



# G3 Inventory Guide

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-at-a-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)

### Steps

1. **Globally change the Status code "A Only"** of the library collection records to be inventoried to "M" (Missing) for **all** collection items to be inventoried, this can be a global change to an entire **Single** collection or globally done by **Selected** 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: 000-299 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.

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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.

Starting G3 Inventory -- Figure 1. Main G3 Menu

The screenshot shows the main menu of the G3 Professional Archive Management System. The menu is organized into several sections:

- Navigation Buttons:** Circulation, Labels & Cards, Catalog Management (highlighted with a callout), Reports, Borrower Management, and Advanced & Online Settings.
- Support Sections:** TECHNICAL SUPPORT and TRAINING SUPPORT, each with a "Call me!" button.
- Footer:** GoToMeeting™, Join a Meeting, Help, G3 Training Guides, and LRMIS Products and Pricing Guide.

A callout box with a black border and white background points to the "Catalog Management" button. The text inside the callout box reads: "Select the Catalog Management button from the G3 Main Menu".

### *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 than 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.

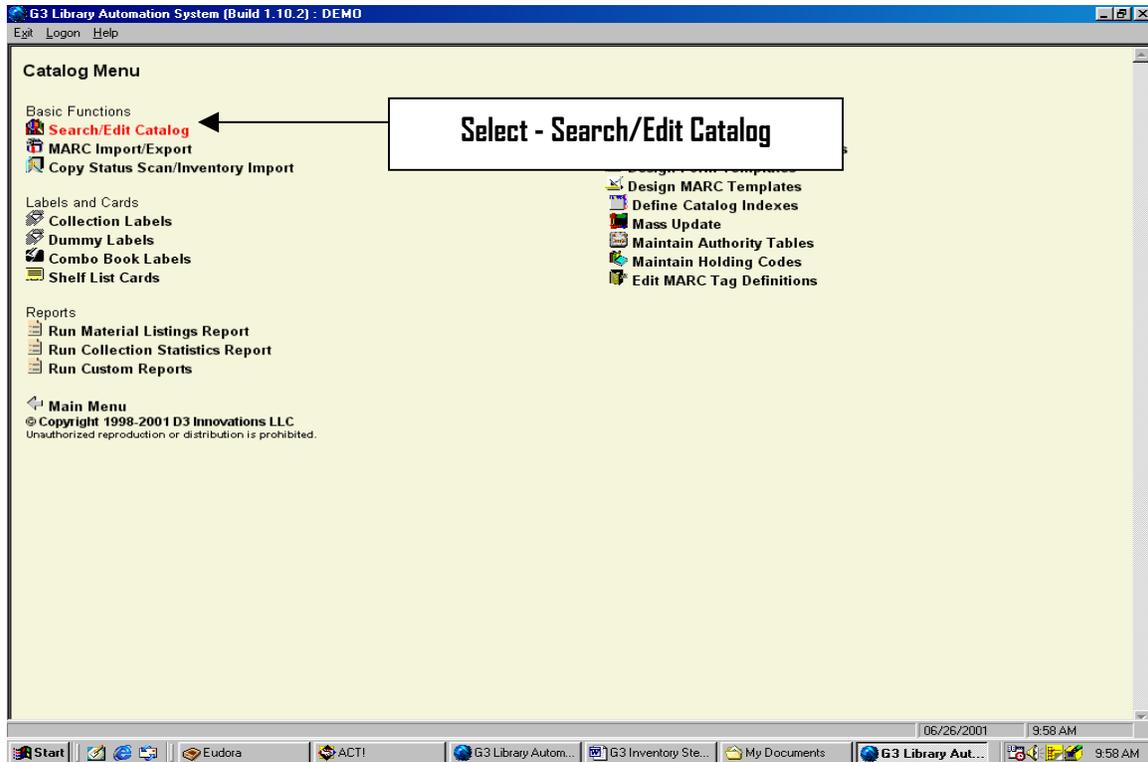


Figure 2. Catalog Menu Main Screen

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.
2. 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.

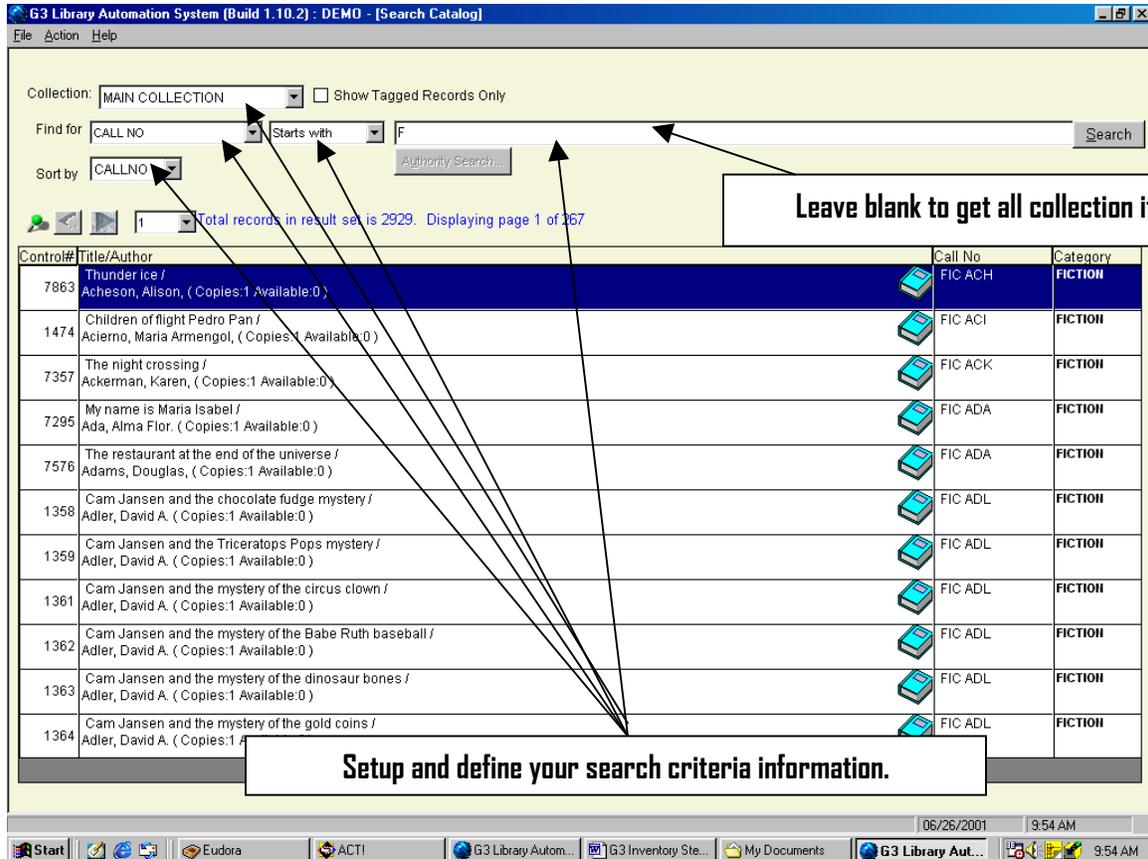


Figure 3. Search/Edit – Search Catalog Screen

**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).

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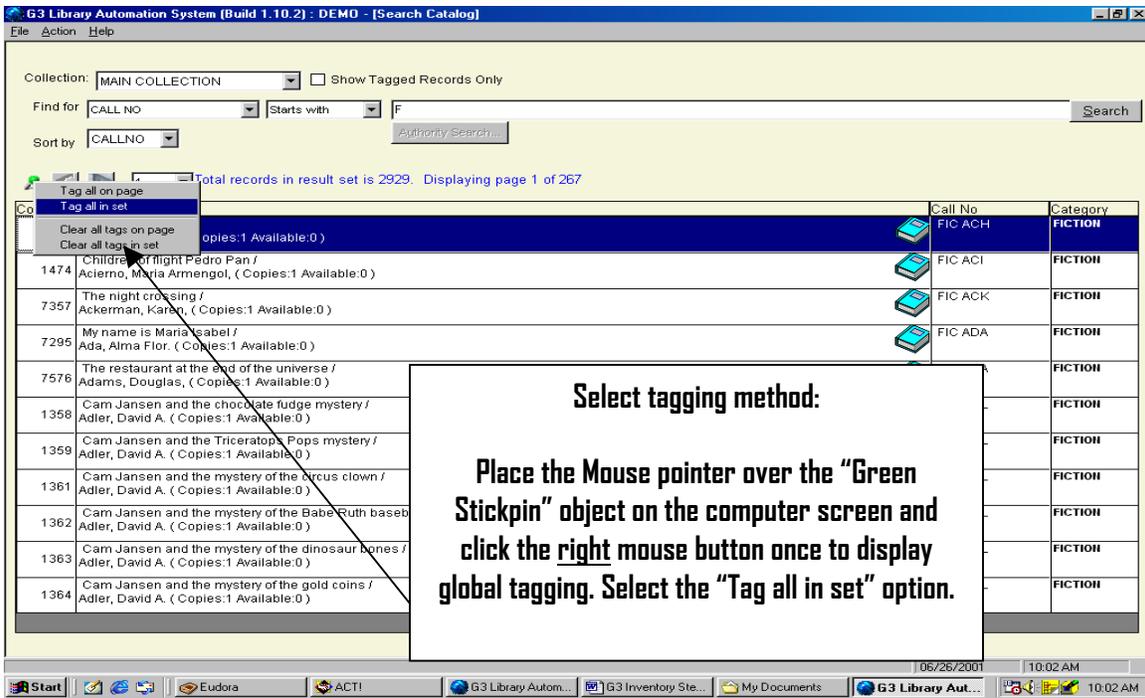


Figure 4, Search/Edit – Search Catalog Screen with Tagging open

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.

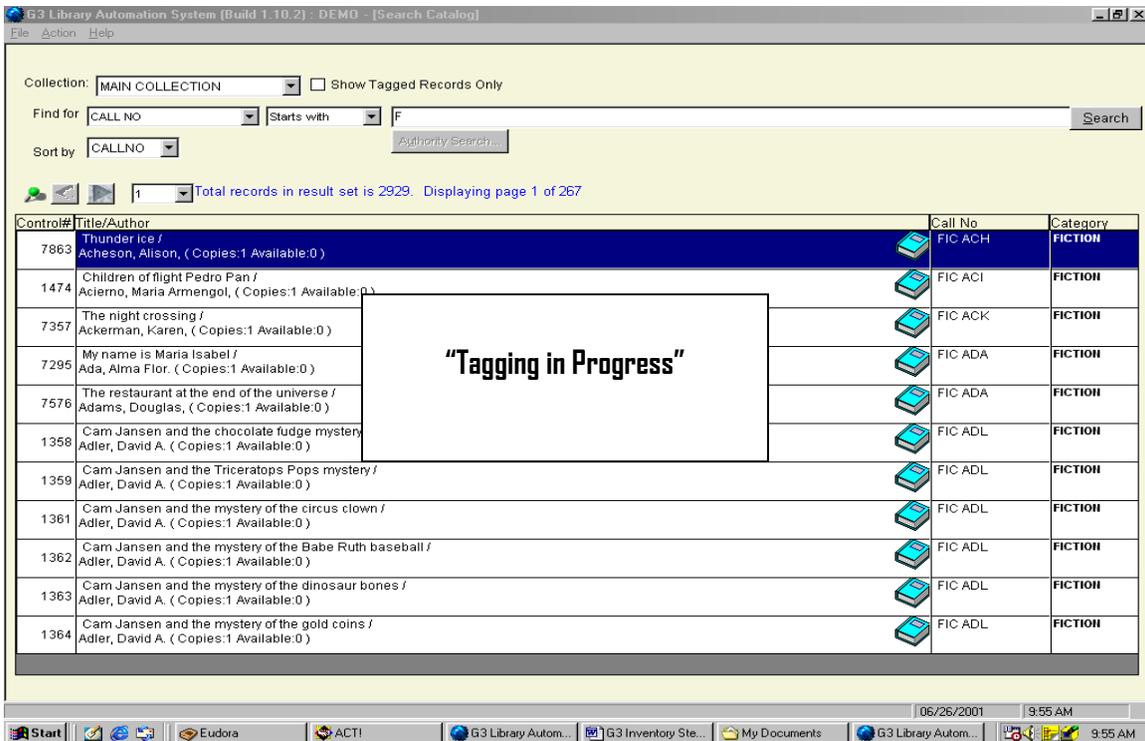


Figure 5, Tagging in progress

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G3 Library Automation System (Build 1.10.2) : DEMO - [Search Catalog]

File Action Help

Collection: MAIN COLLECTION  Show Tagged Records Only

Find for: CALL NO Starts with F Search

Sort by: CALLNO Authority Search...

1 Total records in result set is 2929. Displaying page 1 of 267

Control#	Title/Author	Call No	Category
7863	Thunder ice / Acheson, Alison, (Copies:1 Available:0)	FIC ACH	FICTION
1474	Children of flight Pedro Pan / Acierno, Maria Armengol, (Copies:1 Available:0)	FIC ACI	FICTION
7357	The night crossing / Ackerman, Karen, (Copies:1 Available:0)	FIC ACK	FICTION
7295	My name is Maria Isabel / Ada, Alma Flor, (Copies:1 Available:0)	FIC ADA	FICTION
7576	The restaurant at the end of the universe / Adams, Douglas, (Copies:1 Available:0)	FIC ADA	FICTION
1358	Cam Jansen and the chocolate fudge mystery / Adler, David A. (Copies:1 Available:0)	FIC ADL	FICTION
1359	Cam Jansen and the Triceratops Pops mystery / Adler, David A. (Copies:1 Available:0)	FIC ADL	FICTION
1361	Cam Jansen and the mystery of the circus clown / Adler, David A. (Copies:1 Available:0)	FIC ADL	FICTION
1362	Cam Jansen and the mystery of the Babe Ruth baseball / Adler, David A. (Copies:1 Available:0)	FIC ADL	FICTION
1363	Cam Jansen and the mystery of the dinosaur bones / Adler, David A. (Copies:1 Available:0)	FIC ADL	FICTION
1364	Cam Jansen and the mystery of the gold coins / Adler, David A. (Copies:1 Available:0)	FIC ADL	FICTION

**Tagging process completed, green stickpin will appear to indicate tagged items.**

06/26/2001 9:57 AM

Start Eudora ACT! G3 Library Autom... G3 Inventory Ste... My Documents G3 Library Aut... 9:57 AM

Figure 6. All Items tagged

**Using Mass Update for changing Copy Status codes for Tagged records:**

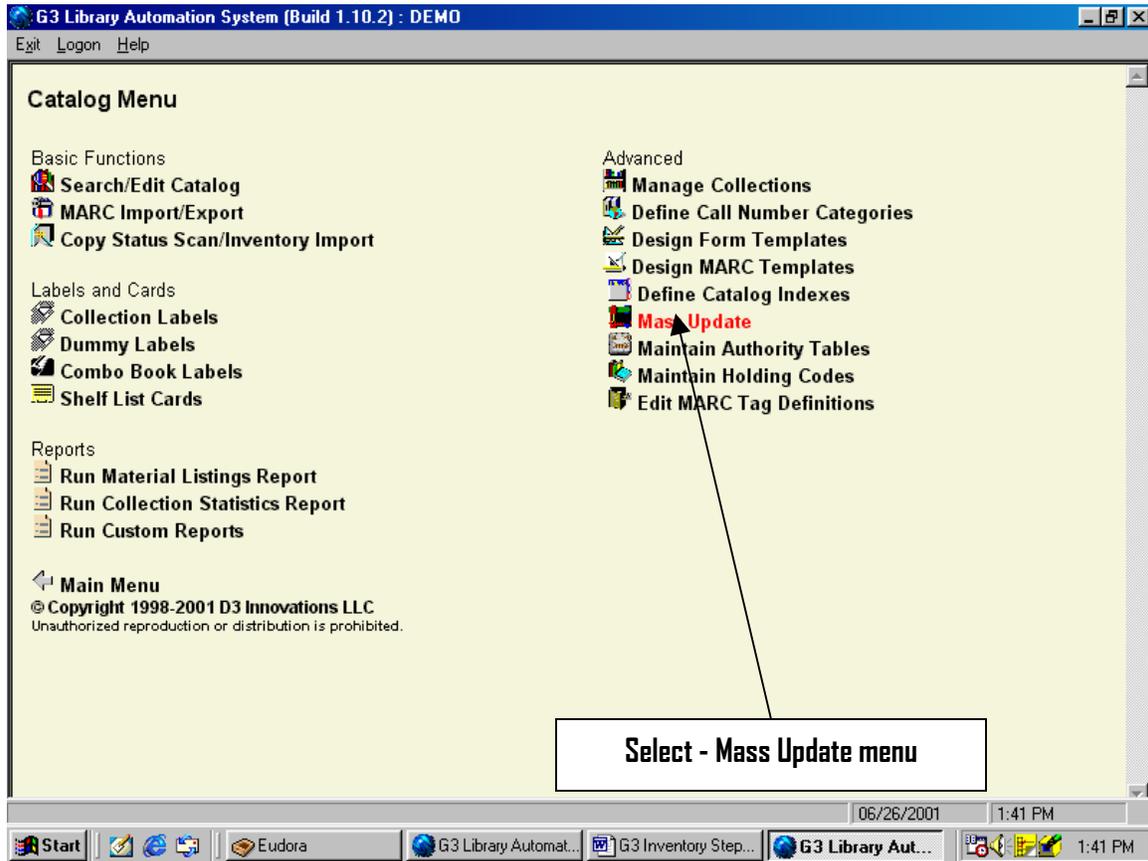


Figure 7. Catalog Menu Advanced selection

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.

**Using Mass Update for changing Copy Status codes for Tagged records:**

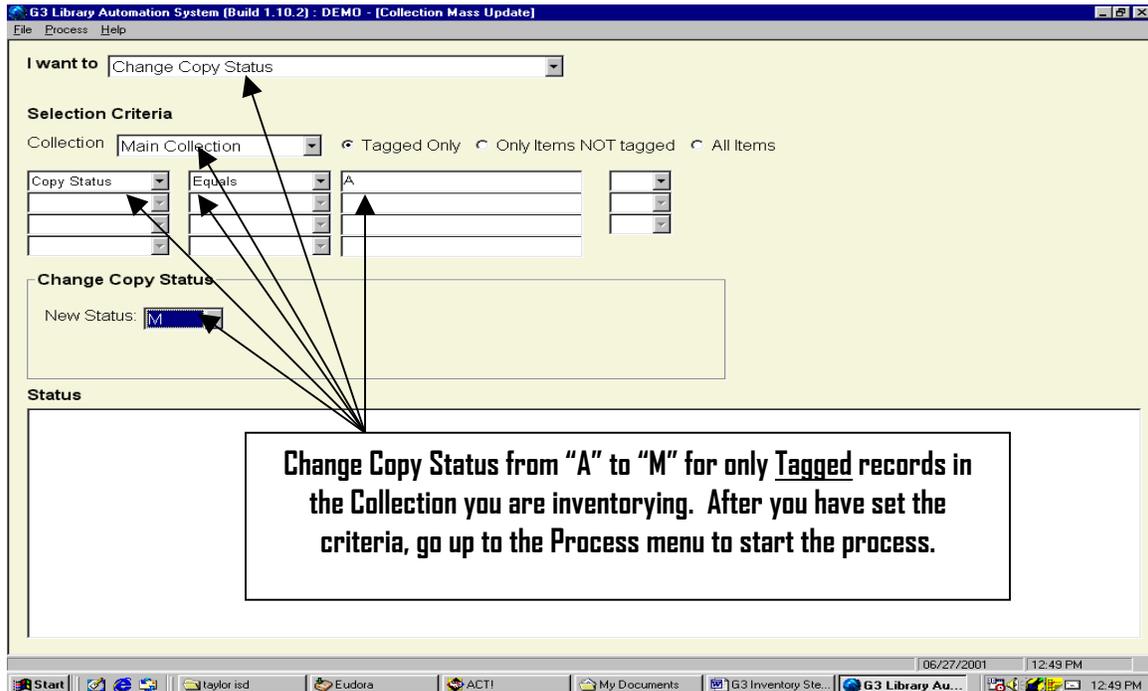


Figure 8, Mass Update – Change Copy Status

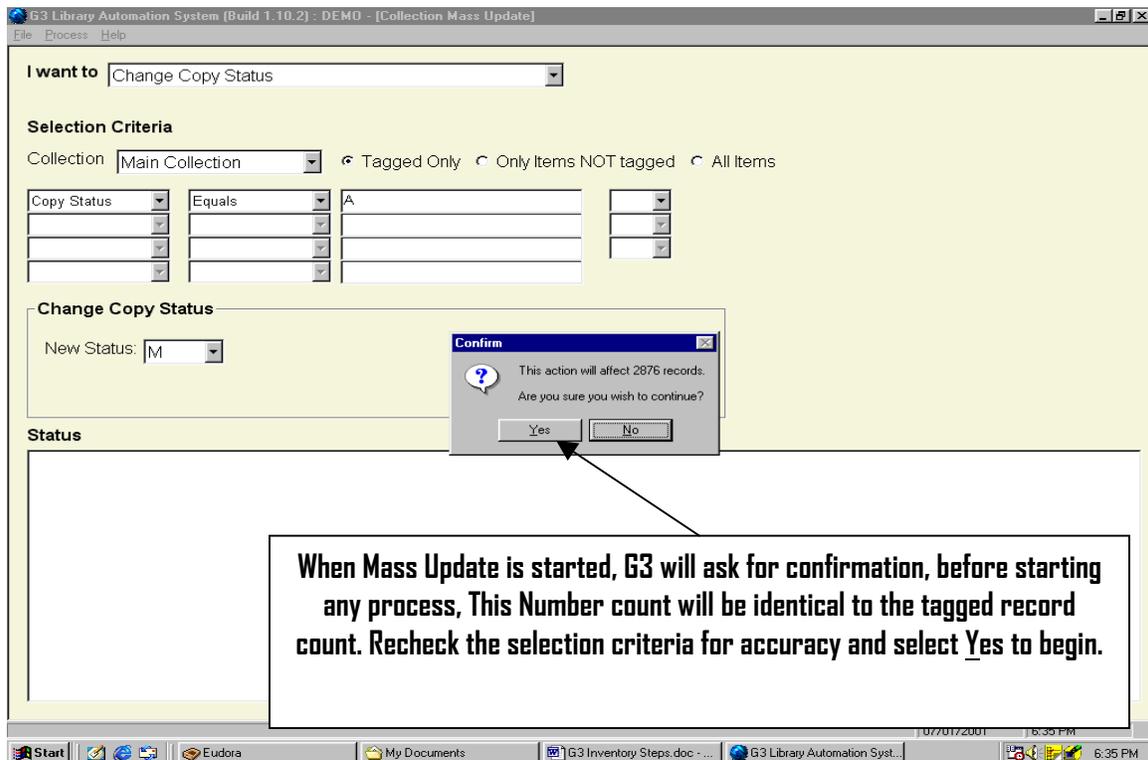


Figure 9, Mass Update – Change Copy Status to “M” – Confirmation of change

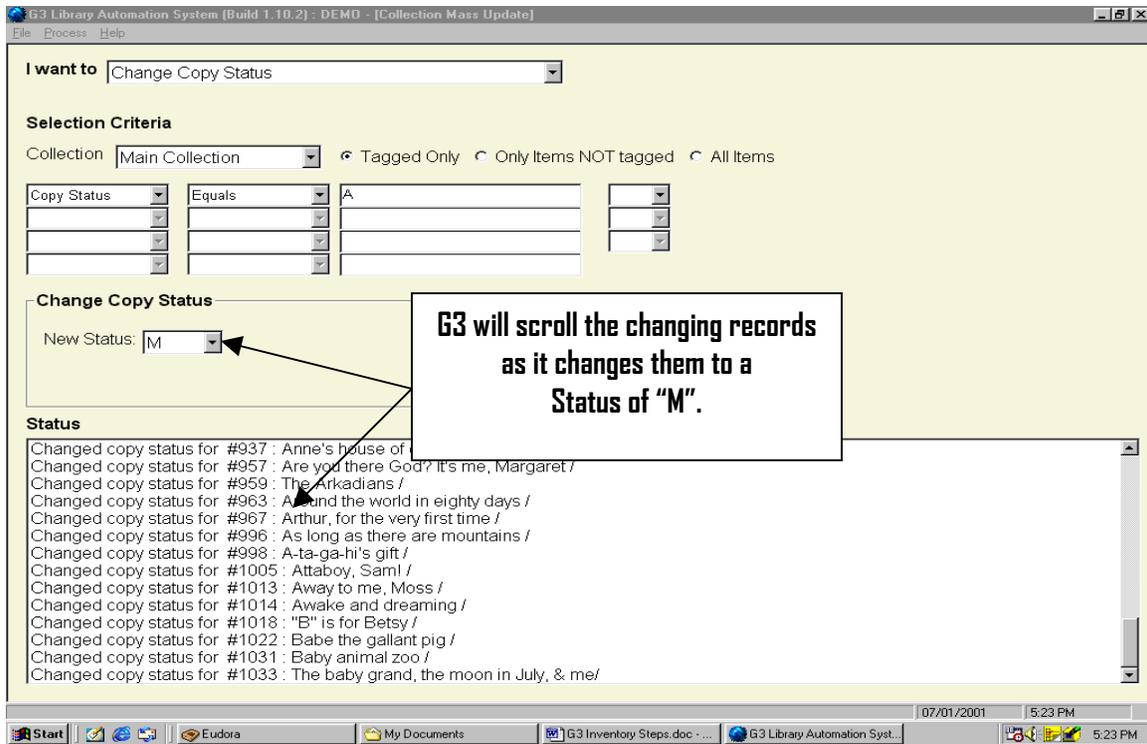


Figure 10, Mass Update – Change Copy Status – In Process

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 Search Catalog screen of any records marked “Missing” to be “0” (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

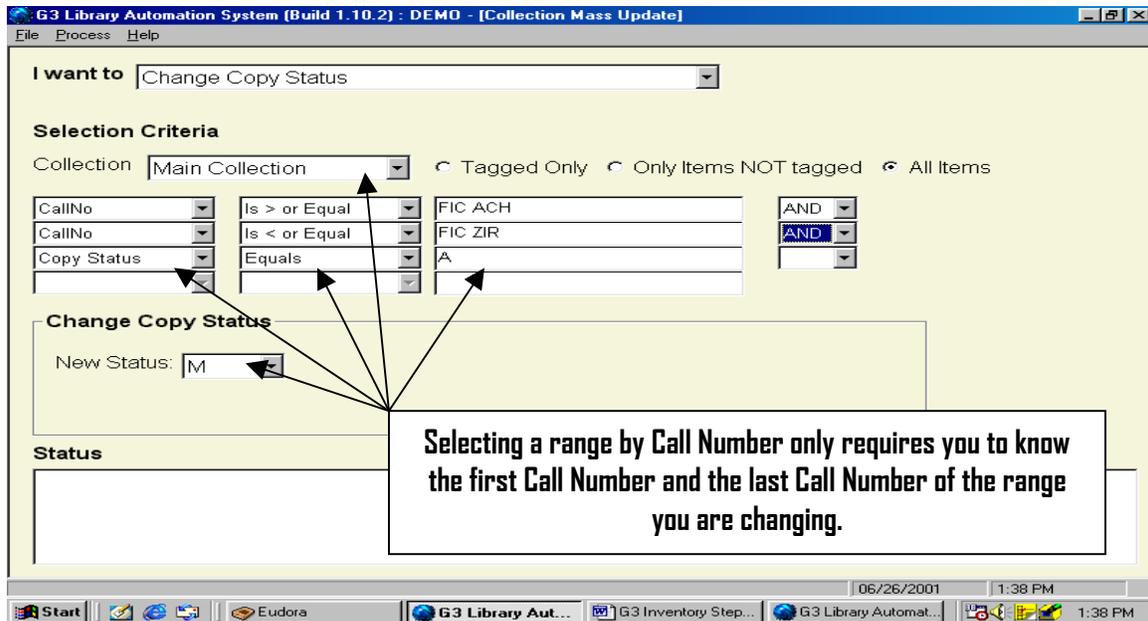


Figure 11, Mass Update – Change Copy Status – By Call Number Range

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.

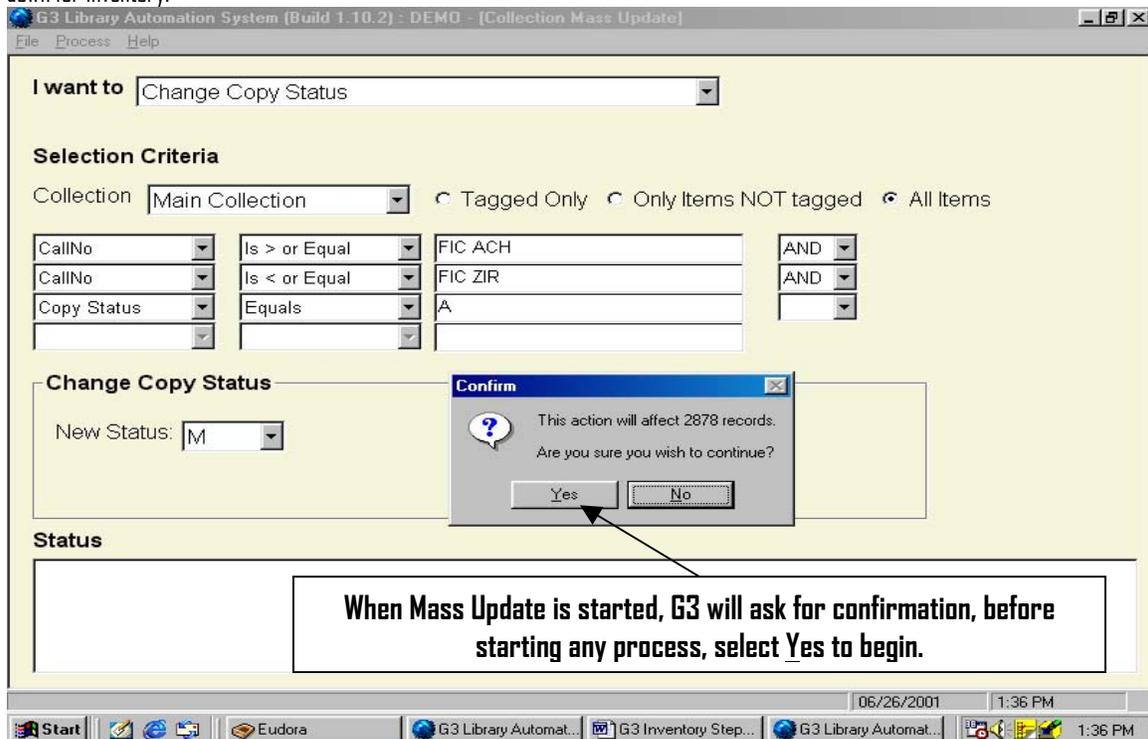


Figure 12, Mass Update – Change Copy Status – By Call Number Range

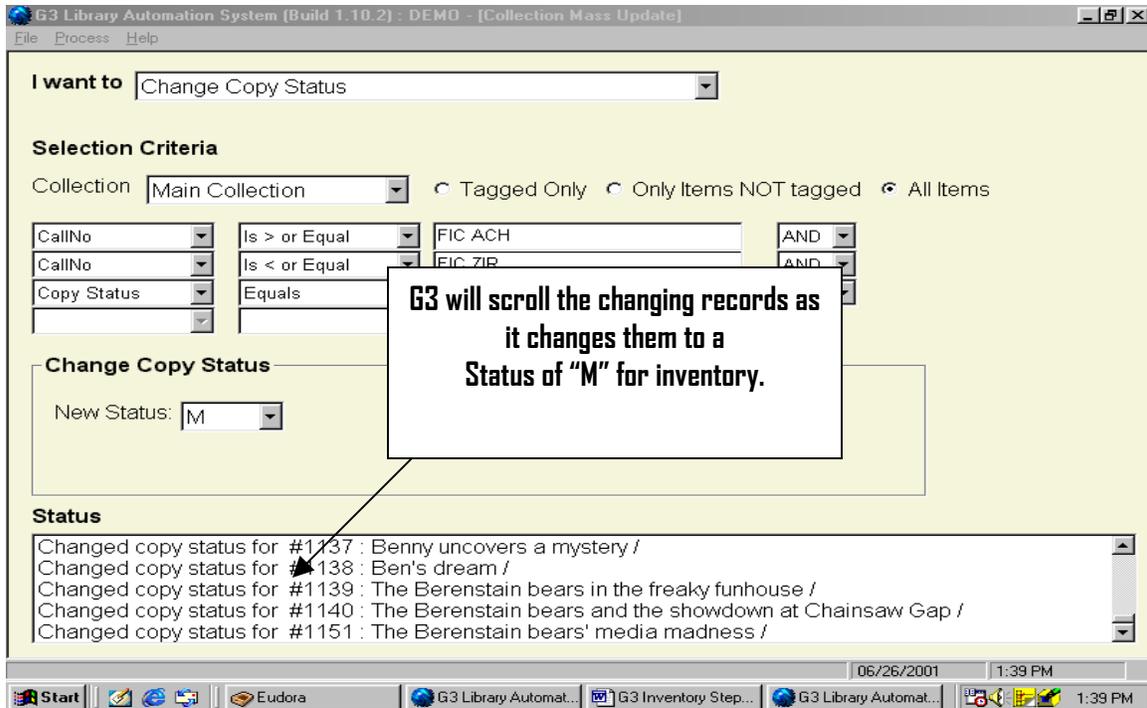


Figure 12. Mass Update – Change Copy Status – By Call Number Range

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 re-indexing 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 Search Catalog screen of any records marked “Missing” to be “0” (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

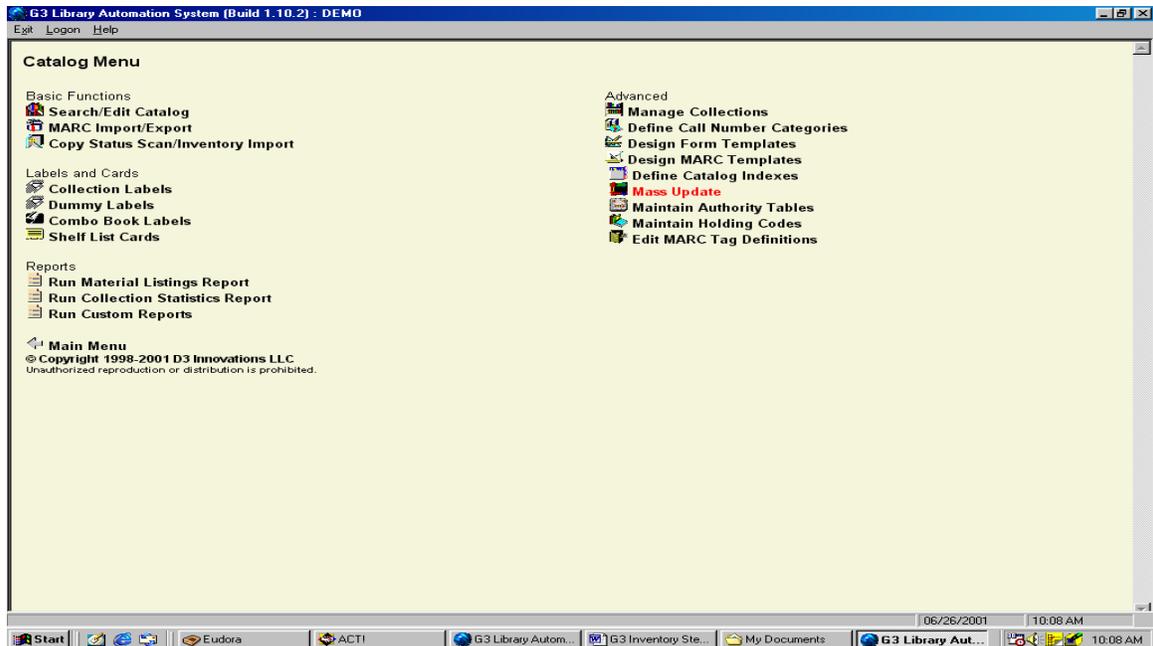


Figure 13, Mass Update - Change Copy Status

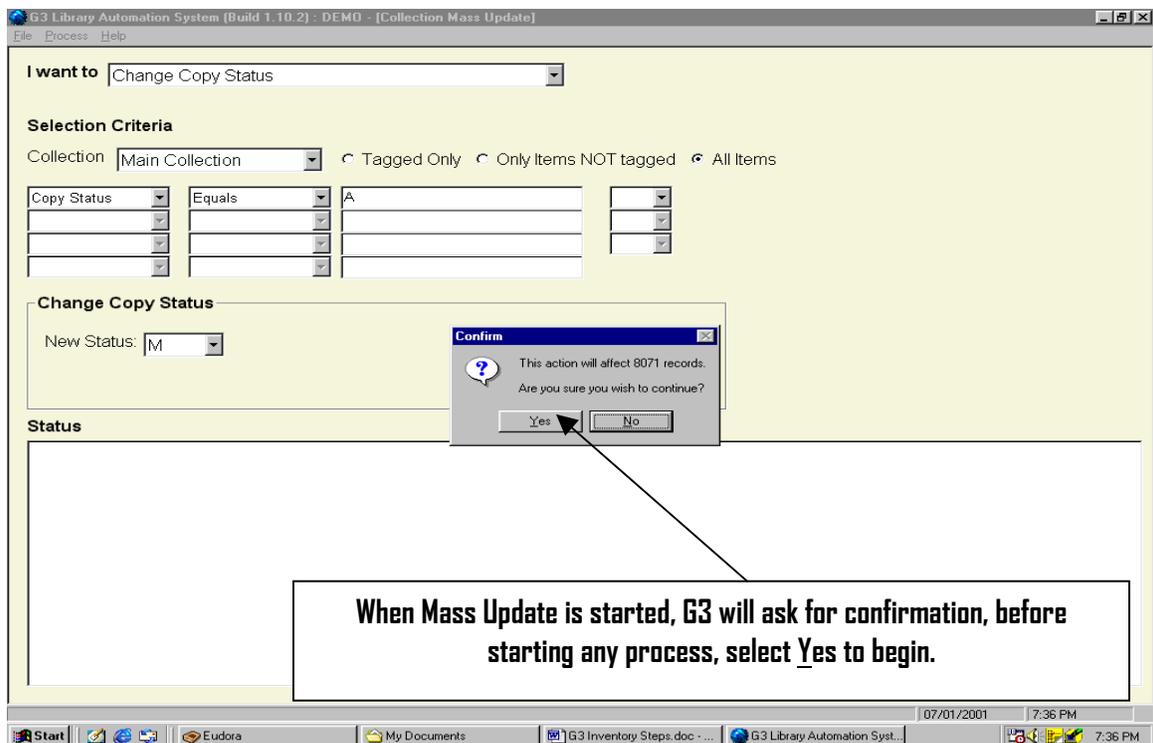


Figure 14, Mass Update - Change Copy Status - By Status Code Range for All Items

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

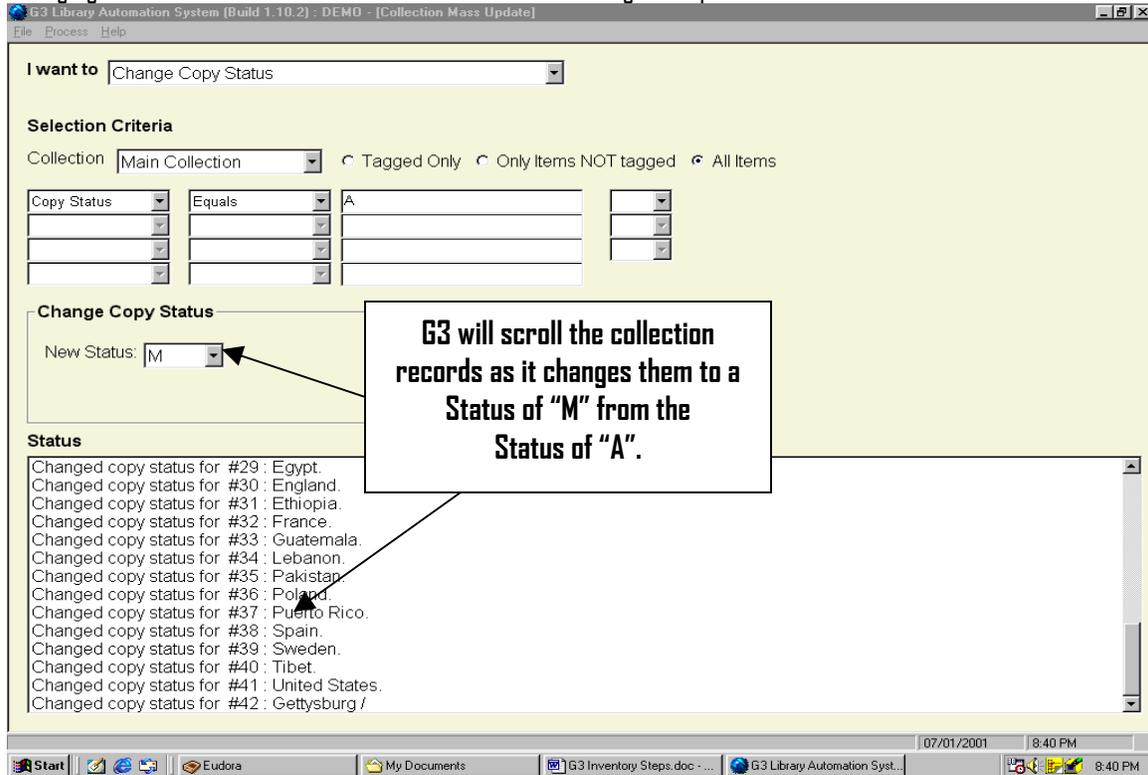


Figure 15, Mass Update – Change Copy Status – By All Items

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 Search Catalog screen of any records marked "Missing" to be "0" (zero).

## **G3 Inventory**

### **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 barcode-scanning 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 (000-100.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.

2. 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 FIG.txt or JFIG.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

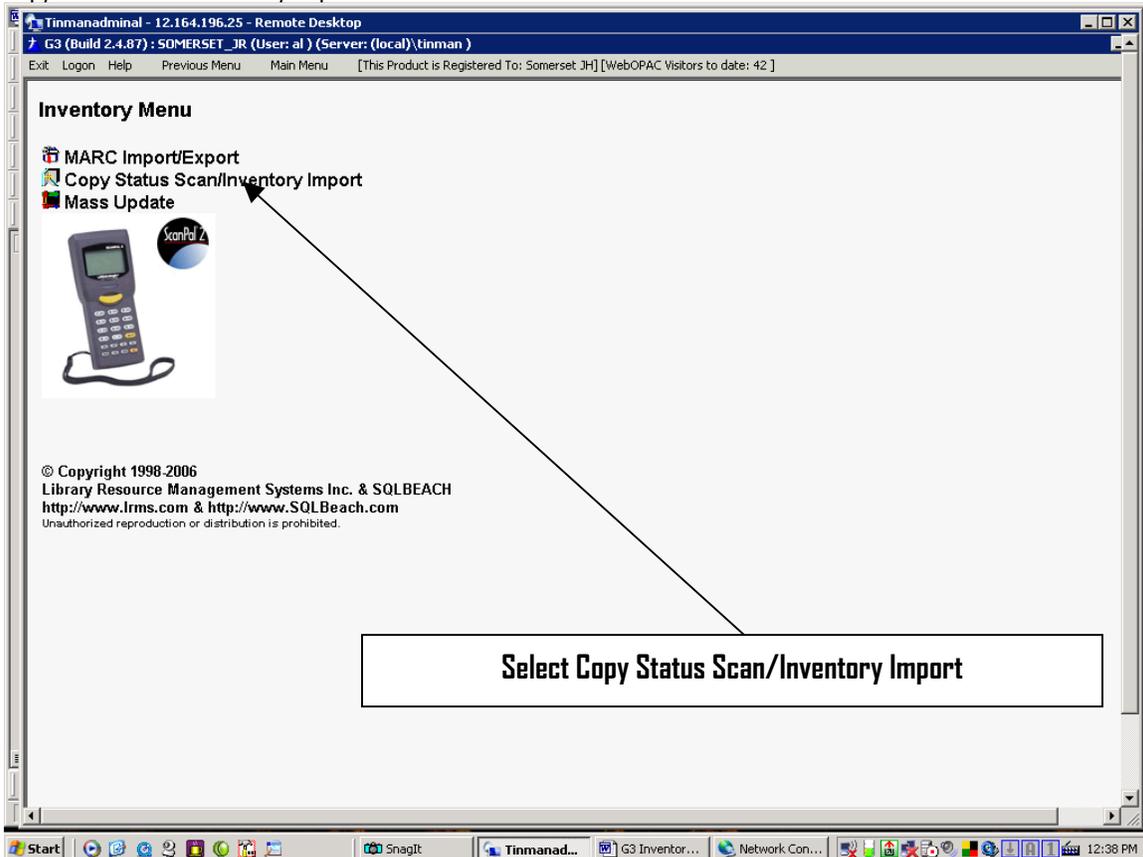
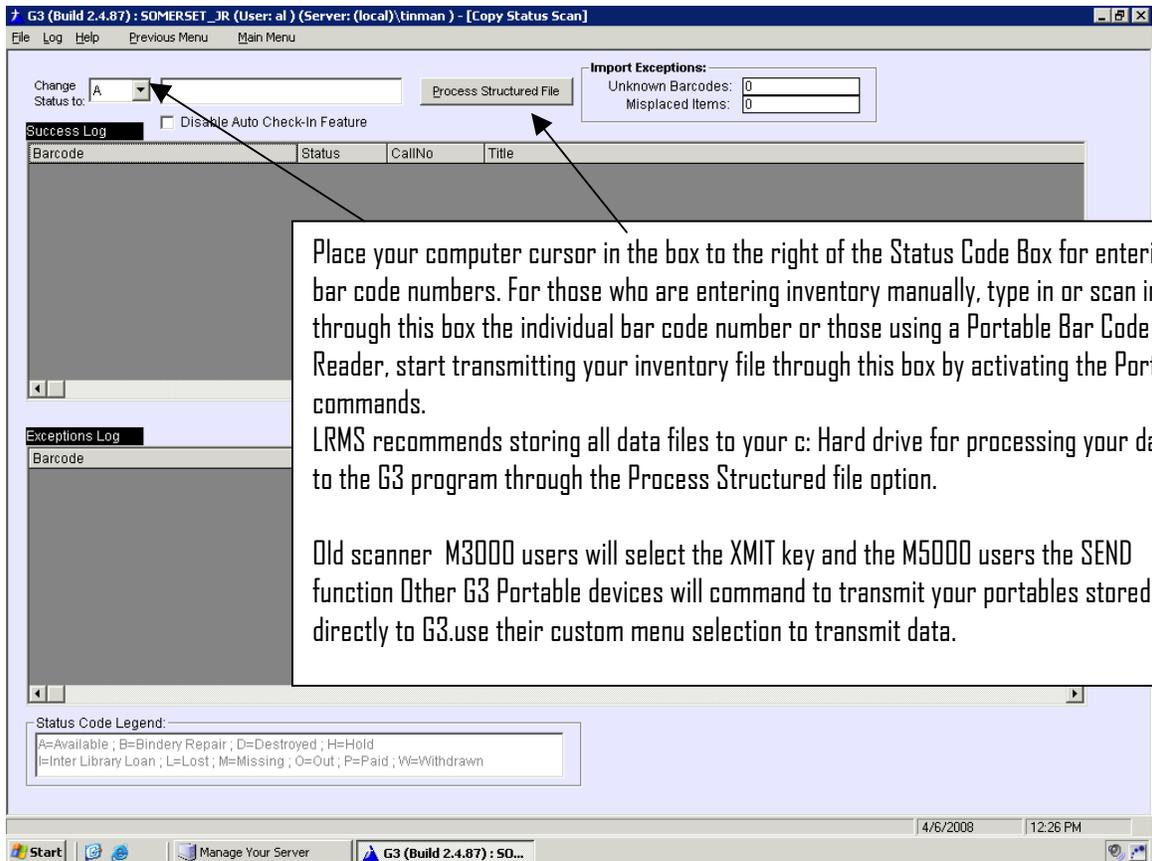


Figure 16, Copy Status Scan/Inventory Import



Place your computer cursor in the box to the right of the Status Code Box for entering bar code numbers. For those who are entering inventory manually, type in or scan in through this box the individual bar code number or those using a Portable Bar Code Reader, start transmitting your inventory file through this box by activating the Portable commands.

LRMS recommends storing all data files to your c: Hard drive for processing your data to the G3 program through the Process Structured file option.

Old scanner M3000 users will select the XMIT key and the M5000 users the SEND function Other G3 Portable devices will command to transmit your portables stored file directly to G3.use their custom menu selection to transmit data.

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.

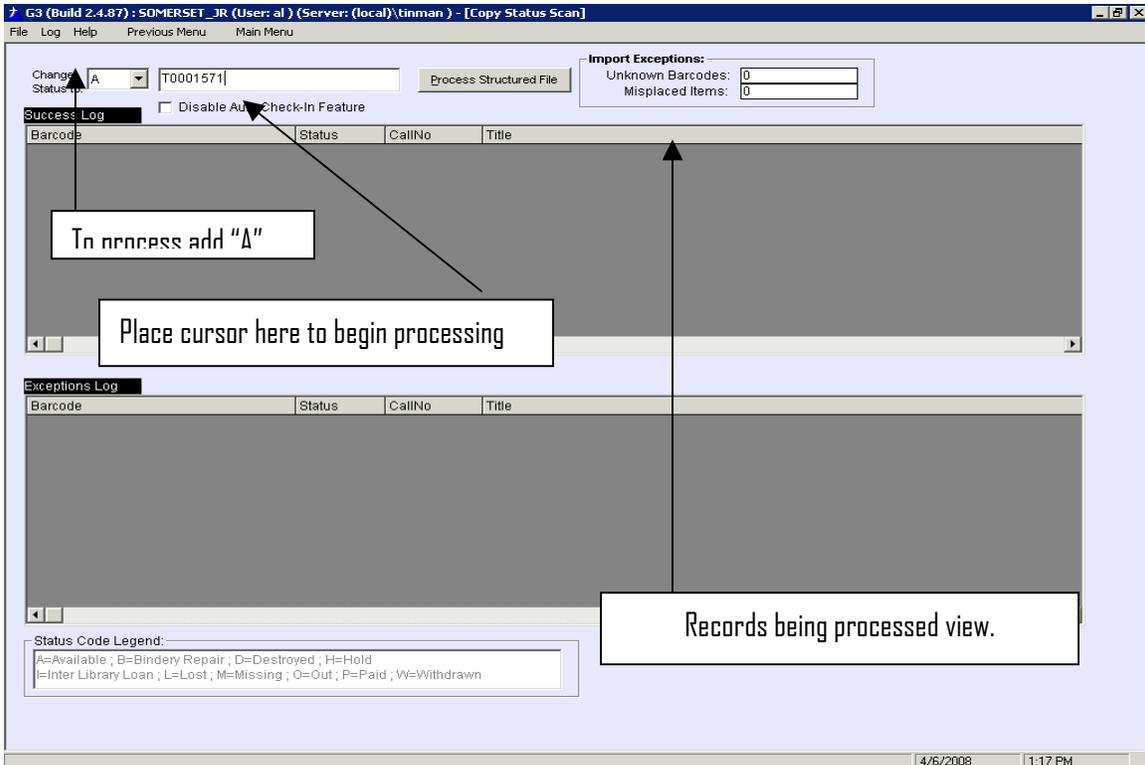


Figure 18, Copy Status Scan, processing bar code numbers

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".

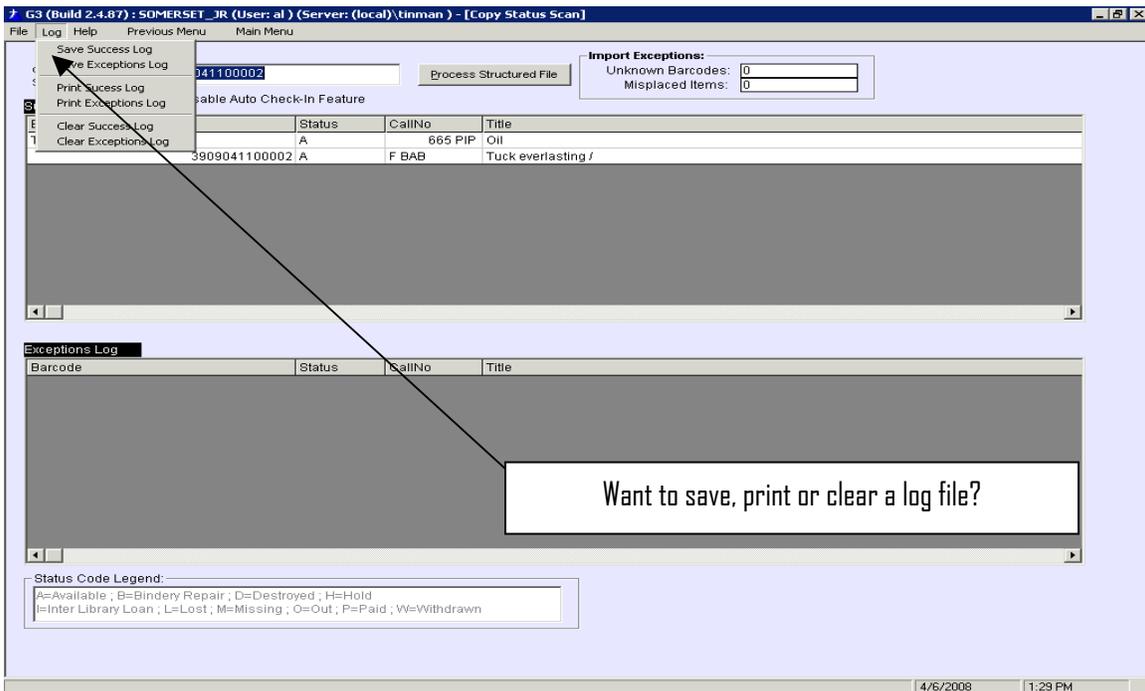


Figure 19, Copy Status Scan, Log file process

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**Success Log**

Barcode	Status	CallNo	Title
T0001571	A	665 PIP	Oil
3909041100002	A	F BAB	Tuck everlasting /

**Import Exceptions:**  
 Unknown Barcodes: 0  
 Misplaced Items: 0

**Save Log**

Save in: My Documents

- Company Policies
- Libra III OPAC\_files
- My Briefcase
- My Documents
- My Pictures
- My Webs
- Online Services
- Sales Package
- Training Package
- Test.log

File name:

Save as type: \*.log

Open as read-only

Buttons: Save, Cancel

**Callout 1:** G3 does manage multi- length barcode numbers up to 25 digits in length and is designed to work with special T- type barcode numbers.

**Callout 2:** Give your file a name, FIC2002 no need to add an extension, G3 will add .log

Figure 20, Copy Status Scan, Log file save

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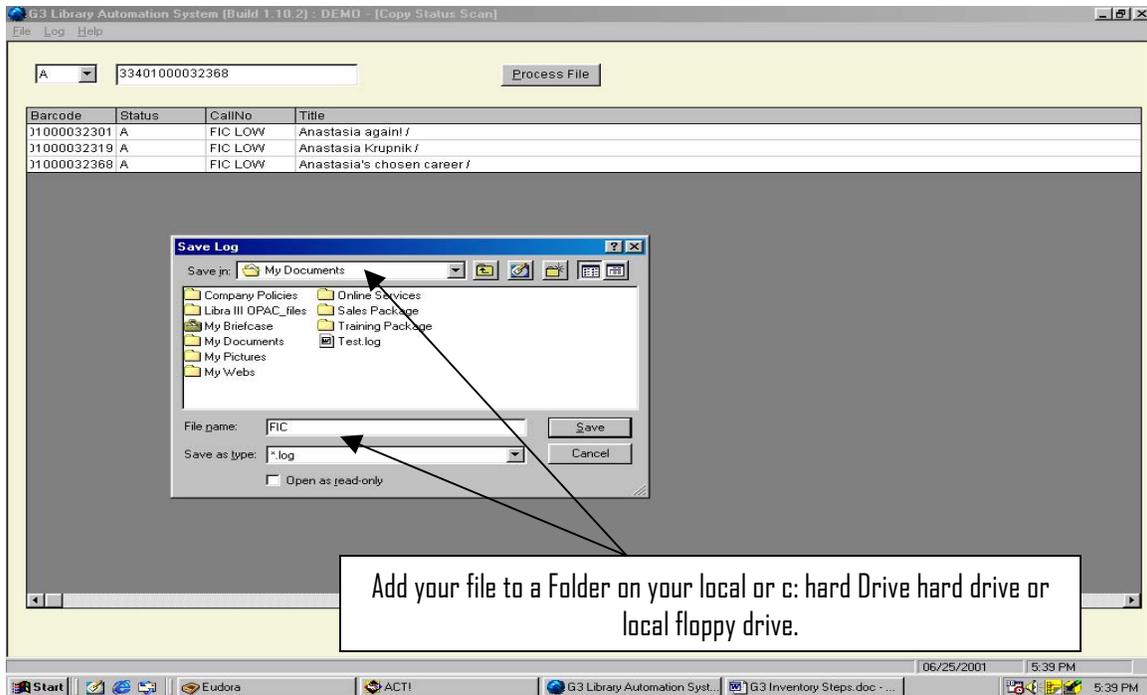


Figure 21. Copy Status Scan, Naming the log file

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.

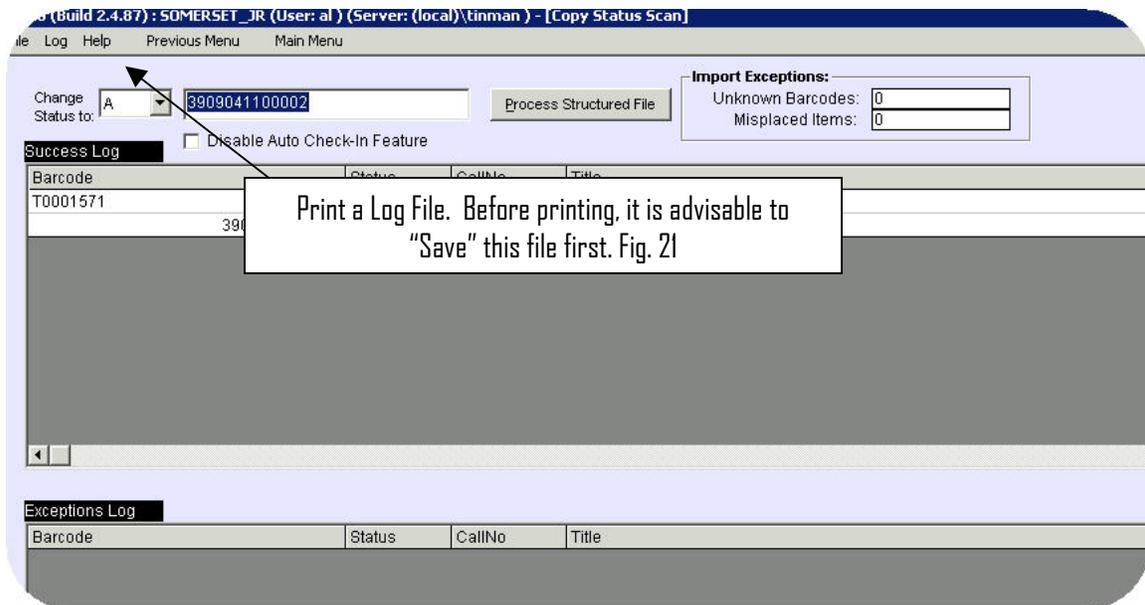


Figure 22. Print your log file

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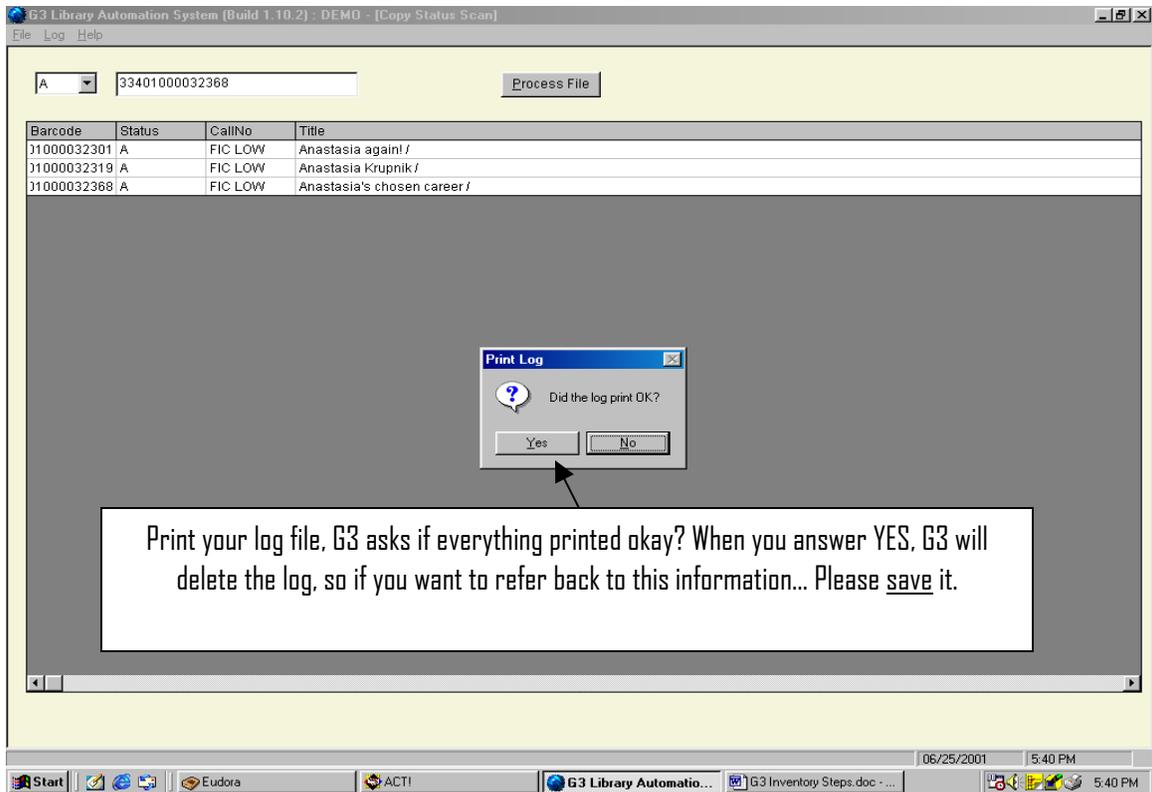


Figure 23. Copy Status Scan, Log file save

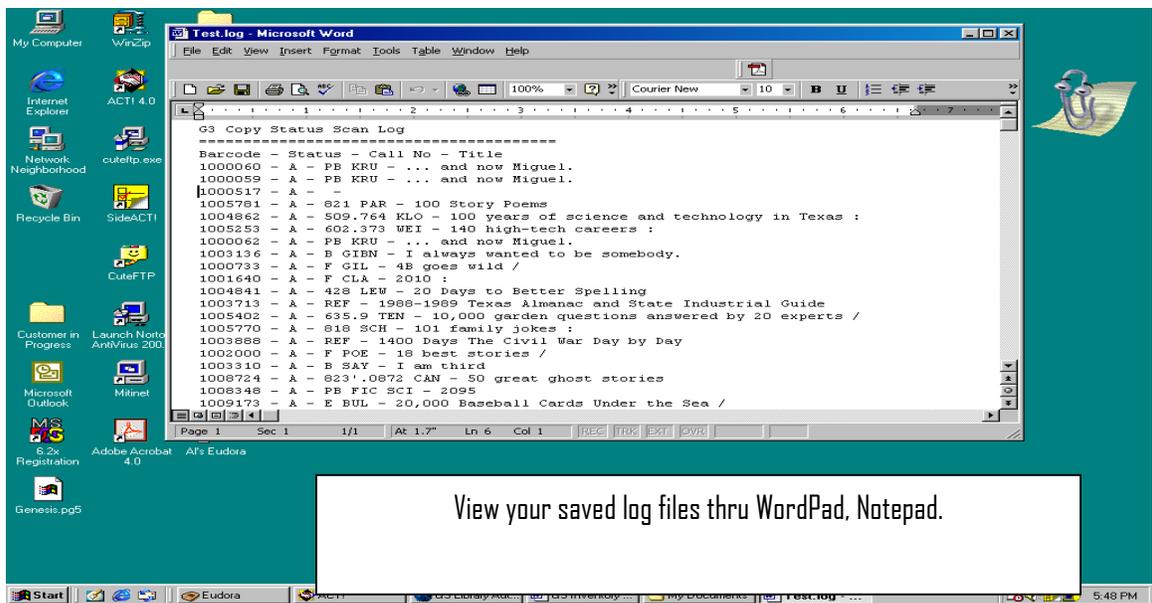


Figure 24. Copy Status Scan, Viewing Log files for errors

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

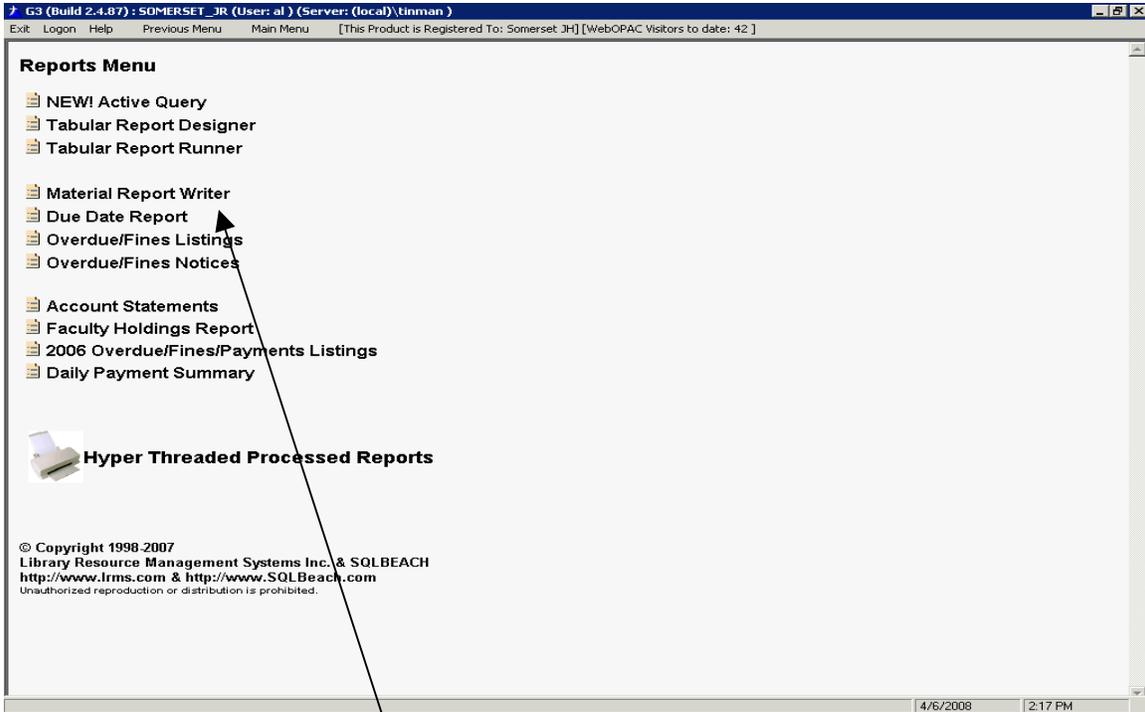


Figure 25, Catalog Menu, Run Material Listings Report

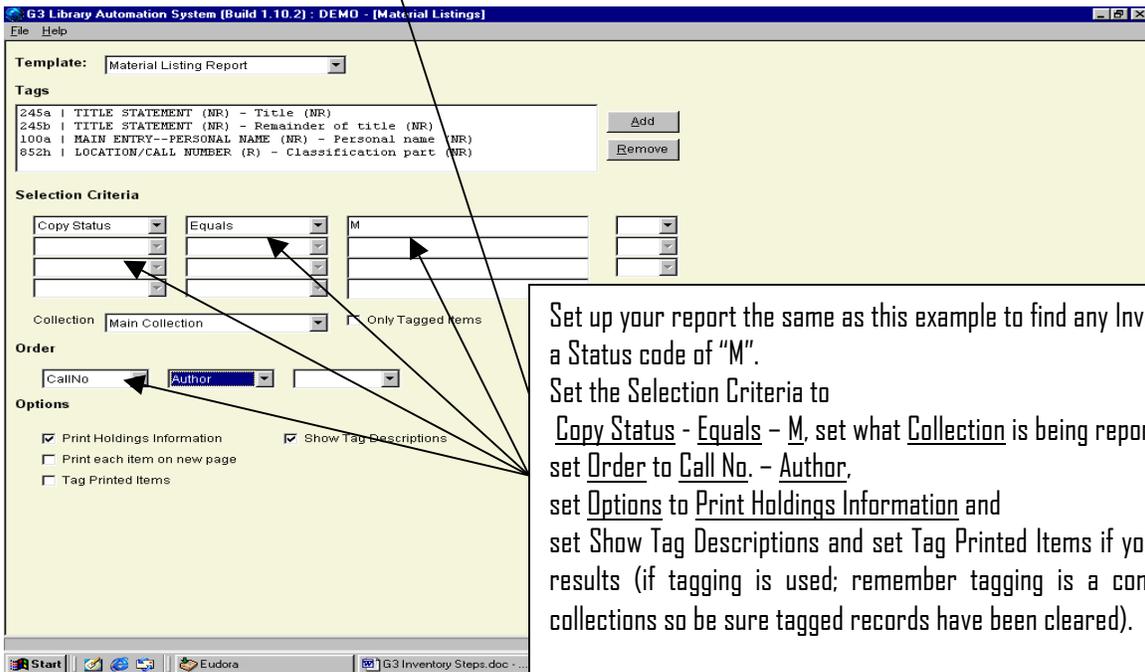


Figure 26, Catalog Menu, Run Material Listings Report

Run a Materials listing Report by Call Number Range for Missing Items

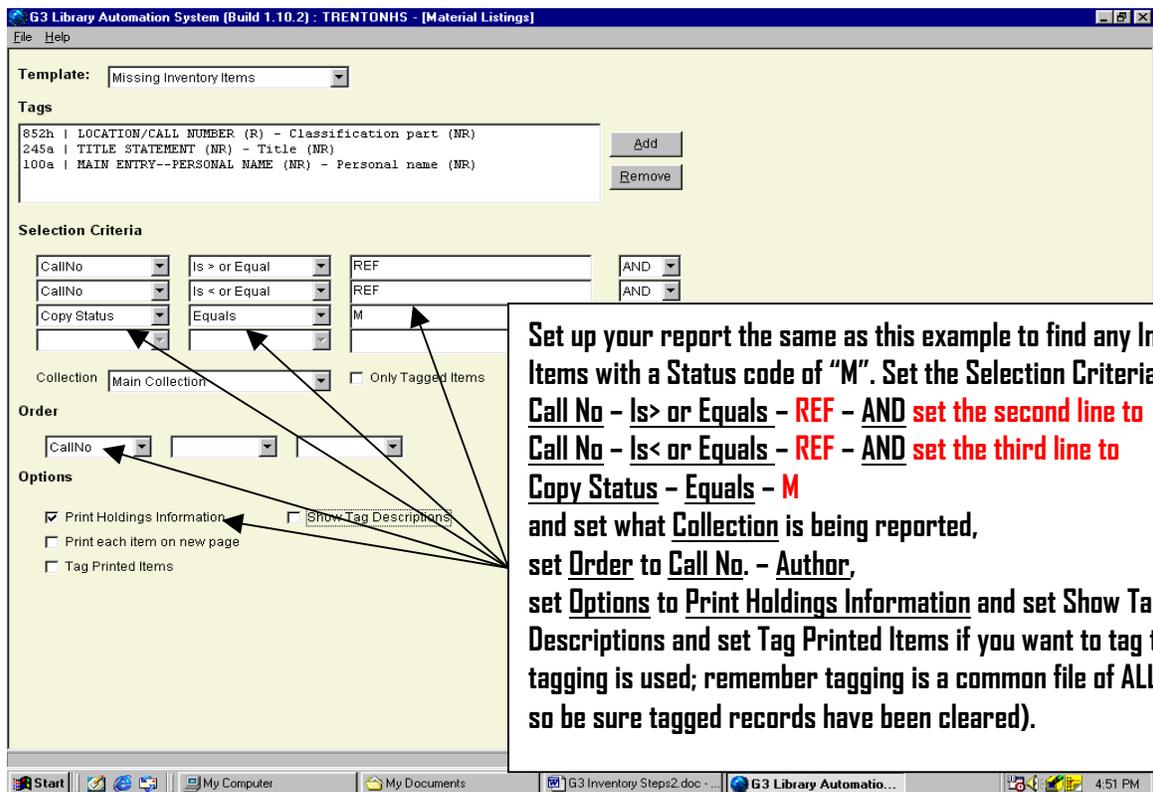


Figure 27, Catalog Menu, Run Material Listings Report by Call No. Range

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.

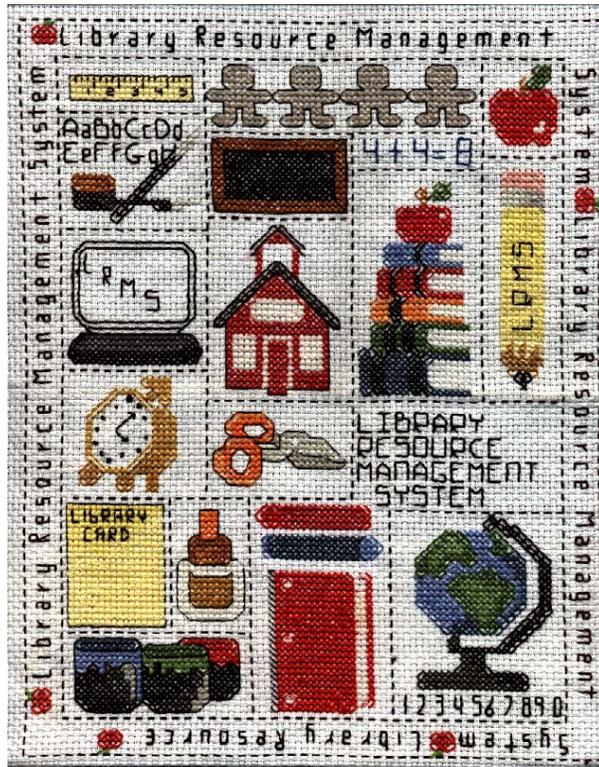
Before running of this report for tagging records be sure that your tagged records file is empty or this file contains previously tagged records for the same reason.

**Report Sample**

**LRMS  
Material Listings**

245a TITLE STATEMENT (HR) Title (HR)	Arthur and the scare-your-pants-off club /					
100a MAIN ENTRY--PERSONAL NAME (HR) Personal name (HR)	Brown, Marc Tolon.					
852h LOCATION/CALL NUMBER (R) Classification part (HR)	FIC BRO					
-----						
9990009990001				M	10.00	07/03/2001
0	APL	ALA	CB		APL	
245a TITLE STATEMENT (HR) Title (HR)	20,000 leagues under the sea /					
100a MAIN ENTRY--PERSONAL NAME (HR) Personal name (HR)	Verne, Jules,					
852h LOCATION/CALL NUMBER (R) Classification part (HR)	FIC VER					
-----						
33401000105719				M	11.45	07/25/2000
0	LHL	PB	CB		LISD	
245a TITLE STATEMENT (HR) Title (HR)	101 ways to bug your parents /					
100a MAIN ENTRY--PERSONAL NAME (HR) Personal name (HR)	Wardlaw, Lee.					
852h LOCATION/CALL NUMBER (R) Classification part (HR)	FIC WAR					
-----						
33401000099003				M	10.00	07/25/2000
0	LHL	PB	CB		LISD	
33401000099906				M	0.00	06/27/2001
0	APL	ALA	CB		APL	

Figure 28. Catalog Menu, Run Material Listings Report -Preview



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