

End-of-year prep—Inventory

March 29th, 2021

It's time to inventory! What exactly do you have in your collection? What needs to be reordered? Which items are damaged and need to be discarded? All of these questions can be answered by performing inventory.

The screenshot shows a web application interface for setting up an inventory session. At the top is a navigation bar with tabs: Intro, Sessions, Inventory (selected), Exceptions, Review, and Complete. On the left, under 'Inventory Sessions', there is a list of session ranges: Fiction AAA - GZZ, Fiction HAA - OZZ, Fiction PAA - ZZZ, Non-Fiction 000 - 699, and Non-Fiction 700 - 999. The main area on the right is for configuring the session. It includes fields for 'Site' (COMP - COMPanion Demonstration Library), 'Session Name' (Fiction AAA - GZZ), and 'Session Start Date' (Feb 9, 2018). There is a dropdown for 'Inventory By' set to 'Call Number Range'. A text block explains that this option allows creating sessions for different sections and that start dates and selections cannot be modified once a session begins. Below this are two input fields for 'From' (FIC AAA) and 'Through' (FIC GZZ). A list of checkboxes follows: 'Audible alerts and note when items are not in Inventory by selection' (checked), 'Audible alerts when inventorying items checked out to System Patrons 1-10' (checked), 'Audible alerts when items are not in Call Number order' (checked), and 'Bookdrop items scanned during inventory' (unchecked). A detailed note explains that bookdrops include items 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 Unknown or System Administrator patrons, but excludes Discarded, For Library Use, or Archived items. At the bottom, there are buttons for '+', '-', 'Modify Session Start Date', 'Back', and 'Continue'.

Inventory is a survey of the items and materials you have in stock, so you know what you have, what's missing, and what needs to be replaced, reordered, or discarded.



You can continue regular circulation while doing inventory. Each time a book is checked out or bookdropped, its inventory date is updated.

Version 7

- [End-of-Year Procedures Inventory tab](#). Get an overview of what inventory is and what it entails.
- [Support Center Inventory section](#). Read through FAQs, tips, and instructions to make your inventory process easier.
- [Inventory Workshop](#). Learn the ins and outs of inventorying from our certified trainers.
- [Mobile inventory—Offline Mode](#). Use Offline Mode on a mobile device to inventory stuff in the far reaches of your school... where no scanner has gone before.

Version 6

- [End-of-Year Procedures Inventory section](#). Read through some general information on inventorying.
- ["Why Perform Inventory?" article](#). Get more in-depth information on the importance of inventorying and various methods.
- [Inventory Workshop](#). Go through the inventory process with our certified trainers.

Before you go...

Feel free to contact our 24/7 Support team at 1-800-347-4942 or support@goalexandria.com if you need additional help or have questions. We wish you the best and hope you stay safe!



Still on version 6? [Learn about switching to Alexandria 7!](#)

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