

Cataloging Equipment

Tip for: 11.09.15

Did you know you can use Alexandria to catalog your equipment? Inventory and check out projectors, Chromebooks, and more!

Now that you know about this awesome feature, you could jump in and start creating items immediately—but we highly recommend **setting up your policies** beforehand. Once you have your policies, you can decide what kinds of items to create.

One policy or multiple policies—Do different types of equipment have different check-out periods? Would it be useful to have detailed statistics for projectors, TV carts, and Chromebooks individually? If so, you will want multiple policies. On the other hand, if all your equipment checks out for similar periods, and you only want general statistics, you can create just one policy for Equipment.

Teachers or rooms—Sometimes it makes more sense to check out projectors etc. to a room rather than to a teacher. If so, you will want to create a policy for Rooms, then create individual 'patron' records for each room.

Exceptions—The best way to handle item policies is to set them as they apply to the majority of your patrons, then create exceptions. So if your students can't check out equipment, set your equipment policies to have No Loan Period, then create exceptions for the patron types who can check out equipment.*

Hard Due Dates—Rather than checking an item out for 2 weeks, you could set the Transaction Period for a number of months (or 9999 days) and instead set a Hard Due Date when these types of items are due. This may be more useful if you check out your projectors to classrooms for the entire school year, for example, but keep in mind you will need to set these dates every year.

Item Management—Create titles for the types of equipment you are using (e.g. Overheads), and add copies. These copies can include their specific Serial Numbers. Include the Copy Number as part of the call number to make inventory easier, e.g. OH-1 for the first Overhead, OH-2 for the second. The overheads can then be shelved in call number order, making it easy to see which one(s) are missing or out.

*Create an Exception for Teachers to Check-out Equipment:

1. In **Preferences**, go to the **Policies** area.
2. On the **Patron Policy** side, bring up the Teachers policy.
3. On the **Item Policy** side, bring up the Equipment policy.
4. Click the **Exceptions** tab at the top. It will turn red, indicating you are in Exceptions mode.
5. On the Item Policy side, under **Check Out**, change the No Loan Period drop-down to **Transaction Period**.
6. Fill in the appropriate number of days.
7. Save the preference.

8. Click on **Exceptions** again to exit the mode.

[Learn more about cataloging Chromebooks here.](#)