

<http://www.goalexandria.com/v7Docs/index.php/Inventory>

http://www.companioncorp.com/mediawiki/index.php/Inventory_Management_Window

Inventory Management

Performing inventory is important to ensure your physical collection matches your Alexandria database. Let me show you the module in Alexandria to use for inventoring.

Keep in mind, Alexandria automatically inventories items when they are checked-in and checked-out.

The tool instrumental to getting your inventory done is the Inventory module. Stepping you through the process, this module keeps inventoring simple and easy to follow.

From Tools, open Inventory.

There are 5 total steps represented by the tabs at the top. We'll start with Sessions.

Sessions

Sessions allow you to specify perimeters for inventoring a part of your collection, as a 'Session' that can thereon be continued by yourself or anyone else with permission to inventory at that Site.

We recommend creating a separate session for each area you intend to inventory unless you intend to inventory all areas under a single session.

For example, you might have separate Sessions based on call number; a session for the 100-200 range, another for the 200-300 range and so on. Alexandria will keep track of the progress in each of these sessions, allowing you to perform the inventory over a number of stations, users, bookshelves, and any length of time.

So the first thing we need to do is Create a Session. Give it a name, I'll call this one FIC A through FIC B.

If you are inventorying by call number, fill in the call number range.

Session Options

You have 4 options for this session. Let's look at the bottom one first so you understand what is going to happen during inventory.

'Bookdrop items scanned during inventory', when checked, means that all items you scan, the system assumes are in your hand, so to speak, and thus checks them in.

This applies to any item checked out to a regular patron, and those checked out as Lost, On-Repair, On-Order, In-Processing, In-Transit, as well as to the Unknown Patron and System Administrator.

Items that are Discarded, in Library Use, or Archived will NOT, however, be bookdropped;

Also, In-Stock Holds will remain In-Stock Holds, the status will not change to Available.

All these items will nonetheless be inventoried.

'Audible alerts when inventorying items checked out to System Patrons 1-10.' will give you a special alert to let you know the item you just scanned was previously Lost, In-Transit, or so forth. It will also let you know those that are Discarded etcetera whose status did not change, so you can set these items aside.

I'm going to check this option.

'Audible alerts when items are not in Call Number Order.'

If you are scanning by shelf -- especially if you are using a wireless scanner and not looking at your screen -- this alert will allow you to keep your collection in good call number order.

‘Audible alerts and note when items are not Policy:’

If you are inventorying by policy, select that policy -- in this case, I’m looking at FIC A through B, which means I really shouldn’t encounter anything not in the Fiction policy, so if I do, I want Alexandria to let me know so I can return the lost child or fix the item record.

Once you have set the options, Save the Session. You can modify the session at any time, but note that reports and utilities run depending on the current settings for this session.

Once you begin Inventory, it will automatically save your inventory start date, but you can ‘Modify Session Start Date’ later -- if for example you’ve gotten sidetracked and would like to begin again with a new Start Date.

The next step is to Continue to Inventory,

Inventory

and this is the point where you scan your items.

‘Out of Order after’ call number etc.: This notice lets me know this call number is out of order. Notice it’s not actually that this one is out of order, but that the one before belongs in the FIC B section and I’m still on the As.

Here’s another alert; ‘Lost item found for’ this patron. This book was lost, it’s been found and bookdropped. If you have lost item fines, Alexandria will automatically remove the amount due on the patron’s record or, if she’s already paid, refund the patron.

Note this refund will be an ‘Unaccepted’ Credit and you will need to Accept the Credit to apply it to her account.

This item is also not in call number range or the right policy. It’s a good thing I’m doing inventory....

This item gives us two alerts. First, it was checked out, so it has been bookdropped. Next, it had a hold, which is now an in-stock hold, so I can set that item aside.

Hmm, nothing happened. This is an unknown barcode — it's possible the scanner malfunctioned, there's something wrong with the item record, or the barcode is wrong. You can try to scan it again or set that item aside.

'Non-Fiction is not the Session Policy'. Well, this item is clearly Fiction. I'll need to set the book aside or make a note to modify the policy in the item record.

'Outside Session Call# Range'. This item belongs in a different Fiction area; it's outside the call number range we set for this session.

And that's it for this example. Let's Continue.

Exceptions

Exceptions show how many items had some sort of notice or exception to normal inventorying. Out of order or range, lost items checked in, and so forth. You can also specify certain days of your session.

Let's Continue.

Review

Under Review, you can run certain reports helpful to completing your inventory.

'Inventoried Items' is a list of all items -- in your specified call number range -- inventoried in this session.

'Missing Items' lists copies that were in your call number range and should have been inventoried but weren't — we recommend going over this list carefully. If you run the 'Declare missing items as Lost' utility at the end of the session, these are the items that will be declared lost.

'Site Inventory Statistics Summary' gives you inventory statistics for this site not specific to this session.

And 'Site System Patrons Analysis' gets you inventory statistics for the site -- specifically items checked out to System Patrons.

Check the reports you want to run. You can also email the report by filling in an email address, as long as you have your Email settings configured in Administration.

Click 'Run Selected Reports' and they will show in Operation Management.

Complete - Utilities

Move on to Complete, where you can perform certain Utilities relating to your session.

'Declare missing items as Lost'; Any items that were in your call number range with the status of Available should have been inventoried. If they weren't, you can assume them Lost, and have them all checked out to the Lost patron.

These will be all those items from the Missing Items report.

'Declare not-inventoried still checked out as Lost'

If all items should have been returned to your library before you did this inventory, you could also mark any items in your call number range that were checked out to non-system patrons—and are still checked out—as Lost.

'Recall items not inventoried that are checked out to non-System Patrons.' Alternatively, you can simply Recall any items in your call number range that are still checked out.

Check the Utilities you wish to run.

Complete - Finish

Once you are finished, click Complete Session. You will be presented with this confirmation window. Are you sure you are finished, have you run all the Reports you need, are you ready to run any selected Utilities?

Note that it tells you how many items will be marked Lost. Make sure these numbers look right.

Remember, you could step away from this session at this point, go check all those items, and come back to complete the session later. Otherwise, if all the numbers look right and you are ready to finish, click Complete Session.

This last window lets you know where you can find details of the operations you ran. Press Continue.

Check Operation Management to see the Inventory Exceptions Report, and information on any utilities you ran.

Those are the basics of taking inventory with Alexandria.