2016 End-of-Year Checklist for Librarians

The following are suggested tasks to complete before the end of school:

1. **Submit Compulsory Return Dates**
   Send NEOMIN Library Services your Compulsory Return Dates by district, or building, via the online survey. No CRD results in books being due the same day they are checked out. https://www.surveymonkey.com/r/PVR6JZD

2. **Setup ISearch Local "Featured Titles" for Book River**
   If your school was in the first wave of ISearch Local conversions (HUB, HOW, LAB, LAK, MAP, MAT, NFA, NIL, TCT, WAR), do you want a book river setup for your ISearch Local? NOTE: In the Fall, ISearch Local will be setup and available for the remaining NEOMIN districts.
   - Your ISearch Local URL was sent via email, however, you can get to it by going to CAT and clicking on ISearch from the top right menu bar.
   - If you want a book river, open/send an email helpdesk ticket to infohio.support@neomin.org.
   - Once your book river is configured, you will need to determine how you want to populate the featured titles list (there are three different options).

3. **Add Closed Library Dates for 2016-17 School Year**
   LIB1's need to enter closed dates for the upcoming school year. If you charge fines, make sure you close dates for the summer months to prevent overdue fines from accruing while the library is closed. All buildings need closed calendar dates entered. Please contact NEOMIN if you do not have LIB1 access and cannot enter your library's closed dates.

   Login to Workflows:
   - Common Tasks wizard >> Library Calendar
     - Refer to Workflows Handbook: Setup, Getting Started, Library Calendar

4. **Mark *Long Overdue* Items as Lost (Manually)**
   If an item has not returned during the school year, it's time to mark that item as lost and charge the user for the amount of the item. Find items that are long overdue (due before August 2016) and mark them as lost.

   CIR: Overdues and Notices Report:
   - Schedule New Reports >> INFOhio tab >> CIR: Overdues and Notices
     - User Options tab – User Status: Both

- User Selection tab – exclude faculty, if desired
- Checkout Selection tab – Date due: "<08/03/2015" (before Aug. 3, 2015)
- Checkout Selection tab – indicate your library (or leave blank to get all)
- Output Options tab –
  - Brief
  - Uncheck "Start New Page on Sort Key"
  - Uncheck "Unpaid Bills"
  - Uncheck "Total Bills and Charges"
- Run Now. When opening the finished report, view result only.
- In Microsoft Word: Courier New, size 10, moderate margin

NOTE: An "Assumed Lost" report can be run and all *long overdue* items would be marked LOST-ASSUM (instead of LOST-CLAIM). Notices can also be created when this report runs to alert the student of the lost item amount. If you are interested in running this report, please open a helpdesk ticket by sending an email to infohio.support@neomin.org.

5. **Cleanup Inactive Patrons with Bills**
Identify and cleanup inactive or expired patrons with bills. These students owe you money but have left the district. If you do not think they will return to pay what they owe, you can manually forgive/cancel/waive their bill amount and remove their patron record.

List Users with Bill Report:
- Schedule New Reports >> All Circulation tab >> List Users with Bills
  - User Selection tab >> add school (or leave blank to select all)
  - Run Now. When opening the finished report, view result and format report.
  - In Microsoft Word: Courier New, size 10, moderate margin

6. **Cleanup Inactive Patrons with Overdue Item(s)**
Identify and cleanup inactive patrons with overdue item(s). These are students who left the district and/or seniors who still have an item(s) checked out (hint: Seniors may have items checked out but not yet overdue). NEOMIN's summer patron cleanup procedures will remove all patrons, however, these students will remain because they have items associated with their account.

If you know that you will *not* recover the item, you can mark it as lost (if you want to keep the student in the system and keep the item linked to the item); or you can check-in the item, remove the student record (since they are inactive), and mark the item as missing.

CIR: Overdues and Notices Report:
- Schedule New Reports >> CIR: Overdues and Notices

- User Options tab select "Both"
- User Selection tab >> add school (or leave blank to select all)
- User Selection tab >> Privilege exp. date as "<07/01/2016" (Before July 1, 2016)
- Output options tab uncheck "Start New Page on Sort Key"
- Output options tab uncheck "Unpaid Bills"
- Output options tab uncheck "Total Bills and Charges"
- Run now. When opening the finished report, only view the result.

7. **Submit Library Staff Changes to NEOMIN**
Review Library Staff accounts (ignore the * - DO NOT DELETE accounts and the Sub account for each building) and provide NEOMIN with appropriate additions/changes in staffing (not faculty).

To view existing staff accounts:
- Go to User Maintenance wizard >> Display User
  - Search for: "Building code$" (ex. LAKHS$)
  - Index: User ID
  - Library: ALL_LIBS

8. **Create an Annual Library Report**
Assuming others know what you do is silly. Annual reports provide a very effective way to demonstrate to administration that you are improving the educational process. Utilize the *new* NEOMIN annual report infographic template, or one of the shared templates from NEOMIN librarians.
- Templates can be found here: http://neolibrary.weebly.com/user-group-blog/annual-library-report-templates
- Run statistic reports to gather information for your report. You can find a spreadsheet of useful reports here: http://www.neomin.org/Library/2015-16UserGroups/Mar/StatisticReportsExplained.xlsx

9. **Cleanup Transit Items**
Transit items are tricky! For various reasons, items get stuck in transit to other libraries within the district. This happens if an item belongs to one library and is scanned at another library. These often times occur when buildings merge and building codes don't get changed on the item record. I also believe there is a library leprechaun that loves to move books in the system when no one is looking.

The Pending Transits wizard is used to display a list of items currently in transit to a specific library. Use the 'Pending Transits' wizard to check if there are any items 'in transit' to your building. You can also check other libraries, within your district, to see if your items are in transit to their location.

Login to Workflows:
- o Special Circulation Functions >> Pending Transits
  - ▪ If an item is in the list, click on the title glossary and see if it belongs to your library (it will show the library code under the volume/copy section).
  - ▪ If the item is yours, you will want to take the item out of transit by selecting the item from the list and clicking "Receive Item" at the bottom. This will make the item available at your library. Next, go to the shelves and try to find the book. If it is not physically on your shelves, you will want to move onto the next bullet…
- o If you don't have the item, use the Check Item status wizard to see who borrowed it. Contact them to get it returned. If they don't have it, use the Mark Item Missing wizard to change status to Missing.
- o NOTE: If you have an extremely large number of transits, NEOMIN can run a procedure to check-in the items to the home library location. Please open/send a helpdesk ticket to infohio.support@neomin.org if you are interested in this procedure.

10. **Cleanup Unused Reports**
    Delete unused/outdated Scheduled Reports and Template Reports.

11. **Cleanup Titles without Items**
    Remove any titles that were not completed during the SmartPort cataloging process. These titles *will* display in CAT/Cat. Jr. and should be removed if you are not adding items to them. You can easily find these because their call number starts with "XX".

    Login to Workflows:
    - o Cataloging wizard >> Remove Item
      - ▪ Search for: "XX"
      - ▪ Index: Call Number
      - ▪ Library: YOU MUST SPECIFY A BUILDING
    - o Remove the title and XX call number from the tree shown.
    - o NOTE: If there is a valid barcode listed, you (or a previous staff member) probably forgot to change the call number during the cataloging process. In this case you will want to fix the call number:
      - ▪ Click "Close" in the Remove Item wizard
      - ▪ Go to Cataloging wizard >> Call Number / Item Maint
      - ▪ Do the same search (from previous step searching XX and call number) to find the item record.
      - ▪ Modify the call number information to reflect the correct call number. NOTE: Never change the Shelving Key (this will update automatically).

12. **Complete a Library Inventory**

It's a good idea to complete an inventory yearly. All you need is a laptop, Notepad, and a scanner! The goal is to update your electronic library records to match what you have in your physical library collection. Reports are of no value if the electronic data doesn't match what you have on your shelves.

- o Contact Autumn if you need a refresher, cannot attend Inventory training, or would like a one-on-one session.
- o INFOhio's online handbook has videos on how to complete an inventory in Workflows. Workflows Handbook >> Video Tutorials >> Inventory https://www.infohio.org/educators/library/workflows-handbook/category/inventory-2

13. **Statistics Reports**

Use this spreadsheet to find links to all the reports shown below:
http://www.neomin.org/Library/2015-6UserGroups/Mar/StatisticReportsExplained.xlsx

- o Circulation Reports
    - Total Checkouts by Item Group
    - Total Checkouts by Grade
    - Total In-House Checkouts
    - Popular Items (Highest circulation items)
- o Population Reports
    - Total Patrons Served
- o Collection Reports
    - Shelf List (shows item status totals, item group totals, total items in library)
    - Total Items by Funding Source for Year
    - Total Value of Collection
    - Total Age of Collection
    - List of New Titles for the Year (and Total Cost)
    - Total Receipts by Payment Type

14. **Database Cleanup Reports**

You find these reports on INFOhio's Workflows Handbook >> Reports >> Favorite Reports.

- o (Older) Items that have Not Circulated (in time - range selected)
- o (Older) Items that have Never Circulated
- o Items with No Price Listed
- o Run a shelflist in spreadsheet view to sort various data (item groups, call numbers, etc) to see where issues need resolved.

15. **Review INFOhio Summer Beach Bags & Virtual Camp INFOhio**
Back by popular demand: INFOhio Beach Bags and the virtual Camp INFOhio offered for free to all Ohio families by INFOhio and the Ohio Department of Education. The Beach Bags feature stories and activities that let children practice reading skills while learning about careers and their environment.

The Beach Bags are:
- Explore the World of Work: Police Officer
- Explore the World of Work: President
- Explore the World of Work: Veterinarian
- The Foods We Eat
- On the Move
- Perfect Pets
- Weather, Weather Everywhere!
- What's in Your Neighborhood?
- Where Does the Garbage Go?

Camp INFOhio contains five days of reading, activities, and experiments centered on STEAM topics. STEAM stands for Science, Technology, Engineering, the Arts, and Math. Kids can try their hand at code breaking, conduct science experiments with items they find in the kitchen, learn about roller coasters before designing their own, and create their own musical instruments.

No sign up is necessary! Simply download the packets above and work through the activities at your own pace.

16. **Complete INFOhio's The 21 Things Modules (retired as of June 1, 2016)**
For your planning purposes, the INFOhio team wants to let you know that The 21 Things modules will be retired as of June 1, 2016. In their place will be an up-to-date and streamlined set of six modules, our new Success in 6 professional learning program.

Just as with The 21 Things, participants will be able to work through **Success in 6** at their own pace and earn contact hours for CEU credit, three hours per module for a total of 18.

And like The 21 Things, **Success in 6** teaches participants the latest ways to incorporate digital resources in their classrooms to support 1:1, blended learning, personalized learning, differentiation, and a host of other student needs.

Success in 6 includes the following modules:
- Develop Your Research Toolbox
- Learn to Search Effectively
- Discover High Quality STEAM Resources
- Engage Young Students with Reading Resources

- Find Free Content for Your Blended Classroom
- Explore INFOhio's Differentiation Tools

If you are currently running the 21 Things modules for professional development, please complete all work before June 1. And please use the Success in 6 modules for professional learning in 2016-17!

17. **Complete End-of-the-Year Surveys**
- NEOMIN Customer Service Survey
- NEOMIN Compulsory Return Date Survey
- *Possible* NEOMIN Library User Group Survey
- *Possible* NEOMIN Training Interest Survey