

# Beginning-of-Year Procedures

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## Agenda

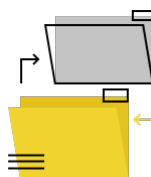
Here are some answers to common questions and tips for beginning your school year with Textbook Tracker. Please note that procedures 1-3 overlap with Alexandria, meaning you only have to do those procedures once to count for both Alexandria and Textbook Tracker.

1. Update Calendars
2. Import Patron Records
3. Remove Patron Records
4. Maintenance
5. Training



### **Calendars**

Set your Closed and Period Due dates.



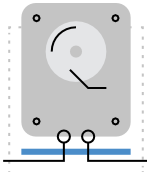
### **Import records**

Update and add new patron information.



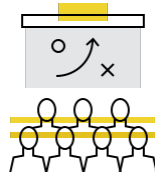
### **Remove patrons**

Get rid of unused and graduated patron records.



### Maintenance

Be prepared. Back up your self-hosted data.



### Training

Ensure your team knows what's up.



Before running any of the data-changing utilities described in the steps above, create an [archive](#) so you have a restore point if something unexpected happens.

## Calendars

### Calendars

Calendars are used in conjunction with Patron Policies to accurately perform circulation-based calculations, like due dates, fines, holds and reservations, etc. Textbook Tracker will not adjust the due date after an item has been checked out, so it's important to establish your Closed and Period Due dates at the beginning of the year, before any items or resources are checked out. Read [Calendar Preferences](#) to learn more.



Unknown macro: 'multiexcerpt-include-macro'

1. Go to [Preferences > Calendars](#).
2. Select a calendar from the list on the left.
3. Choose a date and click once for Closed, twice for Period Due.
  - a. To close the *same day of the week* for the *entire month*, click on one or more day of the week headings at the top of the calendar.
  - b. Click + to add a note to a particular date.
4. Click Save and move on to the next month, or the next calendar.
5. Repeat step 2-4 for each calendar.

Patrons are assigned to a calendar according to their Patron Policy. Go to [Preferences > Policies](#) and check that each patron policy is assigned to the correct calendar and that [Apply Period Due Dates](#) is checked.



**Period Due** is a date by which all items should be returned to the library. The circulation period just before this date will be shortened so items are returned in time. For example, if you set a Period Due date of May 13, all items checked out before May 13th—that would have been due *after* the 13th—will be assigned a new due date of May 13th. Set a Period Due date to remind patrons to return their borrowed items before the end of the year or another specified period.

## Import Records

### Import patron records



Skip if your patrons are synced with SIF or Clever.

Patrons will transfer in and out of your school. You'll want to clear out patrons who have left, add new patrons to Alexandria Textbook Tracker, and update existing patron information. You can do this all through imports.

Patron information can come from any source that provides a text file in a tab-delimited file format; most word-processing and spreadsheet applications support files in tab-delimited format. In most cases, patron data is readily available in a machine-readable format from your school's front or district office. Others schools automatically import updated patron information from a Student Information System (SIS). Since all libraries import patron information a little differently, check with your school or district office to find out how patron data is maintained.



Unknown macro: 'multiexcerpt-include-macro'

Before you import new student records, the following steps can help you determine which patrons are no longer enrolled at your school and should be removed from the database. Run the Change Patron Location utility to change the Homeroom for all active, currently-enrolled students to "Gone".

[Change Patron Location utility](#)

If your tab-delimited import file includes patron **Homeroom**, change the Homeroom for all of your currently-enrolled students to the same value. This example will replace the Homeroom for all of your currently enrolled students to "Gone".

1. Go to Tools > Utilities.
2. Select the Patrons > General category.
3. Choose the **Change Patron Homeroom** utility on the right.
4. In the Selections tab, choose the options needed to select a group of *student* patron records. For example, you may want to select a student-only policy and/or security group — you don't want to accidentally update Operators and/or Staff records.
  - a. Patrons with a Status of: Active
  - b. Patrons in Security Group: Patron
  - c. Patrons with a Policy of: (Student)
  - d. Patrons from: Homeroom
    - i. Leave the From and Through fields blank if you want to update them all.
5. In the Options tab, type "Gone" in the *Change Location to* field.
6. Run the utility.

The Homeroom field for all of the patrons matching your selections will be changed to "Gone". Next, import your new student records from your SIS.

## Import Patrons

### Quick Patron Import

A new import at this point will update the Homeroom for all patrons who are returning for the school year. Those who are not returning will retain the Homeroom "Gone".

1. Go to Tools > Import.
2. Select the Patrons category on the left.
3. In the Imports pane, click Choose File. Locate the import file on your computer.
4. In the Settings tab, make the following selections:
  - Skip First Record: Check if the first record in your import file is an unrecognized header.
  - Patron Updates: Allow Import to Modify Existing Records
5. Run the import.

The Homeroom for all returning patrons will be updated. The next step is to remove the other patrons, the ones with the Homeroom "Gone".

# Remove Patrons

## Remove patron records

★ Beginning or End of Year

Run the *Remove Patrons* utility to remove patrons who won't be returning and graduated students from the database. You may need to run it multiple times with different selections, depending on your needs.

### Remove unused patron records

Run this utility after going through the steps on the [Import Records](#) tab.

1. Go to **Tools > Utilities**.
2. Select the **Patrons** category.
3. Choose the *Remove Patrons* utility.
4. In the **Selections** tab, choose the criteria for the patrons whose records should be removed. Make sure **Patrons from Homeroom** is set to "Gone".
  - a. **Patrons from Homeroom:** Gone
5. In the **Options** tab, choose if you want patrons to be removed even if they have items checked out or outstanding charges.
6. Click **Run**.

### Remove graduated student records

⚠ Skip this step if you keep records for graduated patrons.

1. Go to **Tools > Utilities**.
2. Select the **Patrons** category.
3. Choose the *Remove Patrons* utility.
4. In the **Selections** tab, enter the criteria needed to select the individual patrons or groups of patrons you intend to remove.
  - a. **Patrons with a Status of:** Limit the operation to a single status, like *Active* or *Transferred*, or choose *Any* to include them all.
  - b. **Patrons in Grade:** Enter the user-defined value for Last Grade (most commonly "Graduated"), as defined in Grade Table preferences.
5. In the **Options** tab, choose if you want patrons to be removed even if they have items checked out or outstanding charges.
6. Click **Run**.



### Do you manage patrons with SIF or Clever?

When patron data is synced with Textbook Tracker via SIF or Clever, patrons who have an active record in Textbook Tracker but are no longer included in the synced data will be marked as *Transferred*. Those patron records will need to be removed manually. Run this utility to remove patrons with a status of *Transferred*.

## Maintenance

### Maintenance



Self Hosted, only. Skip if your library is Cloud Hosted.

#### Backups

Create a complete backup of your Alexandria Data folder. Unlike an [archive](#), backups are considered a "last resort" in case everything else fails.

Don't store your backups on the same device as your library data station. We recommend storing your backups with a file hosting or cloud storage service, like [Dropbox](#) or [CrashPlan](#), which are specifically designed to backup to other machines or off-site servers. If you use an external hard drive, we suggest storing it in a fire-resistant safe in an off-site location. It may seem extreme, but you never know what will happen, and we want you to be prepared for the worst.

This is also a great time to review and possibly revise your backup strategy. Read [Back Up Your Data](#) to learn more.

#### Updates

Make sure you are using the latest version of Textbook Tracker. To check for updates, go to **Tools > Administration**. Then click on the



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icon in the upper left corner of the screen. Lastly, click on **Check For Updates**.

## Training

### Training


Invest some time in training your team on Textbook Tracker. Whether you are brand new or returning users, it's a good idea to make sure everyone who will be using the software is comfortable with it. Here are a few recommended ways to brush up:

#### Read the Getting Started Guide

If you're new, go through the [Getting Started Guide](#) on the Support page will be very helpful. This contains information on setting up Textbook Tracker, configuring both Administration Settings and Preferences, and importing new items and patrons.

#### Review how to do common functions

Over the summer, you may have forgotten how to do some important things in Textbook Tracker. That's okay! Here are a few common functions you should definitely review:

- **Using Circulation Commands:** You may not remember all of the keyboard shortcuts to getting things done in the **Circulation** module. Browse through the **Command Help** tab in Circulation or the [Circulation Commands List](#) in the Support Center for a quick reminder. You could also print a [Circulation Commands chart](#) to keep near your computer. Here are a few important commands to remember:
  - B starts Bookdrop mode, which checks in all items scanned or inventories items if they're already checked in
  - R starts Renewal mode, which renews multiple checked-out items
  - X clears the Current Patron and Current Item panes
- **Adding new patrons and items:** It's a new school year, which probably means new patrons and inventory. Here are a few things to review:
  - If you use Clever to sync student information system (SIS) records and have disabled Clever for the summer, you'll want to [enable](#) it.
  - Remind yourself how to [add patron records manually](#) or through [imports](#).
  - To add a [title record](#) manually in the **Textbooks** module, press the  Broken image at the bottom left. Or, review how to [import textbooks](#).
- **Running label reports:** Getting new inventory means you'll need new labels! Once you've brushed up on [how to run reports](#), learn how to create [Custom Label Reports](#) to customize your barcode and spine labels.

