

Outstanding Checkouts: Excluding Summer School Students

Last Modified on 04/09/2024 1:21 pm PDT

Tools

In this Guide you will use:

- Destiny to run the current checkouts/fines report,
- Google Sheet with summer school students listed,
- MS Excel to merge Destiny report and Google Sheet list into a report displaying students who are not attending summer school but have not returned the district-issued equipment yet.

Steps

Step 1: Destiny

Run the current checkouts/fines report in Destiny with the following settings:

Set up a new report or notice

Show **Checked Out/Overdue Materials**

All that are currently overdue

That are overdue by to days [?](#)

That are due from to [?](#)

All that are checked out

Resources Assigned to a Custodian

Unpaid Library Fines

Unpaid Resource Fines

Unpaid Patron Fines [?](#)

Format Report -- Output [?](#)

Email to Homerooms

Notices -- Language: [?](#)

1. Format 2. Limit 3. Details

Checked Out / Overdue Materials Report

Limit the results to...

My Patron

Student - 1st Grade
 Student - 2nd Grade
 Student - 3rd Grade
 Student - 4th Grade
 Student - 5th Grade
 Student - Kindergarten
 Student - Preschool
 Student - SpEd Preschool

Status Active
 Inactive
 Restricted

Graduating in

Also Include Patrons of other sites that have my materials and/or that owe fines to Farr School Library. [?](#)

My Materials

Library - No Circulation Types

Resources Technology > Computer Equipment > Tablets
 Technology > Computer Equipment > Tablets > Student iPads
 Technology > Computer Equipment > Tablets > Teacher iPads
 Technology > Computer Equipment > Tablets > Title I iPads
 Technology > Network > Hotspots

Also Include The materials my patrons have and/or the fines they owe that belong to other sites in the district. [?](#)

Select & Sort by from to

Also Display...

Title Info Title for library materials
 Price of checked out/overdue materials

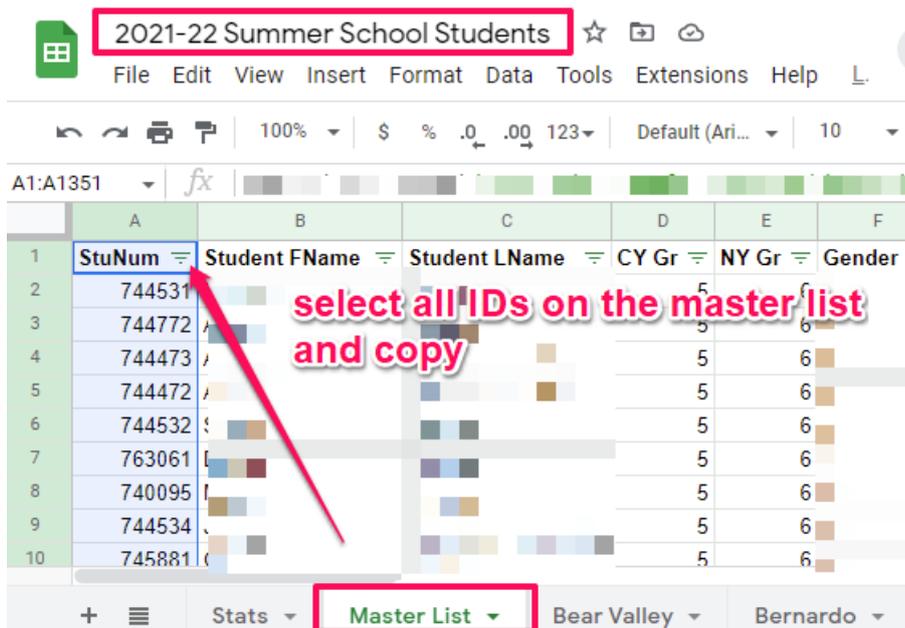
Patron Info Barcode

Phone number

Download the Excel file once it's ready in the Job Manager.

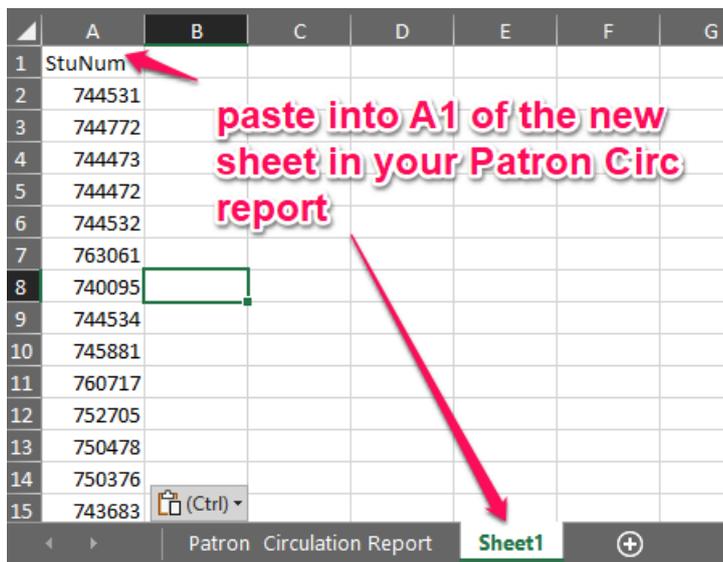
Step 2: Excel, Prep Work

Open and prepare the Patron Circulation report for the merging by removing "P " from the Patron Barcode column. Highlight the whole column with student IDs by clicking on the letter name of the column (B in this case). Bring up the Find-Replace screen by pressing Ctrl+H.



Step 4: Excel, Paste

Paste the copied list of IDs into Sheet1 (if you haven't renamed it) cell A1 of the opened Excel file. To do that, right-click into A1 and select Paste Special > Match destination formatting.



Step 5: Excel, Fun with Formulas

On the Patron Circulation report sheet, right-click on column D, for example, and select "Insert column" to insert a blank column to the left of the grade level column. Type in the VLOOKUP formula starting with the equal sign. If you are following steps in this guide, then your formula will be as follows:

```
=VLOOKUP(B2,Sheet!A:A,1,FALSE)
```

File Home Insert Page Layout Formulas Data Review View Develop

SUM X ✓ fx =VLOOKUP(B2,Sheet1!A:A,1,FALSE)

**Patron Circ sheet: add new column, use the
vlookup formula to reference the other sheet**

Patron Name	Patron Barcode	SMR match	Grade Level	Home
A4	744611	FALSE	4	Ulloa r
A4	744703		4	Ulloa r
A4			3	Ramir
A4	717519		4	Ulloa r
A4	750073		3	Hughe
A4				Oakley
A4	758136		1	Trejo r
B4	745545		5	Herma
B4	745545		5	Herma
B4	754661		2	Rodrig
B4	744071		4	Ulloa r
B4	750360		4	Ortega
B4	757041		1	Rosale
B4	745300		4	Ulloa r

B2 is the lookup value
Sheet!A:A is reference range
1 is which column to return
FALSE is necessary for exact matching



Hit Enter to apply the formula.

As the screenshot above states, the formula is made of 4 parts:

- B2** is the first lookup value you have on your sheet - the value that you want Excel to find on the Sheet1 that has all summer school students' IDs. Generally, if you're entering the formula into the row 2 of cell C, then your lookup value is also in the second row;
- Sheet1!A:A** is the sheet name and cell range reference: you're making Excel look through Sheet1's range A:A (which means the whole column A). ! is used to separate the sheet name from the range. : is used to separate the beginning of the range from its end (top-left cell from bottom-right). To reference the whole column or columns, omit the row number: A:A or A:Z, and so on. Referencing a specific limited cell range will look something like this: A2:B6 or D123:Z1000. The most important thing to remember is that the column with the referenced value (student ID) needs to be the first one in the range;
- 1** is referring to the sequential number of the column that you want the formula to return. In this case we only have one column in the referenced range, so 1 it is. If it was something like A:B with B containing student names, and if you wanted to return student names to the main list, then you'd list column 2;
- FALSE** just means that **NO** - you **DON'T** want *approximate matching* (a.k.a. best guess if nothing is found). You want **exact** matches.

Now that you have an active formula for the first student in your list, you can flash-fill or click-drag that formula for the rest of the students.

`=VLOOKUP(B2,Sheet1!A:A,1,FALSE)` **Double-click the corner to flash-fill or drag to the last row**

	B	C	D	E	F
	Patron Barcode	SMR match	Grade Level	Homerroom	Transaction Type
	744703	#N/A	4	Ulloa rm:30	Resources - Checked
	744703		4	Ulloa rm:30	Resources - Checked
	748356		3	Ramirez rm:28	Resources - Checked
	747519		4	Ulloa rm:30	Resources - Checked

	B	C	D	E
	Patron Barcode	SMR match	Grade Level	Homerroom
	744611	#N/A	4	Ulloa rm:30
	744703	#N/A	4	Ulloa rm:30
	748356	748356	3	Ramirez rm:28
	747519	#N/A	4	Ulloa rm:30
	750073	#N/A	3	Hughes rm:23
	762221	#N/A	0	Oakley rm:2
	758136	758136	1	Trejo rm:15
	745545	745545	5	Herman rm:37
	755555	755555	5	Herman rm:37
	754661	754661	2	Rodriguez rm:34
	757041	757041	1	Rosales rm:14
	745300	#N/A	4	Ulloa rm:30
	760295	#N/A	0	Oakley rm:2
	760295	#N/A	0	Oakley rm:2

#N/A is non-summer students because their ID was not found on the summer reference sheet

Step 6: Excel, Filter

Turn the filter on for the whole sheet by selecting all content: either Ctrl+A or click on the corner block between the first row # and the first column name (left of A, top of 1) - then switch to the Data tab of the workbook and click on the funnel icon to turn the filter on.

	A	B	C	D	E	F
	Patron Name	Patron Barcode	SMR match	Grade Level	Homerroom	Transaction Type
M		760543	760543	0	Harris rm:1	Resources - Checked
C		760544	760544	0	Curry rm:1	Resources - Checked
Cl		760966	760966	0	Curry rm:1	Resources - Checked
L		761770	761770	1	Herman rm:37	Resources - Checked
S		811475	811475	5	Herman rm:37	Resources - Checked
S		811475	811475	5	Herman rm:37	Resources - Checked
A		744611	#N/A	4	Ulloa rm:30	Resources - Checked
A		744703	#N/A	4	Ulloa rm:30	Resources - Checked
A		747519	#N/A	4	Ulloa rm:30	Resources - Checked
A		750073	#N/A	3	Hughes rm:23	Resources - Checked
A		762221	#N/A	0	Oakley rm:2	Resources - Checked
B		744071	#N/A	4	Ulloa rm:30	Resources - Checked
B		750360	#N/A	4	Ortega rm:34	Resources - Checked
B		745300	#N/A	4	Ulloa rm:30	Resources - Checked
B		760295	#N/A	0	Oakley rm:2	Resources - Checked
B		760295	#N/A	0	Oakley rm:2	Resources - Checked
B		750896	#N/A	3	Leal Torres rm:24	Resources - Checked
B		753307	#N/A	0	Oakley rm:2	Resources - Checked
C		747495	#N/A	4	Sarabia rm:35	Resources - Checked

turn the filter on for the whole sheet and either sort by matches or filter for #N/A to display regular (non-summer) students who still have resources checked out

Click on the drop-down icon next to your column with the formula, and either Sort A to Z (or Z to A) to group all #N/A together, or filter for the #N/A value. #N/A is the code returned by VLOOKUP that means it was unable to

find a match for this student ID on the summer school students sheet. Meaning, these students are non-summer school students, and if they appear on the checkout report, they still owe you some equipment. These are the students to contact and iPads to lock/mark lost.
