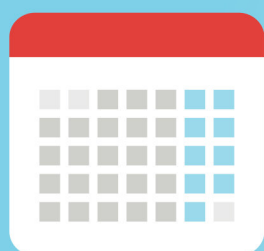


SEVEN STEPS TO A SUCCESSFUL END-OF-YEAR PROCESS



CALENDARS

For school libraries, items currently checked out need to be returned before the end of the year. Setting calendars properly in Alexandria can automate this process. Alexandria's **Calendars** preferences should be examined at the beginning and end of each school year. For end-of-year procedures, you should set a **period due date** to establish a global due date for loaned items by which items must be returned. A period due date is set by clicking twice on the desired date in the calendar, which will read "**Period Due.**"

HARD DUE DATES

Some libraries use hard due dates with certain policies to allow items to be checked out all year long. If your library is using hard due dates for extended checkout periods, then those dates must be changed before circulation can resume next year. These are changed from within the specific item policies in your **Policies** preferences. **Item** policies are on the right-hand side of the window; here you can modify or remove a hard due date. A hard due date will override all other due dates.



LOANED ITEMS

Before shutting down for the summer, it's wise to run a Loaned Items Report to see what materials are still in circulation. To see what items are still checked out, go to **Tools > Reports > Circulation > Information**. Select **Loaned Items Information** as the **Report Type**, and click Print. If you run the report with default settings, it will show all items that are out - even those that are not yet overdue. This report helps you determine which items should be checked out as lost or discarded, and what fines or fees may need to be charged.

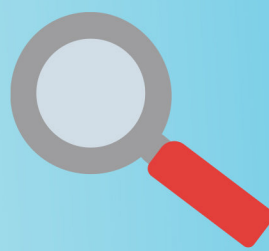
LOST OR DISCARDED ITEMS

Utility: If all the items that are not returned are to be set to Lost, use utilities to automate this process. Go to **Tools > Utilities > Copies**. Select the **Declare Missing Copies Lost** utility. In the **Selections** tab, fill in the **Inventory Start Date**. This will move all items in the **Loaned Items** report (that have not been inventoried) to **Lost**. If an item is later returned, it will be shown as **Available** once it's bookdropped.

Report: Many libraries remove items which have been Lost or Discarded at the end of the school year. Before removing Lost or Discarded items, run a report to show which items will be removed. Go to **Tools > Reports > Copies > Special Status**. Select the report you wish to run from the list of **Report Types** here.

Remove: To remove lost items, go to **Tools > Utilities > Copies**. Choose **Remove Lost Copies** as the **Utility Type**. Click **Run** to remove ALL lost copies. You can also remove lost copies based on a date range by using the **Copies Lost Selection**. Click on **Run** to start the utility.

The same procedure can be used for removing Discarded copies. From the **Copies Utilities**, select **Remove Discarded Copies** and follow in the instructions listed above.



MANAGING STUDENTS

Moving current students up one grade level prepares your system to import new students for the next year. Go to the **Grade Table** tab in **Patron's Preferences**. By pressing **Advance All Grades**, all patrons will be advanced one grade level. Patrons who were assigned the last grade in the table will be set to the **Last Grade** value (usually **Graduated**). To remove graduated patrons, go to **Tools > Utilities > Patrons** and choose **Remove Patrons** as the **Utility Type**. In the **Selections** tab, fill in the **Patrons in Grade** selection range with **Graduated** (or your **Last Grade** value). Once you run this utility, the patrons in the grade you selected will be removed from your system.

PATRON POLICIES

If your patron policies are set to match your patron grade levels, you'll need to make sure each student's record is updated so their policy matches their new grade level. This can be done at the end of the current school year or the beginning of the next one. Go to **Tools > Utilities > Patrons**. Set the **Utility Type** to **Change Patron Policy**. In the **Selections** tab, fill the grade in the **Patrons in Grade** field—this must match how the grade is saved in the **Grade Table** (e.g. 8th). In the **Options** tab, set the **Change Policy To** dropdown to the new policy (e.g. 8th Grade). Run the utility, then follow this procedure for each level.



BACKUP (SELF HOSTED ONLY)

The last thing to do before closing your library is to complete a permanent backup of your data. This backup should be stored off-campus or in a fire resistant safe. For instructions on creating a backup, please see the Backup article in Alexandria's online Support Center at http://www.goalexandria.com/v7Docs/index.php/Self-Hosted:_Backing_Up_Your_Data. This is also a good time to review and revise your backup strategy. Examine the media on which the backup is stored; drives and disks may need to be replaced or serviced.

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