End-of-Year Procedures (part 3)

Part 3:
Advance Grade
Remove Graduated Students
Update Patron Policies

Advance Grade

It's time to advance patron grades.

NOTE: If you are using **SIF** to import and update patron data, *do not* rearrange the grade table or advance the grades. Skip this step.

Everyone else, in Preferences, go to the Patrons area, and click on the Grade Table tab.

Double-check the grades in the grade table and the Last Grade field.

Next, advance patron grades by clicking Advance All Grades. This will move the patrons up a grade according to the grade table; patrons who were in the last grade here will be set to the Last Grade value (usually Graduated).

Remove Graduated Students

Next, you can remove those graduated students.

In Utilities, Patrons, choose the Remove Patrons utility. For Patrons in Level, type in Graduated.

Remember to go under Options and check this box if you want to remove all Graduated patrons regardless of whether they have items out.

Run the utility to remove the Graduated patrons.

Alternatively, if you want to keep these patron records, you can create a policy for Graduated and update those Graduated patrons to that policy.

Update Patron Policies

If your patron policies are named after or based on the grades, well, your grades just moved up, so you are also going to have to update which policy the patrons are assigned to.

In Utilities, Patrons, use the Change Patron Policy utility. Under Options, choose which policy to assign, for example grade 7; or in the case of this demo data, choose a set of grades. (Middle Student)

Under Selections, fill in the Patrons in Level with that grade exactly as it's entered in the Grade Table; in this example, it's 7.

In this example, running this utility will assign all 7th-grade students to the policy Middle Student.

Repeat for any other policies and levels.

Note if you keep your Graduated patron records, and have a policy for Graduated, you will also want to run this utility to move the newly graduated patrons to the Graduated policy.

End part 3

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