



## Inventory using existing Evergreen Functionality

Since there is not yet an Inventory Module for Evergreen, you can use existing Evergreen functionality for a simple, no-frills inventory. Basically, what you will be doing is checking in all items on the shelf to reset the last item/copy status change date. After you have done that, you then run reports to find items in available status with a last status date prior to that date. You will also be discover other issues needing resolution. You then follow up and check for those items that are potentially no longer on your shelves.

### What this process does

- Identify items marked as available (prior to a specific date) that aren't on the shelves.
- Reset missing or lost items on the shelf to available.
- Allow you to run reports to identify items potentially not on the shelves.
- Identify items with barcodes but not in the database (which may be in the database with an incorrect barcode).
- Identify items without barcodes (which may be in the database with an incorrect barcode).
- Identify other problems with items or bibliographic records.

### What this process can't do

- Can't notify you of items out of call number order or in incorrect shelving location.
- Can't identify items on the shelf but from some other library except to put them **In Transit**.
- Can't flag problems in the database.
- Can't automatically correct some statuses to **Available**.
- Can't be set up to both automatically void or suppress fines and report on actions around fines.
- Doesn't set an inventory date in the database.

### Two potential workflows

- 1- Leave items on shelf and take laptops, scanners, and receipt printers to the stacks.
  - If you have Wi-Fi and Wi-Fi capable laptops or workstations, this is probably the most efficient. However, it may be disruptive if you are open.
- 2- Pull all items (in shelf order) and check them in elsewhere.
  - If you don't have Wi-Fi capability you will need to do this. However, this workflow may add time to the whole process.

### Suggested preparation

- The first step is to decide what you want to inventory (specific shelving locations, a specific branch, or the entire system) and break it into manageable sections.



- The next step is to decide whether to pull the items from the shelf and take them to a workstation or to set up a portable workstation with everything you need and take it to the shelves. This will be dependent on what technology you have and whether you feel one process or the other would be more disruptive if you remain open while conducting the inventory.
- Make sure you note the date you start for your reports.
- It is highly recommended that you read shelves and put them in call number order first. While this is not necessary, it is a standard first step in any inventory process. It is especially important in this no frills process since the steps you will be using here will not inform you if any item is misshelved.
- Weed, if needed (you could weed for condition as you go).
- Determine how you will handle problems such as items not in the database, both with and without barcodes, items with incorrect statuses not resolved by the process, bills, damaged items, etc. This includes how you will identify specific problems for specific items. Establishing these procedures before you begin will streamline the overall process; but, don't be afraid to make changes later if you need to. You could put color coded or preprinted bookmarks for specific problems in the items or keep specific problems on specific book trucks, for example.
- Make provisions for unexpected problems.
- Make sure all inventory staff understand the process, particularly problem and exception handling. Given local practices and policies, some resolutions may be handled by other staff. These problems should be among those set aside, clearly identified, for later staff intervention.

### **What you need**

- Workstation(s) with current Evergreen Staff Client.
- Barcode Scanner(s).
- Receipt printer(s) (for any items that will be put In Transit).
- Portable cart, table, or book truck if you are working in the stacks.
- Book trucks or other means to collect problem items.
- Pens, paper or other supplies for notes to include with your problem items.
- Other supplies or equipment you identify for your specific practice.

### **Potential problems to watch for**

Some of these problems or exceptions may be found as you check in items. Others will only become apparent in reports and subsequent shelf checks.

- Items still checked out to patron; particularly if there are fines and/or bills associated with them.
- Items in the database but no barcode on item.
- Items where the barcode in the database doesn't match the barcode on the item.
- Items on the shelf with or without a barcode but not in the database.



- Items in the database but not on the shelf.
- Items with incorrect circulation modifiers.
- Items with incorrect statuses that required a click through dialog response to proceed. Some of these items can be checked in without further staff action (**Missing**, for example). Others may or may not require further staff action for resolution. **Bindery, Cataloging, Damaged, Lost, Long Overdue**, etc. may need to be set aside for further research or for other staff to determine response. For example, an item with **Damaged** status may have been repaired so that inventory staff can force the action and leave it on the shelf. Or it may not have been repaired so needs to be pulled.
- Items in the wrong place – either the wrong shelving location or out of call number order.
- Incorrect call numbers (entry in the database doesn't match the spine label. Either could be incorrect).
- Obvious errors in the bibliographic record (remember that the cover or spine title may not match title page and the title in the bibliographic record).
- Items with holds that will be placed **In Transit** by the process.
- Items from other PINES libraries on your shelves that will be placed **In Transit** by the process.

## The Inventory Process

Once you've decided how to proceed and have everything setup, you can start the process. You still have a little bit of set up in the Staff Client.

- Note your start date. This is the date you will use in reports.
- Log in to Evergreen using a Circulation login. Make sure that staff conducting the inventory have the appropriate permission level to clear up those problems you want to be resolved during the inventory process.
- Open **Check in**.
- Configure columns to show those elements you consider useful for the process. Here, I have used call number, author, title, location, barcode and, circulation modifier; but, you may prefer to include more information:

A screenshot of the 'Check In' interface. At the top, there is a 'Check In' title bar. Below it, there is a text input field for 'Enter Barcode:' with a 'Submit' button to its right. To the right of the input field, there is an 'Effective Date:' field showing '06/ 6/ 2012' and a dropdown arrow. Further right, there is a link for 'Actions for Selected Item'. Below these elements is a table with the following columns: 'Call Number', 'Author', 'Title', 'Location', 'Barcode', and 'Circulation Modifier'. The table is currently empty.

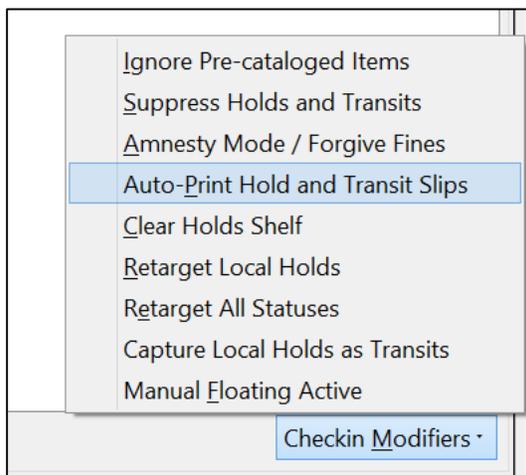
- Whatever columns you choose, remember to save the list configuration under **List Actions** at the bottom left hand portion of the screen.
- If you wish to suppress fines, place the session in **Amnesty Mode/Forgive Fines under Checkin Modifiers** at the bottom right-hand portion of the screen (whether or not you forgive fines for items found on the shelf will depend on local policy. If your library does not, you will not need to set this)



- Or, you can void a fine at the time of **Check In**, or pull the item for further research, depending on local policy:

Alert Message	Balance Owed	Barcode	Bill #	Checkin Date	Family Name	Finish
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- Also set **Auto-print hold and transit slips**:



- Make sure the **Trim List** option is unchecked.
- Make any other adjustments you have identified to **Check In** mode that will streamline your process.
- Scan in items.
- **WATCH THE SCREEN** so that you can spot problems that need to be rectified.
- **WORK IN SHELF ORDER.**
- **DO NOT SKIP SHELVES.**
- Pull or mark items according to procedures established to resolve problems.
- Make sure you mark or record where you stop at the end of each work period.

## Reports

After you have completed the inventory, set up a report to identify all items with last copy/item status change date before the date you started the process. The report template is: "Item List for Inventory Processing" in Shared Folders -> Templates -> csharp -> csharp-shared -> Items

## Shelf Check

Use the inventory report(s) and check the shelves to verify those items listed as available with an item status change date before your inventory start date aren't on the shelf and also to



verify items still marked as **Missing** aren't on the shelf. A shelf check may also resolve other problems as well.

- Remember to check the items pulled for resolution of problems, including those with barcodes and not in the database and items without barcodes.
- Remember to always verify the barcode against the report.

## Final steps

- Run the report again and sort by status. At this point, you can either do a second shelf check or you can resolve outstanding status issues in the database.
  - For resolution of those items in the database but not on the shelf but in **Available** status, you can set these to missing at this point or delete them, depending on local policy. If you are inventorying only a section of your database, you may want to shelf check other sections or set the items to missing and see if they show up when you inventory the other sections. Remember to resolve these after the entire process is finished. You could run a report for the items set to **Missing** during the inventory, if desired.
  - For resolution of items still **Missing**:
    - You may want to delete those items missing longer than a specific period determined by your library policy.
    - You may want to institute a regular shelf check schedule for **Missing** items.
- For those items with barcodes and not in the database, verify again that they are not in the database with a different or incorrect barcode, if needed. Otherwise handle according to local policy.
- For those items without a physical barcode and not in the database, handle according to local policy. If you are inventorying a section of your collection, verify that they are not in the database under another shelving location.