

Inventory Guide

(33

Updated October 2008

Just scan it or enter it to Inventory it!

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Introduction and Preparations

Inventory is predominantly accomplished once a year and traditionally at the End of the Library Year, but in fact Inventory can be accomplished any time throughout the year. Inventory can be quite simple; and can be accomplished with a little preparation.

Did you know G3 allows the use of practically any type of Standard Barcode Readers for Inventory; in fact you can use portable data readers, wireless portable readers or standard Hand held Bar Code readers and you can also manually enter barcode numbers one-ata-time or through the use of any simple text or ASCII file. Please note that some portable readers used for other automation programs may not work because it has been specifically modified for that program. If you do not have a Portable Reader some suggestions; put your wireless laptop atop an AV cart with a standard barcode reader an a long power cord if needed, then move to the library shelves to inventory items directly into G3.

Many libraries' have purchased Portable Bar Code Readers over the years and continue to use these devices with G3 inventory. Today these portables have again been technologically modernized to allow wireless communications to the library workstation, simplifying the inventory procedure. Using a Wireless or Bluetooth interface is what LRMS now offers; for updating to a new portable scanner that allows you to travel up to 300 feet standard (and with a special long range interface 800 feet) into your library from your workstation for scanning inventory items directly into your G3 program. This method of inventory has become very popular; visit http://www.lrms.com/pricesheet.html (page 6) for more Bar code reader information. (Note: Blue Tooth can be interfered with and range of transmission can be limited by outside or other portable wireless devices, electrical lines, even noisy fluorescent lighting, so if this exist in your library do not use BT.)

Whether you move to the shelves, or to a remote library collection location or if you bring the materials for inventory to your computer to be scanned, G3 is used the same way for all inventory purposes.

INVENTORY Process Steps

Preparation:

- Determine whether you want your library opened or closed for Inventory
- Will inventory be accomplished all at one time?
- Will Circulation remain active or will it be shut down during Inventory?
- Or will you close down collection usage one section at a time. (Closing this section to borrowers until inventory is completed)
- Check out your bar code scanning equipment, if using a Portable Bar Code scanner or standard Stationary scanner, attach it to the computer that will be used for inventory. If batteries are used be sure they are fully charged.
- G3's inventory system currently requires the changing of the Status Code "A" (for Available) to "M" (representing Missing for only inventorying library materials)

<u>Steps</u>

- Globally change the Status code "A <u>Only</u>" of the library collection records to be inventoried to "M" (Missing) for <u>all</u> collection items to be inventoried, this can be a global change to an entire <u>Single</u> collection or globally done by <u>Selected</u> Call Number range.
- 2. Chose a method to enter Inventory Items into G3:
 - a. Physically scan the collection item bar code numbers directly into G3 inventory
 - b. Use a Laptop computer and standard scanner connected through your wireless network to G3, and scan your materials directly in to G3 while at the shelves.
 - c. Scan using a Portable Bar code scanner; scan a section of items into your Portable Inventory Barcode Reader and upload this data into a file on your local C drive for processing through G3. Review this file using MS "Notepad" from the Accessories folder found under the "All Programs" Menu. You might ask why? Experience tells us that there can be bad scans, or bar coded ISBN numbers that were accidentally scanned and need to be removed before processing. (See Items 1 & 2 at page 16.)
 - i. Save these files with a name that represents what was inventoried (Example: DDD-299 or FIC.txt) and "Keep" your inventory data files from your barcode reader until after you have completed Inventory
- 3. As you process your inventory files "Create" and save or print any necessary Inventory log files. Repeat this step until the inventory is complete.
- 4. Upon completion "RUN" the Material Listing Report for listing Missing Items use a Status code of "M" to locate missing items.
- 5. Make any necessary record corrections or adjustments for items that remain Missing. Use G3's global transfer utility for moving missing copies with a MARC record to a collection of choice for archiving or reporting.

G3 Inventory provides a simple flexibility to the library staff for performing the required steps for its inventory process. The following information will help guide you through inventory.



Suggestion:

Read through this information before attempting Inventory, once you are ready we suggest that you experiment by testing your understanding through inventorying a smaller then normal area of a collection. Once you have successfully tested your results and have determined your strategy for inventorying your library materials; you are ready to get going!

(If you want to close your Library for Inventory, See page 14.)

Inventory your Collections a section at a time or a Collection at a time:

Use this set of instructions if you want to inventory a section at a time by Call Number range or Collection by Collection.

🔆 G3 Library Automation System (Build 1.10.2) : DE	MO				
G3 Library Automation System (Build 1.10.2) : DEF Ext Logon Help Catalog Menu Basic Functions Search/Edit Catalog MARC Import/Export Copy Status Scan/Inventory Import Labels and Cards Collection Labels Dummy Labels Collection Labels Shelf List Cards	Select - Sea	Contemporaries Contemporarie].		
Reports Run Material Listings Report Run Collection Statistics Report Run Custom Reports Main Menu © Copyright 1998-2001 D3 Innovations LLC Unsuthorized reproduction or distribution is prohibited.					
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Figure 7 Catalog Menu Main Screen					

<u>Figure 2, Catalog Menu Main Screen</u>

There are two methods of identifying library collection items for Inventory.

- 1. Use Catalog/Search Edit with tagging to define collection items for inventory a section at a time using Call Number ranges.
- Or use MASS Update to identify and tag a section at a time by using from thru ranges of Call Numbers. (As shown on the following pages 12 thru pages 13.)

Defining a Section of Items for Inventory:

Use Search/Edit to define a section of inventory; once the inventory is identified; Tag these records for Global processing.

 For example, a search on "F" or "FIC", or FICTION depending on how your records are labeled, will locate all items matching search description. For instance, our example is Fiction materials. "F" in our example found 2929 Fiction items in the Main Collection or 267 pages of information.

Look at how the Search Catalog screen was setup in Figure 3; notice that "Main Collection" was selected and "Find for and Sort by" was set to CALL NO (Call Number) with the search criteria set to "Starts with" and the description defined as "F". With this search completed we can move on to tagging these records.

But before moving on, we would like to point out that this is a perfect opportunity to write down your search findings "first and last" Call Number as this will be helpful later in the Inventory process. View the first item shown and go to the last page (example: 267) by selecting the down arrow on the right side of the box to the left of the "Total records in this set..." to see the last page of the search and last Call Number of this search.

G3 Library Automation System (Build 1.10.2) : DEMO - [Search Catalog]		_ 8 ×
Action Help		
MAIN COLLECTION		
Find for CALL NO		<u>S</u> earch
Sort by CALLNO		
A 💽 🏬 👔 🕄 Total record in refull set is 2929. Displaying page 1 of 267	Leave blank to get all	collection i
ontrol# Title/Author		Category
7863 Acheson, Alison, (Copies:1 Available:0)		FIGTION
Children of flight Pedro Pan / 1474 Acierno, Maria Armengol, (Copiest, Available 0)	FIC ACI	FICTION
The night crossing / 7357 Ackerman, Karen, (Copies:1 Available:0	FIC ACK	FICTION
My name is Maria Isabel / 7295 Ada, Alma Flor. (Copies:1 Available:0)	FIC ADA	FICTION
The restaurant at the end of the universe / 7576 Adams, Douglas, (Copies:1 Available:0)	FIC ADA	FICTION
Cam Jansen and the chocolate fudge mystery / 1358 Adler, David A. (Copies:1 Available:0)	FIC ADL	FICTION
Cam Jansen and the Triceratops Pops mystery / 1359 Adler, David A. (Copies:1 Available:0)	FIC ADL	FICTION
Cam Jansen and the mystery of the circus clown / 1361 Adler, David A. (Copies:1 Available:0)	FIC ADL	FICTION
Cam Jansen and the mystery of the Babe Ruth baseball / 1362 Adler, David A. (Copies:1 Available:0)	FIC ADL	FICTION
Cam Jansen and the mystery of the dinosaur bones / 1363 Adler, David A. (Copies:1 Available:0)	FIC ADL	FICTION
Cam Jansen and the mystery of the gold coins /	FIC ADL	FICTION
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Tag your Search Results:

Tagging the results of your search is necessary; this allows for the use of globally changing all tagged items with a Status code of "A" (or Available) to a new code for inventorying purposes to "M" (or Missing).

G3 Library Automation System (Build 1.10.2) : DEMO - [Searc	h Catalog]		_ 8 ;
<u>File Action H</u> elp			
Collection: MAIN COLLECTION	I Records Only		
Starts with	Howitry Coords		Search
Sort by CALLNO	inonty search		
Total records in result set is 2929	Displaying nage 1 of 267		
Tag all on page			
Clear all tags on page		FIC ACH	FICTION
Clear all tags in set opies:1 Available:0)	×		
Childre of flight Pedro Pan / 1474 Acierno, Maria Armengol, (Copies:1 Available:0)		FIC ACI	FICTION
7357 The night crossing /		FIC ACK	FICTION
Ackerman, Karen, (Copies:1 Available:0)	 ∕		FICTION
7295 Ada, Alma Flor. (Conjes:1 Available:0)		FIC ADA	inc non
The restaurant at the end of the universe /		A.	FICTION
Cam Jansen and the chocNate fudge mystery (Select tagging method:		FICTION
1358 Adler, David A. (Copies:1 AvaNable:0)			
Cam Jansen and the Triceratops Pops mystery / 1359 Adler, David A. (Copies:1 Available 0)		-	FICTION
Cam Jansen and the mystery of the Arcus clown /	Place the Mouse pointer over the "Green	-	FICTION
1 361 Adler, David A. (Copies:1 Available:0)	Sticknin" object on the computer concer and		
Cam Jansen and the mystery of the Babe Ruth baseb 1362 Adler, David A. (Copies:1 Available:0)	Prickhill, onlect on the combatel, screen and	•	FICTION
Cam Jansen and the mystery of the dinosaur ones/	click the right mouse button once to display	-	FICTION
Adler, David A. (Copies:1 Available:0)		_	FICTION
1364 Adler, David A. (Copies:1 Available:0)	giudai lagging. Select the Tag all IN Set optio	n. –	
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Figure 4, Search/Edit – Search Catalog Screen with Tagging open

Once you have selected "Tag all in set" the process of tagging starts. This may take a few moments depending on the number of items to be tagged and the transmission speed to the hosting server.

G3 Library Automation System (Build 1.10.2) : DEMO - [Search Catalog]		_ 8
ile <u>A</u> ction <u>H</u> elp		
Collection: MAIN COLLECTION Show Tagged Records Only		
Find for CALL NO		Search
Sort by CALLNO CALLNO		
Solution in the second sec		
Control#/ Litle/Author Thunder ice /	Call No FIC ACH	Category FICTION
(2003 Acheson, Alison, (Copies:1 Available:0)		FICTION
1474 Acierno, Maria Armengol, (Copies:1 Available:1)		
7357 Ackerman, Karen, (Copies:1 Available:0)	FIC ACK	FICTION
My name is Maria Isabel / 7295 Ada Alma Flor (Copies: 1 Available: 0.) "Taoging in Progress"	FIC ADA	FICTION
The restaurant at the end of the universe /	FIC ADA	FICTION
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Cam Jansen and the Triceratops Pops mystery / 1359 Adler, David A. (Copies:1 Available:0)	FIC ADL	FICTION
Cam Jansen and the mystery of the circus clown / 1361 Adler, David A. (Copies:1 Available:0)	FIC ADL	FICTION
Cam Jansen and the mystery of the Babe Ruth baseball / 1362 Adler, David A. (Copies:1 Available:0)	FIC ADL	FICTION
Cam Jansen and the mystery of the dinosaur bones / 1363 Adler, David A. (Copies:1 Available:0)	FIC ADL	FICTION
Cam Jansen and the mystery of the gold coins / 1364 Adler, David A. (Copies:1 Available:0)	FIC ADL	FICTION
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G3 Library Automation System (Build 1.10.2) : DEMO - [Search Catalog]		
<u>File Action H</u> elp		
Collection: MAIN COLLECTION Show Tagged Records Only		
Find for CALL NO		<u>S</u> earch
Sort by CALLNO CALLNO		
n 🔊 📶 🔝 Total records in result set is 2929. Displaying page 1 of 267		
Control# Title/Author	Call No	Category
7863 Acheson, Alison, (Copies:1 Available:0)	FIC ACH	FICTION
Children of flight Pedro Pan /	FIC ACI	FICTION
14/4 Acterno, Maria Armengol, (Copies:1 Available:0)		FIGTION
7357 Ackerman, Karen, (Copies:1 Available:0)		FICTION
My name is Maria Isabel /	FIC ADA	FICTION
Ada, Aima Fior. (Copies:1 Available:0)		FICTION
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Cam Jansen and the chocolate fudge mystery /	FIC ADL	FICTION
Sam Jansen and the Tricorations Pons mystery (FICTION
1359 Adler, Bavid A. (Copies:1 Available:0)		
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Cam Jansen and the mystery of the Babe Ruth baseball /	FIC ADL	FICTION
1362 Adler, David A. (Copies:1 Available:0)		
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Figure 6, All Items tagged





Figure 7, Catalog Menu Advanced selection

Mass update is used for many purposes, be cautious and double-check your selections and criteria prior to processing any Start command.

When entering the Mass update menu, G3 may act or appear to be sluggish. This is normal depending upon the network speed and the power of your computer workstation. G3 is loading a number of different processes or choices for you when the Mass update menu is chosen.

The management of this screen is similar to the other G3 selection methods; Selection boxes with drop down arrows contain a list of choices. Set your descriptions using the next page as a guide.

G3 Library Automation System (Build 1	1.10.2) : DEMO - [Collection Mass Update]	_ 8 ×
I want to Change Copy Status	us D	
Selection Criteria		
Collection Main Collection	← Tagged Only ⊂ Only Items NOT tagged ⊂ All Items	
Copy Status Equals		
Change Copy Status		
New Status:		
Status		
	Change Copy Status from "A" to "M" for only Tagged records in	
	the Collection you are inventorying. After you have set the	
	criteria, go up to the Process menu to start the process.	
🎉 Start 🛛 🧭 🌲 🗍 🚞 taylor isd	06/27/2001 1 😓 Eudora 🛛 💭 ACT! 🔄 My Documents 🛛 🗐 G3 Inventory Ste 🛛 🎯 G3 Library Au 🖓 🔀 C	2:49 PM
<u>Figure 8, Mass Update – Change</u>	<u>ge Copy Status</u>	
G3 Library Automation System (Build 1	1.10.2) : DEMO - [Collection Mass Update]	
I want to Change Copy Status		
Collection Main Collection		
Copy Status 💌 Equals		
Change Copy Status	Confirm	
New Status: M	This action will affect 2876 records.	
	Are you sure you wish to continue?	
Status		
	when Mass update is started, update is the tagged age	arting ord
	count. Recheck the selection criteria for accuracy and select Ves to	henin
	07/01/2001 [8	35 PM
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Using Mass Update for changing Copy Status codes for Tagged records:

Figure 9, Mass Update – Change Copy Status to "M" – Confirmation of change

G3G3 Library Automation System [Build 1.10.2] : DEMO - [Collection Mass Update] Elle _Brocess _Help	
I want to Change Copy Status	
Selection Criteria	
Conjection Main Collection Tagged Only C Only Items NOT tagged C All Items	
Change Copy Status]
as it changes them to a	
Status Status	
Changed copy status for #937 : Anne's house of Changed copy status for #957 : Are you there God? It's me, Margaret /	
Changed copy status for #959 : The Arkadians / Changed copy status for #963 : Abound the world in eighty days / Changed copy status for #967 : Arthur for the very first time /	
Changed copy status for #996 : As long as there are mountains / Changed copy status for #998 : A-ta-ga-hi's gift /	
Changed copy status for #1005 : Attaboy, SamI / Changed copy status for #1013 : Away to me, Moss / Changed copy status for #1014 : Away to me, Moss /	
Changed copy status for #1014 : Wake and direating/ Changed copy status for #1018 : "B" is for Betsy / Changed copy status for #1022 : Babe the gallant pig /	
Changed copy status for #1031 : Baby animal zoo'/ Changed copy status for #1033 : The baby grand, the moon in July, & me/	-
	07/01/2001 5:23 PM
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Figure 10, Mass Update – Change Copy Status – In Process

Once the process of changing Available "A" to "M" Missing is completed for a section of your collection or for the entire collection, you are ready to begin scanning these items.

Re-indexing Note: At times slower networks will cause G3 to appear to have failed during the re-indexing phase of finishing this process. This usually happens when the Rabbit does not stop running after G3 displays the Re-indexing statement. Test this by using the Ctrl-Alt-Del keys; press all three keys simultaneously (one time). Windows will display an Action Box; look for the G3 Library Automation System, if you see the statement "Not Responding" highlight this description and click on End Task and Restart G3. Check these records for completion, do a search by Tagged records or Call Number range for the records that were being changed. Test your first and last item by viewing the "Holdings" through "Edit Holdings" of these records, look for the Status code "M". Additionally, G3 will show the "Available" status in the <u>Search Catalog</u> screen of any records marked "Missing" to be "D" (zero).

Proceed to Copy Status Scan/Inventory Import, page 16 or read on for using Mass Update: Copy Status Change by Section using Call Number Ranges

Mass Update: Copy Status Change by Section using Call Number Ranges

I want to Change Copy Status Selection Criteria Collection Main Collection Is > or Equal FIC ACH Is < or Equal FIC ACH CallNo Is < or Equal Is < or Equal FIC ACH CallNo Is < or Equal FIC ZIR AND Copy Status Equals New Status: M Status Selecting a range by Call Number only requires you to know the first Call Number and the last Call Number of the range you are changing.	G3 Library Automation System (Build 1.10.2) File Process Help	; DEMO - [Collection Mass Update]	<u>_8×</u>
Selection Criteria Collection Main Collection Is > or Equal Fic ACH CallNo Is < or Equal	I want to Change Copy Status	×	
CallNo Is > or Equal FIC ACH CallNo Is < or Equal	Selection Criteria Collection Main Collection	 Tagged Only Only Items NOT tagged All Items 	
Change Copy Status New Status: Mex Status: Status	CallNo Is > or Equal CallNo Equal Copy Status	FIC ACH FIC ZIR A	
Status Selecting a range by Call Number only requires you to know the first Call Number and the last Call Number of the range you are changing.	Change Copy Status		
,	Status	Selecting a range by Call Number only requires you to kn the first Call Number and the last Call Number of the ran you are changing.	ow
06/26/2001 1:38 PM Start Constant Cons	Start 2 2 2 Start	06/26/2001 1:38 P	м 2 1:38 РМ

Changing Copy Status codes this way for inventorying by section using Call Number Ranges is often used when a library is not to be shut down for Inventory.

File Process Help	
I want to Change Copy Status	
Selection Criteria	
Collection Main Collection Tagged Only C Only Items NOT tagged @ All Items	
CallNo Is > or Equal FIC ACH AND CallNo Is < or Equal	
Change Copy Status Confirm	
New Status: M This action will affect 2878 records. Are you sure you wish to continue?	
<u>Yes</u>	
Status	
wnen mass update is started, אין אין און ask for confirmation, before starting any process, solget Vas to begin	
starting any process, select <u>r</u> es to begin.	
06/26/2001 1:36 PM 😭 Start 💋 🍘 🗊 📀 Eudora 🎯 G3 Library Automat 🗐 G3 Inventory Step 🎯 G3 Library Automat 🖽 🛃 1:36 P	м

Figure 12, Mass Update – Change Copy Status – By Call Number Range

G3 Library Automation System (Build 1.10.2): DEMO - [Collection Mass Update] File Process Help I want to Change Copy Status Selection Criteria Collection Main Collection I is > or Equal Fic AcH AND CallNo Is < or Equal Fic AcH AND CallNo Copy Status G3 will scroll the changing records as it changes them to a Status of "M" for inventory.	_ = >
Status Changed copy status for #1137 : Benny uncovers a mystery / Changed copy status for #1138 : Ben's dream / Changed copy status for #1139 : The Berenstain bears in the freaky funhouse / Changed copy status for #1140 : The Berenstain bears and the showdown at Chainsaw Gap / Changed copy status for #1151 : The Berenstain bears' media madness /	*
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Figure 12, Mass Update – Change Copy Status – By Call Number Range

Once the process of changing Available "A" inventory to Missing "M" is complete for any Call Number range or for the entire collection, you are ready to begin Inventory scanning for these items.

Re-indexing Note: At times slower networks/Internet will cause G3 to appear to have failed during the reindexing phase of finishing this process. This usually happens (Older G3 program when the Rabbit does not stop running) after G3 displays the Re-indexing statement. Test this by using the Ctrl-Alt-Del keys; press all three keys simultaneously (one time). Windows will display an Action Box; look for the G3 Library Automation System, if you see the statement "Not Responding" highlight this description and click on End Task and Restart G3. Check these records for completion, do a search by Tagged records or Call Number range for the records that were being changed. Test your first and last item by viewing the "Holdings" through "Edit Holdings" of these records, look for the Status code "M". Additionally, G3 will show the "Available" status in the <u>Search Catalog</u> screen of any records marked "Missing" to be "D" (zero).

Proceed to Copy Status Scan/Inventory Import, page 16 or read on for Using Mass Update to Change Copy Status for ALL Items in a Collection

Using Mass Update to Change Copy Status for ALL Items in a Collection

C3 Library Automation System (Build 1.10.2) : DEMO	
Exit Logon Help	
Catalog Menu	<u> </u>
-	
Basic Functions	Advanced
Search/Edit Catalog	Manage Collections
Conv Status Scan/Inventory Import	Section Call Number Categories
or copy status scanniventory import	Sesign MARC Templates
Labels and Cards	Define Catalog Indexes
Collection Labels	Mass Update
W Dummy Labels	Maintain Authority Tables
Shelf List Cards	≪ Maintain Holding Codes
Reports	
Run Material Listings Report	
Bun Custom Reports	
🔶 Main Menu	
© Copyright 1998-2001 D3 Innovations LLC Unauthorized reproduction or distribution is prohibited.	
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Figure 13, Mass Update – Change Copy Status



Figure 14, Mass Update – Change Copy Status – By Status Code Range for All Items

G3 Library Automation System (Build 1.10.2) : DEM() - [Collection Mass Update]					_ 8 ×
<u>File Process Help</u>						
I want to Change Copy Status						
Change Copy Status						
Selection Criteria						
Collection Main Collection	Tagged Only Only I	tems NOT tagged 🛛 🧟 A	II Items			
	, , , ,					
Copy Status 💌 Equals 💌 A						
Y Y		v				
_		-				
, , , ,						
Change Copy Status						
	63 will scr	oll the collection				
New Status: M			_			
	records as it	changes them to	a			
	Ctatus n	"M" from the				
Status	Stat	us of "A".				
Changed copy status for #29 : Egypt.						
Changed copy status for #30 : England.	L					
Changed copy status for #31. Ethopia.						
Changed copy status for #33 : Guatemala						
Changed copy status for #34 : Lebanon.						
Changed copy status for #35 : Pakistap						
Changed copy status for #36 : Poland.	<u>^</u>					
Changed copy status for #37 . Ptento Rice Changed copy status for #38 : Spain	0.					
Changed copy status for #39 : Sweden.						
Changed copy status for #40 : Tibet.						- 11
Changed copy status for #41 : United Stat	tes.					
Changed copy status for #42 : Gettysburg	1					•
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			are clorely Automation System		11-0-0-122 EV	0.401.01

Changing an entire collection from Available "A" to "M" Missing is simple and fast.

Figure 15, Mass Update – Change Copy Status – By All Items

Once the process of changing Available "A" inventory to Missing "M" has been completed for a section of your collection or for the entire collection, you are ready to begin Inventory scanning those items just changed.

Re-indexing Note: At times slower networks will cause G3 to appear to have failed during the re-indexing phase of finishing this process. This usually happens when the Rabbit does not stop running after G3 displays the Re-indexing statement. Test this by using the Ctrl-Alt-Del keys; press all three keys simultaneously (one time). Windows will display an Action Box; look for the G3 Library Automation System, if you see the statement "Not Responding" highlight this description and click on End Task and Restart G3. Check these records for completion, do a search by Tagged records or Call Number range for the records that were being changed. Test your first and last item by viewing the "Holdings" through "Edit Holdings" of these records, look for the Status code "M". Additionally, G3 will show the "Available" status in the <u>Search Catalog</u> screen of any records marked "Missing" to be "D" (zero).

<u>63 Inventory</u> Copy Status Scan/Inventory Import

Once the identifying of the items to be inventoried is complete and these have been changed to "M" for Missing, we can begin the process of scanning the bar code labels of each item. First an explanation of Inventory principles.

G3 principles behind how Inventory is simple:

- ✓ After "Globally" changing "A" (Available) inventory items for inventory purposes to "M" (Missing)
- Inventory is ready for scanning of these inventory items. Barcode labels can be scanned into G3 "Directly" or can be "Remotely" scanned and stored using a suitable portable barcodescanning device. G3 will compare the incoming scanned barcode and locate and match this identical bar code changing the item from "M" Missing back to "A" Available.
- ✓ When using a portable device and storing scanned barcode data, always review this file before processing this data into G3's inventory module. Reason: Experience has shown us that often BC labels on book materials are often located near the ISBN barcode label on book jackets and these are also scanned, poor label quality will provide truncated improper scans. Upload these stored files into WordPad or Notepad for review and then processing this file into G3. Save these files on your local C Hard Drive until you have completed inventory, name these files for the section of inventory they represent (DDD-1DD.txt)
- ✓ When G3 processes a bar code number and finds the bar code match in inventory was not changed to "M" it reports this discrepancy on screen during the data uploading process. This information can be viewed thru or printed from the various Inventory .log files. This kind of discrepancy usually indicates this collection item to be out of place, and should be located, moved to its proper location to avoid inventory errors. Reviewing log file information is very helpful in finding lost or misplaced collection items. G3 will display the Call Numbers of inventoried items in the log file, discrepancies are easily found by Call Number and immediate cleanup can occur quickly. Always SAVE your log files to your local C: Hard drive for reference until inventory is complete
- When G3 processes a bar code number and it cannot match the number with anything in your inventory it will report this discrepancy on screen. Reviewing this log file will once again help you locate items mistakenly placed in the library that never were cataloged or was once removed from the collection but not removed.
- ✓ When inventory is complete "Run" Materials listing reports to list all remaining items with status of "M", these items are truly missing.

G3 provides for three methods for entering bar code numbers into its program.

Bar code numbers can be manually entered or scanned into G3.

1. Using a "Stationary" bar code reader, Scan in items or manually type-in the item bar code numbers one by one directly into G3 inventory module.

- Using a LRMS suitable Portable Hand-held" Bar code reader, Transmit stored scanned items/data one by one directly into the G3 inventory module from the portable device (Only for locally hosted G3 systems not for online systems).
- 3. Transmit stored scanned items/data files from the portable after these files have been viewed and saved as a text file (saved) from your local Hard Drive through the G3 inventory module "Process File" feature.
 - a. Saved files should be stored as a WordPad for large text files or Note Pad for smaller documented text files. (Example FIC.txt or JFIC.txt or 000-100.txt)

Adding "Scanned Records" to G3

Older American Micro systems Portable Readers Only:

Note use the scanner software and a Keyboard (wedge) interface to transmit file information from the portable to the G3 program. Consult your Bar code reader instruction manual for this information. (LRMS readers are properly programmed and are provided with a Keyboard wedge interface. M3000 units uses the "XMIT" key to transmit (upload) data and M5000 units uses the "SEND" function to transmit (upload) data to G3.). Other readers may need to be programmed; the key to successful bar code transmission is each barcode must be terminated by a CRLF pair (ASCII 10 and 13) and the interface to the computer must be through a keyboard wedge interface. If your unit was not purchased from LRMS, contact LRMS or visit our web site http://www.lrms.com for more information.

Copy Status Scan/Inventory Import



Figure 16, Copy Status Scan/Inventory Import



Figure 17, Copy Status Scan

Whether you are adding bar code numbers manually one at a time or transmitting a file from the Portable Bar Code Reader or using the Process File option, in each case the procedure starts with the cursor in the same location and the Status Code is set to "A" for Available.

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Figure 18, Copy Status Scan, processing bar code numbers

As bar code numbers are added through this process, a visual log file appears on screen, it is here that you will see the bar code number being matched to its record and changed back to "A" Available in G3. Any discrepancies during this process will also show in this log view. (See the following Figures) At any time or after you have completed adding inventory Bar code numbers, G3 will allow the operator to Save, Print or Clear this log file. Unlike its predecessor, there are no additional files to process for converting inventory back to "A".

📩 G	3 (Build 2.4.87) : SOMERS	ET_JR (User: al) (Server: (loca	l)\tinman) - [Co	ppy Status Scan]	_ 8 ×
File	Log Help Previous Me	nu Main Menu			
	Save Success Log Ve Exceptions Log Print Sucess Log Print Exceptions Log	0 <mark>41100002</mark> sable Auto Check-In Feature	Process	Structured File Import Exceptions: Unknown Barcodes: Misplaced Items: 0	
	Clear Success Log Clear Exceptions Log	Status A	CallNo 665 PIP	Title Oll	
3	Kceptions Log	Status	AaliNo	Title	
	Status Code Legend:			Want to save, print or clear a log file?	
	A=Available ; B=Bindery R =Inter Library Loan ; L=Lc	Repair; D=Destroyed ; H=Hold sst ; M=Missing ; O=Out ; P=Paic	i ; W=Withdrawn		

Figure 19, Copy Status Scan, Log file process



<u>File Log H</u> elp	
A _ 33401000032368	
Barcode Status CallNo Title	
31000032301 A FIC LOW Anastasia again! /	
01000032319 A FIC LOW Anastasia Krupnik/	
31000032368 A FIC LOW Anastasia's chosen career /	
Save Ir: My Documents Company Policies Online Services Urban III OPAC_Ifes Sales Package My Briefcase Training Package My Documents Training Package My Documents Training Package My Webs File game: Save Save as type: Iog Open as gead-only Cancel	
	Give your file a name, FIC2002 no need to add an
	extension G2 will add log
😹 Start 🛛 🧭 😂 🖉 Eudora 🗳 ACT! 🍏 G3 Library Automation Sg	EXTENSION, OD MIN DUU INÀ
Figure 20. Conv. Status Scan. Log file save	

G3 Library	Automation 5	ystem (Build 1.1	0.2] : DEMO - [Copy Status Scan]	_ # ×
A	33401000	032368	Process File	
Barcode	Status	CallNo	Title	
01000032	301 A	FIC LOW	Anastasia again! /	
01000032	319 A	FIC LOW	Anastasia Krupnik /	
	E	ave Log Save jn: My Company Polic Cubar III OPAC My Dictares My Dictures My Webs File game: Fill Save as type: *k	Coursents Image: Constraint of Structure Jies Online Structure Jies Sales Packbare Image: Test log Image: Constraint of Structure C Save Cg Cancel Open as jead only Cancel	
			Add your file to a Folder on your local or c: hard Drive hard drive or local floppy drive.	J
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Figure 21, Copy Status Scan, Naming the log file

Tip for saving your log files, name them based upon its content for example FIC or FIC2002 for Fiction and year or 000-100. Windows with G3's help will produce a file named FIC.log or 000-100.log on your local computers hard drives "Folder" of choice, for example "My Documents" or a newly created Inventory folder for the year of Inventory.

And a state of the	Previous Menu	Main Menu		
hange A	3909041	100002 e Auto Check-In Featu	Proce	Constructured File Import Exceptions: Unknown Barcodes: Unknown B
arcode		Ctotuo	Collbio	Тио
1001571	39(Print a Log	ile. Before	printing, it is advisable to
		1	'Save" this fi	File first. Fig. 21
eptions Log				

Figure 22, Print your log file

<u>F</u> ile	G3 Library Au Log Help	tomation Syste	em (Build 1.10.	2) : DEMO - [C	opy Status Scar	n]						_ _ _ / / ×
	A	33401000032	368			Process F	ïle					
1	Barcode	Status	CallNo	Title								
	01000032301	A	FIC LOW	Anastasia aga	in!/							
	01000032319	A	FIC LOW	Anastasia Krup	pnik/							
	01000032368	A	FIC LOW	Anastasia's ch	iosen career /							
		Print del	your log f ete the lo	file, G3 as og, so if yr	ks if every	Print Log Ves Yes /thing pr refer ba	≥ he log print OK?) ' Wh nfor	en you answer Y mation Please	ES, G3 wi <u>save</u> it.)))) (540 PM	
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Figure 23, Copy Status Scan, Log file save

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Internet Explorer	ACT! 4.0	R		
_	_	G Cony Status Scan Log		
Network	cuteftp.exe	Barcode - Status - Call No - Title		
Neighborhood	1	$1000060 - A - PB KRU - \dots$ and now Miguel.		
		1000517 - A		
N	7	1005781 - A - 821 PAR - 100 Story Poems		
Recycle Bin	SideACT!	1004862 - A - 509.754 kLO - 100 years of science and technology in lexas : 1005253 - A - 602.373 NFI - 140 high-tech careers :		
	_	1000062 - A - PB KRU and now Miguel.		
		1003136 - A - B GIBN - I always wanted to be somebody.		
	CuteFTP	$1001640 - \lambda - F GLA - 2010$:		
		1004841 - A - 428 LEW - 20 Days to Better Spelling		
	لیکھ	$1003713 - \lambda - REF - 1988-1989$ Texas Almanac and State Industrial Guide		
		$1005770 - \lambda = 818$ SCH = 101 family jokes :		
Progress	AntiVirus 200	1003888 - A - REF - 1400 Days The Civil War Day by Day		
	_	1002000 - A - F POE - 18 best stories /	-1	
얻고	믵	1008724 - A - 823'.0872 CAN - 50 great ghost stories	*	
Microsoft	Mitinet	1008348 - A - PB FIC SCI - 2095	•	
Outlook		1009173 - A - E BUL - 20,000 Baseball Cards Under the Sea /	<u> </u>	
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Figure 24, Lopy Status Scan, Viewing Log files for errors

Items that remain "M" are considered missing, other listed items containing discrepancy statements from inventoried collections will need to be investigated and or corrected. That's it you are ready to Begin or you just finished this section. ©

Reporting on Inventory

Choose from Classic Reports Run Material Listings Report

<mark>ナ G3 (Build 2:4-87) : SOMERSET_JR (User: al) (Server: (local)\tinman)</mark> Exit Logon Help Previous Menu Main Menu [This Product is Registered To: Som	erset JH] [WebOPAC Visitors to date: 42]	
Reports Menu	×	
 NEW! Active Query Tabular Report Designer Tabular Report Runner 		
 Material Report Writer Due Date Report Overdue/Fines Listings Overdue/Fines Notices 		
 Account Statements Faculty Holdings Report 2006 Overdue/Fines/Payments Listings Daily Payment Summary 		
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© Copyright 1998-2007 Library Resource Management Systems Inc. & SQLBEACH http://www.Irms.com & http://www.SQLBeach.com Unauthorized reproduction or distribution is prohibited.		
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igure 25, L'atalog Menu, Kun Material Listings Keport		
63 Library Automation System (Build 1.10.2) : DEMO - [Material Listings] File Help	_ [\$] ×	
Template: Material Listing Report		
Tags 245a TITLE STATEMENT (NR) - Title (NR) 245b TITLE STATEMENT (NR) - Remainder of title (NR) 100a MAIN ENTRYPERSONAL NAME (NR) - Personal name (NR) 852h LOCATION/CALL NUMEER (R) - Classification part (NR)	Add Remove	
Selection Criteria		
Copy Status Equals M		
Collection Main Collection	Set up your report the same as this example to find any Inve a Status code of "M".	entory Items w
Options	Set the Selection Criteria to	
Print Holdings Information Print each item on new page	<u>Lopy Status</u> - <u>Equals</u> - <u>M</u> , set what <u>Lollection</u> is being repor	ted,
☐ Tag Printed Items	set Options to Print Holdinos Information and	
	set Show Tag Descriptions and set Tag Printed Items if you	u want to tag
	results (if tagging is used; remember tagging is a com	imon file of 1
	collections so be sure tagged records have been cleared).	
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Run a Materials listing Report by Call Number Range for Missing Items

G3 Library Automation System (Build 1.10.2) : TRENTONHS - [Material Listin	lgs] _ [Ø] ×
<u>File H</u> elp	
Template: Missing Inventory Items	
Tags	
852h LOCATION/CALL NUMBER (R) - Classification part (NR) 245a TITLE STATEMENT (NR) - Title (NR) 100a MAIN ENTRYPERSONAL NAME (NR) - Personal name (NR)	<u>A</u> dd <u>R</u> emove
Selection Criteria	
CallNo	
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	Set up your report the same as this example to find any Inventory
Collection Main Collection	Items with a Status code of "M". Set the Selection Criteria first line to
Order	<u> Call No – Is> or Equals – REF – AND set the second line to</u>
	Call No – Is< or Equals – <mark>REF</mark> – AND set the third line to
Options	Copy Status – Equals – M
Print Holdings Information	and set what Collection is being reported.
Print each item on new page Tag Printed Items	set Arder to Call No. – Author
	act <u>or der</u> to <u>our no</u> . <u>Author</u> , ant Ontions to Onist Valdings Information and ant Cham Tag
	set <u>uptions</u> to <u>print Holoings information</u> and set Snow Tag
	Descriptions and set Lag Printed Items if you want to tag the results (if
	tagging is used; remember tagging is a common file of ALL collections
	so be sure tagged records have been cleared).
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Figure 27, Catalog Menu, Run Material Listings Report by Call No. Range

Preview or print the results of this report. When you have determined the validity of the listed items to be "Missing", it would be advisable to rerun this report to tag the missing items for the purpose of transferring these items to a Missing or Lost Book Collection.

Transferring missing or lost items as reported will allow you to preserve the items information, its MARC record and circulation history. Should a Missing item be found, simply re-tag that item, change its Status Code from "M or L" to "A" Available and transfer it back to its proper collection.

Transferring these items out of its Collection will allow for clearing them from active viewing and accidental circulation.

Before running of this report for tagging records be sure that your tagged records file is empty or this file contains previously tagged records for the same reason.

Report Sample

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		LR	MS				
		Material	Listings				
245a	TITLE STATEMENT (NR)	Art	hur and the	scare-y	your-pants-	off club /	
100a I	MAINENTRYPERSONAL NAME (NR) Bro	wn, Marc Tol	Lon.			
Perso 852h L Classi	nai name (NR) .OCATION/CALL NUMBER (R) ification part (NR)	FIC	BRO				
9990				м	10.00	07/03/2001	
0	APL	ALA	СВ		APL		
245a Title (100a Berge	FITLE STATEMENT (NR) NR) MAIN ENTRYPERSONAL NAME (1 Wal Dama (ND)	20, NR) Ver:	DOO leagues ne, Jules,	under t	the sea /		
852h L Classi	OCATION/CALL NUMBER (R) fication part (NR)	FIC	VER				
				 M		07/25/2000	
0	LHL	PB	СВ		LISD	0112012000	
245a	TITLE STATEMENT (NR)	101	ways to bug	your p	oarents /		
100a I Borco	MAINENTRYPERSONAL NAME (1	NR) War	dlaw, Lee.				
852h L Class	OCATION/CALL NUMBER (R) fication part (NR)	FIC	WAR				
3340	1000099003			 М	10.00	07/25/2000	
0	LHL	PB	СВ		LISD		
3340	1000099906			м	0.00	06/27/2001	
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Figure 28, Catalog Menu, Run Material Listings Report -Preview



Contact Information:

Customer Sales **877-700-5767**

Customer Fax 928-203-4747

www.lrms.com

Dedicated to the Memory of Todd A. Szerlong and C. Frank Hicks III