

## Getting Ready for DESTINY

### STEP 1: Clean up your Follett database by May 29, 2009.

In order to get ready for Destiny it is important that your database is in the best possible condition. Analyze and print the following reports. Follow these instructions to make corrections in your database.

#### 1. Print the Collection Statistics Report

- ✓ Directions: *Go to Reports—Circulation Reports tab—Collection Statistics—Report Circulations for This Month—Dewey Call Number Range Starting Number 0 and Ending Number 999—Report Circulations by Dewey, 100's—Include Call Number Prefixes—Print*
- ✓ Check to see how many items are in OTHER by reviewing the Collection Statistics Report.

#### 2. Print the Copies With OTHER Call Numbers Report

- ✓ Directions: *Go to Reports—Cataloging Reports tab—Copies With Other Call Num's—Click on Starting At—Select a title—Click on Ending At—Select a title—Print*
- ✓ Examine the Copies With OTHER Call Numbers Report.
- ✓ Determine why an item is on this report. The solution may be as simple as correcting typographical errors, adding a special call number abbreviation such as F and FIC, R and REF, T and P, etc., adding space, deleting spaces, etc.
- ✓ Correct any items displayed on this report.

#### 3. Print the Copies Without Call Numbers Report

- ✓ Directions: *Go to Reports—Cataloging Reports tab—Copies Without Call Numbers—Click on Starting At—Select a title—Click on Ending At—Select a title—Print*
- ✓ Examine the Copies Without Call Number Report.
- ✓ Add the call number to the MARC record.

#### 4. Print the Titles Without Copies Report

- ✓ Directions: *Go to Reports—Cataloging Reports tab—Titles Without Copies—Click on Starting At—Select a title—Click on Ending At—Select a title—Check Exclude WebPath Express, Exclude eBooks, and Exclude records with 856 tags—Print*
- ✓ Examine the Titles Without Copies Report.
- ✓ Globally delete titles without copies.
- ✓ Directions: *Cataloging—Edit—Global Delete—Titles Without Copies*

#### 5. Print the Lost Copies Report

- ✓ **If** you have created a patron for LOST books, set all the items under this patron to LOST. Delete this patron and all items will become lost.
- ✓ Directions: *Go to Reports—Circulation Reports tab—Choose a Report: Copy List by Status—Copy Status drop down menu: **LOST**—Click Starting At located above Copy Status (1<sup>st</sup> title in the collection will be highlighted)—Click Select—Click Ending At—Type "zzz" in Find the Nearest Title to box—Click Find—Click Select--Print*
- ✓ Examine the Copy List by Status of LOST items.
- ✓ Globally delete LOST copies.
- ✓ Directions: *Cataloging—Edit—Global Delete—Lost Copies*

## 6. Print the Missing Copies Report

- ✓ Directions: *Go to Reports—Circulation Reports tab—Choose a Report: Copy List by Status—Copy Status drop down menu: **Missing**—Click Starting At located above Copy Status (1<sup>st</sup> title in the collection will be highlighted)—Click Select—Click Ending At—Type "zzz" in Find the Nearest Title to box—Click Find (Last title in the collection will be highlighted)—Click Select—Print*
- ✓ Examine the Copy List by Status of MISSING items.
- ✓ Globally delete MISSING copies.
- ✓ Directions: *Cataloging—Edit—Global Delete—Missing Copies*

## 7. After all corrections/deletions have been made rerun all the above reports by May 29, 2009. Attach signed goldenrod checklist.

### STEP 2: Update patron records by May 29, 2009. Indicate completed on goldenrod checklist.

#### 1. Update individual student records

- ✓ Directions: *Go to Patron Maintenance— Click on one of the search strategies (Name, Sound, Barcode, ID)—Type in the appropriate data (Name, Barcode, ID)—The patron name list appears—Highlight the patron you would like to edit—Click Edit*
- ✓ Examine the record.
- ✓ Make sure the student's 9-digit ID number is in the ID field AND the barcode field. If not, type the 9-digit ID number in both fields.

#### 2. Update individual teacher records

- ✓ Directions: *Go to Patron Maintenance— Click on one of the search strategies (Name, Sound, Barcode, ID)—Type in the appropriate data (Name, Barcode, ID)—The patron name list appears—Highlight the patron you would like to edit—Click Edit*
- ✓ Insert your school number in front of the existing barcode (ex. 298123)

#### 3. Delete teachers and students that are no longer at your school

- ✓ Directions: *Go to Patron Maintenance—Click on one of the search strategies (Name, Sound, Barcode, ID)—Type in the appropriate data (Name, Barcode, ID)—The patron name list appears—Highlight the patron you would like to delete—Click Delete*
- ✓ Globally delete LOST copies.
- ✓ Directions: *Cataloging—Edit—Global Delete—Lost Copies*

### STEP 3: Print these reports after the last day of school. Send a copy of the reports to LMS by June 19, 2009. Attach signed pink checklist.

#### 1. Print a list of overdue items

- ✓ Directions: *Go to Reports—Circulation Reports tab—Checkouts/Fines—Select whether or not to generate the list by patron name, location 1, location 2—Enter the Starting At and Ending At information—If you want to limit your list to just students or faculty, click on <Patron Types>-- Click on Selected Patron Types—Highlight the patron type and click OK—**Select Overdues**—If you want to limit your list to a particular circulation type, click on <Circulation Types>-- Click on Selected Circulation Types—Highlight the circulation type—Click OK—Answer the remainder of the questions—Print*

## 2. Print a list of all items checked out

- ✓ Directions: *Go to Reports—Circulation Reports tab—Checkouts/Fines—Select whether or not to generate the list by patron name, location 1, location 2—Enter the Starting At and Ending At information—If you want to limit your list to just students or faculty, click on <Patron Types>--Click on Selected Patron Types—Highlight the patron type and click OK—**Select All Items Checked Out**—If you want to limit your list to a particular circulation type, click on <Circulation Types>--Click on Selected Circulation Types—Highlight the circulation type—Click OK—Answer the remainder of the questions—**Print***

## 3. Print a list of fines

- ✓ Directions: *Go to Reports—Circulation Reports tab—Checkouts/Fines—Select whether or not to generate the list by patron name, location 1, location 2—Enter the Starting At and Ending At information—If you want to limit your list to just students or faculty, click on <Patron Types>--Click on Selected Patron Types—Highlight the patron type and click OK—**Select: Fines Only**—If you want to limit your list to a particular circulation type, click on <Circulation Types>--Click on Selected Circulation Types—Highlight the circulation type—Click OK—Answer the remainder of the questions—**Print***

## 4. Print a list of titles in a specific category (Optional)

- ✓ Directions: *Go to Reports—Cataloging Reports tab—Titles by Category—Enter the Starting At and Ending At information—Click Show Copies---Click Show **Categories**---**Print***

## 5. Print the System Information Report

- ✓ Directions: *Go to Reports—Help in the Menu Bar—About Reports—Click on **Information**—Yes, Count Overdues---**Print***

**STEP 4: Delete patrons by graduation year and delete lost copies. Send copy of Lost Copy Report (after deleting) to LMS by June 26, 2009. Attached signed green checklist.**

## 1. Deleting patrons by graduation year

- ✓ Directions: *Go to Patron Maintenance—Edit—Global Delete—Delete All Patrons Whose: Graduation Year is: Select the school year you wish to remove and Patron Type is: Select the appropriate patron type*
- ✓ Globally delete LOST copies.
- ✓ *Print a list of Lost Copies*
- ✓ Directions: *Cataloging—Edit—Global Delete—Lost Copies* Directions: *Go to Reports—Circulation Reports tab—Choose a Report: Copy List by Status—Copy Status drop down menu: **LOST**—Click Starting At located above Copy Status (1<sup>st</sup> title in the collection will be highlighted)—Click Select—Click Ending At—Type "zzz" in Find the Nearest Title to box—Click Find—Click Select--**Print***

**STEP 5: Final steps. Complete by June 26, 2009. Send signed green checklist to LMS by June 26, 2009**

**1. Run the Integrity Check**

- ✓ Directions: *Go to Follett Applications---Utilities---Maintenance---Click Check Database Integrity*
  - This process will run for approximately 30 minutes – 1.5 hours
  - This checks the electronic integrity of the database and can fix any problems or can let you know if other utilities need to be run.
  - If there are problems, the exception report provides you with suggested solutions. Save this report and resolve any issues before proceeding.

**2. Run backups**

- ✓ Directions: *Go to Follett Applications—Backup and Restore—Perform a complete backup including keywords.*

**DO NOT add, delete, or make any corrections to your database after June 26, 2009.**

**CHECKLIST**  
**(due May 29, 2009)**

**School:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Media Specialist** \_\_\_\_\_ **Signature** \_\_\_\_\_

- Collection Statistics Report**
- Copies With OTHER Call Numbers Report**
- Copies Without Call Numbers Report**
- Titles Without Copies Report**
- Lost Copies Report**
- Missing Copies Report**
- Individual student records updated**
- Individual teacher records updated**
- Deleted patrons that are no longer at my school**

**CHECKLIST**  
**(due June 19, 2009)**

**School:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Media Specialist** \_\_\_\_\_ **Signature** \_\_\_\_\_

- Overdues Report**
- All Items Checked Out Report**
- Fines Report**
- System Information Report**

**CHECKLIST**  
**(due June 26, 2009)**

**School:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Media Specialist** \_\_\_\_\_ **Signature** \_\_\_\_\_

- Deleted students by graduation year
- Lost Copies Report
- Performed Integrity Check
- Performed Backup