WYLD TECHNOTE 99: Conducting Inventory.

Due to the impact on system resources when conducting an extensive inventory, you must schedule your inventory ahead of time with the WYLD office.

The general concept behind the inventory process is that you mark all items of known location, those checked out and those in the library, with an inventory date. Then you run a report to find the items whose inventory date in the item record does not match the date(s) of the inventory. Now you have a list of items presumably missing. You search the library again looking for the items, marking any of those found with the inventory date. Finally all items which do not have the inventory date set to the time period of the inventory are missing. You can manually mark them missing, or use the Charge to MISSING report.

NOTE: This technote assumes prior experience in scheduling and retrieving reports.

A special group of reports have been created in an inventory report folder. If you do not see the inventory report folder, contact the WYLD Office and request that be added for your login. Also, for your convenience a **toolbar named "inventory"** has been created with several wizards used during the inventory process.

Inventory planning: Before you start the inventory process here are a few things to think about. Will you be open or closed during inventory? What home locations do you use? How are your call numbers entered in the system? How are you going to deal with items that are being returned or checked out, etc. Are your new books in a separate location? Are your "on order" books or items in processing in a different location?

Please notify the WYLD Office, wyldstaff@will.state.wy.us of when you would like to do inventory just to verify that all is "OK" with the system and so the WYLD Office knows about the inventory reports that will be generated. If there are any concerns, the WYLD Office will contact you.

Summary of Inventory Process -- Order of operation

A. Run **"1. Set inv date on chrgd items"** report to mark all items charged out to the inventory date. **[Report 1]**. Do this at the time you start scanning your barcodes.
B. Scan barcodes by one of these methods:
   i. Use the Inventory Item wizard  in workflows if you use this method skip to STEP E.
   ii. Scan barcodes into a "NOTEPAD" .txt file.
C. If you scanned barcodes into a notepad file you must transfer the gathered barcodes to the server with the **Scanner Transfer Utility** wizard 
D. Run "**2. Load barcdes from file**" report [**Report 2**]
E. Run "**3. Not inv date NEVER**" report for items NEVER inventoried. [**Report 3**]
F. Run "**4. Not inv this date**" for items inventoried BEFORE the date you scanned your barcodes. [**Report 4**]
   Do not run reports 3 & 4 simultaneously.

G. Reports 3&4 create a list of "possibly" missing items. Look for the items on the report; those found should be scanned with the Inventory wizard. 

H. Once you are certain all items have been accounted for, and that all items not inventoried are truly missing you are ready to mark these items missing by one of these methods:

   i. Use the "Mark Item Missing" wizard  and type barcodes of missing items.

   ii. Run reports to automatically mark those currently uninventoried items as missing. Either of the above methods charges the currently uninventoried items to the MISSING user and changes the current location to MISSING.

I.Run the "**5. Chrg NEVER inv to missing**" for items NEVER inventoried before [**Report 5**].

J. Run the "**6. Chrg not inv to missing**" for items inventoried BEFORE the date you scanned your barcodes [**Report 6**]

K. At some point in the future MISSING items should be purged. You can run a report to move all MISSING items meeting a certain criteria to DISCARD. Run "**7. Set items to discard**"[**Report 7**] then you can run the Remove DISCARD Items report to purge all of your items marked as DISCARD.

Detailed Inventory Instructions:

A. Run "1. Set inv date on chrgd items" [Report 1] to set inventory date on charged items

1. Start this report at the time you start scanning barcodes: Select the Inventory group of reports and select "**1.Set inv date on chrgd items" [Report 1**] click "Schedule", click "Selection criteria"
2. Skip to the "Home location" step if you plan on doing the entire home location at one time.
   - Note: if you are limiting your inventory by call number range be absolutley sure you know how the call numbers in the range are entered. Every character in the call number is examined for matching including the space character. If you are uncertain about the exact entry of the call number data you would be wise to run the "Count item numbers" report in the bibliographic group and enter the call number range and home location you plan to enter here to see what your results are.
   - Click the gadget next to the "Call number range " data well.
   - Click the [x-y] button.
   - Enter a call number preceding the call number you want to start with in the left data well
   - Enter a call number just succeeding the end call number in your range in the right data well.
   - NOTE: to learn how to enter call numbers use your workflows helps to find "call number range gadget".
   - Click "OK"
3. Select your items' "Home location" from the data well drop down and click "OK"
4. Click the "Schedule" button and click "OK". Run this report now.
5. **Wait for report to finish? -- NO**

B. Scan barcodes

- **Option 1 - Scan barcodes directly with the Inventory Item wizard**

You can simply scan the barcodes directly in the system by using the

Inventory Item wizard in workflows. This saves you several steps in uploading the barcodes from a laptop and the corresponding load barcodes report. Another advantage is that you can immediately identify barcode misreads, and the system will alert you if items are checked out, etc. when you scan items using this wizard. Also this direct process allows you to verify that the call number and title of the item matches the call number and title in the database. Skip to Step E if you use this direct scanning method.

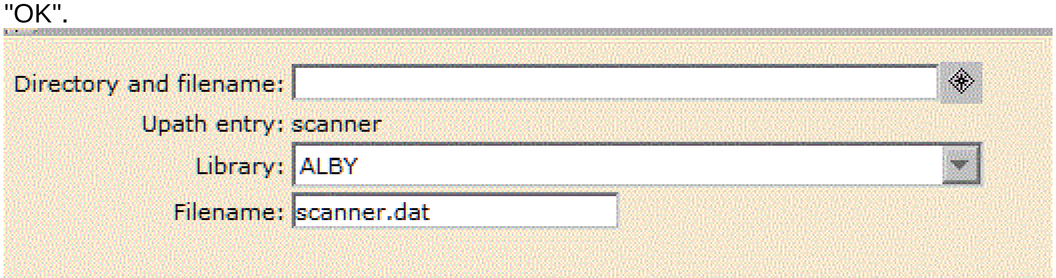
- **Option 2 - Scan barcodes into a NOTEPAD .txt file.**

  If you choose to use a laptop and scan a file of barcodes: It is important to use NOTEPAD and save it as the default .txt format. Using another word processor program adds unnecessary codes to the file that interferes with the inventory processing program that the WYLD office did to process these files.

C. Transfer scanned barcodes from NOTEPAD file using scanner transfer utility wizard

You have collected onto a floppy disk or onto one pc that has the SIRSI Workflows software, all the files of the scanned barcodes.

0. Load the "**inventor**" toolbar
1. Click on the "Scanner transfer utility" wizard
   - Note: this wizard was designed to help retrieve data directly from one of 3 supported scanner devices.
2. The first screen of the wizard will have you select your scanner device, accept the default by clicking "Retrieve", a scanner window will appear which you may close.
3. On the next Workflows window click on the gadget next to the "directory and filename" data well and locate your file and click "Open"
4. Select your library from the drop down next to the "Library" data well. Click "OK".



5. If you have more than one file of barcodes continue this process; each succeeding file is appended to the previous file(s). There is no notification that the file has transfered. NOTE: You can easily make the mistake of adding the same file multiple times if you are not careful.

D. Run "2. Load barcdes from file" report [Report 2]

0. In the Inventory group of reports select the "**2.Load barcdes from file" [Report 2]**
1. Click "Schedule"

2. You will not be modifying any "Selection criteria", you may want to modify the "Output options" Review this guide to help make your decisions Load scanner help . You may choose to not run the "misshelved report." Often the misshelved report is very lengthy as spacing differences and the complexity of some call numbers are mistakenly identified by the system as out of order.
3. Click "Schedule" and click "OK". You should run this report ASAP.
4. **Wait for report to finish before going on the next step? -- YES**
5. View the completed report for:
    a. Items inventoried but checked out
        i. Missing
        ii. Charges
    b. Barcode ID "xxxxxx" is not in your database it was scanned after:
    c. Items out of order (if you choose to run that output option.)

   (This report will not identify if items are in transit, on the hold shelf, or in a different location, such as "DISCARD" "IN PROCESS" or on "Reserve" . Any items in those circumstances will be listed as "Not inventoried, and therefore possibly missing."

E. Run "3. Not inv date NEVER" report for items NEVER inventoried. [Report 3]

Review: we have marked all items checked out in the section of the collection we are inventorying with the inventory date. We have scanned all the items on the shelves and marked them with our inventory date also. Now we will run a report to find the items in this part of the collection that did not get marked for inventory.

0. From the "Inventory" group of reports select the "**3.Not inv date NEVER" [Report 3]** and click "Schedule"
1. In the "Selection criteria" tab enter the same call number range and location as was selected in the first report, it is critical that these selections match each other.
2. In the "Date inventoried" data well type **NEVER**
3. Click schedule and click "OK", we need to run these reports now.
4. **Wait for the report to finish? -- YES**

F. Run "4. Not inv this date" for items inventoried BEFORE the date you scanned your barcodes. [Report 4]

0. From the "Inventory" group of reports select Run **"4. Not inv this date" [Report 4]** the and click "Schedule"
1. In the "Selection criteria" tab enter the same call number range and location as was selected in the first report, it is critical that these selections match each other.
2. In the "Date inventoried" data click the gadget and choose **BEFORE** and then enter the date that you scanned the items for inventory.
3. Click schedule and click "OK".
4. **Wait for the report to finish? -- YES**

G. You now have reports of items that are possibly missing. Search shelves - If found scan with inventory item wizard .

We now have two reports that represent all the items in our piece of the collection that may be missing. The reports list items that were not on the shelf where they should have been and they were not checked out.

If you find any of these items, scan them in Workflows with the Inventory item" wizard

 . This marks the item inventoried with the date it is scanned.

H. Mark items not inventoried that were not found on the shelves as missing

- **Option 1** - Use the "Mark Item Missing" wizard  by manually typing in the item barcodes.
- **Option 2** - Run reports as instructed in Step I and Step J to automatically mark items not inventoried as missing.

I. Run the "5. Chrg NEVER inv to missing" [Report 5] to mark items NEVER inventoried as missing.

0. From the "Inventory" group of reports select the "**5.Chrg NEVER inv to missing" [Report 5]** and click "Schedule"
1. In the "Selection criteria" tab enter the same call number range and location as was selected in the first report, it is critical that these selections match each other.
2. In the "Date inventoried" data well type **NEVER**
3. On the "Output options" tab, select "**Update database records" to yes**
4. Click schedule, and since it is not critical to the inventory process, select "Date and time to run", click the date gadget and enter 18:00 for the time.
5. Click "Ok" and "Ok" again.
6. **Wait for the report to finish? -- YES**

J. Run the "6. Chrg not inv to missing" [Report 6] to mark items that were not inventoried currently as missing

0. From the "Inventory" group of reports select the **"6. Chrg not inv to missing" [Report 6]** and click "Schedule"
1. In the "Selection criteria" tab enter the same call number range and location as was selected in the first report, it is critical that these selections match each other.
2. In the "Date inventoried" data click the gadget and choose **BEFORE** and then enter the date that you ran the first report (Set inv date on chrgd items).

   Selecting BEFORE the date you inventoried is critical!! Be very careful in selecting this date, if you set the date such that it falls with in the range of dates that you ran the inventory you can mark all the items you inventoried as missing, not a good thing, as there is no easy way to reverse this.
3. On the "Output options" tab, select **"Update database records"** to yes
4. Click schedule, and since it is not critical to the inventory process, select "Date and time to run", click the date gadget and enter 18:00 for the time.
5. Click "Ok" and "Ok" again.
6. **Wait for the report to finish? -- YES**

K. Change Missing Items to Discard to purge from database

As a final step of an inventory or collection management process, you may, at some point in time decide that these items have been missing too long and it is time to remove them from the collection. You can use the "Set items to discard" report for this purpose. Since this is not necessarily part of the inventory process per se, you may want to vary the selection criteria say, set to discard all the items marked missing as of a certain date.

0. From the "Inventory" group of reports select the **"7. Set items to discard" [Report 7]** and click "Schedule"
1. In the "Selection criteria" tab you have the same choices as the previous reports, however, you may choose only to run this at certain times of the year.

This report will only move items whose current location is MISSING. To move all your items in current location MIS SING to DISCARD you do not need to enter any selection criteria. For the sake of this example let us say it is 6 months later and we want to move all the items we set to MISSING in this inventory to DISCARD

2. Click the gadget next to the "Call number range " data well.
   - Click the [x-y] button.
   - Enter a call number preceding the call number you want to start with in the left data well
   - Enter a call number just succeeding the end call number in your range in the right data well.

Here are two documents that may help you organize your inventory process.

- Checklist(Word document)
- Planning statistics sheet (Excel spreadsheat)

technote 99 - Dec 2003