

End-of-Year Procedures

Getting Started

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Agenda



this information has been moved to <https://support.goalexandria.com/knowledge-base/end-of-year-procedures/>

End-of-Year Procedures

The end of the school year is coming faster than you think, and planning ahead is going to be crucial for success. The steps described below should be done in order; however, removing graduated patrons can be done at the beginning or end of year, whichever works best for your library.

There's a lot to do, so let's get started!



Print this

Keep this infographic at at your desk.



Due dates

Get your stuff back. On time.



Inventory

Find out what you have and what you don't.



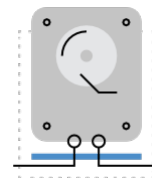
Remove copies

If it isn't in your library, it shouldn't be in your database.



Remove graduated patrons

Clear out patrons who have left.



Backups

Be prepared. Back up your self-hosted data.



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.

End-of-Year Procedures



see [End-of-year reports](#); this information will be expanded when the page is converted.

Due Dates

Due Dates

The end of the school year is approaching, and it's time to get your books back. Don't leave it until the last minute—no one needs that kind of stress! Most school libraries stop library circulation a few weeks before the end of the school year to allow time for overdue notices to be sent and items to be returned. Automate end-of-year due dates using Calendar and Policy preferences.

Alexandria will not adjust the due date after an item has been checked out. We recommend that you set these dates at the beginning of the year, before any items or resources have been checked out, and then review them again at the end of the year to make sure they're still set correctly.

Period Due dates

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. Alexandria will not adjust due dates after an item has been checked out, so Period Due dates should have been set at the beginning of the year. However, it's still a good idea to check your calendars for Period Due dates now.

1. Go to [Preferences > Calendars](#).
2. Select a calendar from the list on the left.
3. Choose the date by which items should be returned, then click twice to set it as Period Due.
4. Repeat step 3 for each calendar.

Show All

SYSTEM - A/TT

Washington High School

Revert

Save

Calendars

Standard

Calendars are available for the current year, previous year, and three years in the future. You can create and assign custom calendars for each **Patron Policy**; this allows you to maintain calendars for groups of patrons who may be operating in different security groups or on different schedules.

Sun	Mon	Tue	Wed	Thu	Fri	Sat
24	25	26	27	28	29	30
1	2	3	4	5	6	7
8	9	10	11	12	13 Period Due	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

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 [Apply Period Due Dates](#) is checked. If it isn't, Period Due dates will not apply.



Calendars can be set up for three years in advance. Since you're already adjusting your [Calendars preferences](#), now might be a great time to prepare calendars for the next school year or summer circulation! Just remember to check them again at the beginning and end of each school year to make sure nothing slips through the cracks.

Hard Due Dates

Hard Due Date overrides all other due dates, including the Period Due date, so items assigned to that policy to be checked out all year or for an extended period. For example, if the calendar assigned to the patron policy has a Period Due date of May 21st and the Equipment item policy has a Hard Due Date of June 2nd, then items under that policy will be due on June 2nd.

Hard Due Dates used for extended checkout periods must be changed before Circulation can resume next year.

1. Go to [Preferences > Policies](#).
2. Choose an Item Policy from the drop-down menu.
3. In the Check Out subtab, update or remove the Hard Due Date.

The screenshot shows the 'Item Policy' form for 'Fiction'. The form has three tabs: 'Check Out' (selected), 'Overdue', and 'Other'. The 'Check Out' tab contains the following fields:

- Item Policy Short Code: FIC
- Loan Fee: \$0.00
- Default Replacement / Purchase Cost: \$20.00
- Maximum Renewals for Item: 1
- Hard Due Date: 05/13/2022 (with a calendar icon)
- Statistics Group: Fiction (dropdown menu)
- Transaction Period: 7 (dropdown menu) Days (dropdown menu)
- Notes: A large text area for notes.

At the bottom of the form are buttons for 'Add', 'Remove', 'Duplicate', and 'Rename', along with a gear icon for settings.

Inventory

Inventory

Do you really know what's on your shelves?

A complete inventory is a critical part of end-of-year library management. No matter the reasons, items can become misplaced or damaged over time, contributing to inconsistencies in your database. A complete inventory lets you know exactly what you have, what you don't have, and what needs to be replaced, reordered, or discarded. Now is the time to take stock of your entire collection, organize materials, and update all of the catalog listings to match the physical items in your library. This information will put you in a better position to analyze and organize your collection for the next school year.

Inventory can be a lengthy process, so we recommend that you split the work into sessions based on different sections of your collection. You can stop or pause a session at any time and resume when you're ready.

Reports and utilities

Before you're done, you can also generate a few inventory-specific reports to help with your year-end analysis:

- Inventoried Items
- Missing Items
- Site Inventory Statistics Summary
- Site System Patrons Analysis

And if everything has been returned and you're ready to start closing the library, before you click Complete Session, run the utilities to mark Lost any items that weren't inventoried. [It can wait until later, too.](#)

Volunteers

Inventory is a big undertaking, but you don't have to do it alone. Recruit some volunteers to do the scanning for you—just give them a quick tutorial first! When the inventory is done, print and divide your list of books not accounted for in the inventory, then send your volunteers to the stacks to look for them.



Learn more about [Inventory Management](#) before getting started.

Remove Copies

Identify Lost and Discarded Copies

Loaned Items Information report

The Period Due date has come and gone, Inventory has been done, and now it's time to find out what's still missing before the library closes for the summer. Run the [Loaned Items Information report](#) to see which items and materials are still in circulation.

If you stick with the default settings, the report will show all items that are currently loaned out, even if they're not yet overdue, but you can modify that in the Selections tab if you'd like.

1. Go to **Operations > Reports**.
2. Select the **Circulation > Information** category.
3. Choose the [Loaned Items Information report](#) to the right.
4. In the **Options** tab, select any relevant Sort By options and choose the 1 Line format.
5. Run the report.

Declare Missing Copies Lost utility

If items are still checked out after they should have been returned, run the [Declare Missing Copies Lost utility](#). It will move all items that are currently checked out and were not inventoried to the Lost Copies system patron (barcode 1) and automatically charge the responsible patrons.

1. Go to **Operations > Utilities**.
2. Select the **Copies** category.
3. Choose [Declare Missing Copies Lost](#) from the Utilities Selection pane.
4. Fill in the **Inventory Start Date**.
5. Run the utility.

If an item is returned *after* this utility is run, its status will be changed to Available and any patron charges will be removed and/or their accounts credited.



Declare Missing Copies Lost during inventory

Waiting to do inventory until after everything has been returned? Before you complete the session, choose to run the *Declare Missing Items as Lost* utility from the [Complete tab](#) of the **Inventory Management** module. This will change the status of all items *not* inventoried from Available to Lost.

Remove Lost and Discarded Copies

Does your library remove lost and discarded items from Alexandria at the end of the school year? If not, you can skip these steps. Otherwise, keep reading.

Identify lost and discarded copies

Before making any changes to Alexandria, run the [Discarded Copies](#) and [Lost Copies](#) reports so you know which items will be removed.

1. Go to **Operations > Reports**.
2. Select the **Copies > Special Status** category.
3. Choose a report.

- a. [Discarded Copies](#) lists the titles of each copy that has been discarded but not yet permanently removed.
 - b. [Lost Copies](#) lists the titles of each copy that has been declared Lost.
4. Click **Run**.



Reordering Details report

If you've been providing meaningful reasons for items that have been discarded, the [Reordering Details report](#) will help you identify items you may want to reorder.

Remove lost and discarded copies

Next, run the [Remove Lost Copies utility](#) to permanently remove all lost and/or discarded items from your Alexandria database.

1. Go to **Operations > Utilities**.
2. Select the **Copies** category.
3. Choose the [Remove Lost Copies utility](#).
4. In the **Selections** tab, enter your selection criteria or leave the default settings. The utility defaults are set to remove *all* lost copies, but you can narrow your focus with various selections.
 - a. For example, you could select a period before your last Inventory date, so that any items that were recently declared lost or discarded will remain in the system for a while longer, giving them an opportunity to return.
 - b. If you need to be more specific, check the **Show Additional Selections** box to select copies by individual barcodes.
5. Run the utility.

Repeat steps 3 - 5 for the [Remove Discarded Copies utility](#).

Remove Graduated Patrons

Remove Graduated Patrons

★ **Beginning or End of Year**



Skip this step if you keep records for graduated patrons.

Use(s)

- Run this utility at the end of the school year if you re-import your patrons each year and need a clean slate.
- There are two ways to use this utility to remove graduated patrons at the end of the school year:
 - If you keep track of graduation dates in [patron records](#), enter the appropriate date range or relative date in the **Graduation Date** selection.
 - If you use Last Grade in the [Grade Table Preferences](#), enter the user-defined value for Last Grade (most commonly "Graduated") in the **Patrons in Grade** selection.
- If you manage patrons with GG4L or Clever, patrons who have an active record in Alexandria but are no longer included in the synced data will be marked as *Transferred* (this may include graduated and transferred students). Those patron records will need to be removed manually. Run this utility to remove patrons with a status of *Transferred*. You can also run this utility if you update patrons with manual imports, FTP, or SIF; however, you'll select for patrons with a Homeroom (i.e. location) of *Gone*.



Check out our [Beginning-of-Year Procedures](#) and [End-of-Year Procedures](#) for tips and instructions on preparing your library for summer and the new school year.

Selections

SelectionsOptions

Under the Options tab, choose whether or not to include patrons with checked out items or outstanding financial obligations. Remove records for:

Patrons at SiteAMS – Adams Middle School

Patrons with a Status ofActive

Patrons in Security GroupPatron (5)

Patrons with a Policy ofAny Policy

Patrons fromLocationFromThrough

Patrons in GradeFromThrough

Patrons with Accounts Expiring OnFrom MM/DD/YYYYThrough MM/DD/YYYY

Patrons addedFrom MM/DD/YYYYThrough MM/DD/YYYY

Optional DateFrom MM/DD/YYYYThrough MM/DD/YYYY

Patrons with Last Name

Patrons in Barcode RangeFromThrough

Patrons with Barcodes

Show Additional SelectionsCreate Saved UtilityRun

Options

SelectionsOptions

☐ Remove even with Checked Out or Outstanding Financial Items,

Remove even with Checked Out or Outstanding Financial

When *unchecked*, all selected patrons without checked out removed. Some things, like reviews, are transferred to the l deleted.

When *checked*, all selected patrons will be removed no ma will be declared lost, and holds, reservations, charges, and

Backups

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

The final step before closing your library is to [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.