# 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
L	Show 🗹 Checked Out/Overdue Materials
	◯ All that are currently overdue
	◯ That are overdue by ✔ 1 to days ?
	○ That are due from 6/13/2022 31 to 6/13/2022 31 ?
	All that are checked out
	Resources Assigned to a Custodian
	Unpaid Library Fines
	□ Unpaid Resource Fines
	Unpaid Patron Fines 💿
F	ormat 💿 Report Output Microsoft Excel 🗸
	◯ Email to Homerooms
	O Notices Language: English 💌

		1. Format	<u>2. Limit</u>	3. Details		
		Checked	Out / Overdue Materials Rep	ort		
Limit the re	sults to		_			
My Patron	Student - 1st Grade Student - 2nd Grade Student - 3rd Grade Student - 4th Grade Student - 5th Grade Student - Kindergarte Student - Preschool Student - SpEd Preschool	Update n		Status 🗹 Ad	ctive active estricted	
	Graduating in 20	22				
Also Inclue	le 🗌 Patrons of other	sites that have <u>my mat</u>	terials and/or that owe	e fines to Farr School Library. (	?	
My Materials Library - No Circulation Types Update   ✓ 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 <u>my patrons</u> have and/or the fines they owe that belong to other sites in the district. ?						
			Continue			
Select 8	Sort by Patron Na	me 🗸 from	to			
Also E	)isplay					
	Title Info 🗌 Title for	ibrary materials				
	Price of	checked out/overdue	materials			
Pa	atron Info 🗹 Barcode					
	🗌 Phone n	umber				
	Grade	Level 🗸				
	✓ Homer	oom 🖌				
				Save Setup	Run Report	

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.

	~		<u> </u>		0	
Patron Nam	e 1	Patron Barcode	Grade Level	Homeroom		Transaction T
Ag		P 744611	4	Ulloa rm:30		Resources - C
Ar		P 744703	4	Ulloa rm:30		Resources - C
Ar_		P 748356	3	Ramirez rm:	28	Resources - C
Ap	Find and Replace	at natron	harood	lo colu		Resources - C
Are	Sele	ci pairon	Darcou	e colu		Resources - C
Avi	Find Replace	H to repl	ace "P	" with	nothing	Resources - C
Ayi	Find what D	No Fe	emat Cat	Format -		Resources - C
Bar 📕	PI		irmat set	For <u>m</u> at •	37	Resources - C
Bar	Replace with:	V No Fo	ormat Set	For <u>m</u> at •	7	Resources - C
Bar	Wit <u>h</u> in: Sheet 🗸 🗆 !	Match <u>c</u> ase			h:20	Resources - C
Bar I	Search: By Power	Match entire cell c <u>o</u> n	tents			Resources - C
Bar	Search. Dy Kows				L.	Resources - C
Bau	Look in: Formulas		C	Op <u>t</u> ions <<	4	Resources - C
Вац						Resources - C
Ba 📰 🖬 🤞	Replace <u>All</u> <u>R</u> eplace	Find All	Find Next	Close		Resources - C
Ba		P 760295	0	Oakley rm:2		Resources - C
Be		P 750896	3	Leal Torres	rm:24	Resources - C
Be		P 753307	0	Oakley rm:2		Resources - C
Во		P 751540	2	Bernal rm:2	1	Resources - C
Во		P 748366	3	Leal Torres	rm:24	Resources - C
Са		P 747495	4	Sarabia rm:	35	Resources - C
Са		P 760297	0	Dent rm:5		Resources - C

Find "P " (with the space!) and replace with a blank. Replace All.

Create a new sheet in the same file by clicking + next to the existing sheet name. This sheet will hold summer school students' IDs.



#### Step 3: Google Sheet, Copy

Open the shared Google Sheet workbook containing summer school students lists and copy all student numbers on the Master List sheet.

	2021-2	22 Summe	r Schoo	ol Student	s ☆	Ð Ø		
-	File Ed	it View In	sert Fo	ormat Data	Tools	Extensio	ons Help	<u>L</u> .
lic"		<b>P</b> 100%	• \$	% .0 <u>_</u> .0 <u>0</u>	123-	Default (/	Ari 👻	10 👻
A1:A13	351 <del>-</del> <i>f</i>	x				1		
	А	В		С		D	E	F
1	StuNum \Xi	Student FNa	ame =	Student LNa	me =	CY Gr \Xi	NY Gr \Xi	Gender
2	744531	e 4	lect	allIne	ont	he m	ster/l	let
3	744772				ent		6	130
4	744473		nd co	ру⁻		5	6	
5	744472	/				5	6	
6	744532					5	6	
7	763061					5	6	
8	740095					5	6	
9	744534				_	5	6	
10	745881	C				5	6	
	+ ≣	Stats 👻	Maste	er List 🔻	Bear	Valley 👻	Berna	rdo 👻

#### 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 D	evelope
SUM	•	: ×	✓ <i>f</i> <sub>x</sub> =∨	'LOOKUP( <mark>B2,</mark> Shee	t1!A:A,1,FALSE	)	
P	atron	<b>Circ</b> (	sheet: ad	d new co	lumn, us	e the	
⊿ VI	ooku	<b>p forn</b>	nula to re	eference t	<b>he other</b>	sheet	
Patr	ron Name			Patron Barcode	SMR match	Grade Level	Home
AĮ	D2 is	din a		744611	FALSE)	4	Ulloa r
Ar	DZIS	une	ookup va	744703		4	Ulloa r
Ar	Shee	t!A:A	is refere	nce range		3	Ramire
A	4 lies	which	column	to return		4	Ulloa r
Ar	113	VIIICI	corum			3	Hughe
A١	FALS	SE IS	necessa	ry for exa	ct match	ling	Oakley
A				758136	5	1	Trejo r
Ba				745545	5	5	Herma
) Ba				745545	5	5	Herma
Βε				754661	L	2	Rodrig
2 Ba				744071	L	4	Ulloa r
3 Ba			_	750360	)	4	Ortega
‡ Βε			_	757041	L	1	Rosale
δBa				745300	)	4	Ulloa r
		-					

Hit Enter to apply the formula.

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

- 1. **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;
- 2. 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;
- 3. **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;
- 4. **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

Б	C			
Б	L L	U	<b>E</b>	F
Patron Barcode	SMR match	Grade Level	Homeroom	Transaction Type
74 🚹 l 1	#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

В	L	U	E
Patron Barcode	SMR match	Grade Level	Homeroom
744611	#N/A	4	Ulloa rm:30
744703	#N/A	4	Ulloa rm:30
748356	749356	3	Ramirez rm:28
747519	#N/A	4	Ulloa rm:30
750073	#N/A	3	Hughes rm:23
762221	#N/A	6	Oakley rm:2
758136	758136	1	Trejo rm:15
745545	745545	5	Herman rm:37
#N/A is n	on-summ	er stud	ents m:37
754661	754661	2	Podriguez rm:
because	their, ID w	/as not	found
on the su	mmer ref	erence	sheet 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

#### 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.

А	В	2	<b>B</b>	ma mina an (	F
Patron Name	Patron Barco	SMR match 🖃	(rade TUTT	htte, filter on i	orntnen Type
M	7605 <mark>45</mark>	700343	who	ole sheet and	eithers-Che
Ci	760544	760544	0	Parris rm:1	Resources - Che
Cl	760966	760966	o SOL	<sub>coy</sub> matches of	esources - Che
Ld	761770	761770	1 filte	r for #N/A to c	isplay/Che
Sa	811475	811475	5	Formar rm·37	Resources - Che
Sé	811475	811475	5 Jeg	mermal millor	nesoc ces - Che
A	744611	#N/A 🕳	4 stu	dents who stil	Rhave - Che
A	744703	#N/A	4 res	urces checke	desources - Che
A	747519	#N/A	4	Unioa rhitsd	Resources - Che
AL	750073	#N/A	3	Hughes rm:23	Resources - Che
A <sup>1</sup>	762221	#N/A	0	Oakley rm:2	Resources - Che
Bí	744071	#N/A	4	Ulloa rm:30	Resources - Che
Bé	750360	#N/A	4	Ortega rm:34	Resources - Che
Bé	745300	#N/A	4	Ulloa rm:30	Resources - Che
Bi	760295	#N/A	0	Oakley rm:2	Resources - Che
Bé	760295	#N/A	0	Oakley rm:2	Resources - Che
Be	750896	#N/A	3	Leal Torres rm:24	Resources - Che
Be	753307	#N/A	0	Oakley rm:2	Resources - Che
Ci	747495	#N/A	4	Sarabia rm:35	Resources - Che

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 nonsummer 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.