

End-of-Year Procedures

01 DUE DATES

Set your Period Due and Hard Due Dates at the beginning of the year and review them at the end.



02 INVENTORY

Over time, items can become misplaced or damaged, which may contribute to inconsistencies in your database. An inventory lets you know exactly what you have, what you don't have, and what needs to be replaced, reordered, or discarded.



03 REMOVE COPIES

- Run the **Loaned Items Information** report to find out what's missing, then run the **Declare Missing Items Lost** utility to prepare for removal.
- Run the **Discarded Copies** and **Lost Copies** reports so you know which items will be removed.
- Next, run the **Remove Lost Copies** utility to *permanently* remove all lost and/or discarded items from your database.



04 ADVANCE PATRONS

- Advance all of your patrons at once in **Patron Grade Table** preferences, or advance specific groups of patrons at a time with the **Advance Patron Grade** utility.
- Run the **Remove Patrons** utility to remove patrons who have graduated or transferred.



05 BACKUPS

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

