

v7

[http://www.goalexandria.com/support/tech\\_notes/guides/tech\\_notes/v6/v6\\_EOY.html](http://www.goalexandria.com/support/tech_notes/guides/tech_notes/v6/v6_EOY.html)

## **End-of-Year Procedures (part 1)**

Planning ahead is key to a complete and stress-free end of the school year. The tips in this video will help you with that.

Part 1:

Calendars

Hard Due Dates

Part 2:

Circulation

Lost Items

Remove Lost and Discarded Items

Part 3:

Advance Grade

Remove Graduated Students

Update Patron Policies

Part 4:

Rebuild

(End of Year Backup)

Although inventory is also an end-of-year procedure, it's covered in a separate video. You can find the link under See Also.

### **Calendars**

First, a preliminary step you will want to take care of as soon as possible.

To make sure all items will be checked in by the end of the school year, you can set Period Due dates.

Go to your Calendars preferences, and click twice on a day to mark it as a Period Due. Remember, a period due date is a date when you want all

items returned to the library. The circulation period just before that date will be shortened so items may be returned on time. Set this date now, because Alexandria does not adjust a due date after an item is checked out.

While you are here, you could prepare the calendar for the next school year, or for the summer if you have summer circulation.

Note that you can set up the Calendar for up to three years ahead, but we do recommend checking your Calendar preferences at the beginning and end of each school year.

Now on to the steps you'll perform when closing the library.

### **Hard Due Dates**

Some libraries use hard due dates on certain policies to allow items to be checked out all year. Before circulation for those items can resume next year, those dates must be changed.

In Preferences, go to Policies.

On the Item policy side, under Check Out, you can modify, remove, or enter new Hard Due Dates.

Remember that Hard Due Dates override other due dates such as the Period Due date. So if you have a Period Due date of June 1st, but your Equipment policy has a Hard Due Date of May 2nd, the Equipment items will be due May 2nd.

End part 1

Also see

[http://www.companioncorp.com/mediawiki/index.php/  
Inventory\\_Manager\\_Window](http://www.companioncorp.com/mediawiki/index.php/Inventory_Manager_Window)