

BEGINNING-OF-YEAR PROCEDURES

01. UPDATE CALENDARS & POLICIES



Set your Closed, Period Due, and Hard Due Dates at the beginning of the year and check that each **patron policy** is using the correct calendar. Review **item policies** for hard due dates and transaction periods.

03. IMPORT PATRON RECORDS

Add new patrons and update existing patron information through Alexandria's **Import** tool.



- If your tab-delimited import file includes patron homerooms, first use the **Change Patron Homeroom** utility to put all of your patrons under the same homeroom (e.g. "Gone").
- Once imported, all currently-enrolled students will be updated to the correct homeroom.

02. ADVANCE PATRONS



If you didn't do this at the end of the school year, now's the time to advance your patron records to the next level.

- Advance all of your patrons at once in **Patron Grade Table** preferences.
- Advance specific groups of patrons at a time with the **Advanced Patron Grade** utility.
- Do your policies match your grades? These need to be updated too! Run the **Change Patron Policy** utility for each patron group.

05. UPDATE EXPIRED CARDS

Do you use expiration dates for patron library cards? Run the **Renew Patron Cards** utility to update the expiration dates for the new years.

04. REMOVE GRADUATED STUDENTS

Run the **Remove Patrons** utility to remove patrons who have graduated or transferred.



- Select by **Grade** "Graduated" to remove all graduated patrons.
- Select by **Homeroom** "Gone" to remove all patrons that weren't updated during your import.
- If you use one of our patron services (e.g. Clever) to sync SIS data, select by **Transferred** to remove patrons no longer in your SIS.

06. BACKUPS



Is your library self-hosted? Back up your data and store it in a secure off-site location, like cloud storage – you never know what might happen!

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