Running Post-Inventory Reports & Utilities

Tip for: 04.11.16

Once you've completed Inventory—a session or the whole shebang—it's time to get all your ducks in order with Reports and Utilities.



Are you using the **Inventory** module? If so…

The **Exceptions** tab lets you run reports on exceptions (such as out of order, or items with holds) that happened during this session.

The **Review** tab is where you run final reports before completing the Inventory session—you could run these reports later in the Reports module as well.

The **Complete** tab lets you run utilities to recall items that are still checked out to patrons, as well as declare Lost items that were not inventoried but should have been.

Remember the fields to specify a call number range for your Session? These utilities will only affect copies within the specified call number range. If you didn't specify a call number range, but you only inventoried a specific section of the library, you can run into trouble here. For example, if you did not specify a call number range and you run the **Declare missing items as Lost** utility, Alexandria will take any item in the collection that was not inventoried this session and check it out to Lost.

Uh oh! So, what should you do?

Instead, uncheck these utilities, go ahead and complete the inventory session, and perform the utilities at a later time through the Utilities module.

Post-inventory **reports** in **v7**:

- From Tools, open **Reports**.
- Go to the **Inventory** category and you have 3 reports:
  - Copies Inventoried
  - Copies Not Inventoried—This functions as your Missing Items report, showing copies that were supposed to be Available but that were not inventoried since you started the inventory process.
  - Inventory Statistics Summary—This gives you pure, overall numbers for Items Inventoried, Items NOT Inventoried, and LOST Items Inventoried, based on your Start Date.
- For any of these reports, don't forget to fill in your **Inventory Start Date** under the Options tab.

Post-inventory **reports** in **v6**:

- From Tools, open **Reports**.
- Go to the **Copies** category, and the **Inventory** sub-category and you have 4 reports:
  - Inventoried Items
  - Not Inventoried Items—This functions as your Missing Items report, showing copies that were supposed to be Available but that were not inventoried since you started the inventory process.
  - Lost Items Inventoried
  - Inventory Statistics Summary—This gives you pure, overall numbers for Items Inventoried, Items NOT Inventoried, and LOST Items Inventoried, based on your Start Date.
- For any of these reports, don't forget to fill in your **Inventory Start Date**!

Post-inventory **utilities** in **v7**:

- From Tools, open **Utilities**.
- Go to the **Copies** category, and you'll want to look at 1 utility:
  - Declare Missing Copies Lost—Set your Inventory Start Date, and this utility will declare Lost all copies that were supposed to be Available but were not inventoried during your inventory period.

Post-inventory **utilities** in **v6**:

- From Tools, open **Utilities**.
- Go to the **Copies** category.
- Select the **Check Out** utility; you can use it two ways:
  - Check Out—To Patron 1-Lost Copies, From Selection: set a selection BEFORE your Inventory Date, AND Copy Status of Available in order to declare Lost all items that are supposed to be Available but were not inventoried during your inventory period.

- Check Out—To Patron 1-Lost Copies, From Selection: set a selection BEFORE your Inventory Date, AND Copy Status of Checked Out in order to declare Lost all items that are checked out and were not inventoried during your inventory period.

Let us help! If you have any questions about Reports and Utilities in Alexandria, contact Customer Support at 1.800.347.4942.