

## 6 Steps to an Easy Inventory



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

# 6 STEPS to an EASY INVENTORY

## 1. CREATE SESSIONS

1. Create multiple **Sessions** for each area in your library you plan to inventory.
2. Separate and name each session in a way that fits your preferred method (e.g. FIC A – FIC B).
3. Name all the **Sessions** you need to complete.

## 2. SET ALERT OPTIONS

1. Alert when the scanned item was previously **Lost**, **In Transit**, or has a **Discarded** status.
2. Alert when scanned items are not in **Call Number Order**.
3. Alert when scanned item is not within the **Policy** or **Range** you selected.

## 3. INVENTORY BY

Have a certain way you divide your inventory? You can set these preferences in the **Inventory By** options below:

Call Number Range	Copy Location
Copy Policy	Entire Collection

## 4. SCAN AND EXAM

Alerts you may come across while scanning:

Out of Order after	Scanned Policy is not the Session Policy
Lost Item Found	Outside Session Call# Range
Unknown Barcode	

## 5. RUN REPORTS

Select the inventory reports you wish to run and click **Run Selected Reports**.  
Choose any or all of the following list:

Inventoried Items Report	Site Inventory Statistics Summary
Missing Items Report	Site Special Patrons Analysis

## 6. COMPLETE SESSION

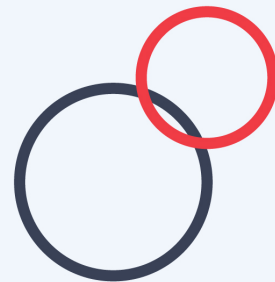
Complete your inventory by selecting the utilities you wish to run:

Recall Overdue Items from Patrons  
Declare Missing Items Lost  
Declare Non-inventoried Items Checked Out or Lost

Click **Complete Session** and review the short summary that appears.

### NOTES:

- We recommend creating separate **Sessions** for every area you intend to inventory – unless you intend to inventory ALL areas under a single **Session**.
- Although you can modify the **Session** at any time, note that reports and utilities run depending on the current settings for this **Session**.
- Once one **Session** is **Complete**, you will be unable to go back and work on it, as it is removed from the Sessions list!



### For More Information:

Visit our Support Center!

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