



Year End Items – (To Do List) Step by Step



As the end of the school year draws near, please find the year end items that you will want to complete :).

1. **18/19 School Year - First and Last day of school for students AND a LIST of dates students are NOT attending (i.e. holidays, Christmas break, spring break, etc.)** - please send this by email to HelpLibrary@mveca.org by ****April 13, 2018****.

Example:

First Day for Students -	August 16
Last Day for Students -	May 23
<u>Days students NOT attending:</u>	
Labor Day	September 3
Parent/Teacher Conference Exchange	October 19
Thanksgiving Break	November 22-23
Christmas Break	December 24 – January 4
Spring Break	March 25 - 29

2. **Compulsory Return Date (CRD – i.e. the final due date all items should be returned to the library for THIS year)** for ALL libraries / or EACH library in the district. **Please notify me of this date by emailing HelpLibrary@mveca.org. *DUE April 13, 2018***
3. Do you have any **changing or merging of libraries?** **Please notify me of these changes by emailing HelpLibrary@mveca.org.**
4. Do you have any **Library staff changes? (Retiring Library Staff or New Library Staff?)** **Please notify me of these changes by emailing HelpLibrary@mveca.org.**
5. **Suspend Overdue Notices sent by Email.** (If you have set up emailing notices to students/parents or teacher homerooms) – (Or those emails will continue to be sent all summer to the patron’s/parents/teachers.
 - a. Go to Reports and Notices wizard group.
 - b. Click on Scheduled Reports screen.
 - c. All reports that are scheduled to automatically run will be listed.
 - d. Any reports that are in **BOLD** print are already suspended.
 - e. Click Suspend at the bottom of the screen.
 - f. Then check the boxes for all reports you need to suspend (stop running for the summer).
 - g. Then click Suspend at the bottom of the screen again.
 - h. The reports are now all suspended from running.
 - i. **You will notice in the “Next Run Date” column it shows “NEVER”.**
 - j. To then make sure all those reports start back up next fall at the beginning of school, you have two options:
 - i. Wait until you are back from summer, go to the Scheduled Reports screen, click the report you want to Unsuspend, click Advanced at the bottom of the screen, click Unsuspend, bullet “Specific” and enter the date for the report to start.
 - ii. Once you have suspended all the reports, you may Unsuspend and set the Specific date to be the first day of school (or whatever date you wish for the reports to start again)

and they will all start on the specified date. (Use the instructions in “i.” above to unsuspend and specify a date.)

6. **Clear/Check on OLD Checked-Out Items.** (Patrons that have long overdue items, and you want to see how long they have been overdue.)
 - a. You can use the Assumed Lost Report – (assumedlost) available on the All Circulation report tab which will keep the item associated to the patron and will KEEP the patron in your files and will automatically BILL the student for the amount of the item. **You would use this report if you expect to receive payment from the student for the item and you want the student billed for the item.**
 - b. To run the **Assumed Lost Report:**
 - i. Go to Schedule New Reports
 - ii. Click on the All Circulations tab.
 - iii. Click on “Assumed lost report”
 - iv. Click Setup & Schedule at the bottom.
 - v. Click on the Checkout Selection tab:
 1. Enter your library in the library field by using the gadget
 2. Enter the Date Due by clicking the gadget. Start Date should be bulleted “Since the beginning of the system” and the end date should be bulleted “The date this report will be run”.
 - vi. **If you want JUST THE LIST, AND NOT TO BILL THE STUDENT - Click on the Update Option tab and make sure the box is *NOT* checked so nothing is updated the first time you run it and bills are NOT created.**
 - vii. This will give you a list of all books that were due on and before the date the report was run.
 - viii. Go through the report and view the Due Dates of the books that are checked out. Are any VERY old?
 - ix. Do you want to bill the user and mark them as Assumed Lost?
 - x. If so, then run the report again exactly as you did the first time BUT **Click on the Update Option tab and make sure the box *IS* checked so all records are updated and bills are created.**
 - xi. **If you want to run this for a select student population only (such as seniors) do not hesitate to ask how to run it differently than what is specified above.**
7. **ReportTemplates – Remove any Unneeded Report Templates**

Review the templates found on the Templates tab when selecting **Schedule New Reports**. Any reports that are no longer needed or outdated please remove using the Remove option.
8. **Generate a list of patrons to be expired as of July 1, 2018**

From the INFOhio report tab, select the **“PAT: List Users” (patlist)** report. Specify “<7/1/2018” for the Privilege Exp. Date selection. Share the list with the library media staff so they are aware of patrons that will be removed during the summer. ****Patrons will only be removed IF they have no bills and no checked out/overdue books.****

Get a list of Patrons Expiring July 1 or before:

 - a. **Click** Schedule New Reports wizard.
 - b. **Select** the INFOhio tab.
 - c. **Select** Pat: List Users report.
 - d. **Click** Setup & Schedule.
 - e. **On the User Selection tab** use the gadget to select your library and under the Privilege exp. Date field – click the gadget, click before and use the gadget to choose July 1, 2018.
 - f. **Click Run Now.**

The report will show up on your finished reports screen and you may print it from there.
9. **Generate list of items w/ XX Call numbers**

From the INFOhio report tab, select the **“CAT: Shelflist” (catitemlist)** report. Specify a Call Number

Range of x – xxx (>x<xxx). This report will only list XX call numbers if there are items associated with the XX call number record. If you have items with XX call numbers, those call numbers will not have (should not have) any item attached. Usually this means you began importing a record using Smart Port but forgot to finish it. **You should delete these items.** Go to Item Search and type in XX in the “Search for” field, choose Item ID in the dropdown in the “Index” field. Then search. This will show you if you have any Call Numbers with XX that need deleted. To delete them, use “Remove Item” in the Item Maintenance group and search for them in the same way. Then remove the Call Number.

To View or Remove Items with XX call numbers:

- a. **Click** on the Item Maintenance wizard group and click on Remove Item.
- b. **In the Search For** field enter XX.
- c. **In the Index** field change to Call Number.
- d. **In the Library** field make sure you have your library selected.
- e. **In the Type** field on the far right, make sure it is set to “Browse”.
- f. **Click Search.**

This will list any XX call numbers.

To “Remove” those call numbers if they are not needed:

- a. **Click** on the first XX call number under the Browse Call Number area so that it is highlighted.
- b. **In the Call Number/Item area** below the Browse area, you will see boxes. Check the boxes for the XX Title.
- c. **Click Delete at the bottom.**
- d. **Repeat these steps until all XX call numbers in your library are removed.**

10. Titles without copies

From the All Titles report tab, select the “**List Titles with No Copies**” (**titlesnocopies**) report. A default library will be selected, but consider clearing this selection to generate a list for all libraries. Sort the list by call number so those with XX call numbers are near the end of the report. This report lists all call numbers that have no item information attached.

Get a list of Titles without copies:

- a. **Click** Schedule New Reports wizard.
- b. **Select** the All Titles tab.
- c. **Select** List Titles with No Copies report.
- d. **Click** Setup & Schedule.
- e. **On the Call Number Selection tab** use the gadget to select your library.
- f. **Click Run Now.**

The report will show up on your finished reports screen and you may print it from there.

11. Check “Transit Items” wizard to receive any items that are in transit

Instructions for utilizing the **Transit Items wizard** can be found online in the “INFOhio Handbook: Sirsi K-12 Library Automation Software GL3.1” documentation under the Special Circulation section.

- a. **Go to Special Circulation Functions** wizard group.
- b. **Click on Pending Transits.**
- c. If there are Pending Transits in your list, it will show the library that is sending it back to you. Did you actually receive the item?? If not, contact the sending library and ask them if they have it on their shelf.
- d. **If you did receive it back from the sending library, click on the item so that it is highlighted, then click Receive Item at the bottom of the screen.**
- e. **Clear off all Pending Transits before Inventory.**

12. **Process Inventory Steps** - "INFOhio Handbook: Inventory -Chapter 14" (and attend the training at MVECA for assistance if needed).
13. **Run the Reset Item Counters Report** - The Reset Item Counters (Itemcntreset) report is used to reset the counters for the interval item statistical fields: Interval Checkouts, Interval Renewals, and Interval Start Date. This is important if you are running statistical reports in your library.

It can be found on the Bibliographic report tab.

NOTE: If running annually, set it up as a "Scheduled Report" to run 1 time on July 1, 2018 :).

To set this report up as scheduled once on July 1:

- a. **Click** Schedule New Reports wizard.
- b. **Select** the Bibliographic tab.
- c. **Select** Reset Item Counters report.
- d. **Click** Setup & Schedule.
- e. **On the Item Selection tab** use the gadget to select your library.
- f. **Click Schedule** at the bottom of the screen.
- g. **Select "Once", July 2018, 1st, 12:00 AM**
- h. **Check the box "Save to Finished Reports Wizard"**
- i. **Check the box to Email to Individuals and enter your email address.**

Screenshot of the "Schedule New Reports" wizard for the "Reset Item Counters" report. The "Schedule" section shows "Once" selected, with a calendar for July 2017 where the 1st is highlighted. The "Printing/Distribution" section has "Save to Finished Reports Wizard" checked, and "Email to Individual(s)" checked with an email address entered. The "Format" checkbox is also checked.

Once you have completed this, you are done with the yearend task list! :)

Please let me know if there is anything else I can assist you with, or if you have any questions!

Have a wonderful summer break!