End-of-Year Workshop

ⓘ this page has been moved to https://support.goalexandria.com/knowledge-base/end-of-year-procedures/#video

Frequently Asked Questions
Please learn more about modifying your Grade Table here.
Watch our Inventory Workshop.
Check out our YouTube channel!
Visit our Support Center.
Oh man! We have a great workshop for you.

- *Discarded Copies* report: See which copies have been discarded throughout the year and make sure the list is correct before permanently removing them with the *Remove Discarded Copies* utility.

- Copies Labels Reports: Create labels for new copies.

- Send patrons notices about their coming due items, overdue items, and charges:
  - *Coming Due Items Notice* report
  - *Overdue Items Notice* report
  - *Unpaid Charges Notice* report
  - *Overdue Items and Unpaid Charges Notice* report

 If you have used Alexandria or Textbook Tracker to catalog non-book items such as laptops, chargers and other technology it is a good idea to use a specific item policy or policies to manage them. In most cases you will want a title record for something like a Chromebook to include all of the copies instead of 1/1 with titles/copies. If you are using an import file, you will need to create a title record with an ISBN first so the import setting "Title update matching" works for title and ISBN/LCCN. Read HERE about how to catalog equipment in Alexandria. If you have any questions please call Customer Support at 1-800-347-4942 to get help with importing files.
You should consider advancing patron grades even if you update the students each year with an import file. Advancing your last grade to "Graduated" will allow you to remove students who have moved on to bright futures. Don't worry, you will be able to keep records for any who have outstanding material or account balances. Read about End-of -Year procedures HERE and call Customer Support at 1-800-347-4942 if you need help with your Patron Grade Table or running utilities.
Of course you want to run reports on loaned or overdue items, and before you close the library for the summer you should consider cleaning out any lost and discarded copies. Run reports for lost and discarded material first before using utilities to remove them. One great feature of the Remove Lost /Discarded Copies utilities is that you can control which copies specifically to remove. This means you can retain copies from a specific date range, and choose between material that is lost or discarded from inventory, weeding or patrons. Read about best practices for lost and discarded copies HERE and as always, contact Customer Support if you have any questions or need assistance.