End-of-Year Procedures (part 2)

Part 2:
Circulation
Lost Items
Remove Lost and Discarded Items

Circulation

It may be time to close your library, but are there some items still checked out? Let's run a Loaned Items Report.

From Tools, open Reports. Expand the Circulation category and click on Information. Select Loaned Items Information. Run the report. Go to Operation Management to see the report.

From here, you can determine which items should be checked out as lost or discarded and what fees and fines might be charged.

Lost Items

When you do Inventory with Inventory Management and get to the Complete step, there is a nice utility that lets you 'Mark missing items as Lost'. That will change the status of all items not inventoried that should have been Available to Lost by checking them out to the Lost Copies Patron (barcode 1).

If you don't use the utility at that time, you can run it separately.

Go to Tools, Utilities, and the Copies category.

Click on the Declare Missing Copies Lost utility, and fill in your Inventory Start Date.

When you run this, all copies that were supposed to be Available but were not inventoried would be moved to Lost.

Remove Lost and Discarded Items

Many libraries choose to remove lost and discarded items at the end of the school year. Before you do that, you should run a report to see which items would be removed.

In Reports, Copies, go to the Special Status sub-category. You can run the Discarded Copies and Lost Copies reports here.

Before you remove your discarded copies, if you have been using meaningful discard notes, the Reordering Details report will help identify items to reorder.
You'll find this report in the Reports Module under Copies and Information.

Now to remove them. In Utilities, Copies, choose the Remove Lost Copies utility. You can run it as-is to remove *all* lost copies, or you can remove them based on a date range.

Go to the Options tab, and change the Copies Lost drop-down to date Range.

For example, you may want to choose an Ending Date before your Inventory date, so that any items that were marked as Lost recently will be kept in the system for a while longer, giving them a chance to return.

Use the Remove Discarded Copies utility to do the same for discarded copies.
Again, be aware that once you've removed the copies that are 'discarded' or 'lost', those records are completely removed from the system.

End part 2

Also see
http://www.companioncorp.com/mediawiki/index.php/Inventory_Manager_Window