

Inventory through Circulation



this information has been moved to <https://support.goalexandria.com/tools/inventory/>

We recommend that most Alexandria users perform inventory by using the Inventory Management module. The advantages to the Inventory module are that there are several exceptions reports that are not otherwise available and all of the reports and utilities needed to finalize the inventory session are set up automatically. However, if you use call numbers in a non-standard way, or if you have a process in place where you have used the Circulation window for inventory in the past that you don't want to change, using the Circulation window to perform your inventory may be a better option for you.



Unknown macro: 'multiexcerpt-include-macro'

Inventory Modes



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In Alexandria, each time an item is circulated or entered using one of the Inventory modes listed below, the Inventory Date that copy is updated with the current date. Once the entire collection (or specific range) has been processed using one of the inventory modes, you may perform inventory reports and utilities. The reports will show which copies have an Inventory Date within a particular date range and which copies do not. Many operators use the Inventory Bookdrop (IB) or Inventory Bookdrop Suppressed (IBS) mode.

- **Inventory Bookdrop (IB).** When performing a complete inventory of items that are still on the shelf, it is a good idea to use Inventory Bookdrop (IB) mode so that copies checked out to teachers, students, or a System Patron (such as the Lost Copies System Patron) will be checked in and shown as Available again.

Along with updating the copy's Inventory Date, copies scanned in this mode are also bookdropped. To start Inventory Bookdrop (IB) mode, type "IB" in the command line followed by enter. See the Inventory Bookdrop (IB) section for more information on using this mode.

- **Inventory Bookdrop Suppressed (IBS).** This mode behaves the same as Inventory Bookdrop, but will suppress all dialog windows, e.g. Lost Item, Overdue Charge, Unknown Barcode, and simply process the window. Choose this mode if you are using a wireless scanner and will be away from your Circulation screen.

Any Exceptions that occurred during the inventory session can be viewed in an Exceptions Report.

- **Inventory (I) and Inventory Suppressed (IS).** If an item (or items) need to remain checked out to a patron, such as a classroom set for a teacher, or if you are inventorying the On-Hold area of your library, then using the Inventory (I) or Inventory Suppressed (IS) mode is appropriate.

All materials that are scanned or typed when in these modes will be recorded as inventoried but will remain checked out. To enter Inventory (I) mode, type "I" and then press enter in the command line. Once in this mode, barcodes can be scanned (or typed) to record them as inventoried on the current (or specified) date. See the Inventory (I) section for more information on using this mode.

Inventory Methods

Your options are:

- Perform the inventory on a laptop or tablet.
- Perform inventory using a wireless scanner.
- Perform inventory by use of a transaction script file.

The most common way to use the Circulation window for inventory is with a wireless laptop or tablet. Using a cart, you can quickly move throughout the library as you scan your copies. Any copy scanned in the Circulation window will update the copy inventory date in the Alexandria database.

If a reliable wireless scanner is available and can reach all the shelves in the library while in "live" scan mode, then inventory can be processed using this method. Please be aware that exception dialogs will halt the inventory process unless you are in IBS or IS mode. If the wireless scanner is used in "live" mode, an assistant should watch the main Circulation window for exceptions, or enable Alexandria's event Sounds and make sure that the Data Station's speakers are turned up loud enough so that the operator scanning copies can hear any exception sound events that might occur. To avoid exceptions, the wireless scanner can be used to scan into another program and create a transaction script file, or scan in IBS or IS mode.

Creating and Importing Transaction Script Files

Another method of performing inventory is to create a transaction script file. A transaction script file is a text file that contains a list of copy barcodes with each barcode separated by a carriage return. Learn how to [create a transaction script file](#), then learn how to [import transaction scripts](#).

Inventory Exceptions

During the inventory process, it is crucial that you periodically check the Transaction Log for exceptions.

- **Call Number Order.** The most common exception occurs when copies are found out of ascending call number order. Alexandria monitors all the copies scanned while in Inventory (I) / Inventory Bookdrop (IB) modes and expects that inventory is being performed shelf-by-shelf from the first call number to the last.

As your inventory progresses, if a scanned item has a copy call number lower than the preceding copy call number, two question marks (??-->) will be placed in front of the log entry for that copy. If those question marks appear in the log, the copy that was scanned, and the copy preceding it, should be examined to determine if they are out of shelving order.

- **Unknown Barcode.** Another common exception alerts you that an unknown copy barcode has been entered. First, check to make sure that the copy actually belongs in your collection. Next, scanner technology continues to improve, but misreads are still possible, so enter the copy barcode once again by scanning (or typing) to ensure that it was correctly entered.


If the same exception message occurs, open up the Items Management window and search for the copy by title. If the title entry appears but a copy with this particular barcode is missing, add a new copy using the barcode of this item. If the title does not exist, the book must be cataloged. In order to complete the inventory process quickly, it may be wise to set aside any items that need to be cataloged for processing until after the inventory is complete.

- **Status.** When processing in inventory mode, watch each copy's status. Copies on the shelf should normally have a status of Available. If a copy appears as Checked Out or Lost or Discarded, it is important to find out why the copy has that status. Copies which have a Lost or Checked Out status may need to be bookdropped and returned to circulation.

As previously mentioned, when in Inventory Bookdrop (IB) mode, copies that are checked out (or Lost) will be bookdropped. If inventory is performed in Inventory Bookdrop (IB) mode, review the Transaction Log for status changes. Copies that were previously designated as Lost or Checked Out will be changed to Available. Such changes may require that a refund be issued or a fine adjusted.


Inventory exceptions from transaction scripts can be viewed in the Transaction Script operation report. This will be available in Operation Management after the script has been imported.

Inventory Reports

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The two most commonly-used inventory reports are [Copies Inventoried](#) and [Copies Not Inventoried](#). Both of these reports can be found by opening the **Reports** window and clicking on the [Inventory](#) category. All inventory reports require an Inventory Start Date; look under the Options tab to set this date. These inventory reports will generate results based on the Inventory Date for each copy.

Inventory Utilities

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Use the [Declare Missing Copies Lost utility](#) for copies that have a status Available but were not inventoried; the utility will check out these items to the Lost Copies System Patron.

 As with every utility, a current [archive](#) or [backup](#) should be made prior to running the utility.

Non-inventoried items can also be manually checked out to the Lost Copies System Patron. Copies that are checked out to either the Lost Copies or the Discarded Copies System Patron can be removed by running the [Remove Discarded Copies utility](#) or the [Remove Lost Copies utility](#).