

INVENTORY USING EVERGREEN INDIANA

- Full inventory of TPL items *excluding magazines*
- Used F2 (Item Check-in) to alter items' "last edited" dates
- Item count (excluding magazines) at end of 2009 was 52,087
- Items scanned during 5 weeks of inventory = 51,749
 - Keep in mind that collection size fluctuated between Dec 2009 and Mar 2010
 - Some items were checked in as a result of normal circulation & not specially inventoried; we tried to keep an eye on these items as well
- Could also inventory by item location, but we decided to do a *complete* inventory to see what problems might surface

- Staff were assigned sections of the library to work on (see attached)
- F2 screen was configured to show
 - Call number
 - Title
 - Location
 - Barcode
 - *We did not check **circulation modifier**, but this would be a good one to add during the inventory process.*
- Items were loaded onto carts and brought to staff offices and circ desks for check-in
 - Had considered taking laptop and other computers to collection
- Used 9 Metrologic Voyager scanners; we could move them around where they were needed most
- Staff pulled any items that
 - Spine didn't match call number
 - Title didn't match (or was entered in all caps, etc.)
 - Location was incorrect
 - Were soiled, damaged, worn
 - Needed new labels
 - Call numbers (labels) just looked "weird"
- Piles were made and carts were filled with "problem" items, divided by problem type
 - Ex. Check bib, Relabel, Add series info, Re-cover
- Piles were added as needed

- Piles grew rather quickly—understatement! Several folks were pulled from inventory to troubleshoot and begin fixing items. (We were fixing many old problems, and expect faster inventory in the future.)
 - Staff took breaks from inventory to relabel, repair, fix bib records, and edit call numbers
 - Once the pile(s) became manageable, they would return to inventory
- Scanning the entire collection took five weeks, and we remained open for the duration.
 - We found that it was best to inventory in the morning/early afternoon before system and internet would begin to bog down.
 - We had no trouble running all 9 scanners at once.

- Remember to inventory:
 - Items on display
 - Items in storage
 - Items in staff offices/professional collection
 - Any equipment that is barcoded and cataloged

INVENTORY “HUNT” PROCEDURE

Before you begin, check your sheet for duplicate barcodes/items. Scan first for duplicate titles, and then move to the barcode column for duplicate barcodes. This doesn't happen often, but one sneaks by from time to time.

Highlight any barcodes you find that do NOT belong to Thorntown; you will know they are not ours because they won't begin with 30034000. . .

Also **highlight** any barcodes that are too long, too short, or just plain look weird.

Check the shelves where the item **should** be. You will want to have a cart for “found” items, because you will need to bring them to a computer for check-in.

Remember to look at the barcode! Barcodes must match the ones listed on the sheet.

✓ put a check mark if you have looked on the shelf but have not found the item.

~~Mark through~~ items that you put onto a cart to check in.

If we have an item by the same title, but not exact item (check barcode!), write HAVE next to the check mark.

Remember to check in “found” items!

Once you have looked for an item where it should be, look where it **shouldn't** be. Look for Js in the Es and Es in the Js. Look for DVDs in J DVD. Look for J VHS in storage. Etc. **Make sure you check the carts of items that need to be fixed, relabeled, etc.**

+ add a plus before the check mark once you have looked other places but have NOT found the item

Ex: +✓

Once you are done with your section, hand the paper off to Christine or Chris.

If you find any other anomalies that I haven't mentioned here, please explain them in writing on the sheet or on an attached piece of paper. DO NOT explain directly to me. I will tell you I understand, but then I will get distracted and forget, I promise.

If you feel that another category of means of marking needs to be added to our procedure, let me know ASAP so that I can inform everyone in the staff! Any questions, just ask!

PS—Why we are doing this in the first place:

This inventory will allow us to account for items that we spend a lot of time hunting for and never finding. It will enable us to replace things that are worth replacing. We will delete other things from the catalog so that our Evergreen holdings truly represent what we have in the building. This “hunt” is perhaps the most important part of the inventory process—so while we want to work quickly, we also need to take enough time and care to do a thorough job!

INVENTORY ASSIGNMENTS

Britta	YA FIC	A-C	D-F	G-I	J-L	M-O	P-R	S-T	U-W	Y-Z	
	YA NF	001-299		300-599		600-999					
	YA Audio										
Von	Audio FIC	A-C	D-F	G-I	J-L	M-O	P-R	S-T	U-W	Y-Z	
	Audio NF	001-299		300-599		600-999					
	VHS NF	001-299		300-599		600-999					
Becki	New Materials	Upper level Displays				Holds Shelf					
	DVD FIC	A-C	D-F	G-I	J-L	M-O	P-R	S-T	U-W	Y-Z	
	DVD NF	001-299		300-599		600-999					
	VHS FIC	A-C	D-F	G-I	J-L	M-O	P-R	S-T	U-W	Y-Z	
	CD (music) REF	001-299		300-599		600-999					
Bonnie	FIC	A	B	C	D	E	F	G	H	I	J
		K	L	M							
Linda P.	FIC	Z	Y	X	W	V	U	T	S	R	Q
		P	O	N							
Cathie	CH FIC	A-C	D-F	G-I	J-L	M-O	P-R	S-T	U-W	Y-Z	
Christine	SCI FIC	A-C	D-F	G-I	J-L	M-O	P-R	S-T	U-W	Y-Z	
	MYS FIC	A-C	D-F	G-I	J-L	M-O	P-R	S-T	U-W	Y-Z	
Karen	WES FIC	A-C	D-F	G-I	J-L	M-O	P-R	S-T	U-W	Y-Z	
Linda W.	IN COL	001-299		300-599		600-999					
	GEN REF	001-299		300-599		600-999					
	GEN										
	GEN VHS GEN CDROM										

Nonfiction assigned as other sections are completed:

001-099	100-199	200-299	300-399	400-499
500-599	600-699	700-799	800-899	900-999

REPORTS FOR INVENTORY

- Three reports were used during TPL inventory

Limit output to 10 Create a new Template for this folder

Select All None	name	description	create_time	owner
<input type="checkbox"/>	Inventory using F2--what has been scanned? (can filter by shelving location)	Displayed fields call #, shelving location, title, author, status, last edit date/time; base filters added owning library, is deleted = false, location id, last edit date/time (copy-level) between specified dates	2010-04-28 17:43	ttpl-csterle
<input type="checkbox"/>	Inventory using F2; can filter by shelving location (Thorntown)	Displayed fields call #, shelving location, title, author, status, last edit date/time; base filters added owning library, is deleted = false, location id, last edit date/time (copy-level) not between specified dates--Displays un-scanned items	2010-04-28 17:41	ttpl-csterle
<input type="checkbox"/>	Inventory - un-scanned items (Sitka)	Displayed fields call #, shelving location, title, author, status, last edit date/time; base filters added owning library, is deleted = false, location id, last edit date/time (copy-level) before specified date	2010-04-28 17:39	ttpl-csterle

- 1st – lists what HAS been scanned on a given date/date range
- 2nd – lists what has NOT been scanned between specified dates
- 3rd – lists what has NOT been scanned before specified date
- 2nd and 3rd do the same thing, just different ways of thinking about it
- 3rd template was provided by Jeremy Buhler from the Sitka Evergreen libraries
- Reports can be run at any time by shelving location.
- Checking what has been scanned can give a good idea of pace and progress.
- TPL waited until scanning was complete to run “final” report.

NOW THAT WE HAVE THESE REPORTS, WHAT DO WE DO WITH THEM?

- Reports were run in two batches—Youth Dept. and Adult Dept.
 - Reports were divided into available items and missing/damaged/lost (i.e. everything else) items
 - Focus was on finding items listed as “available” first
 - Reports showing “available” items were sorted by call number into logical groupings and assigned to staff for an inventory hunt (see attached)
 - Over 90% (guesstimate) items that we didn’t originally account for were just passed over during scanning or placed on carts to be fixed; those were checked in (F2) when found
 - Items listed in missing/damaged/lost etc. were passed along to dept. heads to decide whether to replace or delete
- Once staff has searched for items, reports are forwarded to dept. heads to delete “lost” items
- Dept. heads make lists of items to replace during this process
- Staff was given very specific instructions for Inventory hunt—why?
 - Every so often EI reports will throw out a duplicate barcode, or won’t seem to recognize a check-in as an edit date. . .
 - Reports can be re-run after the hunt,
 - But the final “marked” report serves as the best indicator of inventory success!

What would we have done differently?

- Added circulation modifier column in check-in screen (esp. for reference and AV materials)
- Taken a snapshot of item count the morning before inventory started