

# 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.

## 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.
- Since the inventory date is being set on the items, you can check items for the start date.
- 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 may need

- Workstation or device(s) with necessary software and Wi Fi capabilities.
- 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 or look at the in item status. 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. 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 using the Check In Interface



Take care since it is easy to redisplay the page, losing your progress.

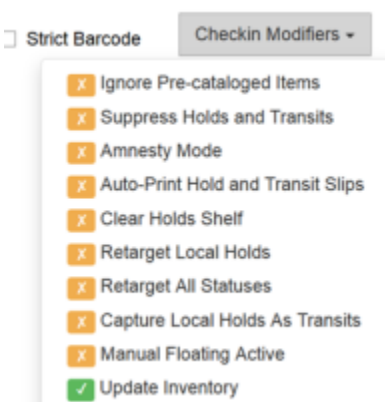
Once you've decided how to proceed and have everything setup, you can start the process. You still have a little bit of set up in the Staff Client.

- Note your start date. This is the date you will use in reports. However, since the inventory date on items will be update, you can skip this step.
- 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. Suggestions are call number, author, title, location, barcode, circulation modifier, and inventory date and workstation; but, you may prefer to include more or less information:

Grid Columns Configuration						
Visible	Column Name	Move Up	Move Down	First Visible	Last Visible	Sort Priority
<input checked="" type="checkbox"/>	Barcode	↑	↓	⬆	⬇	0 : ⬆
<input checked="" type="checkbox"/>	Location	↑	↓	⬆	⬇	0 : ⬆
<input checked="" type="checkbox"/>	Title	↑	↓	⬆	⬇	0 : ⬆
<input checked="" type="checkbox"/>	Circulation Modifier	↑	↓	⬆	⬇	0 : ⬆
<input checked="" type="checkbox"/>	Circulation Library	↑	↓	⬆	⬇	0 : ⬆
<input checked="" type="checkbox"/>	Status	↑	↓	⬆	⬇	0 : ⬆
<input checked="" type="checkbox"/>	Call Number	↑	↓	⬆	⬇	0 : ⬆
<input checked="" type="checkbox"/>	Inventory Date	↑	↓	⬆	⬇	0 : ⬆
<input checked="" type="checkbox"/>	Inventory Workstation	↑	↓	⬆	⬇	0 : ⬆
<input type="checkbox"/>	Balance Owed	↑	↓	⬆	⬇	0 : ⬆

- Whatever columns you choose, remember to save the configuration.
- Set Update Inventory under Checkin Modifiers:



- If you wish to suppress fines, place the session in Amnesty Mode under Checkin Modifiers (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.
- 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.

# The Inventory Process using Item Status

- Configure columns in item status to show those elements you consider useful for the process. Suggestions are call number, author, title, location, barcode, circulation modifier, and inventory date and workstation; but, you may prefer to include more or less information.
- Compile files of barcodes in shelf list order to upload in item status or scan barcodes directly into item status.



Take care if you are directly scanning into item status since it is easy to redisplay the page, losing your progress

- While you can input or upload 1000s of items into item status, do not have more items than you can easily manage.
- Sort columns by item status for resolution.
- From the Actions menu – Update Inventory.
- 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 the current inventory date. The report template is in Quick Reports > Items > List of Items for Inventory Processing.

## Shelf Check

Use the inventory report(s) and check the shelves to verify those items listed as available with an either no inventory date set or the date of your previous inventory are on the shelves 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.

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