Follett Destiny – Textbook Reports

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I. Overview

Follett Destiny’s Reports feature provides a series of customizable reports allowing sites to quickly assess their textbook collection in a variety of ways. In addition to enabling sites to create their own reports using the Report Builder, Follett Destiny also provides many useful prefabricated reports.

1. To access Follett’s prefabricated reports:
   a. Select the Reports tab.
   b. Select Textbook Reports.
   c. Select a report from the list.
      i. (Optional) Select the More icon next to a report for further details.

In this document, we will focus on the following reports: Student to Textbook Statistics, Textbook Checkout Summary, Title and Copy List, and Current Checkouts/Fines, as well as providing an overview of the Report Builder.

Textbook Reports and Course Associations

Each grade (at the elementary level) or course (at the secondary level) has a Williams Board Adopted Textbook associated with it. Follett Destiny compares enrollment information it gets from Zangle (the District’s enrollment and attendance system) with each site’s textbook to course associations. If a student is enrolled in a course but is using a different book than what is associated with that course, Follett Destiny considers that student “without a textbook”.

In rare cases, multiple editions of a textbook will be associated with one course. For example, a class may be
using both the 9th and 10th editions of “The Big Book of Science” – separate titles in Follett Destiny, but one book for the purposes of Williams compliance. While students need only one copy of either edition, the Student to Textbook Statistics and Textbook Checkout Summary will think students need both.

Textbook Reports and Special Education Students

The needs of special education students are met in a variety of ways, including:

- **Special Day Classes (SDC):** Students of varying grades are taught in a specialized classroom. SDC students will not be included in Student to Textbook Statistics or Textbook Checkout Summary reports.

- **Mainstreaming:** Students with special needs are educated in general education classrooms for specific time periods based on their level and skills. Depending on the classroom or course, mainstreamed students are usually included in Student to Textbook Statistics or Textbook Checkout Summary reports.

Because of the unique and varied needs of each student, it is recommended you use these reports as a tool to facilitate the textbook process, but also keep in mind discrepancies might arise which need investigation to resolve.

II. Student to Textbook Statistics

The Student to Textbook Statistics report compares the number of students enrolled in a course to the number of textbooks in your inventory associated with that course. The District reviews this report to ensure Williams compliance and to verify the necessity of textbook requests. It is strongly recommended sites do likewise. **NOTE:** Electronic editions of textbooks which have not been assigned to a course and site purchased copies are not included in this report. (For more information on site purchased copies, see Site Purchased Copies.)

1. To run the report, select Student to Textbook Statistics from the list of reports.
2. To customize the report, continue to step 3. To use the default settings (recommended), skip to step 5.
3. To choose the parameters of the report:
   a. Select the focus of the report from the drop-down menu:
      - All: Lists statistics for every title. Recommended.
      - Title: Lists statistics for a user-specified title.
      - ISBN: Lists statistics for a user-specified ISBN.
   b. (Optional) Limit the statistics to Classes starting on or after a certain date by entering or selecting the start date. Click ☀️ for calendar.
   c. Show:
      - Site details: Provides a detailed summary sorted alphabetically by textbook title, including each course title and course code using a textbook title. Recommended.
      - District summary: Provides an overview of each site’s statistics sorted alphabetically by textbook title.

4. (Optional) Click ⬅️ Save Setup to save this configuration for quick access in the future.

5. Click ✅ Run Report.
6. The report may take several minutes to generate. Click **Refresh List** to check its progress. When it is complete, click **View** to open report.
7. The report is sorted alphabetically by textbook title and is divided into several sections:

- **Course:** This lists the course (or courses) associated with a textbook at your site, along with the course code.

- **Total Copies:** This count includes copies with a status of *Available, Checked Out,* and incoming *In Transit* in your Total Copies. **NOTE:** Follett does not distinguish between current checkouts and overdue checkouts.

- **Incoming Transfers:** If any copies have been transferred to you and are still in transit, they will show up here. **NOTE:** This number is included in Total Copies.

- **Total Enrollment:** This count includes all students enrolled in a course. Enrollment is updated nightly with the latest information from Zangle.
  
  **NOTE:** Please see “A Note on Course Associations and Special Education Students” for details on how enrollment figures might be affected in different circumstances.

- **Extra Copies:** If your number of total copies is higher than your total enrollment, extra copies will be listed here.

- **Copies Needed:** If your number of total copies is less than your total enrollment, copies needed to make up the difference will be listed here in red. Please place a request through Follett for any needed materials. (For more information on requesting materials, please see [Managing Requests](#).)
III. Textbook Checkout Summary

The Textbook Checkout Summary identifies the number of students at your site without textbooks checked out to them. **NOTE:** This report only applies to sites that check out textbooks directly to students. Elementary sites that check out to teachers will not be able to utilize this report.

1. To run the report, select **Textbook Checkout Summary** from the list of reports.
2. If you wish to customize the report, continue to step 3. If you wish to use the default settings, skip to step 4.
3. To choose the parameters of the report:
   a. From the **Current Classes** drop-down menu, you can choose to focus on a specific course or all courses.
   b. To pinpoint specific students without textbooks, check **Include Names of Students without Textbooks**.
4. Click **Run Report**.

5. The report may take several minutes to generate. Click **Refresh List** to check its progress. When it is complete, click **View** to open report.
The report is sorted numerically by course code and is divided into several sections:

- **Class**: The course code and class name.
- **Section**: The class period.
- **Enrollment**: The number of students enrolled in the section.
- **Title**: The textbook title associated with the course.
- **Students with textbooks**: The number of students in a section with the course’s textbook checked out to them.
- **Students without textbooks**: The number of students in a section without the course’s textbook checked out to them. If you checked [Include Names of Students without Textbooks](#) in step 3b, a list of these students will be listed here alphabetically.
IV. Title and Copy List

The Title and Copy List provides a list of Board Adopted Textbooks in your Follett inventory.

1. To run the report, select Title and Copy List from the list of reports.
2. Choose the parameters of the report:
   a. Select and sort by one of the following options from the drop-down menu:
      - **Title**: Sorts by the “Title” field of a textbook’s title.
      - **Publisher**: Sorts by the “Publisher Name” field of a textbook’s title.
      - **Vendor**: Sorts by the “Vendor Name” field of a textbook’s title.
      - **ISBN**: Sorts by the unique International Standard Book Number of a textbook.
      - **Copy Category**: This function is not utilized by the San Juan Unified School District.
      - **Default Budget Category**: Sorts by title’s budget category. Standard budget categories include Williams Board Adopted Textbook, Williams Board Adopted Consumable, and Supplemental. Recommended.
      - **Copy Budget Category**: Sorts by a copy’s budget category. Copies should always have the same budget category as their textbook title.
      - **Instructional Classification**: Sorts by the “Instructional Classification” field of a textbook title.
      - **Subject**: Sorts by the “Subject” field of a textbook’s title.
   b. (Optional) Include Teachers’ Editions and Resource Kits by checking the appropriate box(es).
   c. Show Titles:
      - **Only**: Lists textbook statistics only, sorted alphabetically by title. Does not include individual copy information.
      - **With all copies**: Lists textbook statistics and details on every individual copy in your collection, sorted alphabetically by title. Copies are separated by status (Available, Checked Out, etc.) and sorted numerically. This is the most detailed report. Recommended.
      - **With available copies**: Lists textbook statistics and details on all individual copies in your collection with a status of “Available”.
      - **With checked out copies**: Lists textbook statistics and details on all individual copies in your collection with a status of “Checked Out”.
      - **With copies loaned out**: Lists textbook statistics and details on all individual copies in your collection with a status of “Loaned Out”.

• **With copies on order**: Lists textbook statistics and details on all individual copies in your collection with a status of “On Order”.

• **With copies out for repairs**: Lists textbook statistics and details on all individual copies in your collection with a status of “Out for Repairs”.

• **With incoming transfers**: Lists textbook statistics and details on all individual copies in your collection which have been transferred from another site and have yet to be received.

• **With “lost” copies**: Lists textbook statistics and details on all individual copies in your collection with a status of “Lost”.

  i. **NOTE**: For each of these options, you can include or exclude copies based on their condition by checking the appropriate box(es).

  d. (Optional) **Include the following information** by checking the appropriate box(es):

    • **Default Budget Category**: Includes a title’s Default Budget Category in the textbook statistics.
    
    • **Grade Level**: Includes a title’s grade level, if available.
    
    • **Instructional Classification**: Includes a title’s instructional classification, if available.

3. (Optional) Click **Save Setup** to save this configuration for quick access in the future.

4. Click **Run Report**.
5. The report may take several minutes to generate. Click Refresh List to check its progress. When it is complete, click View to open report.

6. The options you selected in step 2 will determine what information your final report will contain and how it will look. Below is a sample report using the options recommended in step 2:
V. Current Checkouts/Fines

The **Current Checkouts/Fines** report allows you to identify or send notices to patrons with overdue checkouts or fines.

1. To run the report, select **Current Checkouts/Fines** from the list of reports.
2. Choose the parameters of the report:
   a. Choose what the report will **Show** by checking the corresponding box(es):
      - **Checked Out/Overdue Materials**: Materials which are overdue, but for which no fine has been assessed. Additional options are provided to broaden or focus your report.
      - **Unpaid Library Fines**: Fines assessed for library materials which remain outstanding.
      - **Unpaid Textbook Fines**: Fines assessed for textbook materials which remain outstanding.
   b. Choose the **Format** by selecting the corresponding options:
      - **Report**: Lists patrons alphabetically by last name, their overdue materials, and any unpaid fines (depending on parameters selected in step 2a). Report is available in PDF or Excel formats. This option is detailed in step 6a, pg. 14.
      - **Email to Homerooms**: This feature is not utilized by the San Juan School District.
      - **Notices**: Generates fine notices for mailing or internal distribution. Notices are available in English, Spanish, or French. This option is detailed in step 6c, pg. 16.
3. Click **Continue**. **NOTE**: You can return to any previous step of the report setup by clicking on that step at the top of the page.
4. This step allows you to further refine the focus of your report. You can limit the results to the following:
   a. **My Patrons**: Patron types include faculty, student, and volunteer. Select one or more of these by clicking and checking the appropriate box(es).
      i. You can further limit the report to patrons graduating in a certain year. This option is useful for senior checkouts.
   b. **Status**: Include or exclude patrons by their active status.
   c. **Also Include**: Gives you the option to include patrons of other sites that have materials belonging to your site, or owe outstanding fines. This option is useful to track overdue checkouts and fines for students moving from elementary to middle school, and middle school to high school.
   d. **My Materials**: Choose which library materials, if any, to include in your report by clicking and checking the appropriate box(es).
   e. **Also Include**:
      i. **Textbooks**: This can be unchecked if you wish to look only at library fines.
      ii. **Materials**: Check this box to include materials your patrons have or fines they owe to other sites.

5. Click **Continue**.

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6. If you chose Report in step 2b, proceed to step 6a. If you chose Email to Homerooms in step 2b, proceed to step 6b. If you chose Notices in step 2b, proceed to step 6c.

**Report**

a. Finalize the parameters of your report:

i. **Select and sort by** one of the following options from the drop-down menu:

   - **Patron Name**: Lists patrons alphabetically by last name. Can be limited using the “From” and “To” text boxes.
   
   - **Grade Level**: Lists patrons alphabetically by last name, sorted by grade level. Can be limited using the “From” and “To” text boxes.
   
   - **Homeroom**: Lists patrons alphabetically by last name, sorted by homeroom. Can be limited using the “From” and “To” text boxes.

   
   ii. To **start a new page for each group**, check this box.

   iii. You can choose to **Also Display** other details in your report by checking the appropriate box(es) here.

   iv. (Optional) Click **Save Setup** to save this configuration for quick access in the future.

   v. Click **Run Report**.

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6a-i. **Select and sort by**.

6a-ii. **Start a new page for each group**.

6a-iii. **Also Display**.

6a-iv. (Optional) **Save Setup**.

6a-v. (Optional) **Run Report**.
vi. The report may take several minutes to generate. Click **Refresh List** to check its progress. When it is complete, click **View** to open report.

![Refresh List and View buttons highlighted](image)

vii. The options you selected in steps 6a-i through 6a-iii will determine what information your final report will contain and how it will look. Below is a sample report:

![Sample Report](image)
Notices

b. Finalize the parameters of your notices:

   i. Select and sort by one of the following options from the drop-down menu:

   - **Patron Name**: Lists patrons alphabetically by last name. Can be limited using the “From” and “To” text boxes.
   - **Grade Level**: Lists patrons alphabetically by last name, sorted by grade level. Can be limited using the “From” and “To” text boxes.
   - **Homeroom**: Lists patrons alphabetically by last name, sorted by homeroom. Can be limited using the “From” and “To” text boxes.

   ii. Choose how the notices will be distributed:

   - **Internally**: Includes the patron’s name, the form message in step iv, and any overdue materials or fines. This method produces a physical notice for printing.
   - **Mailed**: Includes the patron’s name, the patron’s address, the form message in step iv, and any overdue materials or fines. This method produces a physical notice for printing.
   - **Via email**: This feature is not utilized by the San Juan School District.

   iii. From the page layout drop-down menu, choose whether to print 1, 2, or 4 notices per page.

   iv. You can modify the form Message that will be sent to patrons, or use the default message provided.

   v. If you selected Mailed in step 6c-ii, you can modify the Address Label to include “To the Parent or Guardian of:” before the student’s address.

   vi. You can choose to Also Display other details in your report by checking the appropriate box(es) here.

   vii. (Optional) Click to save this configuration for quick access in the future.

   viii. Click .
ix. The report may take several minutes to generate. Click Refresh List to check its progress. When it is complete, click View to open report.
x. The options you selected in steps 6b-i through 6b-v will determine what information your final notices will contain and how it will look. Below is a sample notice:

```
Charles Bartowski Technical Academy
9000 Burbank Blvd
Carmichael, CA 95608

10/15/2012

Diane Beckman
9800 Savage Rd
Fort Meade, MD 20755

Barcode: P SAMPLE

Notice: Checked Out Materials, Unpaid Fines.

Dear Diane Beckman:
The following items are overdue. Please return them as soon as possible.

<table>
<thead>
<tr>
<th>Unpaid Fines &amp; Refunds</th>
<th>Barcode</th>
<th>Title</th>
<th>Amount Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>5/29/2012</td>
<td>X 30705</td>
<td>¡En Español! 1 Uno</td>
<td>$75.00</td>
</tr>
<tr>
<td>Lost TB</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Total: $75.00</td>
</tr>
</tbody>
</table>
```
VI. Report Builder

Follett’s **Report Builder** gives you numerous ways to build custom reports that meet your needs. This is a general overview of the options available.

1. To access the **Report Builder**:
   a. Select the **Reports** tab.
   b. Select **Report Builder**.

2. Reports which have been crafted at the District level for use at the site level will be listed here. If you have any saved reports, they will also be listed here.
   a. To create a new report, select **New Report**.
   b. To run a report you or the District has already created, select **Run** for that report.
   c. To add frequently used reports to your favorites list, select **Add to Favorites** for that report.

![Report Builder screenshot](image-url)
3. Select the type of information you wish to report on from the drop-down menu and click the green arrow to proceed. Information types include:

- **General**: Statistics
- **Library**: Titles, Copies, Statistics, Reviews
- **Patron**: General Information, Transaction Summary, Current Checkouts, Current Fines/Refunds, Current Holds/Booking, Recommendations/MyQuest Comments
- **Textbooks**: Titles, Copies, Classes, Statistics

4. Continue to advance through the Report Builder by clicking the green arrows. Looking for a particular solution to a problem? Experiment with different approaches. Sometimes one combination of data sets will succeed where another failed.

5. When you reach step 7 of the Report Builder, you will be asked to enter a name and an optional description for your report. To save this report for later use, select ![Save](save-icon). To save this report for later use and run it immediately, select ![Save & Run](save-run-icon). To cancel the report altogether, select ![Cancel](cancel-icon).

6. The report may take several minutes to generate. Click **Refresh List** to check its progress. When it is complete, click **View** to open report.