## Inventory by Call Number Range

- ✓ Inventory Steps for section scanning
- ✓ Use this process if you want to organize your library Collection as you Inventory.

- ✓ What to use to accomplish inventory?
  - ○ Use a Laptop computer or Tablet with a wireless connection and an attached or wireless scanner.
  - ○ Set up your laptop and Bar code scanner on cart to begin scanning inventory, if wireless is not available perhaps the use of a 50ft. network cable.
  - ○ Use a portable hand held data collector Bar code scanning device get it setup and connected to your Administrative or Circulation workstation (be sure to test the device before actually starting your inventory).

## How Inventory works

G3 requires a Status Code change to an "M" Status of "All" available Items that will be inventoried. This change will only affect those items in collection that currently have a Status Code of "A" which represents those items to be available within your collection. Items that are currently in circulation with a Status code of the letter "O" for Out, these items will not be affected by performing an inventory. However, if an Item having the Status of "O" be returned to the library shelf without being Checked-in and it is scanned, depending on whether the Auto Check-in feature is Enabled (this is the Default setting) the will be checked in and will be added to the Success list.

## Inventory like this requires a few preparation steps.

1. Recommend doing inventory this way.
2. Start with opening the Catalog Search Menu.
   a. Plan to do inventory by sections (IE. 000-099 or 100-199 or Fiction, etc)
   b. Pre-pick your section to tag by using the Catalog Search as shown below.
   c. As shown enter 1** in the search field and you will pull up all of the 100's.
3. Once your items display proceed to Tag these items by Right clicking on the "Green Stick pin" locate next to the ? Question Mark Symbol and selecting "Tag all in set" as shown below.

Tag books a section at a time

Verify the number of Items Tagged, in this example it is 70



**IMPORTANT - BE SURE TO UNTAG EACH SET BEFORE TAGGING ANOTHER SET!**

## Changing the Copy Status from "A" to "M"

- ✓ Use "Mass Update" from the Catalog Menu to change the copy status.
- ✓ Select Change Copy Status
- ✓ Select your Collection Select – <span style="color:red">for by Section</span>
  - o Bullet "**Tagged Only**" then 1st. column Pick - Copy Status, then 2nd. Column Pick – **Equals** and 3rd. column add the Status code – **A** set and
  - o "New Status" to – **M**
- ✓ Note: If you want to inventory your <u>entire collection</u> and <u>not by sections</u> it <u>will not be necessary to tag records</u>.
  - o Bullet "**All Items**", then 1st. column Pick - Copy Status, then 2nd. Column Pick – **Equals** and 3rd. column add the Status code – **A** , set and
  - o "New Status" to – **M**



**This is an Administrative Function:**
When attempting any Global Change as an administrator it is important to set- up this function correctly when doing inventory, **be sure to always indicate that you are changing only the Copy Status of A** to avoid changing all of your status codes to the New Status setting.
Know your Tag Count of what you are changing to avoid changing more then what is intended to be changed. **(Reference to 70 records)**

**This changes only the "A" Available books, not the ones checked out or having a different Status Code.**

Status Codes are found within the Holdings of every MARC Record, it is this code that is altered from A to M for inventory purposes using the Mass Update option and then changed back to A through the inputting of the scanned bar code number during inventory.

**If you have multiple collections "Only" work in one collection, plan to do each separately if you are doing a precise Inventory!**

If you are doing a quick Inventory and not by Call Number sections you will change all **A** Status Codes of library items to the New Status of **M**

## Begin Inventory:

**Be sure your Cursor is placed within the bar code field to when starting the Inventory process.**

**Scan the books making sure they show up in the top Success Log section.**

If they show up in the bottom half "Exception Log", read the message and either set them aside because they are "UNKOWN" or put them in the right place on the shelf. Scan these again just to make sure there was not a bad scan as some could re-scan okay the second time. It is not unusual to find a few library items in the wrong place, example 808 in the fiction. You can see in the "Status column" where it changes to "A" in the top and bottom sections so even if they were out of order, it changed their status.



Cursor is automatically placed into this field to allow inputting your Bar code Numbers. When a bar code number is scanned or entered it will quickly disappear to allow the next item to be scanned. Scanned items will appear in the Success log or Exceptions log areas. All items scanned receive a Sequnce Number which is in the order of item entry into inventory. This has been done to assist in locating trouble items within the Exception log. Processed, Exceptions and Unknow items are color coded as an added aide.

## When you have finished inventorying a section:

## Exceptions List

To review the exceptions list, select the "Log menu option" this allows for the printing of the exceptions log or to save it as a file for reviewing and locating any listed items.



Click the Log menu to Save, Print or Clear the Log information.

**Analyze your Exceptions log**

Possible reasons for an inventory exception are:

1. Unknown Barcode
    1. The book item scanned had never been entered into inventory
    2. or had been deleted in the past
    3. Bad Barcode label, Torn or smudged
    4. Bad initial scan
    5. ISBN number was scanned in error
2. Item already Processed or Misplaced, usually is displayed having a "A" Status Code
    1. True this item could have been scanned earlier and has been re-scanned, however if you know that this is a brand new scan and this warning appears in the Exceptions.
        1. Consider having someone look this item up by Barcode Number and by Title to review the accuracy of what was cataloged. It is always possible that the book has the wrong label displaying the wrong barcode number of an item scanned earlier.
        2. Viewing by Title and reviewing the items barcode number may show a different Barcode number assigned and the label on that item requires changing.
        3. There is always an outside chance an item was labeled with a barcode number that was used on another item but the item in question was missed and was not entered into the system, making the Title look-up impossible to find but the barcode number finds another library item Title.
3. Item Misplaced (Part of Item 2)
    1. Usually Means the Item scanned has a Status Code other than "M" and is not within the Call Number range that was initially changed for inventory.
    2. Status code is other than "A" and will be displayed in the Exceptions; items like this should be taken back to cataloging and researched to determine whether the item should be placed back into inventory with the proper Status code. Also, if this item was considered Lost and a Borrower was charged for the lost item, determine if a refund is valid.
        1. Other Status Codes that can appear are:
            1. B – Bindery
            2. D – Destroyed
            3. H – Hold
            4. I – Interlibrary Loan
            5. L – Lost
            6. P – Paid
            7. W - Weeded

**How to Create a Missing Items Report (Begin with no Items Tagged for this report)**

When inventoried items appear in the Exceptions during inventory you can search for items that still have an **M** Status Code

**Using the Catalog Menu – Search/Edit Catalog to View Missing Items**

Create a search to see what is still "Missing" from the section just inventoried by use of the Catalog Menu.

**Search/Edit Catalog**

- Select your collection and set the "Find for" to "Status Code"

- Next choose "Is Exactly" and place the letter **M** in the information field to show only the remaining Missing items from the section just inventoried.

- Tag these results and run a report and look for missing books to get your collection cleaned up.
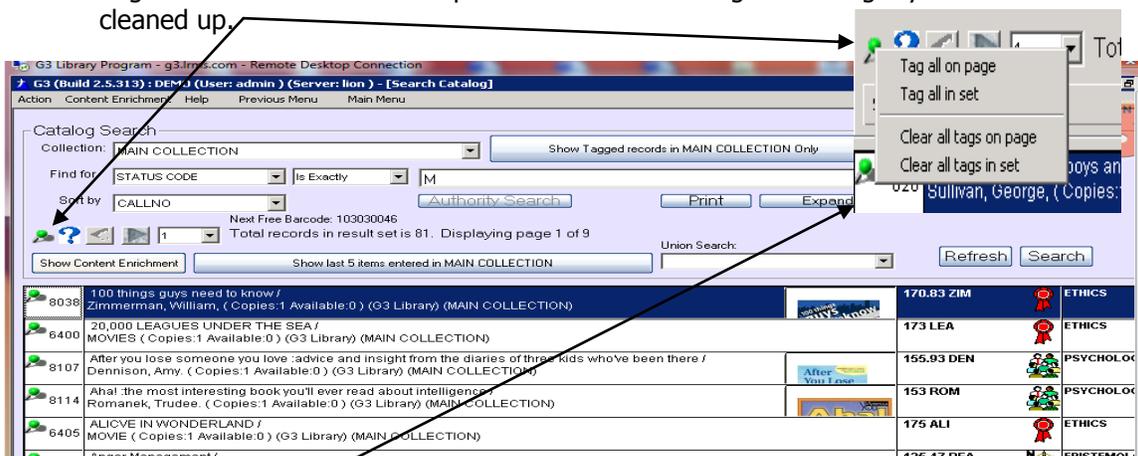
How to Tag:

To Tag all the missing shown; begin by using the Green Stick pin and right clicking the Pin to tag these items, select "Tag all in set" once tagged can be reported by using the Classic Reports – Material Report Writer.

## Create a Missing report:

Go to Reports, select Classic reports, then select Material Report Writer, and select the Template that displays the Missing Inventory Items using the Copy Status code of "M" to form this report.



If you have run the Classic Report - Materials Report Writer; setup this report as shown; adjust settings based upon what collection is has been or is being inventoried.

You can Preview this report through the File menu by selecting "Preview".

If you do not have this report "Template" it can be downloaded and imported into the Material Report Writer, see http://lrms.com/g3support

Print this report and look for the listed missing items, when any Missing items are located change its status to "A" by scanning it through the inventory process or just change the Holding Status code to "A".

Consider deleting any missing items or transfer these items to a Missing Collection Clean up your collection (consider re-running a Missing Report again after any adjustments and before any deletions) and get your stats, so you can create a report to show collection loss or perhaps justify buying new books.