

Prepare for Back-to-School

The start of the school year is a busy time for librarians. Use the following checklist to help you get ready to circulate materials to your patrons.

□ Add or update patron records for new and existing patrons.

Note: It is strongly recommended to check with the Destiny Administrator or Patron Manager before updating or deleting any patrons, as your district or site may have specific guidelines for patron management.

District level

Though you can add and update patrons manually in Destiny, Follett recommends that you use the Patron Import Converter utility, as it is faster and easier.

Note: To use the Patron Import Converter, you must have the *Manage Patrons for the District* permission.

To use the utility, follow these steps:

- a. Get the patron CSV file from your Student Information System, and copy it into your working folder.
- b. Find the Patron Import Converter file in your working folder or the FSC-Destiny\fsc\bin folder, or download the Patron Import Converter in Destiny (at the District, select **Back Office > Download Tools**).
- c. Load the CSV file, map the fields, and save the properties file to your working directory.
- d. Run the utility.
- e. Upload the file into Destiny (**Back Office > Update Patrons > Update**).

□ Delete patrons that have graduated or moved to other schools/districts (**Back Office > Update Patrons > Delete**) using one of the following options:

- Globally, based on graduation year.
- Manually, based on a list of students.

- Upload pictures for new patrons (**Back Office > Upload Patron Pictures**). At the district level, the patron District ID is used; at the site level, the patron Barcode is used.

Note: You need a zip file containing all the images from your picture vendor and a map file named idlink.txt, with patron District ID or barcodes matched to the pictures.

- Set your open/closed days and hours of operation (**Back Office > Calendar / Hours**).
- Review and verify your library policies for the upcoming year (**Back Office > Library Policies**).