

# Beginning-of-Year Procedures

## 01 UPDATE CALENDARS

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.

## 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.



## 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 year.

## 06 BACKUPS

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

## 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 **Advance 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.

## 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 partner services (e.g. **Clever**) to sync SIS data, select by **Status** **Transferred** to remove patrons no longer in your SIS.

