6 STEPS to an EASY INVENTORY

1. CREATE SESSIONS

1. Create multiple **Sessions** for each area in your library you plan to inventory.
2. Separate and name each session in a way that fits your preferred method (e.g. FIC A – FIC B).
3. Name all the **Sessions** you need to complete.

2. SET ALERT OPTIONS

1. Alert when the scanned item was previously **Lost**, **In Transit**, or has a **Discarded** status.
2. Alert when scanned items are not in **Call Number Order**.
3. Alert when scanned item is not within the **Policy** or **Range** you selected.

3. INVENTORY BY

Have a certain way you divide your inventory? You can set these preferences in the **Inventory By** options below:

- **Call Number Range**
- **Copy Policy**
- **Copy Location**
- **Entire Collection**

4. SCAN AND EXAM

Alerts you may come across while scanning:

- **Out of Order after**
- **Lost Item Found**
- **Unknown Barcode**
- **Scanned Policy is not the Session Policy**
- **Outside Session Call# Range**

5. RUN REPORTS

Select the inventory reports you wish to run and click **Run Selected Reports.** Choose any or all of the following list:

- **Inventoried Items Report**
- **Missing Items Report**
- **Site Inventory Statistics Summary**
- **Site Special Patrons Analysis**

6. COMPLETE SESSION

Complete your inventory by selecting the utilities you wish to run:

- **Recall Overdue Items from Patrons**
- **Declare Missing Items Lost**
- **Declare Non-inventoried Items Checked Out or Lost**

Click **Complete Session** and review the short summary that appears.

NOTES:

- We recommend creating separate **Sessions** for every area you intend to inventory – unless you intend to inventory ALL areas under a single **Session**.
- Although you can modify the **Session** at any time, note that reports and utilities run depending on the current settings for this **Session**.
- Once one **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:

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