

Delaware Library Catalog

How to do an Inventory

Inventory Overview

Basically the Inventory process consists of three steps.

- A. Running the Set Inventory Date report to mark all items currently checked out with an inventory date.
- B. Scanning the items in the shelf using the Inventory Item Wizard.
- C. Clean up, running a list items report to get a list of all the items not inventoried and marking those items as missing. (DDL will be doing this for you with the help of API.)

Most of the reports used in this process are in the Scanner group of reports. Other reports you will find helpful will be found in the Circulation and Bibliographic groups.

To prepare for the inventory you should get a count of your items by Home Location. You can use Director's Station of Workflows for this. It is recommended that nothing be cataloged during the inventory to avoid mistakes with new items being missed or marked as missing when they are not. If the inventory is going to take several weeks this may not be an option. In that instance you might be better off running your reports so that items created after the start of the inventory are not considered.

To create your item count in workflows, go to the Bibliographic group of reports and Set Up and Schedule the Item Statistics Report. Under the Item Selection tab chose your library for the library, and leave everything else blank. (Unless you are cataloging during the inventory then set the Date Created field to a date right before the start of the inventory.) Under the Transactions Statistics tab set Column: to Total and Row: to Home Location. Run the report. You now have a breakdown of your collection by home location and can plan what locations to do first and in what order. You are ready to start.

Doing the Inventory

- A. Run the Set Inventory Date report.
 1. Run the Set Inventory Date report to account for any items currently checked out. This report updates the Date Inventoried and Times Inventoried fields of all checked-out items. This report is in the Scanner group of reports. Setup and Schedule it and go to the Item Selection tab. Make sure you put your library in the Library field. If you are doing the inventory in sections by Home Location you can run this report just for the location or locations you are inventorying. Doing this prevents items that are checked out during the inventory from being missed. Prior to running this report if you'd like to know how many items are

currently checked out you could run a count items report for every item with the current location of Checked Out. When the Set Inventory Date report finishes these two numbers should be the same or very close.

- B. Scan the barcodes on the items you want to inventory.
1. Use the Inventory Item wizard located in the Special Circulation Functions group in the Circulation Module. You can start and stop scanning at any time and even go into other wizards.
 2. The Inventory Item wizard will scan in the items as you pull them from the shelf and list them in the bottom window. In cases where the items was not in the system you will get a pop-up telling you the Item ID is not in the system.
 3. Items that are not yours will also show up in a pop-up telling you to send them to the library where they belong or are needed. This will put the item in transit to the library. (You may want to have some scratch paper on hand since you most likely will not have a receipt printer in the shelves.)
 4. Be aware that the wizard will not alert you if an item is misshelved and there is no report to run that will do this so it is a good idea to keep an eye on the spine labels.
- C. Clean up, time to run some reports once the inventory of all home locations are complete.
1. If this is your first inventory in Unicorn run an Item count report for a count of the items not inventoried. Go to the Bibliographic group of reports and Setup & Schedule Count Items. Under the Item Selection tab choose your library, and the Home locations you just inventoried. Use the gadget beside Date Inventoried and select No Date. Run the report. Once that is finished you can then run a List Items report with the same selections. You now have a list of all the items that were not inventoried.
 2. If this is your second inventory run count and list reports and set the Inventory Date to before the date of the current inventory. This will give you a listing of all of the copies that were previously inventoried but were not in the current inventory.
 3. Take the list of items not inventoried for one last check of the shelves. Once you are satisfied that these items are not in your building you can run the Charge to Missing report. It is in the Scanner group of reports. The password is, "inventory," without the quotes of course. The report will checkout all items with a date inventoried of NEVER to missing. These items will no longer appear in the OPAC but will still show up in Workflows in their original home Locations but their Current Locations will be MISSING. DO NOT set any of these items to MISSING in the home location because if the item reappears you will have to edit it again to change its Home Location but there will be no indication in the record what the original Home Location was. To run the report pull it up and put your library name in the title under the Basic tab. Make no changes under the Call Number Tab. Under the Item tab you will put your library in, the home locations you have inventoried, or if you save this for the very end leave it blank and do all the home locations. Change the date in the Date Inventoried field from 1/1/1971 to NEVER. The last tab, Update Option gives you the option of running the report without changing anything just to make sure the records you want are changed. You can run it with the box unchecked and compare the number of

records the report finds to the number you expect to have. If they match run the report a second time with all the same selection except this time check the box. The report will rerun and change all your records with no inventory date to missing.

You Are Done

That is it for the inventory. The items that were marked missing will stay that way for 6 months and then be set to DISCARD for another six months before finally being removed from the system.

For DDL

To change the items Current Location to MISSING use API since the reports do not allow this to be done for multiple libraries.

1. On the production server go to the Unicorn/Bincustom/VinAPI directory
2. Type in: `selitem -y[Lib Policy] -l[Home Locations] -v="NEVER" >lib_inv[year].out` If you are doing this for the DDL or Del Tech the Home Location of ONLINE must be omitted. This creates a file equal to the number of items not inventoried.
3. Type in: `cat lib_inv[year].out | edititem -mMISSING` This will set all the current locations to MISSING. (At least until we get reports that do this for the libraries themselves.