

# 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 either checking in all items on the shelf to set an inventory date or setting the inventory date in Item Status. After you have done that, you then run reports to find items in available status without a set inventory date, if it is your first inventory, or a last inventory date prior to your current inventory date. The process also sets the inventory workstation. You will also be able to find other issues needing resolution. Use the reports and data gathered during the inventory to follow up with a shelf check and other processes to resolve identified issues.

If you use the check in interface, you will check in to update the inventory date for each item from your shelves. This means that transit and holds slips will print automatically, items will be moved to some statuses to reshelving/available, and other statuses such as lost, will stop the process. Since you will not know what status the item is until you check it in, you have to make broad plans for handling exceptions.

If you use Item Status to update the inventory date, you can sort items by status and resolve issues outside of automated processes. However, some things will not be discovered, like items with holds and others will be more difficult to resolve, like items with a barcode but no record in the bibliographic database.

## What this process does

- Identify items marked as available (prior to a specific date) that aren't on the shelves.
- Set an inventory date and identify the inventory workstation.
- Reset missing, discard/weed, bindery to reshelving/available.
- Allow you to locate and resolve items on the shelf still checked out, lost, or long overdue.
- 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.

## 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.
3. Use specialized barcode scanners to store barcodes to build files for item status, either from the shelves or pulled from the shelves onto book trucks.
  - Requires special purchase of scanners.
4. Take barcode scanner and laptop or other device to shelves and scan either into notepad to build files or item status.
  - Efficient if you have the equipment but may be disruptive if you are open.

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