Inventory Bit by Bit

Tip for: 03.28.16

Inventory season has *come again*—how will you tackle it this year? Consider biting off chunks using Sessions.

Sessions allow you to divide your collection based on how you conduct your inventory: by section of your library, by person inventorying, by date, or all of the above. A Session can be continued by yourself or anyone else with permission to inventory at that site.

For example, you could create separate Sessions based on Call Number; a session for the 100-200 range, another for the 200-300 range, and so on. The Inventory Management module keeps track of the progress of each of these sessions, allowing you to perform inventory over a number of stations, users, bookshelves, and any length of time.

To create a Session:

- From **Tools**, open **Inventory**.
- Go to the **Sessions** step.
- Use the add **+** icon to enter a new Session.
- Give it a name, e.g. FIC A.
- If you are inventorying by call number, fill in the **call number range** (e.g. FIC A through FIC BAA).
- Set the other options for the session and **Save** it.
- Create sessions for the other parts of your collection.

Once an inventory session is complete, you can run final reports and perform utilities *based* on the session information. This will give you more relevant information than trying to tackle your entire collection in a single session.

How do you use sessions? Let us know! ideas@companioncorp.com

Note: When finished, the session is considered closed and will be officially removed from the Inventory Sessions list. After a session has been completed and removed, all associated inventory reports will be still be accessible from the Operations Management window for the next 60 (to 90) days.