



Traverse des Sioux Library System

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1/31/08jd

Inventory Procedures

- 1. Decide what item type or location you want to inventory.** Most libraries will base their inventory on item type.
- 2. Call TdS (Jeanne or Dani) to run the *Set Inventory Date* report for the item type or location you want to inventory.**

Details: This report automatically sets the inventory date for items (of that item type or location) that are currently checked out, and alerts the system for the next step. *Please keep track of the date that this report is run, and the date you complete the inventory for each item type as this will be useful for future inventory reports.*
- 3. Use the *Inventory Item wizard* (found on the circ toolbar under special circ functions) to scan items.**

Suggestion: Pull items from the shelves onto a cart and scan them at your desk, or, if you have a wireless network, load WorkFlows on a laptop and take it to the shelves.

Details: When an item is scanned, it will reflect the date that the scan occurred, not the date the "Set Inventory Date" report was run. As you scan, watch the screen for pop-up windows. A pop-up will occur if you encounter an item that is still checked out and should be discharged; or an item that doesn't belong to your library and should be transited to the home library.
- 4. After you have completed scanning barcodes for that particular item type, contact TdS (Jeanne or Dani) to run the *List Items not Inventoried* custom report.**

Notes: This report will list items that have an inventory date of NEVER. This means they were not on the shelf or checked out, and therefore, never scanned. The current location is included in this report, and will show items already identified as missing, or intransit, lost, and on-shelf. It is the supposedly on-shelf items that will need further action.
- 5. Review the *List Items not Inventoried* report and contact TdS to run a report that will automatically charge missing *On-Shelf* items to *Missing*.** (If you only have a few items, you could manually charge them to *Missing*.)
- 6. When items have been charged to *Missing* for a period of time (whatever period you specify), contact TdS to run a report that will automatically change that group of items from *Missing* to *Discard*.** Those items will then be deleted from the database with our normal system discard processes.