

7 Steps to a Fantastic Inventory with Alexandria

Alexandria's **Inventory Management** window steps you through your inventory in a simple, easy-to-follow, and comprehensive process.

Open **Inventory** from the **Tools** menu. After the Intro pane, you'll notice there are five tabs on the top of the window: **Sessions**, **Inventory**, **Exceptions**, **Review**, and **Complete**. To begin, click **Continue** on the bottom-right. This will take you to the **Sessions** tab.

1. Sessions

Sessions allow you to inventory parts of your collection in 'Sessions' that can be continued by your or anyone else with inventory permissions.

Alexandria will keep track of the progress in each section, allowing you to perform inventory with any number of stations, users, bookshelves, in any length of time.

Create a Session. Give it a name; for example, **FIC A** through **FIC B**. If you are inventorying by call number, provide the call number range.

We suggest you create **all** the Sessions that you would need to fully inventory your library. As Sessions are removed as they are completed, it's easy to tell what remains to finish.

Note: We recommend creating separate Sessions for every area you intend to inventory unless you intend to inventory ALL areas under a single Session.



Options

2.

In **Sessions**, there are four options; Alexandria's recommended settings are selected by default.

Audible alerts when inventorying items checked out to System Patrons 1-10 will give you a special alert will sound to inform you that the item you just scanned was previously **Lost**, **In Transit**, etc. It will also let you know when items with a **Discarded** status are found, so you can set these items aside.

Audible alerts when items are not in Call Number Order. If you are scanning by shelf, using a wireless scanner and not looking at your screen, this alert helps keep your collection in good call number order. *This option is selected by default.*

Audible alerts and note when items are not Policy. For example, if you are inventorying by FIC A through B policy, nothing outside the **Fiction** policy should be encountered. If that does occur, Alexandria will let you know, so you can return the lost item or fix the item record.

Bookdrop items scanned during inventory. Alexandria assumes everything you scan is in hand, and checks them in. This applies to any item checked out to a regular patron, and those checked out as **Lost**, **On-Repair**, **On-Order**, **In-Processing**, **In-Transit**. However, items that are **Discarded**, **in Library Use**, or **Archived** will NOT be bookdropped; also, **In-Stock Holds** will remain **In-Stock Holds**—the status will not change to **Available**. All of these items will still be inventoried. *This option is selected by default.*

Once your options are set, **Save** the Session at the top-right of the screen, and **Continue**.



Note: Although you can modify the Session at any time, note that reports and utilities run depending on the current settings for this Session.

3. Inventory

This is where you scan your items. There are several alerts for this screen:

Out of Order after call number etc.—This lets you know when a call number is out of order. It may not be that the number *itself* is out of order, but the call number before it belongs in the **FIC B** section and you're still on the A's.

Lost item found—When a Lost item is found, it's bookdropped. If you charge lost item fines, Alexandria will automatically remove the the amount the patron owes or, if they've already paid, refund the patron. Note this refund will be an **'Unaccepted' Credit** and you will need to **Accept** the Credit to apply it to his account.

Unknown barcode—when something is wrong with the item record, or the barcode is wrong. You can try to scan it again or set the item aside.

Scanned Policy is not the Session Policy—You'll need to set the book aside or make a note to modify the policy in the item record.

Outside Session Call# Range—This item belongs in a call number range outside the one specified for this session.



Exceptions

4.

The **Exceptions** tab shows how many items had some sort of exception during the inventory process (Out of order or range, lost items checked in, etc.). You can also specify certain days of your session in the **Include Exceptions From** drop-down menu.



5. Review

Under **Review**, run certain reports helpful to completing your inventory:

Email Reports to sends the following reports via email to as many addresses as you want, separated by a comma. You must have your email settings properly configured in Administration.

Inventoried Items Report is a list of all items in your specified call number range inventoried in this session.

Missing Items Report lists items that were in your call number range and should have been inventoried but weren't.

Site Inventory Statistics Summary gives you inventory statistics for this site—not specific to the Session.

Site Special Patrons Analysis gives you inventory statistics for the site—specifically items checked out to **System Patrons**.

Select the reports you want to run. Click **Run Selected Reports** and they will show in the **Operation Management** window.



Complete

6.

In the **Complete** tab, you can perform certain utilities relating to your Session:

Recall items not inventoried that are checked out to non-System Patrons—When checked, Alexandria will print or email recall letters for all loaned items.

Declare missing items as Lost—Any items that were in your call number range with the status of **Available** should have been inventoried. If they weren't, you can assume they are **Lost**, and have them all checked out to the **Lost** system patron.

Declare non-inventoried, checked out items as Lost—If all items should have been returned, you can also mark items in your call number range that were checked out (to non-system patrons) as **Lost**.



Select the utilities you wish to run.

7. You're Done!

Once you're finished, click **Complete Session**. You will be presented with a confirmation window. Are you sure you are finished? Have you run all the reports you need? Are you ready to run any selected utilities? If you are complete, click **Complete Session**.

A short summary will appear, telling you what reports or utilities were performed, that your exceptions log for this Session will be deleted, and the Session will be removed.

Check **Operation Management** to view the **Inventory Exceptions Report**.

Note: Once this Session is complete, you will be unable to go back and work on it, as it is removed from the Sessions list!

For more information, tech notes, weekly tips, webinars, and online support, go to www.goalexandria.com/support

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