

Conduct an inventory at your library or district media center

Change to **Library View** > Choose **Back Office** > **Inventory**



After circulating your collection, you may notice that some items just are not where they are supposed to be. Inventorying your collection lets you know exactly what you have and what is missing or just misshelved. Once you know what is in your collection, you will also be in a better position to make acquisition decisions.

With Inventory, you can select to take stock of your entire collection or inspect one or more sections at a time. Your goal is to enter the barcode number of each unaccounted-for copy.

Keep in mind that, while inventorying changes a copy's inventory status (Accounted for/Unaccounted for), it may also affect a copy's copy status (Available/Checked Out/Loaned Out/Lost/On Hold/On Order/Out for Repairs/In Transit). Information about all such changes is included in the topics below.

To take inventory of your collection

Your goal is to enter the barcode number of each unaccounted-for copy in your collection. The following list gives an overview of the general procedure for Inventory:

1. Set up a schedule before you start. This will help you keep track of what you have done and what areas you still need to inventory.
2. Make sure you have selected your preferred shelf-checking options.
3. You can have multiple inventories open at one time and switch between them. Either select an existing inventory to work on from the *Inventory* list, or click **Start New** to begin a new one.

On the *Start Inventory* page that appears, you can specify the copies to include:

- You can limit it to copies in a particular call number range.
- You can exclude any copies that have been seen recently.
- You can limit it to copies with specific Circulation Types.

4. Scan, enter, or upload the barcode numbers to account for your copies.
5. Once you are sure you have entered the barcode numbers for all the copies, review the list of unaccounted-for copies by clicking **% Complete** beneath *Inventory* on the *Inventory* page, and then **See Details** next to *Unaccounted for*:
 - If you can locate any of the copies on the list, click **Found** to account for them.
 - If you cannot locate a copy, click **Mark "Lost"** to account for it and change its copy status to Lost.
6. Review the *Lost Copies* list. To open the list, click **% Complete** beneath *Inventory*, and then click **See Details** next to *Accounted for*.
 - If you can locate any of the copies that had been Lost, either click **Found** on the *Lost Copies* list or enter the barcode directly on the *Inventory* page to make it *Accounted-for* and change its copy status to Available.
 - To delete a lost copy from the collection permanently, click *Delete* on the list. Remember that deleting a copy deletes all information about it, including its circulation statistics.
7. Once the Unaccounted-for total on the *Progress Details* page is 0 (zero), your inventory is complete. Click **Finalize** and then **Yes** on the confirmation message. If you still have any unaccounted-for copies, a [message](#) appears, asking whether Inventory should mark them Lost.

How do I account for my copies?

There are three main ways to enter copies into inventory:

- A. Enter them directly on the *Inventory* page.
- B. Use a PHD Dolphin+ to create a file of barcode scans and upload them.
- C. Create a text file of barcode scans and upload them.

You can use any combination of these methods to take inventory.

What does the Accounted-for total include?

Besides the barcode numbers that you enter or upload on the *Inventory* page, the *Accounted for* total automatically includes any copies with a copy status of Checked Out, On Order, Loaned Out, Out for Repairs, In Transit, or Lost.

What exactly does clicking Start New do?

Clicking **Start New** changes the inventory status of many of your copies, both Accounted-for and Unaccounted-for:

- Unaccounted-for copies remain Unaccounted-for.
- Accounted-for copies that fit the parameters of the inventory and that have a status of Available or On Hold become Unaccounted-for. These copies should theoretically be somewhere in your storeroom or school and you will need to enter these into inventory.
- Accounted-for copies that fit the parameters of the inventory and that have a status of Checked Out, Loaned Out, On Order, Out for Repairs, or In Transit remain Accounted-for. You already have information regarding the current location of these copies.
- Copies that had previously been marked Lost remain Lost and Accounted-for.

What exactly does clicking Finalize do?

After you have inventoried the copies in the selected call number range, you will click **Finalize** to close the inventory. If you have any unaccounted-for copies, a message appears.

- Select **Mark all unaccounted for copies "lost"** if you are sure that you cannot find the remaining Unaccounted-for copies. When you select **Mark all...** on the message, Inventory marks the Unaccounted-for copies Lost. Their copy status changes to Lost; they are added to the lost copies list; and they become Accounted-for.
- When you select **Ignore them (don't mark them "lost")**, Inventory does not change their inventory status or copy status. The Unaccounted-for copies remain Unaccounted-for. Their copy status remains Available, or, for readyholds, On Hold.

How do I generate an inventory report?

To help you keep track of your inventories, click **View In-Progress & Completed Inventories List** for a list, details, and reports of the inventories. The reports are also available on the *Library* page, or for district media centers, the *Media* page, in *Reports*.

Can Inventory check the shelf order?

Inventory can notify you when the barcodes entered are out of call number order. Before beginning an inventory, you will need to set up your shelf-checking preferences in *Site Configuration*. Then, make sure to select the **Check shelf order** check box on the *Inventory* page.

How does circulation affect inventory?

You can continue to circulate your collection while an inventory is in progress. Copies checked out, loaned out, or sent out for repairs during an inventory become Accounted-for. Checking a copy in does not affect its inventory status; it stays Accounted-for. Copies scanned for in-library use or in-media center use become Accounted-for.

How does cataloging affect inventory?

You can continue to add new titles and copies while an inventory is in progress. Copies added manually or by an import become Accounted-for in *Inventory*. Copies replaced during an import by control number (on the Update Only tab) retain their inventory status (either accounted-for or not).

How does entering barcodes directly differ from uploading a file of scans?

When entering barcodes directly on the *Inventory* page:

- Copy information for the ten most recent scans appears on the page in the *Most Recently Accounted For* list.
- Inventory does not create an Inventory job summary in the *Job Manager* for direct scans.
- If there is a problem with the barcode number or the copy, an alert message appears at the top of the *Inventory* page.
- The copy status of any Lost copy changes to Available. Inventory deletes any library fine charged to a patron for the lost copy. If it was paid, Inventory creates a refund.
- Inventory checks in a checked-out copy. Inventory creates a library fine, if you automatically assess them, for an overdue copy.

When uploading a file of scans from a PHD, Follett Remote, Destiny Remote, or a text editor:

- No copy information appears in the *Most Recently Accounted For* list.
- Inventory creates an Inventory job summary in *Job Manager*.
- Lost copies remain lost. Inventory adds an entry to the job summary indicating that the copy is lost.
- Checked-out copies remain checked out. Inventory adds an entry to the job summary indicating that the copy is checked out, and includes its due date.

What information does the Inventory job summary contain?

Inventory makes an entry in the job summary for every barcode number in the uploaded file. For exceptions, it enters one of the following messages:

- If the barcode does not match any barcode that belongs to your collection, *Skipped: Barcode <barcode number> not found* appears.
- If the copy is currently listed as checked out, it remains *Accounted-for* and checked out. *Barcode <barcode number> has been accounted for, but is currently checked out and has a due date of <due date>* appears.
To make the copy *Available*, enter its barcode on the main *Inventory* page.
- If the copy was *Lost*, it remains *Accounted-for* and *Lost*. Any assessed library fines are unaffected. *This barcode is currently marked lost* appears.
To make the copy *Available*, enter its barcode on the main *Inventory* page.
- If you opted to have Inventory check the shelf order and the copy's call number appears to be out of order, *This item appears to be shelved incorrectly* appears.
- If you opted to have Inventory check the differences in Dewey numbers and the copy's Dewey number is much greater than the previous one, *The difference in the Dewey numbers of this and the previous item is greater than <number>* appears.

I set all my unaccounted-for copies to Lost by mistake. What can I do?

If you have finalized an inventory and selected **Mark all unaccounted for copies "lost"** on the confirmation message by mistake, you can reset the copy status to *Available* from the *Lost Copies* list.

To open the *Lost Copies* list, do one of the following:

- If you have an open inventory, click **% Complete** beneath *Inventory* on the *Inventory* page, and then **See Details** next to *Accounted for*.
- If you do not, click **View Lost** on the *Inventory* page.

How do I delete my lost copies?

Inventory allows you to remove any unneeded copy records from your database that were marked lost on or before a particular date.

To delete the lost copies, follow these steps:

1. Open the *Lost Copies* list (see above).
2. Scroll to the bottom of the page.
3. Click the calendar icon next to *Delete all copies marked "lost" on or before* and select the date.
4. Click **Delete All**, then **Yes** on the confirmation message.

NOTES

Delete All deletes copies that have been checked out and then lost by patrons as well as copies that were marked *Lost* by *Inventory*. You may want to retain a list of these lost copies. Before deleting them, you can print out the *Lost Copies* list by clicking **Printable** and then using your browser's command or button. Copies deleted here are included in the *Weeding Log* that you can generate in *Reports*.

Take inventory with a scanner

You can take inventory with a scanner either by scanning the barcodes directly into the *Scan or enter one-at-a-time* box on the *Inventory* page or by creating a file of barcode scans.

You can create the file several ways. In fact, you can use any method of barcode collection that results in the proper ASCII text format:

- Use the inventory function in Follett Remote or Destiny Remote. (For more information on Follett Remote, click **Help** next to **Logout** in the upper corner. Then, search for Follett Remote.)
- Use your scanner to scan barcodes into a text editor such as Notepad or SimpleText. You could also type the barcode numbers into the file.

Note: Do not use Microsoft Word, WordPad, or Apple TextEdit. Hidden characters created by these programs can cause the upload to fail.

To create a file with a text editor:

1. Open your text editor.
The file does not need any header.
2. Scan the barcodes.
3. Name and save the file. Make sure to save it as a `.txt` file and record the name and location of the file.
4. Upload the file to *Inventory*.

Example of an inventory file:

T 852467
T 15547
33976000651010
33976000651077
33976000651333
T 874
T 55478
T 21947
33976000647646
T 62155

Take inventory with a PHD Dolphin+

Scan the barcodes by pressing the **ON-SCAN** key (you will view the laser beam). Point the Dolphin at the barcode you want to read. When the Dolphin successfully reads the barcode, it displays the name of the symbology and the barcode number, and saves it to a file named Scan.Log.

After you have collected your scans, you will need to transfer them to your workstation.

Transfer scan files

To transfer the scan file from the PHD Dolphin+ to your workstation, follow these steps:

1. Change to alpha mode by pressing the **SHIFT** key once on the Dolphin. (If you have been scanning barcodes, the Dolphin is probably in numeric mode.)
2. Place the Dolphin in the HomeBase. You should view the following message on the Dolphin's screen: **You have a LOG file, do you wish to ship it out?**
3. Type **Y** (press the **3** key once) for Yes. You should view the following message on the Dolphin's screen:
 - **Set Dcomm to
Receive a file
Place in base
Press Enter**
4. Start the Dolphin File Transfer utility (Dcomm) and select **Receive File**.
5. With the Dolphin in the HomeBase, press **ENTER** on the Dolphin to begin the file transfer.

Once the file has transferred to the computer, you should see **Hooray! Your data has transferred successfully**, indicating that the utility has successfully transferred your Scan.Log file to the computer.

At this point, the utility automatically deletes the scans from the Dolphin. The Dolphin then shifts to the low-power mode (displaying the Follett logo).

Transfer Multiple Files

If you collect additional scans with the Dolphin and wish to transfer another batch to your workstation, you will receive the following message on your computer after pressing **ENTER**:

- **SCAN.LOG
Dcomm is going to overwrite this file.
Do you really want this?**

Choose **Create a backup copy**. The utility automatically renames the existing Scan.Log file to Scan.Log.Bak0. If a Scan.Log.Bak0 already exists, the utility renames it to Scan.Log.Bak1 and Scan.Log.Bak1 to Scan.Log.Bak2, etc.

IMPORTANT The utility can only rename files up to Scan.Log.Bak9. Once it reaches Scan.Log.Bak9, it starts over with Scan.Log.Bak0, overwriting the existing files. Make *sure* to upload the files to *Inventory* before you accumulate ten log files. The higher the appended number on the file name, the older the Scan.Log file. Once the utility transfers the file to the computer, you can upload the file to *Inventory*.

Choosing **Abort** cancels the file transfer. You can then press **ENTER** on the Dolphin to return to the scanning mode.

Choosing **Overwrite** overwrites the existing Scan.Log file on your computer.

Upload the file to Inventory

Once you have created a text file with a text editor, a data file (LibraryCopies<scan date>.txt) with Follett Remote or Destiny Remote, or transferred a Scan.Log file from your Dolphin, you are ready to upload the file into *Inventory*:

1. Open *Inventory* in the *Back Office*.
If there are tabs, select **Library Materials**.
2. Click **Browse** to locate and select your text, data, or Scan.Log file.
3. Click **Upload**.
4. Check the *Inventory* job summary in the *Job Manager* to review any exceptions.

