Destiny
Understanding Roles and Assigning Permissions
Webinar

Participant Guide

Follett
Destiny®

Understanding Roles and Assigning Permissions Webinar

Participant Guide

Version 11.5

© 2013 Follett Corporation.
Welcome to the Destiny Understanding Roles & Assigning Permissions Webinar, which introduces you to the access levels and permissions features and functions of Destiny web-based software products.

During the training, please do not hesitate to ask questions. Your facilitator may take notes to respond to questions later in the training when the related topic arises.

We want you to be confident in your ability to set up and assign access levels and permissions in the Destiny products, and we know that this training simply gives you a glimpse of the power of these products. Because we know that you’ll want to explore other features and functionality as you grow more confident, we provide a number of eLearnings for your product that are available through the Follett website, as well as product support. If you can’t find what you’re looking for, please don’t hesitate to contact your Follett representative as additional trainings not yet posted may be available to you and your school or district.

We’re delighted that you are a Follett customer, and we look forward to providing you with the training, professional development, and services you need to achieve success.

Who Should Take This?

District administrators, site administrators, and information technology personnel.
### Agenda

This webinar presents the information Destiny Administrators and Site Administrators need to know about roles and permissions in Destiny, in particular, creating and editing access levels and setting permissions for each user group. The webinar covers the following topics:

<table>
<thead>
<tr>
<th>Description</th>
<th>Participant Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Introductions</strong></td>
<td></td>
</tr>
</tbody>
</table>
| **Destiny Overview** | ● Access and navigate Destiny.  
● Communicate an understanding of the user hierarchy in Destiny.  
● Use the Destiny Help System to locate additional information. |
| **Managing Access Levels** | ● Organize Destiny users into groups.  
● Assign permissions to a group of users. |
| **Assigning Access Levels, Usernames, and Passwords** | ● Assign users to access levels.  
● Assign users usernames and passwords. |

Destiny and Site Administrators need to have a basic understanding of the Destiny user hierarchical structure. They must also know how to log in as an Administrator; how to navigate the Destiny products by using tools such as tabs, options, subtabs, and breadcrumbs; and how to access application assistance quickly through the Destiny Help System.

Access level permissions define what users can see and do in the Destiny products, so controlling user access is one of the most important tasks within the software. Destiny and Site Administrators control access by organizing all Destiny users into groups and then setting appropriate permissions for each group.

When the District or Site Administrator has set the permissions for each access level, the next step is to assign Destiny users to access levels and, depending on users’ access level, assign them user names and passwords so they can log in to the system. Assigning the appropriate access level and user names and passwords ensures that users have access to the features in the Destiny products that they need based on their roles.
<table>
<thead>
<tr>
<th>Description</th>
<th>Participant Objectives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Evidence of Learning</td>
<td>• Create an access level.</td>
</tr>
<tr>
<td></td>
<td>• Select appropriate permissions for an access level.</td>
</tr>
<tr>
<td>Access levels and permissions in Destiny are crucial to ensuring that users have access to the features in Destiny they need to accomplish their tasks while limiting access to features not related to their tasks. This module allows you to practice the Destiny features you learned about in this training.</td>
<td></td>
</tr>
</tbody>
</table>
Contents

Destiny Overview ................................................................. 1
Managing Access Levels ...................................................... 7
Assigning Access Levels, User Names, and Passwords ............ 11
Evidence of Learning ............................................................ 17
Appendix A - Destiny Roles and Permissions: Next Steps . 19
Resources .............................................................................. 21
Course Survey ....................................................................... 25
Module 1

Destiny Overview

Learning Objectives
As a result of completing this module, you should be able to:

- Access and navigate Destiny.
- Communicate an understanding of the user hierarchy in Destiny.
- Use the Destiny Help System to locate additional information.

Destiny and Site Administrators need to have a basic understanding of the Destiny user hierarchical structure. They must also know how to log in as the Site Administrator; how to navigate Destiny by using tools such as tabs, options, subtabs, and breadcrumbs; and how to access application assistance quickly through the Destiny Help System.

Introduction to Destiny Users
The diagram below illustrates the user hierarchy in Destiny. All users below the Destiny Administrator are classified in one of two ways: district level or site level.
● **Destiny Administrator**  
The **Destiny Administrator** manages the Destiny software, creates the district-level user accounts, and, most important for this training, configures the permissions granted to the Site Administrator.

● **District Asset Manager, Library Manager, and Textbook Manager Users**  
The **District Asset Manager, Library Manager, and Textbook Manager Users** manage asset templates and data (Asset Manager only), library data (Library Manager only), and textbook data (Textbook Manager only) and generate district reports.

● **District Patron User**  
The **District Patron User** manages patron data for the entire district and generates district patron reports.

● **District Report User**  
The **District Report User** generates both district and patron reports.

● **Site Administrator** (focus of today’s training)  
The **Site Administrator** creates access levels and sets permissions for site-level users.

● **Site-Level User**  
The **Site-Level User** performs site-level tasks the Site Administrator has defined.
Accessing Destiny and Logging In

You may want to make a note of Destiny’s URL, or web address, and create a bookmark or shortcut for future access.

This URL brings you to the District home page (shown below). Only users that have been set up at the district level can log into Destiny by using the District Users... Login button. You will not log in as a District user for this training.

Selecting a site’s hyperlink from the District home page displays the site’s main home page (shown below).

Note: Depending on the Destiny product, your main site page may look different from the screenshot above.
Logging in as the Site Administrator allows you to manage access levels.

To log in, first select your site name hyperlink. Then click the Login button in the upper right corner. When the Login fields appear, enter your user name and password.

**Navigation Tools**

Destiny has four key navigation features: tabs, options, subtabs, and breadcrumbs.

The tabs represent the five major functional areas of Destiny: **Dashboard**, **Catalog**, **Circulation**, **Reports**, and **Back Office**.

- The key function in **Dashboard** provides graphical at-a-glance view of report data.
- The key functions in **Catalog** are searching for, adding, and updating materials.
- The key functions in **Circulation** are checking materials out and in and looking up patron and material status.
- The **Reports** tab provides access to preconfigured and customized reports.
- The **Back Office** tab enables administrative tasks such as setting up loan policies and conducting inventory.

Options are the functions associated with each tab. This list of options changes as you select a different tab.

Subtabs are additional functions of a particular option. Selecting a subtab takes you to a new screen and a different function.

Breadcrumbs indicate the path of tabs and subtabs you have navigated. It is important to use the breadcrumbs to back out of a function because using the browser back arrow may log you out of Destiny.
Destiny Help System

Destiny offers two ways to access the help system: on-page Help and online Help.

On-page Help allows users to locate information regarding the page or screen or a specific field that displays currently.

Online Help provides information on any Destiny topic, no matter which screen or page displays currently, and is available to users with the Access Destiny online help & support permission enabled. To access online Help, click the Help link at the top right of the screen. The online Help window opens and offers various ways to locate Help information, such as browsing the Index or Contents or conducting a search for the topic you wish to know more about. It also offers contact information for various departments at Follett. This real-time information hosted on a Follett server is updated regularly.
Learning Objectives

As a result of completing this module, you should be able to:

- Organize Destiny users into categories.
- Assign permissions to a category of users.

Access level permissions define what users can see and do in Destiny, so controlling user access is one of the most important tasks within the software. Destiny and Site Administrators control access by organizing all Destiny users into categories and then setting the appropriate permissions for each category.

Access Levels

The Access Levels option allows the Destiny Administrator or the Site Administrator to set up different levels of Destiny users, then set and edit permissions for each access level. These permissions control the features and functions users can see and use in Destiny.

The default access levels differ slightly depending on the Destiny product: they include Administrator, Asset Administrator, Guest, Library Administrator, Patron, Staff, Teacher, and Textbook Administrator.
• **Administrator**
  
  The **Administrator** access level is intended for the person who will manage the access levels and permissions for a specific site. During the Destiny installation, a patron record is created and given the name of **Site Administrator**. This patron, by default, has the **Administrator** access level assigned automatically. This access level:

  - Can create, edit, or delete access levels and edit permissions for all access levels except **Administrator**; only the Destiny Administrator has the ability to edit **Administrator** permissions.

  - Cannot grant permissions to other access levels that the **Administrator** access level does not have.

  It is recommended that you log in as **Site Administrator** only when changing access levels or permissions. You should have a second patron account and perform all other Destiny functions under this second account’s login user name and password. Following these recommended practices ensures that others cannot edit permissions in the event you leave the workstation while logged in with **Administrator** access.

• **Asset Administrator (Asset Manager only)**
  
  The **Asset Administrator** access level has the permissions to manage assets at the site.

• **Guest (Library Manager & Media Manager only)**
  
  The **Guest** access level has only the ability to search the catalog because a guest is any user who is not logged in with an assigned user name and password.

• **Library Administrator (Library Manager only)**
  
  The **Library Administrator** access level has the permissions to manage library materials at the site.

• **Patron**
  
  The **Patron** access level is intended for students. Upon installation of Destiny, **Patron** is the default access level for all users. Until the Site Administrator assigns a new access level, all users have the **Patron** access level. Patrons have permissions to search the catalog, add materials to a resource List, view a public resource list, view their own status, and place holds on library materials.

• **Staff**
  
  The **Staff** access level is intended for general staff members who do not have as many responsibilities within the software as the Library Administrator, Textbook Administrator, and Asset Administrator but have more than students or teachers.

• **Teacher**
  
  The **Teacher** access level is intended for faculty members, and you can tailor the permissions to their needs. For example, you may set the permission that allows teachers to create their own public resource lists.
• **Textbook Administrator (Textbook Manager only)**
  The **Textbook Administrator** access level has the permissions to manage textbooks at the site.

Destiny and Site Administrators can create additional access levels.

**Note:** If access levels and permissions are standard across the district, your Destiny Administrator can set them all up once and then push them down to all the sites within the district. But access levels and permissions can also be site specific and vary at each site in your district.

**Access Level Permissions**

As mentioned previously, access level permissions determine what users can and cannot do within Destiny.

To view the current permissions or to make changes to an access level’s permissions, click the **Edit** icon adjacent to the name of the access level on the **Access Levels** screen.

Permissions are organized under various subtabs depending on the Destiny products installed: **Library Materials**, **Textbooks**, **Assets**, **Patrons**, and **General**

- **Library Materials** subtab contains permissions that deal with functions such as searching, cataloging, managing fines and holds, and circulating library materials. This subtab displays only when Library Manager is installed.

- **Textbooks** subtab contains permissions that deal with functions such as searching, cataloging, managing fines, and circulating a site’s textbooks. This subtab displays only when Textbook Manager is installed.

- **Assets** subtab contains permissions that deal with functions such as searching, cataloging, and circulating a site’s assets. This subtab displays only when Asset Manager is installed.

- **Media** subtab contains permissions that deal with functions such as searching, cataloging, managing bookings, and circulating Media Center resources.
• **Patrons** subtab contains permissions for patron-related tasks such as adding and editing patron records or viewing, adding, and deleting patron fines. This subtab also has permissions for self-empowered patron access functions, which enable patrons to renew library materials, place their own holds and reserve requests, create and publish resource lists, and create their own user names and passwords. The permissions under this subtab apply to all Destiny products installed, so editing the Patron access level applies the changes to all Destiny products.

• **General** subtab contains permissions relating to accessing online Help, editing the Destiny calendar, and accessing historical reports such as checkout history. The permissions under this subtab affect users of all Destiny products installed. As with the Patron access level, editing the General subtab applies the changes to all Destiny products installed.

**Note:** When creating new or editing existing access levels, visit all available subtabs to verify that you have set all the appropriate permissions.

To make changes, simply check or uncheck the available permissions, and remember to save your changes before exiting. The permissions you set apply to all users assigned to that access level.

Permissions that have a line through them are not available for the Administrator access level and, therefore, are not available for any other access level.
Module 3

Assigning Access Levels, User Names, and Passwords

Learning Objectives
As a result of completing this module, you should be able to:

- Assign access levels to users.
- Assign users usernames and password.

When the District or Site Administrator has set the permissions for each access level, the next step is to assign users to the appropriate access levels and, depending on users’ access level, also assign some of them usernames and passwords so they can log in to the system. Assigning appropriate access levels and usernames and passwords ensures that users have access to the features in Destiny that they need based on their roles.

You assign access levels in the Site Information section of patron records and assign usernames and passwords in the Patron Information section of patron records.
You can assign access levels, usernames, and passwords to patron records manually or globally. If your student management system includes fields for access levels, username, or password, you can export these fields into Destiny and use the global method to assign access levels. However, if your student management system does not accommodate access levels, username, and password fields, you can use a combination of global and manual methods to assign access levels.

To assign access levels to a new patron record or to make changes to individual patron records, use the manual method.

**Assigning Access Levels to Patron Records Manually**

Only a Destiny or Site Administrator can assign access levels to patron records. The administrator must first locate an existing patron record or add a new patron record to assign access levels and usernames/passwords manually. Follow the steps below:

To locate an existing patron record:

1. Log in as the Destiny or Site Administrator.
2. Click the Back Office tab, then the Manage Patrons option.
3. Scan the patron’s barcode number or type in patron information, such as the patron’s last name, in the Find field.
4. From the search results, locate the appropriate patron and click the Edit icon adjacent to the name to edit the patron’s record.
5. In the Site Information section, select the Access Level drop-down list to choose the appropriate access level for this patron.

To add a new patron record:

1. Log in as the Destiny or Site Administrator.
2. Click the Back Office tab, then the Manage Patrons option.
3. Click the New Patron button.

4. Enter all appropriate information for the new patron.

**Assigning Access Levels to Patron Records Globally**

To assign access levels to patron records globally, you use exportable fields from the Student Management System.

If an SMS field associates individual users with their appropriate access level, you can include a lookup table in the XML style sheet and use it to perform batch and global updates to patron records rather than editing them one at a time.

However, if no such field exists, then the recommended approach is to make the access level of the largest group in the district the default access level, typically, Patron, the group that contains students then assign access levels globally to this group. Then you simply change the Access Level field manually for each patron record that falls outside the default group (i.e., teachers, staff, etc.).

**Limit by Asset Group (Asset Manager only)**

Administrators can limit users’ view to certain sections of the asset hierarchy by using the Asset Groups feature. The Site Administrator or Destiny Administrator defines the asset groups for each access level.

After defining the asset groups, the Administrator assigns patrons to the asset groups. Their existing add/edit/delete permissions control what patrons can do with the portion(s) of the hierarchy that they can view. This limited view applies throughout Asset Manager. That is, when a user who belongs to a limited group logs in, the user is only able to search for, add, and inventory asset items for which they have access.

You can define an asset group with the following steps.

1. Navigate to the Back Office tab, Access Levels option.

2. Click the Access Level button to add a new access level or click the Edit icon adjacent to an existing access level.

3. Ensure you are on the Assets subtab.

4. If creating a new access level, enter a descriptive name in the Access Level field.

5. Select appropriate permission(s) for this access level.

6. Click the Setup button adjacent to Define Asset Groups.
7. Click the **Asset Group** button to add a new group, or click the **Edit** icon adjacent to a group name to update an existing group.

8. If creating a new asset group, enter an appropriate name in the **Asset Group** field.

9. Select which assets or asset types the access level will be able to view and de-select those the access level will not be able to view.

10. Click the **Save** button.

**Note:** Follett highly recommends that you do not delete the **Unlimited** asset group.

Once you have defined asset groups (and are still logged in as an Administrator), you can assign patrons to the asset groups with the following steps.

1. Navigate to the **Back Office** tab, **Manage Patrons** option.

2. Search for and select the patron you wish to assign to an asset group.

3. Click on the **Edit Patron** button.
4. Select the desired asset group for the patron from the **Asset Group** dropdown list.

5. Click the **Save** button.

### Assigning User Names and Passwords

The method of assigning usernames and passwords to Destiny patron records depends on the information that is available and exportable from other systems within the district or school.

**Method 1:** If your district uses an LDAP directory and you want to use the network user names and passwords, you can add them to the patron records via the District XML Patron Update.

When authenticating with the LDAP directory, the network username must be entered into the appropriate field, but the **Password** field on the patron record must be blank. The only exception is for Destiny users who are not part of the district update (such as parents, homeschoolers, etc.). These users do not need to be assigned usernames and passwords (unless Method 2 applies to these exceptions).

**Method 2:** If you do not have network usernames and passwords set up for your students, you can give Destiny users access to manage their own Destiny login information.

To take advantage of this method, the **Site Configuration** setting **Allow patrons to create their user name and password** must be enabled. You need to enable the **Able to create own login and modify password** permission in the **Access Levels** option.

**Note:** If users won’t have the ability to manage their own login names and passwords, enable only the **Able to create own login and modify password** permissions for the appropriate access levels.

**Method 3:** This method allows you to manage the user names and passwords on individual patron records manually.
To assign a user name and password manually to a patron record, follow these steps:

1. Log in as the Destiny or Site Administrator.

2. Click the Back Office tab, then the Manage Patrons option.

3. Scan the patron’s barcode number or type in patron information, such as the patron’s last name, in the Find field.

4. From the search results, locate the appropriate patron and click the Edit icon adjacent to the name to edit the patron’s record.

5. Enter a username in the User Name field.

6. Enter a password in the New Password field.

7. Reenter the password in the Confirm Password field.

8. Click Save to save changes.
At this time, the facilitator will ask for a volunteer from among participants to assign the access level and permissions for a user at the volunteer’s site. The volunteer will identify the user’s role, then the facilitator will turn over the webinar control to the volunteer’s workstation so all participants can view the process of assigning an access level and permissions.

Follow along with the process as if you were assigning the access level and permissions to one of your own users. Have something to write with handy to jot down questions about setting up your own Destiny users while you watch your colleague complete the assignment process.

When the volunteer has finished assigning the appropriate access level permissions to the user he or she has identified, the facilitator will take your questions about the process of assigning access levels and permissions.

To ensure the success of your upcoming Essentials or On-Site training, it is very important that all training participants are assigned the appropriate access level and permissions as well as a username and password before the training. You need to identify the access levels your district or site requires, then consider the needs of Destiny users in each access level to make sure you assign the appropriate access level permissions to meet these needs.

The following are some questions to consider:

- If you need to create new access levels, do you have any questions about the steps for creating a new access level?
- Do you have any questions about determining appropriate permissions or assigning different permissions to the different access levels? If you have identified the need for the access levels Library Media Specialist, Library Assistant, Site Textbook Manager, and Site Asset Manager, you must next identify the tasks users in each of these access levels perform and assign permissions accordingly. For example, will all these users perform cataloging and circulation functions?
Appendix A - Destiny Roles and Permissions: Next Steps

Before your district and site users take part in the upcoming Destiny Essentials or On-Site training:

- Set the appropriate access level and permissions for each training participant.
- Make sure each training participant has a patron record in Destiny.
- Assign the appropriate access level in each participant’s patron record.
- Set up a username and password so each participant can log in to Destiny during the training.

Plan your course of action to get the access levels and permissions set up for the rest of your Destiny users, such as students and teachers. The process below will get you started setting up users.

1. On paper, categorize the different users of your Destiny products and determine what access level to assign to each category.

The following example identifies Library Manager users.

<table>
<thead>
<tr>
<th>Common Access Levels</th>
<th>Users</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patron</td>
<td>Students, parents, school employees, homeschoolers, community members</td>
</tr>
<tr>
<td>Teacher</td>
<td>Full-time teachers</td>
</tr>
<tr>
<td>Library Administrator</td>
<td>Head librarian</td>
</tr>
<tr>
<td>Staff</td>
<td>Library assistants</td>
</tr>
<tr>
<td>Classroom Assistant</td>
<td>Student teachers, substitute teachers</td>
</tr>
</tbody>
</table>

2. Logged in as the Site Administrator or Destiny Administrator, go to the Back Office tab, Access Levels option.

3. Use the list you created to determine whether you need to create any access levels.

4. Edit and set the appropriate permissions for each access level on your list.

5. Assign the appropriate access levels in each Destiny user’s patron record.
6. If applicable, decide on the method for assigning usernames and passwords to each Destiny user’s patron record.

- Administrator downloads username and password for each patron from district.
- Patron creates own password.
- Staff enter username and password for each patron manually.
eLearnings

Did you know that Follett has eLearning modules available to all customers with current support subscriptions? There are a variety of eLearnings available on the topics covered in this training. Check the website regularly to view new and updated topics.

Accessing eLearnings via the Follett Customer Portal

The Follett Customer Portal is a resource for accessing premium content and advanced functions, managing software subscriptions, accessing product downloads and documentation, viewing eLearning modules, and uploading data securely for technical assistance or enhancement.

To access the Follett Customer Portal:


2. Click on the Login button.

3. Log in with your email address and password if you already have an account. If you have not yet created an account:
   a. Click on Create a New Account.
   b. On the Create a New Account screen, enter your customer number and zip code and click Continue.
   c. Fill out the Contact Information form and click Save and Continue.
   d. A confirmation screen displays. You will then receive an email that includes a confirmation link. You must click the link to confirm and activate your account. If you do not receive the email confirmation within 24 hours, please check your spam filter.
   e. Once confirmed, you can use your email address and password to log in to the Customer Portal.
4. Click the **Professional Learning** option.

5. Select the **eLearning Modules** option.
Destiny’s Help System

Destiny’s Help System allows you to locate information on hundreds of topics. This real-time information hosted on a Follett server is updated regularly.

Destiny offers two ways to access the Help system: online Help and on-page Help.

Online Help allows you to locate information on any topic, regardless of which page or screen displays currently.

On-page Help allows you to locate information regarding the page, screen, or specific field that displays currently.

Technical Support

For help with configuration of Destiny, operational issues, troubleshooting, or problems with your peripheral hardware, contact Technical Support via phone at 800.323.3397 or email at techsupport@FollettSoftware.com.
Your comments are very important to us. The feedback you provide helps us to improve current and future courses to better meet your needs. Please take a moment to complete the course survey.

**Course Survey:** [www.follettsoftware.com/contactdata](http://www.follettsoftware.com/contactdata)

**Course Task ID** (provided by instructor):

**Zip Code** (confirm with instructor):

