull down menu)

Only include "faculty, seniors, students, active"

Run report

2. Circ Statistics for students by grade level—

Reports Tab

Patron (left menu)

Patron Statistics- Historical

Patron Activity from ____ to ____ (use calendar toggle)

Circ of "Library Materials"

Show "Summary"

Group by "Grade Level" (pull down menu)

Only include "students, active"

Run report

Overdue report:

Reports Tab

Patron (left menu)

Current Checkouts/Fines

1. Format

a. Show "All Checked Out/ Overdue Materials"

b. Check "All that are currently overdue"

c. Check "Unpaid Library Fines" and "Unpaid Patron Fines"

d. Format—check "notices" if you want letters to send home

e. Click Continue

2. Limit

a. My Patrons—click "+/- Update" and select faculty and/or students (I only click students for letters to send home)

b. Only check "Active" under status

c. My Materials—uncheck "textbooks", but leave the check in "Also Include Materials my patrons have or fines they owe that belong to other sites in the district."

d. Click continue

3. Details

a. Select and sort by "Overdue Period Teacher" (pull down menu) from a to z

b. Distributed—check "internally"

c. Page Layout—choose from pull down menu

d. Also Display—check "Title,"

- “Price,”
 - “Barcode,”
 - “Subtotal items/fines”—optional,
 - “Grade Level” and change to “Overdue Period Teacher”
- e. Click Run Report

List of All Books Checked Out to Students Report: This report would be used after you close at the end of the year to collect all books still checked out to students(although most of them should be overdue, if your dates are set up correctly)

Reports Tab

Patron (left menu)

Current Checkouts/Fines

1. Format
 - a. Show “All Checked Out/ Overdue Materials”
 - b. Check “All that are checked out”
 - c. Check “Unpaid Library Fines” and “Unpaid Patron Fines”
 - d. Format—check “report”
 - e. Click Continue
2. Limit
 - a. My Patrons—click “+/- Update” and select faculty, seniors and students
 - b. Only check “Active” under status
 - c. May want to check “Patrons of other sites that have my materials and/or that owe fines to (your school name).”
 - d. My Materials—uncheck “textbooks”, but leave the check in “Also Include Materials my patrons have or fines they owe that belong to other sites in the district.”
 - e. Click continue
3. Details
 - a. Select and sort by “Overdue Period Teacher” (pull down menu) from a to z
 - b. Check “Start a new page for each group”
 - c. Also Display—check “Title,”
“Price,”
“Barcode,”
“Subtotal items/fines”—optional,
“Grade Level” and change to “Overdue Period Teacher,”
“Grade Level”—Optional
 - d. Click Run Report

List of All Books Checked Out to Teachers Report: This report would be used after you close at the end of the year to collect all books still checked out to teachers(although most of them should be overdue, if your dates are set up correctly)

Reports Tab

Patron (left menu)

Current Checkouts/Fines

1. Format
 - a. Show “All Checked Out/ Overdue Materials”
 - b. Check “All that are checked out”
 - c. Check “Unpaid Library Fines” and “Unpaid Patron Fines”

- d. Format—check “report”
 - e. Click Continue
- 2. Limit
 - a. My Patrons—click “+/- Update” and select “faculty”
 - b. Only check “Active” under status
 - c. My Materials—uncheck “textbooks”, but leave the check in “Also Include Materials my patrons have or fines they owe that belong to other sites in the district.”
 - d. Click continue
- 3. Details
 - a. Select and sort by “Patron Name” (pull down menu) from a to z
 - b. Check “Start a new page for each group”
 - c. Also Display—check “Title,”
“Price,”
“Barcode,”
“Subtotal items/fines”—optional
 - d. Click Run Report