

# Inventory Management

## Inventory

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## Intro

# Welcome to Inventory Management

End-of-year inventory procedure doesn't have to be long and painful.

Inventory Management is designed to simplify the inventory process by providing you with convenient access to all of the reporting and utility tools needed to analyze and organize your collection. It allows you to perform site-based inventory sessions, optionally limited by specific Call Number ranges and/or copy Policy. Remember, a copy's default call number and policy are "inherited" from the title record; they can be manually replaced (or changed) with copy-specific call numbers or policies.

Performing inventory on your collection can be a lengthy process. Once you have begun an inventory, Alexandria will regularly save all of the information entered until you are finished; we call this an inventory "session". You can stop or pause your session at any time and when you resume, Alexandria will be ready for you to begin again where you left off. You can create as many sessions as you need to fully inventory your collection. When all sessions are completed, you'll rest easy knowing that your entire collection has been inventoried.

If you're running a Centralized Catalog configuration where each collection is physically housed at a different location, each site is required to perform their own, independent inventory. A single-site configuration can perform inventory in one large or several smaller inventory sessions depending on their needs.



Each time an item is circulated (checked in or out) or inventoried using the Inventory ("I") or Inventory Bookdrop ("IB") commands, its Inventory Date is updated.

Your browser does not support the HTML5 video element

### Inventory Management (9:20)

Learn how to use Alexandria's Inventory module to set up Sessions, perform inventory, and run end reports and utilities.

[Download](#) (106 MB) | [Script](#) (PDF)

# Inventory Management Sessions

Last Updated: Feb 03, 2021 14:21

## Inventory Creating Sessions (2:06)

In order to continue with the Inventory Management window, you must first create an inventory session. When creating sessions, you are essentially breaking your collection down into smaller sections that make your inventory more manageable. Optionally, these sessions can be based on Call Number ranges, Policy, or Copy Location and can be selected using the drop down menu. Don't worry, however, any items scanned that fall outside a session's selected Call Number range, Policy, or Copy Location are still inventoried. Keep in mind, once you have set the Call Number range, Policy or Copy Location it can not be edited. If you need to change the Call Number range, Policy or Copy Location you must create a new session. If you elected to inventory your Entire Collection but have decided to break it up, you will need to delete the session before creating a new ones.

The Sessions settings will only impact the exception alerts, notes, and reports for each session; for example, you may want audible alerts when inventorying items checked out to System Patrons during one session and not another.

You may select Entire Collection if you are planning to inventory your entire collection in one session (not recommended).

Once an inventory session is complete, you are given the option to run final reports and perform utilities based on the session information selected here. Choosing to inventory your entire collection in a single session may have unintended outcome if you fail to inventory every available item before clicking Complete Session. When finished, the session is considered closed and will be officially removed from the Inventory Sessions list.

The Inventory Date for each copy is updated and stored independently of individual sessions; they are not cleared or discarded when a session is removed. When a session is removed, only the session alert notes and the ability to print inventory exception reports are irrecoverable. However, general inventory reports can always be performed from Alexandria's Reports module at any time.

After a session has been completed and removed, all associated inventory reports will be stored and accessible from the Operations Management window for the next 60 (to 90) days.

Intro Sessions **Inventory** Exceptions Review Complete

### Inventory Sessions

- Fiction AAA - GZZ
- Fiction HAA - OZZ
- Fiction PAA - ZZZ
- Non-Fiction 000 - 699
- Non-Fiction 700 - 999

Site: COMP - COMPanion Demonstration Library

Session Name: Fiction AAA - GZZ

Session Start Date: Feb 9, 2018

Inventory By: Call Number Range

This option allows you to create a session based on for different sections of your collection.  
Note that once you begin a session, the Start Date and Inventory by selection can not be modified.

From: FIC AAA

Through: FIC GZZ

- Audible alerts and note when items are not in *Inventory by* selection
- Audible alerts when inventorying items checked out to System Patrons 1-10
- Audible alerts when items are not in Call Number order
- Bookdrop items scanned during inventory

Bookdrops items found during inventory that are currently checked out to patrons (excluding In-Stock/On-Shelf hold requests), items designated as Lost, On Repair, On Order, In Processing, In Transit, or items checked out to the Unknown or System Administrator system patron. Items that are Discarded, For Library Use, or Archived will not be bookdropped.

+ - Modify Session Start Date Back Continue



If you are running your session by call number range, we recommend using call numbers of the same length with only whole numbers (no decimals). Using call numbers with irregular lengths can lead to inaccurate estimates.

# Inventory

## Inventory

Next, scan all of the items in the Call Number range specified for this session. As you scan items, they will appear in the log below with those most recently scanned at the top of the list. If your copies are shelved in the proper call number order with statuses of Available, you should rarely encounter any Exception Note entries.

However, when an item is found out of call number order, has a status other than Available, or any other detectable irregularity discovered during this session, an Exception Note is recorded to the log and those entries are kept for the duration of the inventory session.

Although the visible log is limited in size and does not show your previous, off-screen progress, exceptions will be recorded as part of the session, and Inventory Dates are updated for each copy scanned.

The screenshot shows a software interface with a navigation bar at the top containing the following tabs: **Intro**, **Sessions**, **Inventory** (which is highlighted), **Exceptions**, **Review**, and **Complete**. On the right side of the navigation bar are two icons: a wrench and a question mark. The main content area has a light purple background and contains the following text:

Next, scan all of the items in the selection specified for this session.

When an item is found out of order, has a status other than Available, or any other exceptions, this is shown in the log and recorded in the inventory session as an Exception Note.

The visible log shows a maximum of 1000 entries, but all Exceptions are recorded as part of the session, and Inventory Dates are updated for each copy scanned.

Inventory Session: Fiction AAA - GZZ  
Last Item Scanned on This Machine:

Enter Barcode

Call Number	Barcode	Exception Note	Title
-------------	---------	----------------	-------

At the bottom of the screen, there are two buttons: **Back** and **Continue**.

# Exceptions

## Exceptions

### Inventory and Exceptions (1:45)

Problems encountered during inventory are called exceptions — Problems include things like scanned items that are checked out to a System Patron, from the wrong site, are out of Call Number order, are not of the specified policy, or have an unknown barcode. The Exceptions tab provides a summary and tallies the number of Exception Notes triggered during the current session.

Intro Sessions Inventory **Exceptions** Review Complete

Inventory problems are called "exceptions" (e.g. wrong location, wrong collection, wrong policy, unknown barcode). The **Exceptions** tab tallies the number of **Exception Notes** triggered during the current session. Exceptions are grouped by type; you may access (and print) lists of items that caused exceptions by clicking on the name of the exception type (e.g. **Unknown Barcodes Scanned**). Once you have dealt with your exceptions, full inventory reports are available from the **Review** tab.

Inventory Start Date: Feb 09, 2018      Created By: 9999 - demo demo  
 Inventory Session: Fiction AAA - GZZ      For Site: COMP - COMPanion DC Demo

Include Exceptions From  ▾

3 Items Out of Call Number Order	Items Checked Out to System Patrons Number of inventoried items currently checked out to system patrons; the session was not configured to automatically bookdrop them during inventory.
0 Items Out of Call Number Range	0 Lost Items Inventoried
0 Items Out of Specified Policy	0 Discarded Items Inventoried
0 Items Out of Specified Location	0 Library Use Items Inventoried
0 Items Outside Session Site Found	0 On Repair Items Inventoried
1 Unknown Barcodes Scanned	0 On Order Items Inventoried
0 Items Checked In During Inventory	0 Archived Items Inventoried
0 Lost Items Checked In During Inventory	0 In Processing Items Inventoried
0 Other System Patron Items Checked In During Inventory	0 Unknown Items Inventoried
6 Items on In-Stock, Expired or On-Shelf Hold	0 In Transit Items Inventoried
0 Temporary Item was Checked In	
8 Other Exceptions	

[Export All Exceptions](#)      [Back](#)      [Continue](#)

### Include Exceptions From

The selection you make from this drop-down menu will filter the Exceptions tab to only include exceptions for All Days, Last 7 Days, Yesterday, and Today.

Exceptions are grouped by type. Click on the type to view (and print) a list of items that caused the exception.

Session: Fiction AAA - GZZ      Session Fiction AAA - GZZ Items Out of Call Number Order

The following items were found to be out of call number order during inventory.

Time	Call Number	Barcode	Title	Note
02/09/2018				
1:42 PM	FIC ABR	11088	Down the rabbit hole	Out of Order after FIC ACA
1:42 PM	FIC AGU	11094	Outpost	Out of Order after FIC AHL
1:43 PM	FIC AMA	11110	Guitar notes	Out of Order after FIC AME

[Print](#)   [OK](#)

### Export All Exceptions

Export a .txt file that details the exceptions for this inventory session, including date, time, call number, barcode, title, and note. The .txt file can be opened in a spreadsheet for further data manipulation. It's a great way to evaluate the information for discrepancies so you can clean up your data.

## Review

### Review

## Inventory Completion (2:47)

The Review tab is used to prepare and process helpful summary reports detailing the items inventoried during the current session.

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Email Reports to

Can be sent to multiple email addresses by separating them with commas; e.g., email1@domain.com, email2@domain.com.

**Inventoried Items Report**  
Includes all copies in the range you specified for this Session which have been inventoried.

**Missing Items Report**  
Includes all Available and On-Shelf (Hold) copies in the range you specified for this Session which have not been inventoried.

**Site Inventory Statistics Summary Report**  
Displays inventory statistics for the entire site, not just this session.

**Site System Patrons Analysis**  
Displays site-based inventory statistics for items checked out to System Patrons.

**Run Selected Reports**

**Back** **Continue**

**Email Reports to.** Enter the email address(es) to which you want to send the selected reports. Separate multiple email addresses with a comma.

Reports	Description
<b>Inventoried Items Report</b>	Creates a list of barcode for all of the inventoried copies in the call number range you specified in the Sessions tab settings.
<b>Missing Items Report</b>	A report that includes all copies with Available statuses which have not been inventoried, but belong in your specified call number range.
<b>Site Inventory Statistics Summary Report</b>	Displays inventory statistics for the entire site, not just this session.
<b>Site System Patrons Analysis</b>	Displays site-based inventory statistics for items checked out to system patrons.

When you're ready, click **Run Selected Reports**, then go to  [Operations Management](#) to view the progress and download the completed PDF(s).

Complete  
Complete

## Inventory Completion (2:47)



Start the video at 1:55 for information on the **Complete** tab.

All the settings for this session will be cleared when you click Complete Session. Copies will retain their updated Inventory Date, but this session will be removed from the Inventory Management window.

Once you've finishing inventorying all the items for a particular session, it's time to "complete" the session. If you're satisfied with the results, the utility operations (detailed below) can be scheduled to run automatically before the inventory session is removed. Once you've selected the utilities you want performed, click the Complete Session button.

Completing an inventory session can not be undone. During this process, all selected utilities are scheduled and the inventory session will be removed. The copies inventoried during this session retain their new Inventory Date and are not otherwise modified.

Once you've finished inventorying all the items for a particular session, it's time to "complete" the session. Select the utilities you want performed before the inventory session is removed, and click the **Complete Session** button.

When you click Complete Session, the **entire session is removed**. Copies will retain their updated **Inventory Date**, but this session will be permanently removed from the Inventory Management window.

Inventory Start Date: Feb 09, 2018

Inventory Session: Fiction AAA - GZZ

Inventory By: Call Number Range

For Site: COMP - COMPanion Demonstration Library

**Utilities**

Declare Missing Items as Lost  
Copies with an **Available** or **On-Shelf (Hold)** status that were not inventoried in this session will be declared **Lost**.

Declare non-inventoried still checked out as Lost  
Copies that are **Checked Out** that were not inventoried during this session will be declared **Lost**.

Lost items are not removed, so if a Lost item is found during another inventory session, it will be made **Available**.

**Back** **Complete Session**

## Utilities

- **Recall items not inventoried that are checked out to non-System Patrons.** You can either print recall letters to distribute for all recalled items or email recall notices to patrons with email addresses and create recall letters for those without.
- **Declare missing items as Lost.** This utility moves copies with Available statuses that were not inventoried this session to the Lost system patron. If these items have been misplaced, they may be found during other inventory sessions.
- **Declare not-inventoried items still checked out as Lost.** This utility declares copies that were not inventoried during this session and are currently checked out to patrons other than the System Patrons (barcodes #1-10) as Lost. These items, which may have been improperly bookdropped, are sometimes located during other inventory sessions.



**Complete Session: Fiction**  
**READ CAREFULLY, these options can *not* be undone.**

Completing this session will perform the following operations:

**NO missing items will be declared Lost.**

If this number doesn't look right, **Cancel** and check your work, or disable this operation on the **Complete** tab.

**NO items currently checked out to patrons will be declared Lost.**

If this number doesn't look right, **Cancel** and check your work, or disable this operation on the **Complete** tab.

**Call COMPANion's Customer Support if you have inventory questions before completing the session.**

**Cancel   Complete Session**



If you are running your session by call number range, we recommend using call numbers of the same length with only whole numbers (no decimals). Using call numbers with irregular lengths can lead to inaccurate estimates.