

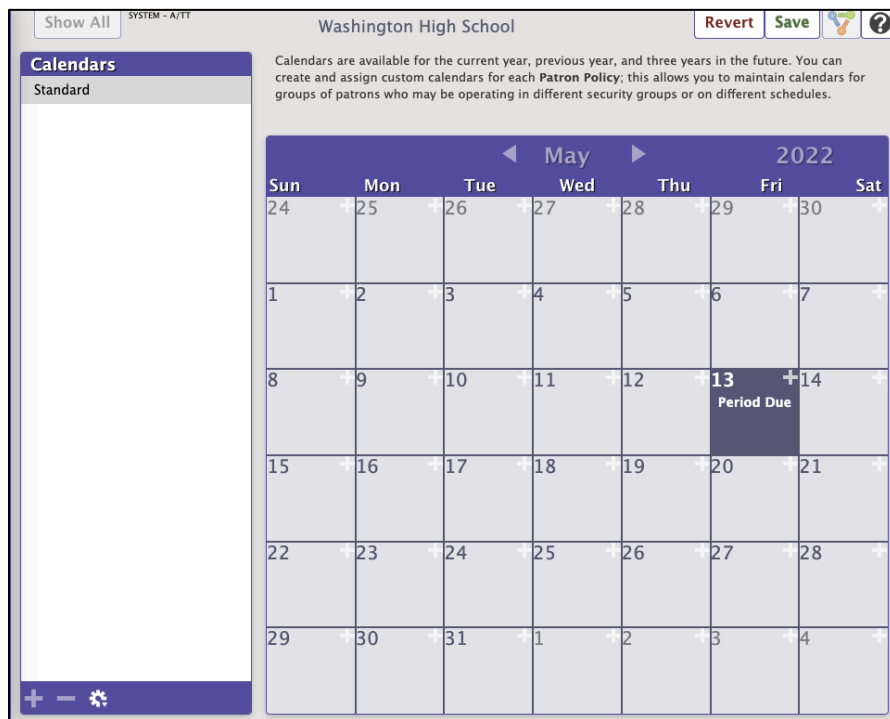
## Alexandria Finish the School Year

### Period Due dates

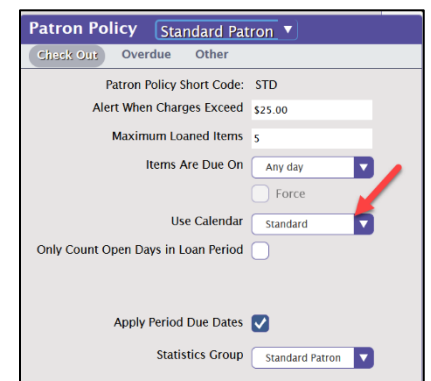
Setting a Period Due date can help you continue circulation as you remind students to return their borrowed items before the end of the year. The Period Due date is a date by which all items should be returned to the library. The circulation period just before this date will be shortened so items are returned in time. For example, if you set a Period Due date of May 3<sup>rd</sup>, all items checked out before May 3<sup>rd</sup> will be assigned a due date of May 3<sup>rd</sup> even if the normal circulation period would indicate a later due date.

You may have set up a period due date already at the beginning of the school year. Alexandria will not adjust due dates after an item has been checked out, so it's a good idea to check your calendars for Period Due dates as the end of the year approaches.

To set or check your period due date, go to your Alexandria Calendar, which can be found in Tools. Navigate to the date you wish to use as your period due date and click it twice until you see Period Due.



Patrons are assigned to a calendar according to their Patron Policy. Go to Tools, then Policies, and check that each patron policy is assigned to the correct calendar and that Apply Period Due Dates is checked. If it isn't, Period Due dates will not apply.



## Loaned Items Information Report

The Loaned Items Information report will give you a list of all items that are currently checked out listed by patron. You can further organize this list by grade or homeroom. It can be helpful to run this report as the end of the year approaches, so that you can remind students what they need to return to the library before school closes. You will find this report in Reports, under the Circulation reports section and the Information subsection.

The 'Selections' tab is active, showing various filters for the report. The interface includes the following fields:

- Patrons with a Status of: **Active** (dropdown)
- Patrons with Items Borrowed: From MM/DD/YYYY [13] Through MM/DD/YYYY [13] (date pickers)
- Patrons with Items Due: From MM/DD/YYYY [13] Through MM/DD/YYYY [13] (date pickers)
- Patrons with a Policy of: **Any Policy** (dropdown)
- Copies with a Policy of: **Any Policy** (dropdown)
- Patrons from: **Homeroom** (dropdown) From [ ] Through [ ] (text input with search icons)
- Patrons in Grade: From [ ] Through [ ] (text input)
- Circulation Group Code: [ ] (text input)
- Patrons with Last Name: [ ] (text input)
- Patrons in Barcode Range: From [ ] Through [ ] (text input)
- Patrons with Barcodes: [ ] (text input)
- Title: [ ] (text input)

At the bottom of the form, there are three buttons: **Show Additional Selections**, **Create Saved Report**, and **Run**.

To get a list of all items that are out, leave the Selections blank. If you only want this list for a certain Homeroom or Grade level, you can select that.

In the Options tab, select how you want the list to be sorted, by Grade or Homeroom.

The 'Options' tab is active, showing settings for the report. The interface includes the following options:

- Sort by: **Grade** (dropdown)
- Page Break on Major Sort**
- Format: **Brief** (dropdown)
- Landscape**
- Copy Barcode**
- Serial Number**

You can run the report, or click Create Saved Report to save the report in order to easily run it again.

## Removing Lost Copies

The Discarded Copies and Lost Copies reports can be found in Tools, Reports, Copies, Special Status. They will give you a list of copies that have the status of Lost or Discarded. You can use this list to try to find these items one last time, and also to order new replacement copies if desired.

After identifying your list of lost and discarded items and confirming them, you are ready to remove them from your Alexandria system with the Remove Lost Copies utility.

To run the Remove Lost Copies utility, go to Utilities. Select the Copies category and select Remove Lost Copies. In the Selections tab, enter your selection criteria, or leave the default settings. The utility defaults are set to remove all lost copies. Run the utility. All lost copies will be removed.

**Utilities** Filter

- Remove Copies
- Remove Copy History
- Remove Copy Notes
- Remove Cover Art
- Remove Discarded Copies
- Remove Holds
- Remove Lost Copies**

**Selections** Options

Remove lost copies for:

Copies at Site: WHS - Washington High School

Copies with a Policy of: Any Policy

Copies from: Copy Location From Through

Copies in Call Number Range: From Through

Copies Lost: From MM/DD/YYYY 13 Through MM/DD/YYYY 13

Copies in Barcode Range: From Through

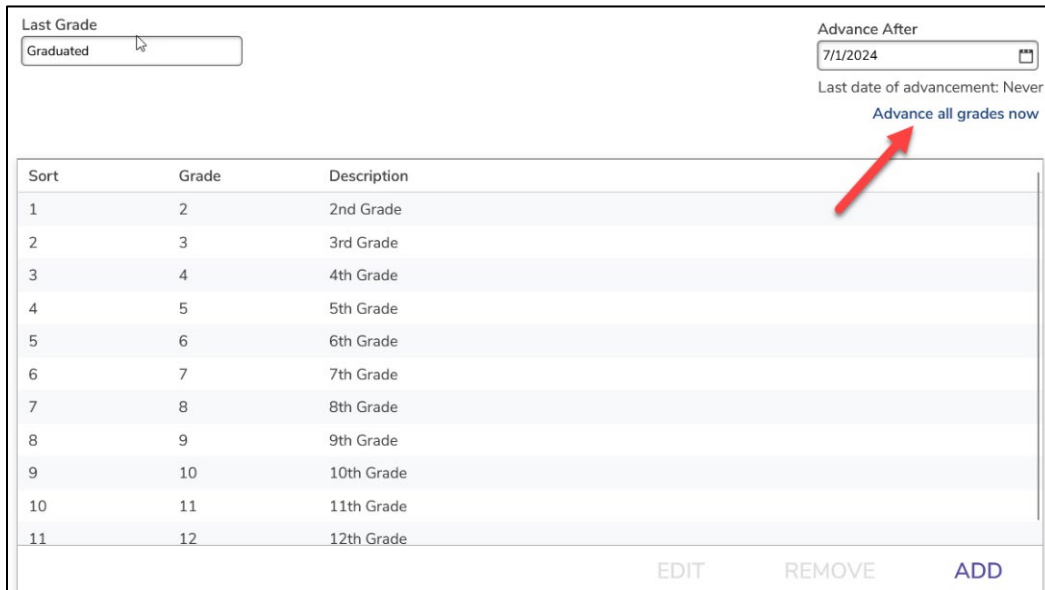
Copies with Barcodes: [Empty Text Box]

✓ Show Additional Selections Create Saved Utility Run

## Updating the Grade Table

If you do not import your patron records but instead enter and update them manually in Alexandria, updating the grade table can advance all students to the next grade. This only needs to be done once per year, so if it is done at the beginning of the school year, there is no need to do it at the end of the school year.

To update the grade table, go to Preferences, then Patrons, then Grade Table.



The screenshot shows a web interface for managing the grade table. At the top left, there is a dropdown menu for 'Last Grade' with 'Graduated' selected. At the top right, there is a date picker for 'Advance After' set to '7/1/2024', and a text label 'Last date of advancement: Never'. Below these is a blue button labeled 'Advance all grades now', which is highlighted by a red arrow. The main part of the interface is a table with three columns: 'Sort', 'Grade', and 'Description'. The table lists grades from 2 to 12. At the bottom right of the table area, there are three buttons: 'EDIT', 'REMOVE', and 'ADD'.

| Sort | Grade | Description |
|------|-------|-------------|
| 1    | 2     | 2nd Grade   |
| 2    | 3     | 3rd Grade   |
| 3    | 4     | 4th Grade   |
| 4    | 5     | 5th Grade   |
| 5    | 6     | 6th Grade   |
| 6    | 7     | 7th Grade   |
| 7    | 8     | 8th Grade   |
| 8    | 9     | 9th Grade   |
| 9    | 10    | 10th Grade  |
| 10   | 11    | 11th Grade  |
| 11   | 12    | 12th Grade  |

Click Advance all grades now to advance all students to the next grade. This cannot be undone, and should only be done once per year, either at the beginning or the end of the year. Students in the last grade level will be advanced to Graduated.

## Alexandria Help

<http://support.companioncorp.com/display/ALEX/End-of-Year+Procedures>

## SCKLS Help

<https://www.sckls.info/services/automation/automation-training>

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