



# Oliver Procedures

## *End of Year Tasks*



Catholic Education Office, Wollongong

## Overview

This document will show you how to ensure your Library data is in good order and condition ready for the following school year. The following procedures should be carried out towards the end of the year. Refer to the Procedures Manual for full step by step instructions.

1. Loan History: print out Loan History if required for Reports. This can be done for a Roll Class or Scholastic year. Go to **Borrowers** > **Search** > select the group you want. Go to the Function Menu > **Reports** > Borrower Loan History.
2. Delete leaving Scholastic year: go to **Borrowers** > **Search** > Select Year 6 or 12. Delete all records. Students with outstanding loans will not be deleted.
3. Delete any individual Borrowers who are leaving. If they have outstanding loans, print these out, return manually and change Status to Missing. The borrower can then be deleted.
4. Use Tag Manager to locate Students who have left, then delete.
5. Overdue loans: return manually any missing resources and change status to Missing.
6. Return all bulk loans and Resource Boxes.
7. Conduct a Stocktake of chosen Collection/s, and record in the Stocktake Overview.
8. Weed Disposed copies, after completing Reports.
9. Resource Management: compile a report of Resource Statistics.
10. If using Acquisitions, set a date range for the following year.
11. Set closed dates for the following year: go to **System** > **Branches** > select Library > click edit. Closed dates must be entered in ddmmyyyy format. To enter a range for holidays, enter ddmmyyyy-ddmmyyyy.
12. Adjust Circulation Expiry dates in the **Lending Rules** Matrix.
13. Renew Subscriptions: SCIS, Scan, Weblinks, etc.
14. Complete the Handover document if required for replacement staff.
15. Turn off the computers and cover if possible.