

## Create a Overdue Report or Notice



1. Go to **Reports > Library Reports** and select **Current Checkouts/Fines** under **Circulation**.
2. On the first page, Format:
  - Select the types of transactions to include:
    - All checkouts (overdue or not)
    - Resources assigned to a custodian (Destiny Resource Manager™ only)
    - Outstanding fines and refunds
  - Choose a format from the following:
    - **Report**—A report to distribute to your teachers and library staff. Either:
      - Generate the report in Adobe® PDF format by selecting **PDF**.
      - Generate the report in Microsoft® Excel® format by selecting **Microsoft Excel**.
    - **Email to homerooms**—Lists for teachers sent by email. You need to have a configured email server and at least one patron assigned to a homeroom.
    - **Notices**—Reminders for your patrons about checkouts, overdue materials or outstanding fines. If you have allowed your library patrons to view Catalog pages in French or Spanish, you can select a language for the notices.
  - When you are ready, click **Continue**.
3. On the second page, Limit, you can limit the report, list or notices to certain Patron Types, Statuses or both.
  - To select the Patron Types, click **Update**.
  - Select the types of checked out/overdue items to include: Library materials, textbooks, resources or any combination. Your options depend on the Destiny Resource Managers you have.
  - To select the library Circulation Types you want to include, click **Update**. My Materials refers to the items in your collection.
  - When you are ready, click **Continue**.
4. On the third page, Details, first select the patrons or homerooms.
  - **Select & Sort by**
    - For reports or notices, select a method for identifying the range of patrons:
      - You can leave **from** and **to** boxes blank to include all patrons.
      - If you leave the **from** box blank and enter a name or number in the **to** box, it includes all those up to and including the name or number in the **to** box.
      - If you enter a name or number in the **from** box and leave the **to** box blank, it includes that name or number and all those after it.
  - If you enter the same name or number in both boxes, it is limited to that one name or number.

**Note:** Destiny does not support the use of wildcards (?, \*) in ranges.

- For homeroom emails, click **Update**. A Select Homerooms page appears. Click **OK** after making selections.
- **Start a new page for each group**— In the reports, groups are determined by the criterion you identified in the **Select & Sort by** list.
- **Distributed**—For notices, decide whether you will distribute them internally, mail them or email them. (The mailed format includes the patron's address.)
  - For email notices or homeroom lists, verify or change the emails' From name and address.
  - For internal (hand-distributed) or mailed notices, select the number of notices per page (1, 2 or 4).
  - For any type of notice, customize the salutation before the patron's name and the message, if desired.
  - If you want mailed notices addressed to the parent, select the **Address Label** checkbox. Otherwise, it is addressed to the patron.
- **Also Display ...**To add more information to the report, notices or list, select or deselect any of the checkboxes under

5. *Title Info:*

Title for library materials

Cover image

Price of checked out/overdue materials

*Patron Info:*

Barcode

Phone number

Subtotal items/fines for each patron

Grade Level, Homeroom, User Defined 1 or User Defined 2

6. To generate the report, notices or list, click **Run Report** or **Run Notices**. If you will be running this same report or notice periodically, you can save the setup by clicking **Save Setup**.
7. For overdue notices and reports to run only on open days, use the **Schedule Report** drop-down to select the frequency.
8. Select the **Do not run on closed days (Closed: <days closed>)** checkbox.
9. Select to either **Save Setup** or **Save and Run**.