INFOhio
OHIO'S PreK-12 DIGITAL LIBRARY

Sirsi Inventory Overview
(Please refer to handbook guides for details)

The All Inventory or My Inventory group of reports allows you to inventory items that are currently checked out, load barcode files into the system, create a list of missing items, and finalize your inventory by changing the status of items to MISSING.

Inventory Preparation **for a less problematic inventory.**

- Before starting, it is recommended you browse your shelves for order.

- *PreInv 1*) Run the Missing Copies List report to check your current missing and contact your ITC to delete items that have been missing for a long time.

- *PreInv 2*) Run the List Transit report (items you loaned) and go to Special Circulation, Pending Transits wizard (items borrowed by you) and review the location and status of any items listed. If you declare transit items as missing in the inventory process, there may be a problem with the record because of the transit status.

Inventory Process

1. **Set Inventory Date** report. This accounts for items checked out by adding an inventory date to the item record.

   WARNING: *If your library remains open, run this report again **each day** you scan items!*

2. **Options for entering inventory –**

   a. Load Scanned Barcodes **- Recommended** method for overall inventory.
   Step 2 - Scan barcodes into file, transfer to system using Scanner wizard.
   Step 2a – Run Load Scanned Barcode report to inventory items in the file. Report will also indicate items in the file with problems.

      Or

   b. Interactive method – Special Circulation – Inventory Item Wizard. **Not Recommended** for scanning entire library. Use this method for found items (Step 3b).

3. **Items NOT in Inventory** report. This is a list of Items that were not on the shelf when scanned. The items may have been missed in scanning, in another location, or possibly truly missing. Rerun this report as needed to reconcile your inventory. Use the Special Circulation – Inventory Item wizard to scan found items.

   NOTE: *Continue the above process for the entire library.*

   WARNING: If you enter new items into your database after you start the inventory, be sure to scan them using the Inventory Item wizard before putting them on the shelf. If you don't, they could appear on your missing items list.

Page 1 05/23/2016

Finalizing the Inventory Process.

4. **Checkout to MISSING** report. Run this report after the entire library has been scanned. Submit this report late in the day or overnight to save process time and interruption of other reports run time.

   a. **Update Option: Be sure that the check box remains empty**: This is a list of items not found in your inventory and will be changed to a status of Missing. Check this list carefully. *(Follow documentation carefully when working with this option!)*

   b. **Update Option: Update database records. A checkmark in this check box will: Finalize Inventory** - This will change the status of the items on the list to Missing. You will not get a list on this final run of the report. . *(Follow documentation carefully when working with this option!)*

5. **Missing Copies List** report - This will give you a final list of items with current status of MISSING, both prior and after inventory.

6. **DISCARD missing items -** OPTIONAL – Contact your ITC for batch discard of MISSING items.

NOTE*: When viewing and/or printing inventory reports in Finished Reports, check View log*
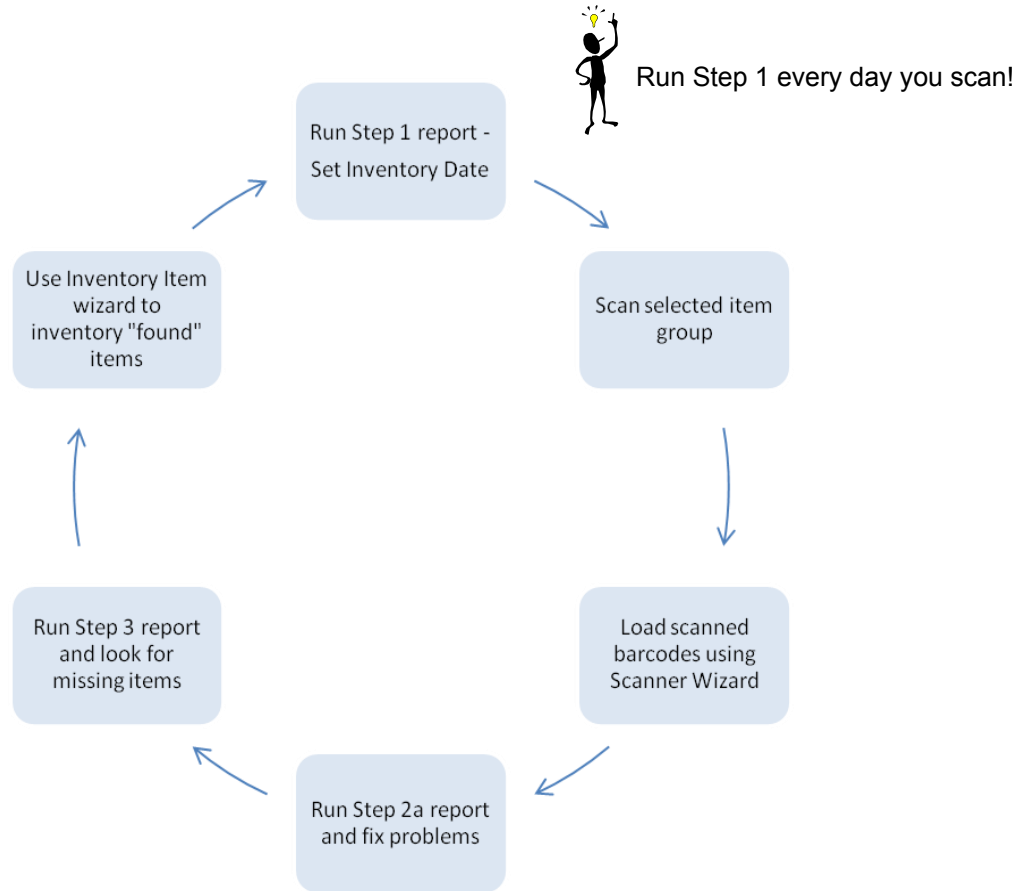
Page 2 05/23/2016

Inventory at a Glance

Preparation:

1. Get shelves in order.
2. Run pre-inventory reports and fix any problems.

Inventory Process – repeat for each collection:

Run Step 1 every day you scan!

Run Step 1 report - Set Inventory Date

Scan selected item group

Load scanned barcodes using Scanner Wizard

Run Step 2a report and fix problems

Run Step 3 report and look for missing items

Use Inventory Item wizard to inventory "found" items

Finalize

1. Run Step 4 report – save as a template and verify items on list are truly missing
2. Run Step 4 report from the template – check Update Database records.
3. Run Step 5 for a final list of all missing items in your library.

Optional:

Contact your ITC to delete missing items from your database.

| Step 1 | Step 2 | | | | | Step 2 | Step 2a |
Set Inventory Date Report	**Item Group**	**Date Scanned**	**First Item Call #**	**Last Item Call #**	**File Name / Notes**	**Create Barcode File**	**Load Scanned Barcodes Report**
Example: 5/2/06	Fiction	5/2/06	FIC A	FIC M	fictiona-m.txt	5/2/06	5/2/06

Inventory scanning completed for Item Group.   **Complete Steps 4-5 when entire library is scanned.**

| Continue with Step 3 | | Step 3a | Step 3b | Step 4a | Step 4b | Step 5 |
| | | *Run report Step 3* | *Check for Missing items* | *Check this list carefully* | *All Items finalized in database* | *Items declared Missing* |
Date	**Item Group**	**Items NOT in Inventory Report (Reconcile)**	For found items, scan using Inventory Item Wizard	**Checkout to Missing for LIST Update Database NO**	**Checkout to Missing to Declare Update Database Yes**	**New Missing Copies List Report**
5/3/06	Fiction	5/3/06		5/3/06	5/30/06	5/30/06

In Finished Reports, when viewing and/or printing inventory reports, put check mark in the view Log box.

Report to view:
☑ View log
☑ View result
☑ Format report

Sirsi Inventory - Understanding the Reports
This document is to help you understand what these reports do!!!
Carefully follow the inventory documentation to eliminate any errors!

Preinv 1 – This is a list of items marked missing or lost before you began your inventory. Look it over to be sure those items really are lost or missing.

Preinv 2 – This is a list of items with the status of "intransit" in your library. Items listed will need to be investigated, corrected.

Step1 – **Set Inventory Date**
This will inventory all items that are currently checked out in the item group you specify. Run this every day that you scan items if your library is open during inventory.

Step2 – This will list cleanup issues you need to address:
- **Items inventoried but checked out** – retrieve the items and check them in.
- **Scanned items not found in the catalog** – these are most likely mis-scanned items. Locate them and scan using the Inventory Item wizard so they won't appear on your missing list. You also might find some items that really aren't in the catalog or have bad barcodes on them. Fix the catalog accordingly.
  NOTE: this will **not** indicate items that don't belong in that item group or belong to another building!!
- **Mis-ordered items** – look through this for any call numbers that are obviously in the wrong place (i.e. a FIC in the nonfiction)

Step3 – This will give you a list of items that <u>might</u> be missing.
- If you have scanned the entire item group – go over this carefully. Any items that you locate should be scanned with the Inventory Item wizard.
- If you have scanned only part of a collection (i.e. 0 – 399 in nonfiction), look over the section of the report that you scanned. The rest of the report will contain the remainder of the item group that you haven't scanned yet.
- Rerun as often as necessary to verify items still missing.

Step4 – This is a list of items that will be changed to Missing when you finalize your inventory.
- **4a** – save as a template!
  - Rename it so it's easy to identify (Step4 Fiction)
  - Note the creation date of the items on this list. Any items added to your collection after you began scanning an item group (date in Step 1) will appear as missing! Scan them with the Inventory Item wizard.
- **4b** – this finalizes your inventory and changes the status of items to Missing.
  - If you are doing your library one item group at a time during the course of the year or two, run this after each item group.
  - If you are doing inventory for just a short time each year, run this when you are done.

Step 5 – This is a complete list of all items that are Missing in your library, including those updated in Step 4.

PreInv 1) MISSING Copies LIST Report

1. **_Run_** the **_PreInv 1) MISSING Copies List report_** (1st Time) to identify items that are currently in the MISSING, LOST or LOST-CLAIM location in the selected Item Group (or all Item Groups). These were marked MISSING, LOST, or LOST-CLAIM prior to this inventory.

2. **_Click_** the gadget for Current status and select MISSING, LOST, LOST-CLAIM.

3. **_Click_** the gadget for Item group and select the item group(s) or leave blank for all item groups.

NOTE: _Library staff should check the shelves to make sure those items are really missing. If any of these items are <u>found</u> in a later search, scan in the items using the Inventory Item wizard._

NOTE: _If items are <u>found</u> that are checked out to a special status user such as LOST or MISSING, they should also be checked in. If the home location of a <u>found</u> item has been modified to a location such as DISCARDED or WITHDRAWN, carefully check status information before making any change._

Sample Missing Copies List Report:

```
                    Inventory: Missing Item List

                Produced Friday, April 15, 2005 at 11:14 AM

 920 PAR                          1953
   Title: Scientist and his tools
   Personal Author: Parker, Bertha Morris
  copy:1       id:32612000002034     library:DLLD          price:$5.00
              cat1:BOOK                cat2:UNKNOWN          type:COLLBIOG
   shelf location:AVAILABLE        created:8/25/2004   permanent
   current status:MISSING

 920 RAZ                          1989
   Title: Custer and Crazy Horse
   Personal Author: Razzi, Jim
  copy:1       id:32612000001960     library:DLLD          price:$7.95
              cat1:BOOK                cat2:UNKNOWN          type:COLLBIOG
   shelf location:AVAILABLE        created:8/25/2004   permanent
   current status:MISSING
```

Step 1   SET INVENTORY DATE Report

This report inventories items that are currently checked out, even if the items are checked out to a special status user, such as LOST or MISSING. The date you run this report will appear on the item record.

This report also establishes the date you need to reference when running future reports.

WARNING: *If library is open, run before each Inventory Scanning session or upload.*

Running the Report:

Check Item Status: : Glossary

Title: Interventions : collaborative planning for students at risk
Author: Sprick, Randall.

Call number:	PROF 371.393 SPR	
Copy:	1	
Item ID:	32620000149671	(circulation summary)
Price:	$15.00	Type: PROFESSNAL
Shelf location:	AVAILABLE.	Current status: CHECKEDOUT...
Material type:	BOOK...	Funding source: GIFT/DON..
Date created:	8/17/2004	Media desk:
Date last checked out: 12/19/2005		Previous user ID:
Last checked in: NEVER		Last activity: 12/19/2005
Date inventoried: 12/19/2005		Total checkouts: 1
Times inventoried: 2		In-house uses: 0

Selection Criteria
1. ***Select*** Library code.

2. ***Select*** the item group(s), leave blank for entire library or use the Excludes Selected Policies to omit an item group.   Example: paperback.

Schedule New Reports : Schedule Step 1) Set Inventory Date

Basic | Item Selection

Library: LMHS   **1**
Shelf location:
Current status:
Item group: PROFESSNAL   **2**
Media desk:

Sample Report Log

```
  6633 item record(s) considered.
  5 item record(s) selected.
UNICORN item selection finished on Tuesday, May 1, 2006, 1:53 PM
UNICORN inventory load v2003.1 started on Tuesday, May 1, 2006, 1:53 PM
  The item key and date will be read from standard input.
**WARNING: This item is currently charged out:31633010229616
**WARNING: This item is currently charged out:31633010231307
**WARNING: This item is currently charged out:31633010134295
**WARNING: This item is currently charged out:31633010134493
**WARNING: This item is currently charged out:31633010164656
  5 item record(s) edited.
UNICORN inventory load finished on Tuesday, May 1, 2006, 1:53 PM
```

Action Steps:

3. **MARK THIS DATE ON YOUR WORKSHEET!** You will need to refer to this date when running later reports.
4. ***Run*** this report each time you scan or upload your files if your library is open or if there is any activity in your database (check in, check out, adding items, etc.).

NOTE: *The item IDs of items with a Shelf Location of AVAILABLE and a Current Status other than AVAILABLE are displayed in the report log with a warning message that the item is checked out. You may review these checked out items individually if desired.*

Step 2 Begin Inventory – Scan Barcodes

Methods for inventory:

An option that is available with the Sirsi K-12 product is to **transfer a file** containing barcode numbers from your local computer to the server for inventory processing. This barcode file can be created in either of two ways:

A. Scanning barcodes into a file using the Notepad application (directions below)

> **HINT:** *Use a laptop or a computer on a cart.*
> * *These computers do NOT need an internet connection or Sirsi on them.*
> * *Plug in your barcode scanner from your circ computer or any scanner you have that will read the barcodes.*
> * *Save your barcode file on a flash drive.   Insert your flash drive into your Sirsi computer and save the file (or drag and drop) into a folder called Inventory 20XX (year). Put this folder where you can easily locate it.*

B. Using portable data collectors (ex: PSC PT2000 (Percon), Symbol, etc.

> **NOTE:** *If using a portable data collector, it is recommended that users consult the scanner documentation and the regional ITC INFOhio support staff for procedures for transferring the barcodes from the scanner to your computer. Once your barcode file is created, continue following directions in this document Step 2a – Loading Scanned Barcodes.*

C.   NOT recommended, but available:

You can use the Inventory Item wizard (under Special Circulation) to scan your items interactively. However this is not recommended because:
* You must watch the screen for every item scanned to be sure the scan registered and to see any messages or alerts.
* Scanning is slower as you are dealing with network speed issues.
* You don't get any of the Step 2a reports which will help you locate problem items or misshelved items.

If you choose to use this method, detailed directions are in Section 14.3b.

Scanning barcodes into a file using the Notepad application

1. PC - Find Notepad application on your computer: START button,/All Programs
   /Accessories/NOTEPAD, save as text file,
    encoding ANSI.

2. MAC – Find TextEditapplication on computer:
    MacIntosh HD/Applications/TEXTEDIT (Top
    menu, FORMAT – select "Make plain text".)
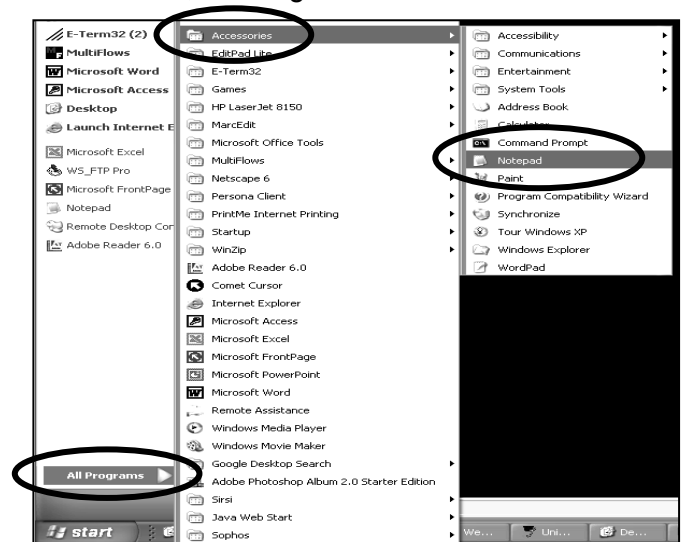
3. When saving the barcode files on your local
    computer or network, *create* a folder named
    INVENTORY wherever you are instructed by
    your technical staff to save files.
    Example: E:/Inventory07

4. *Name* each file a short distinct name, with no
    special characters, for the item group you are
    scanning. *(Save as a .txt file, encoding ANSI)*

    Example: fiction.txt or nonfic100-200.txt or
    dvd.txt
    Example of where your files are located:
    E:/Inventory07/dvd.txt
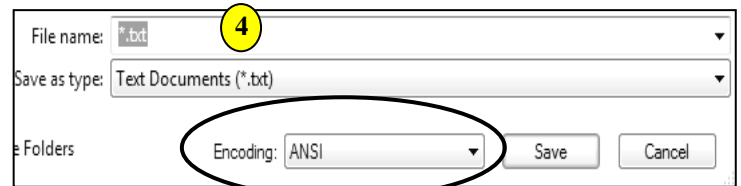
5. *Begin scanning* item barcodes into the Notepad file. There should be a single
    column of barcode numbers. Check there are no blank lines before the first
    barcode number, anywhere in the list, and after the last barcode number.
    REMEMBER TO SAVE often.

    NOTE: *When appending barcode data
    to a file that has been saved, be sure
    to set the cursor at the bottom of the
   list so that the item information will be
    appended correctly.*
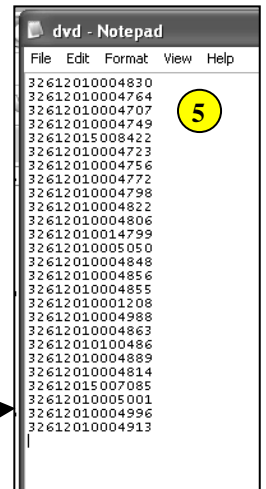
Step 2a – Load Scanned Barcodes

1.   Once the file resides on the local machine, *log in* to Workflows.

2.   *Click* Special Circulation Function Wizard Group.

3.   *Click* on Scanner Wizard.   📙 Scanner
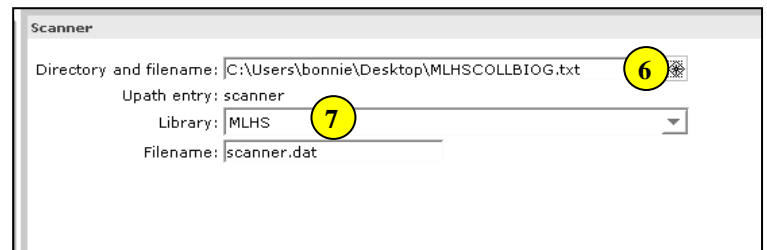
NOTE: Steps 4 and 5 not applicable on MAC's.

4.   *Select* inventory device: Select the second selection in the drop-down menu (*Intermec 9440 Trakker*).

Scanner

Select inventory device: Intermec 2410 ▼
④ Intermec 2410
Intermec 9440 Trakker
Intermec Trakker T2090
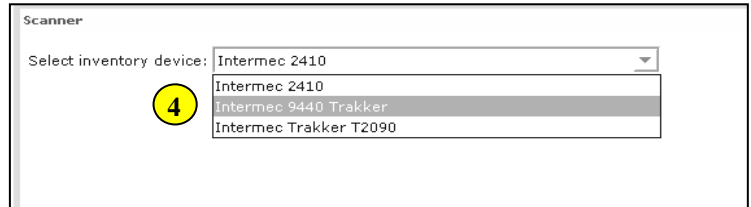
5.   *Click* "Retrieve" (bottom of page).

      NOTE: *If presented with a pop-up window, select EXIT and continue*

6.   When the remainder of the "Scanner" window displays, use the gadget to *select* the file containing the barcodes.

Scanner

Directory and filename: C:\Users\bonnie\Desktop\MLHSCOLLBIOG.txt ⑥ ▨
Upath entry: scanner
Library: MLHS ⑦ ▼
Filename: scanner.dat

7.   *Select* the appropriate library, **but do NOT change the "scanner.dat" filename**. Click UPLOAD. You will see a message indicating the file has been uploaded successfully.
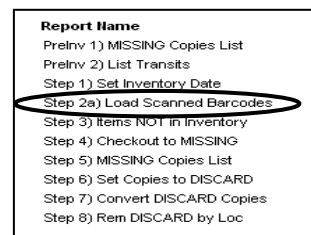
NOTE: *Transfer of multiple files of barcodes in succession is permissible; select Scanner Wizard, select each file to upload until completed uploading multiple files (**do as above, #6 & #7, for each file**). The additional barcodes will be appended to the end of previously transferred barcodes.*

Ⓦ Transfer file ✕
ⓘ Barcode file successfully transfered.
OK
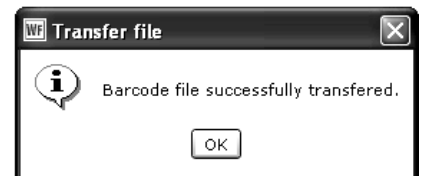
After the desired barcodes have been transferred, they will need to be processed using the "Step 2a) Load Scanned Barcodes (loadbarcodes)" report found on the "All Inventory" or "My Inventory" report tab.

8.   *Click* on the Reports Wizard Group.
9.   *Click* on Schedule New Reports Wizard.

📇 Schedule New Reports

Report Name
Prelnv 1) MISSING Copies List
Prelnv 2) List Transits
Step 1) Set Inventory Date
Step 2a) Load Scanned Barcodes
Step 3) Items NOT in Inventory
Step 4) Checkout to MISSING
Step 5) MISSING Copies List
Step 6) Set Copies to DISCARD
Step 7) Convert DISCARD Copies
Step 8) Rem DISCARD by Loc

10.   *Click* on My Inventory tab**.**

11.   *Click* on Load Scanned Barcodes report.
12.   *Click* Setup and Schedule.

13.   From the "Item Selection" tab use the gadget to *select* the appropriate library.

Schedule New Reports : Schedule Step 2a) Load Scanned Barcodes

Basic   Item Selection   Count Of Transactions Loaded

Library: LEMS ⑬ ◈

14.   *Click* the Run Now button at the bottom of the screen.

15. Carefully *review* the results of this report. It will include:
    - Items in the barcode file that are unexpected because they are currently checked out
    - Barcode numbers that are not in your database
    - Mis-ordered items

```
                    Items Inventoried But Checked Out

PROF 025.04 HOU                        1999
  Title: Decision points : Boolean logic for computer users and
                      beginning online searchers / Janaye M. Houghton and
                      Robert S. Houghton.
  Personal Author: Houghton, Janaye Matteson
 copy:1      id:32612100064090      library:DLHS           price:$16.95
             cat1:BOOK                cat2:UNKNOWN          type:PROFESSNAL
  shelf location:DISCARD          created:9/26/2003   permanent
  current status:MISSING

 PROF 025.5 EIS                        1990
  Title: Information problem-solving : the Big Six Skills
                      approach to library & information skills instruction /
                      Michael B. Eisenberg, Robert E. Berkowitz.
  Personal Author: Eisenberg, Michael B.
 copy:1      id:32612100023351      library:DLHS           price:$20.00
             cat1:BOOK                cat2:UNKNOWN          type:PROFESSNAL
  shelf location:AVAILABLE        created:9/26/2003   permanent
  current status:CHECKEDOUT


NOTE:  At the beginning, the following number of scanned item IDs were not
found on this system: 326121


**WARNING: This item is currently charged out:32612015000684
```

```
                    Scanned Items Not Found in the Catalog\n

Barcode ID "3261210009%939  " is not in your database. It was scanned after:
  PROF 027.8 TOO                            copy:1  barcode:32612100024664
  Reasons, roles and realities : a hands-on seminar in resource based in
  Toor, Ruth
  library:DLHS  location:AVAILABLE

 Barcode ID "32612023088    " is not in your database. It was scanned after:
  PROF 371.2 MEZ                            copy:1  barcode:32612100063944
  Teaching in a block schedule
  Mezich, Jan
  library:DLHS  location:MISSING

 Barcode ID "32617000012974  " is not in your database. It was scanned after:
  PROF 371.3 BEE                            copy:1  barcode:32612100023088
  Secondary learning centers : an innovative approach to individualized

  Bee, Clifford P
  library:DLHS  location:AVAILABLE

Barcode ID "               " is not in your database. It was scanned after:
  PROF W                                    copy:1  barcode:32612000027288
  Junior Classics Vol. 4
  William, Mabel editor
  library:DLLD  location:AVAILABLE

Mis-ordered items are marked with \"=>\" and shown
between neighboring scanned items.

  PROF 371.2 DAN                            copy:1 barcode:32612100060502
=>PROF 371.2 JON                            copy:1 barcode:32612100060452
  PROF 371.2 FOG                            copy:1 barcode:32612100064033
 copy:1 barcode:32612100064033
----------------------------------------------------------------------------
  PROF 371.2 JON                            copy:1 barcode:32612100060452
=>PROF 371.2 FOG                            copy:1 barcode:32612100064033
  PROF 371.2 FOG                            copy:1 barcode:32612100064041
 copy:1 barcode:32612100064041
```

NOTE: *Items in the barcode file will be inventoried **as of the date/time that they are processed by this report.***

Step 3a - Items NOT in Inventory Report

Run the **_Items NOT in Inventory report_** to get a listing of all of the items that were NOT included in the current inventory scan (possible missing items).

NOTE: *Copies are set with a Date Inventoried by either* **_Set Inventory Date report_** *or the* **_Inventory Item wizard_**. *The objective of this report is to obtain a list of copies that are* **not** *in the current inventory.*

If you find an item on this report, use the Inventory Item wizard in Special Circulation Function wizard group to scan in the item. This will mark the item with the date as inventoried.

NOTE: *Be sure that you have scanned all barcodes in the item group(s) being inventoried and uploaded them to the system (Step 2a). Steps 1 and 2 should be completed before running this report.*

1. *Click* Item Selection tab.
2. **Click** the library gadget to select your library code.

3. *Click* the Item group gadget to **select** the item group(s) you have scanned, leave blank for entire library or bullet 'Exclude selected policies' to omit an item group. Example: paperback

4. *Click* on the calendar icon.

   - *Click* on Before.

   - *Select* the *Date Inventoried. This is the first date you started scanning your items. It should be the first date you recorded on your Inventory Worksheet. Even if you are doing several Item Groups, always select this first date!*

Step 1	Step 2		
Set Inventory Date Report	Item Group	Date Scanned	First Item Call #
Example: 5/2/06	Fiction	5/2/06	FIC A
3/10/09	Fiction	3/10/09	FIC AAB
3/12/09	Biography	3/12/09	B AARON
3/13/09	NonFiction	3/13/09	001

Example of report results (be sure to view LOG to see details):

from log:

```
COUNT Items Previously Inventoried but not this time:
     109
COUNT Items NEVER Inventoried:
     205
```

Report results:

```
INFOhio :: Titles Not in Current Inventory (invstep3)         04/22/2009
========================================================================
Call Number  Barcode       Title                              Status
========================================================================
001.94 BIG   32614010158350 Bigfoot and other strange beasts / by AVAILABLE
004.092 PAU  32614012003752 The last lecture / Randy Pausch with  AVAILABLE
004.092 PAU  32614012003760 The last lecture / Randy Pausch with  AVAILABLE
004.6 RED    32614010173672 Adobe Photoshop CS2 revealed / Elizab AVAILABLE
01.9 NAT     32614010160232 Mysteries of the ancient world       AVAILABLE
031 PIC      32614012002713 Pick me up : [stuff you need to know- AVAILABLE
031.02       32614010163467 Guinness world records, 2006 / [edito WEEDED
031.02 RIP   32614010172187 Ripley's believe it or not! : expect  AVAILABLE
031.02 RIP   32614010172435 Ripley's believe it or not! : planet  AVAILABLE
031.22 GUI   32614010158277 Guinness world records 2009 / [editor AVAILABLE
109 B        32614010136356 The English philosophers : from Bacon AVAILABLE
150.19 JUN   32614010173433 Memories, dreams, reflections / by C. AVAILABLE
190 R        32614000001156 Twentieth-century thinkers : studies  AVAILABLE
204 TOL      32614010173110 A new earth : awakening to your life' AVAILABLE
299 H        32614010166148 Shinto / by Paula R. Hartz            WEEDED
304.8 AND    32614012003554 Arriving at Ellis Island / Dale Ander AVAILABLE
304.8 RAA    32614012003661 Ellis Island / by Lucia Raatma        AVAILABLE
305 DIS      32614013700299 Discrimination / Jacqueline Langwith,  AVAILABLE
305.235 FRE  32614010158665 The Freedom Writers diary : how a tea AVAILABLE
305.48 ROD   32614010173193 Kabul Beauty School : an American wom AVAILABLE
305.48 ROD   32614010173219 Kabul Beauty School : an American wom AVAILABLE
306.8 WIL    32614010159010 Why can't we love them both           LOST-CLAIM
323.4 A      32614000004234 The idea of equality : an anthology / AVAILABLE
323.4 KIN    32614010158699 The words of Martin Luther King, Jr.  AVAILABLE
325.73 REB   32614012003786 Life on Ellis Island / by Renee C. Re AVAILABLE
345.766 GRI  32614012004347 The innocent man : murder and injusti AVAILABLE
362.11 CON   32614012003687 Forgotten Ellis Island : the extraord AVAILABLE
362.29 BER   32614012004420 Methamphetamine / by Emma Carlson Ber AVAILABLE
362.82 WAL   32614010172161 The glass castle : a memoir / Jeannet AVAILABLE
362.82 WAL   32614010172302 The glass castle : a memoir / Jeannet AVAILABLE
362.82 WAL   32614010172294 The glass castle : a memoir / Jeannet AVAILABLE
362.82 WAL   32614010172328 The glass castle : a memoir / Jeannet AVAILABLE
363.12 RIF   32614010158384 The Titanic experience : the tragic s AVAILABLE
364.1 LAN    32614000009415 Code name "Zorro" : the murder of Mar AVAILABLE
378.1 STO    32614000010041 The killings at Kent State : how murd AVAILABLE
394.1 SCH    32614012004024 Fast food nation : the dark side of t AVAILABLE
398.2 HOR    32614010172666 Horrors! : 365 scary stories / select AVAILABLE
398.2 WES    32614130003742 Medieval tales / translated and adapt AVAILABLE
398.24 DUD   32614013700372 Unicorns / by William Dudley          AVAILABLE
595.4 K      32614000015669 How to know the spiders : pictured-ke AVAILABLE
```

Step 3b – Using the Inventory Item Wizard

When to use this wizard:

- After running the Step 3) Items not in Inventory report, you will undoubtedly locate some of the items listed on the report. Use the Inventory Item Wizard to inventory them. The inventory item wizard will inventory the item and it will be removed them from the list of potentially missing items.
- If new items are added to your database (SmartPort, vendor loads, etc.) after you begin the inventory, scan them using this wizard before putting them on the shelves Otherwise, they could appear on your Missing Items list.
- Use this wizard if you chose to complete your inventory interactively. We do NOT recommend this.

---

1. **Click** on Special Circulation wizard group.
2. **Click** on Inventory Items Wizard.
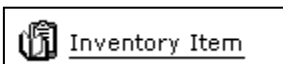
   | Inventory Item |

3. **Use** the **Inventory Item wizard** and **scan** the barcodes on the items being inventoried.

   **CAUTION:** *You **MUST** watch the workstation screen for error/alert messages.*

a) In the Identify Item window, **scan** each item's barcode. You can also use the Item Lookup helper to identify items. A list of physically inventoried items appears; this list includes the call number/copy and barcode of each item.

Inventory Item
Item ID: **3a**

List Of Items Inventoried

Call Number	Copy	Item ID
PROF 911 NEW	1	32620000075405
PROF 911 MID	1	32620000126307
PROF 910 GEO	1	32620000037306
PROF 808 REA	1	32620000046117
PROF 612.8 SYL	1	32620000158425
PROF 510 WOR 1	1	32620000154689
PROF 378.1 STE	1	32620000176252
PROF 920 FAC	1	32620000033248
PROF 911 SOU	1	32620000126265
PROF 911 MOU	1	32620000126273

b) The **insertion point** automatically returns to the Item ID box as each item is added to the list,unless an alert/error is encountered.
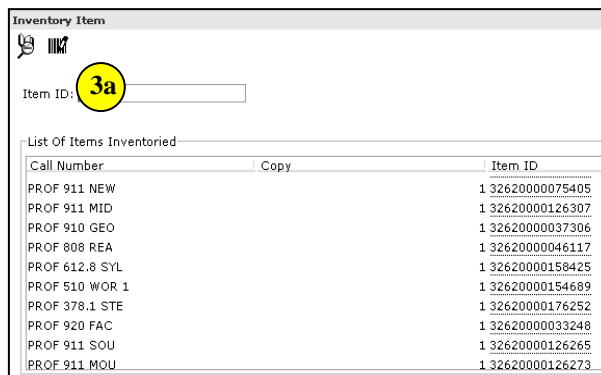
c) The Inventory Item wizard updates the Times Inventoried counter and the Date Inventoried box in the item record. An item's inventory information displays only from the item's platform or glossary information.

Date created:	8/17/2004
Date last charged:	NEVER
Last discharged:	NEVER
Date inventoried:	12/19/2005
Times inventoried:	3 **3c**
Previous user ID:	
Last activity:	12/19/2005
In-house uses:	0
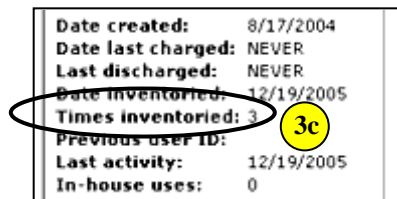
d) If an item has a special status, an alert message window appears displaying the item status.
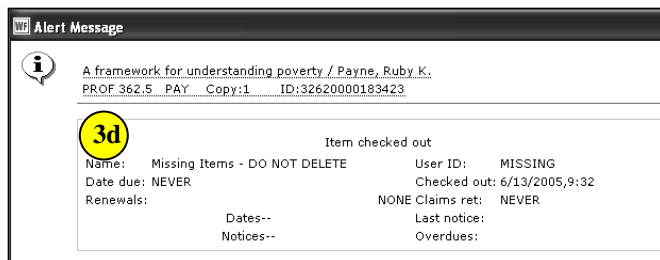
e) Sound will accompany an alert message (default sounds set). To edit an audible alert, right click on the Inventory Item Wizard and choose properties. On the Behavior tab, choose a sound file of your choice..
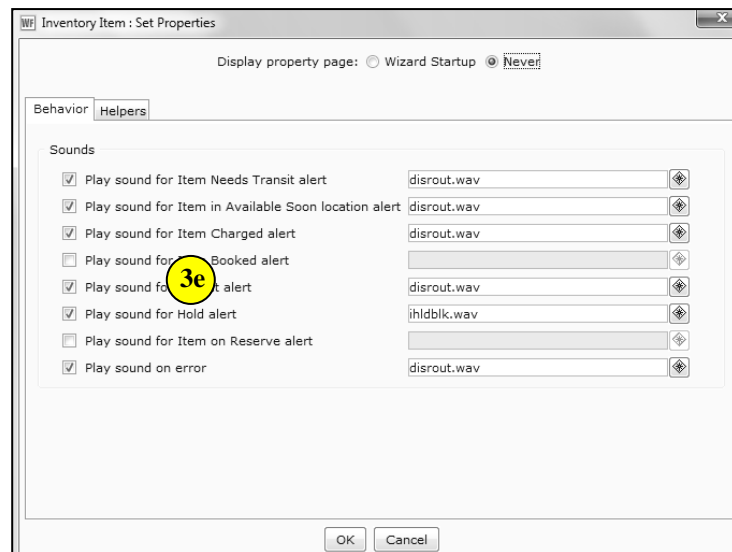
f) The list of Items inventoried may be printed by using the Print wizard before closing the Inventory Item window.

4. **Click** Close to exit the Inventory Item wizard.

NOTE: *If the system determines that the item currently should be anywhere but its shelf location, an alert message appears to indicate what should be done with the item. For example, if a user in another library put a hold on the item, the alert message will suggest that the item be put in transit to the other library to satisfy the hold.*

Step 4a & 4b CHECKOUT TO MISSING Report

WARNING: *You will run this report at least twice*:

4a. The **first time** you will create a list of items that will be changed to Missing. It may be re-run as needed. *Be sure to check this report LIST carefully!*

4b. The **second/last time** will actually finalize your inventory and change the status of items in your database to MISSING.

4a. Run the *Checkout to MISSING report* to create a list of items that will be declared MISSING if not found in the current inventory.

1. *Click* on Schedule New Report.
2. *Click* on My Inventory or All Inventory tab.
3. *Click* on Checkout to Missing report.

4. **Call Number Selection tab**:

    a. No changes necessary.

5. **Item Selection tab**:

    a. *Select* Library if needed.

    b. *Select* the item group(s) you have inventoried or leave blank if you have completed the entire library.

    c. Date Inventoried. *Click* on gadget:
- *Click* Calendar icon.
- *Select* Before
- *Use gadget* to select the date you began your inventory (first date on your worksheet).
- *Click OK.*

6. **Update Options:**

Update database records should be set to **NO by leaving out the checkmark.**

7. **Save Report as a template** before running it**.**

INF⊙hio
OHIO'S PreK-12 DIGITAL LIBRARY

INFOhio/Sirsi K12 Manual Symphony
Inventory Steps 4

Checkout to Missing Report

Sample Report

WARNING: *This list is the items that will be changed to a status of MISSING when you run this report and change the OUTPUT OPTIONS "Update database records"* **YES. CHECK IT CAREFULLY!**

Log shows:
```
  Items will be selected if library is KAHS.
  Items will be selected if item type is (selection)
  Items will be selected if the last inventory date is earlier than 05/18/2006.

ITEM REPORT


Produced Monday, May 22, 2006 at 2:23 PM

 PROF 001.4 GRO 1                          1994
   Title: The Grolier guide to new research methods and sources.
  copy:1        id:3620000137163     library:LMHS            price:$68.50
           cat1:BOOK                 cat2:GENERAL        type:PROFESSNAL
   shelf location:AVAILABLE         created:8/17/2004   permanent
   current status:AVAILABLE

 PROF 371.2 SCH                            1996
   Title: Results : the key to continuous school improvement /
                   Mike Schmoker.
   Personal Author: Schmoker, Michael J.
  copy:1        id:3620000080272     library:LMHS            price:$16.95
           cat1:BOOK                 cat2:GIFT/DON       type:PROFESSNAL
   shelf location:AVAILABLE         created:8/17/2004   permanent
   current status:AVAILABLE

 PROF 371.33 TEC                           1997
   Title: Technology @ your fingertips [microform] : a guide to
                   implementing technology solutions for education
                   agencies and institutions / prepared for National
                   Center for Education Statistics, National Cooperative
                   Education Statistics System, National Forum on
                   Education Statistics.
   Added author: Educational Resources Information Center (U.S.)
  copy:1        id:3620000165925     library:LMHS            price:$5.00
           cat1:MICROFORM            cat2:GIFT/DON        type:PROFESSNAL
   shelf location:AVAILABLE         created:8/17/2004   permanent
   current status:AVAILABLE

 PROF 371.2 DUF                            1998
   Title: Professional learning communities at work : best
                   practices for enhancing student achievement / Richard
                   DuFour, Robert Eaker.
   Personal Author: DuFour, Richard, 1947-
  copy:3        id:3620000183985     library:LMHS            price:$24.95
           cat1:BOOK                 cat2:GIFT/DON       type:PROFESSNAL
   shelf location:AVAILABLE         created:8/17/2004   permanent
   current status:AVAILABLE
```

Last Updated March 2009   **Inventory 14.4 Page 2 of 3**
Page layout created and text abridged by INFOhio from Sirsi copyrighted documents with prior permission of Sirsi Corporation.
Copyright © 2006, SirsiDynix Corporation. All Rights Reserved.

Page 19 05/23/2016

Step 4b - Do this step after COMPLETING the entire library or as much as you plan on doing.

After confirming that the items on the report are truly missing, you will run Report 4 – Checkout to Missing again.

> All items selected in this report will have their **status changed to MISSING**.

1. In Schedule new reports, *click* on Template tab.

2. *Choose* "Step 4) Check out to Missing" from the list of template reports.

3. *Click* Setup and Schedule.

4. **Output Options**:
   Change Update database records to **YES** by putting a checkmark in Update database records.

5. *DO NOT* make any other changes to the report!

```
Schedule New Reports : Schedule Step 4) Checkout to MISSING

 Basic │ Call Number Selection │ Item Selection │ Update Option

   ☑ Update database records
```
4

6. *Click* Run Now button at the bottom of the screen.

```
 Schedule    Run Now    Save As Template    Cancel
```

NOTE: *The list of changed items is NOT printed on this finalize step. This step updates your database. Use the Checkout to Missing report from Step 4a if you want to print the list or save it.*

Step 5   MISSING COPIES LIST Report

Run the *Step 5 Missing Copies List report* to get a complete, updated list of items that are now a status of Missing in your database. This includes all items missing prior to this inventory and the items missing after this completed inventory was finalized. You can check again for the missing materials before deciding to have them discarded.

Selection Criteria:

1. *Click* the gadget for Library and select your library code.

2. *Click* the gadget for Current status and select MISSING. (may include LOST, LOST-CLAIM).

3. *Click* the gadget for Item group and select the item group(s) or leave blank for all item groups.

	Basic	Call Number Selection	Item Selection

Library:	LMHS	①
Shelf location:		
Current status:	MISSING	②
Item group:	PROFESSNAL	③
Material type:		
Media desk:		

NOTE: *Library staff should check the shelves to make sure those items are really missing. If any of these items are <u>found</u> in a later search, scan in the items using the Check In Items wizard.*

NOTE: If items are <u>found</u> that are checked out to a special status user such as LOST or MISSING, they should also be checked in. If the home location of a <u>found</u> item has been modified to a location such as DISCARDED or WITHDRAWN, carefully check status information before making any change.

*4. **OPTIONAL** – Discard MISSING items.*
   When you're ready, NOTIFY your ITC to batch delete your MISSING items.

SAMPLE REPORT   **Step 5) Missing Copies List:**

```
                    Inventory: Missing Item List

              Produced Friday, April 15, 2005 at 12:22 PM

920 LEV                              1988
  Title: Secret Mission
  Personal Author: Levine, Ellen
 copy:1        id:32612000001986      library:DLLD          price:$7.06
         cat1:BOOK                 cat2:UNKNOWN          type:COLLBIOG
  shelf location:AVAILABLE        created:8/25/2004   permanent
  current status:MISSING

920 PAR                              1953
  Title: Scientist and his tools
  Personal Author: Parker, Bertha Morris
 copy:1        id:32612000002034      library:DLLD          price:$5.00
         cat1:BOOK                 cat2:UNKNOWN          type:COLLBIOG
  shelf location:AVAILABLE        created:8/25/2004   permanent
  current status:MISSING
```

Discard/Delete Missing Items
(Note: ONLY ADMIN HAVE ACCESS TO THESE REPORTS)

To be done after the library staff has completed ALL Inventory steps through Step 5 including the Step 4 report that checks out the missing items to MISSING.

> **NOTE to ITC Staff**: *Both Step 6 and Step 7 reports must be run to be sure all appropriate items are changed to DISCARD*. You will need to run Step 6 and Step 7 to get LOST/MISSING items marked DISCARD. And then run Step 8 to delete the DISCARD items.
>
> **Step 6** is used for items that are not "checked out", but have the status of LOST (variety of LOST statuses) or MISSING (see doc - Sec 14.6 for list of possibilities).
>
> **Step 7** is used for items that the library has marked MISSING in the Inventory process (Step 4b), or using the MARK ITEM MISSING wizard - these items are all "checked out" to the MISSING user. This report will change items with the status of MISSING to the status of DISCARD.
>
> **Step 8** is then run to remove all items with DISCARD status.

Step 6 Report – Set Copies to DISCARD

Use the **Step 6)** report to change the status to DISCARD for a group of items that:
- have the status of LOST and are NOT checked out.
- have been declared LOST-CLAIM via the MARK ITEM LOST wizard and are no longer connected to the patron (have been paid, or forgiven, or cancelled).
- the status of MISSING was selected manually, not via the inventory process.
- items with status of MISSING, no transaction attached.

1. Basic Tab – *rename* report with building in it.

2. Item Selection Tab – *change* library, *use* gadget to select statuses, *select* item group or make blank if all groups.

3. Update Option – *leave* unchecked.

4. *Save* as a template.

5. Have Librarian *OK* this list.

6. *Rerun* the report from the template, changing the Update Option by checking the box.

Page layout created and text abridged by INFOhio from Sirsi copyrighted documents with prior permission of Sirsi Corporation.
Copyright © 2006, SirsiDynix Corporation. All Rights Reserved.

Step 7) Report – Convert DISCARD Copies

This report will change items **checked out to the MISSING user** to the status of DISCARD (or possibly items checked out to the **LOST** user):

1. Make a template of the **Step 7)** Convert DISCARD Copies report.
     HINT: Change the report name to *XXX Convert DISCARD Cp* (XXX = LIBRARY)

User ID Tab
- User ID: **MISSING**
- User ID: **LOST** (if items checked out to LOST user in Sirsi migration)

Schedule New Reports : Schedule Step 8) Convert DISCARD Copies

Basic | User ID | Title Selection | Call Number Selection | Item Selection | Checkout Selection | Update Option

User ID: MISSING

Call Number Selection Tab
- Number of copies >0

Item Selection Tab
- Library: XXX
- Specific Item Group can be selected; if selection is ALL item groups, leave *blank.*
- Specific DATE can be selected; if selection is ALL MISSING items, leave blank. If specific date range needed, select "**Date last checked out**" –BEFORE <date needed> or specific date range.

Date last checked out: <08/01/2006

Update Options
- Update Database: **No Check**

☐ Update database records

2. **Run** the *XXX Convert DISCARD Cp* report - Listed items will be changed to status of DISCARD.

3. **Run** the *XXX Convert DISCARD Cp* report again

Update Options
- Update Database: **Checked**

☑ Update database records

HINT: before running this report a second time, change the report name to *XXX Convert DISCARD Cp Y* (will help you keep track in case of interruptions)

After the database is updated, the items should have:
- *Shelf location: (AVAILABLE – or could vary - as manually set on item record)*
- *Current status: DISCARD.*

Items now have status of DISCARD
- **Next steps will DELETE items from the database**.
- If library staff wants a list of items deleted, remind them to save the report on their computer.
- Inventory reports on FINISHED REPORTS tab will NOT disappear after 30 days.

Step 8) Report – Rem DISCARD by Location

This report will remove all items marked DISCARD from the database.

1. Make a template of the **Step 8)** Rem DISCARD by Location.

HINT: Change the report name to *XXX Rem DISCARD by Loc*

Item Selection Tab
- Library: XXX.
- Current status: DISCARD.
- Number of copy holds: =0.

Sorting Criteria Tab
- Call Number.

Update Options Tab
- Update Database –
  No Check.

Remove Items by Location Tab
- Remove all items in the designated location: **Check.**
- Remove title when removing last copy: **Check.**
- Information for each discarded copy: **Check.**

Print Item Tab
- Record by record **Selected**.
- Entry List only **Selected**.
- Title Info/Catalog entry list**: 245,949**
- Data only **Selected**.
- Call Number only **Selected**.
- Brief copy information **Selected**.

- **Run** the *XXX Rem DISCARD by Loc* report

Items *still* have:
- Shelf location: (AVAILABLE – or could vary – as manually set on item record)
- Current status: DISCARD

At this point, if desired, have library staff review list, save it as report of items deleted.

After library staff reviews title list and gives approval*:*

- **Run** the *XXX Rem DISCARD by Loc* report again.

  - Update Options to **CHANGE:** Update Database: **Check**

HINT: Before running it the second time, change the report name to *XXX Rem DISCARD by Loc Y*

☑ Update database records

- Run *adutext* report.