

COLLECTION INVENTORY USING EVERGREEN INDIANA
HANDOUTS AND SAMPLES



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FULL 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
 - *TPL 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

REPORTS FOR INVENTORY

- Three reports were used during TPL inventory

Limit output to [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	ttplt-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	ttplt-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	ttplt-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.

1: ttplt-csterle@TTPLT-csterle.EverGreen.lib.in.us

File Edit Search Circulation Cataloging Acquisitions (Preview) Admin (C)

1 Reports

Go Back Go Forward Debug

Database Source Browser

Sources

Nullable	Source Name
	Item

Source Specifier:

Field Name	Data Type	Field Transform	Output Type
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Enable nullability selection Add Selected Fields

Template Configuration

Name: Inventory - un-scanned items (Sitka) (clone)

Description: 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

Save

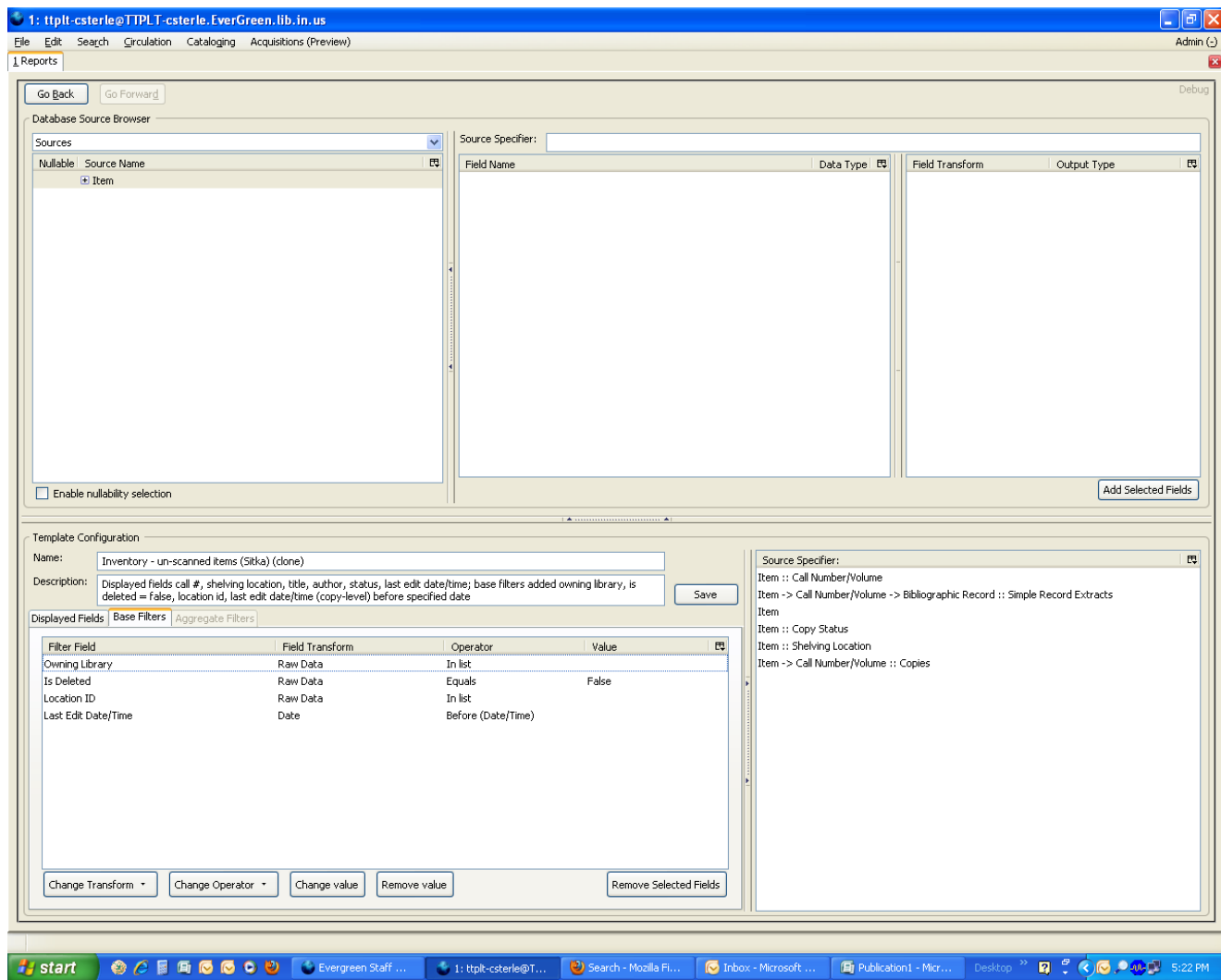
Displayed Fields Base Filters Aggregate Filters

Display Name	Data Type	Field Transform
Call Number Label	text	Raw Data
Name	text	Raw Data
Title	text	Upper case
Author	text	Upper case
Status	text	Raw Data
Barcode	text	Raw Data
Last Edit Date/Time	timestamp	Date

Source Specifier:

Item :: Call Number/Volume
 Item -> Call Number/Volume -> Bibliographic Record :: Simple Record Extracts
 Item
 Item :: Copy Status
 Item :: Shelving Location
 Item -> Call Number/Volume :: Copies

Alter Display Header Change Transform Move Up Move Down Remove Selected Field



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 (TPL) 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

What did MTCPLM do differently?

- MTCPLM did run an item count the morning of inventory.
- Set F2 screen to include **circulation modifier & loan duration** information.
- Also checked number of circulations on the item and recorded it on the back inside cover.
- Conducted inventory during closed hours so staff were able to move about freely.
- Scheduled at least two staff members to tackle the cataloging and label issues.
- During one session we scanned just over 2,000 items.

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!

Sample Staff Instruction Sheet (TPL)

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 FICA – 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

Scanner

IMPORTANT: Be nice to the person re-shelving your items. Be sure to scan in order and place your items on the re-shelving cart in the correct order.

1. Scan each item as if you were checking it in (F2). There will be a lot of beeping going on so look carefully at the screen.
2. Check that the Title on screen matches title of the item in hand.
3. Click on item you just scanned so that it is highlighted in blue.
4. Go to **Actions for Selected Items**; click on **Show last few circulations**. Record the number that is listed in the **Total Circs** field in the bottom right corner of the back cover (or nearest alternative if the back cover is a dark end paper) in pencil. Please use the following style of notation: Total Circ # / 2011
5. Close box
6. Check the following
 - a. Title on screen matches title on book
 - b. Call Number on screen matches spine label on book
 - c. Location on screen is appropriate for the item in hand
 - d. Circ Modifier & Loan duration is appropriate for the item in hand. Note: this is really important for R rated movies.
R Rated Movies Circ Modifier = dvd new r-rated
video new r-rated

If there are any inconsistencies between the item in hand and what is on the screen place the item on the problem cart with a small note.

If there are no inconsistencies check the following

7. Condition of item. pages loose, torn, spine breaking, soiled, damaged? *If yes, give item to the Controller.*
8. Does the item need a series label? *If yes, place a purple tag in the book and place on the problem cart.*
9. Finally if everything looks good place the item onto the re-shelving cart.
10. Repeat process for next item.

Controller

It is your job to help out the scanners, make decisions and solve problems! Items that may need repair or replacement will come to you. Make the decision swiftly and move on. Don't get bogged down and don't put the item to one side for consideration at a later date as you'll be swimming in stacks of things if you do. You may have to be brutal. Remember is the item really circulating enough to be repaired? Can we get a new copy?

If you truly want the item to be repaired, place in mending status and hand off to the repair crew.

Go ahead and withdraw if you just decide to toss the item and put it in the book sale, recycling, or trash as appropriate.

Shelver

It is your job to get the books to the Scanners and then back on the shelf. Be organized!

1. Remove one shelf of books at a time and load them onto the cart. Keep them in order. If you spot something that is clearly out of order fix the problem. Don't use the bottom shelf of the cart.
2. Take the cart to a Scanner.
3. Pick up a Re-shelving cart from the Scanner and return items to the appropriate shelf.
4. Once a shelf has been inventoried tape a large piece of scrap paper to the shelf and write "DONE" on it so that we can keep track of what has been completed.

Cataloger

It is your job to fix problems! Items that go onto the problem cart may include issues with titles, call numbers, spine labels, circ modifiers, loan duration or shelving location. Fix each as necessary. If the item is in good condition once it is fixed it can go back on the re-shelving cart. If an item is in poor condition it needs to go to the controller.

Floater

It's your job to be everywhere, keep everyone focused, motivated and on task. Keep your eyes open for bottle necks and pitch in to ease the flow of work.



TARGETED INVENTORY USING EVERGREEN INDIANA

- Targeted inventory of MTCPLM items with a last edit date of 9/2009. Adult collections except magazines.
- Used F5 Item Status screen to mark items missing
- Targeted items were checked during 2.5 sessions when the library was closed = 14,800 items.
- Staff were assigned a clipboard with approximately 16 sheets of items to check each session. Those who finished quickly were able to check additional sheets.
- Staff checked the shelf for each item listed on their assigned worksheets. This sometimes required a bit of hunting particularly if staff felt the item could have been easily mis-shelved somewhere else.
 - Pulled items with obvious spine damage
 - Pulled items where spine label and call number on worksheet did not match
 - Pulled items that appeared to have other issues (lack of series label, odd DDC numbers)
 - Professional Librarians pulled items that looked significantly worn or dated for withdrawal.
- Items that were not located on the shelf were marked as missing using the F5 screen.
- Worksheets were routed back to administrator at the end of the day.
- Items pulled were examined by appropriate professional librarian in charge of the collection area. If deemed worthy of keeping the item was routed to mending or cataloging as appropriate.

After the worksheets for the adult collection area were completed another report was run to identify all items marked as missing. This data was imported into excel and then saved in 50 barcode batches in CSV format. F5 was then used (logged in with Cat 1 privileges) to upload each barcode batch file and then the items were deleted as a group. It would have been possible to upload the entire file of 2,000 items but this made it every difficult manage the deletion process. Batches of 50 proved to be time effective in terms of uploading a significant number at one time without overwhelming the system or user. It was also possible to quickly scan the status to ensure that individual items with non missing statuses hadn't slipped in somehow.

Professional Librarians elected for the deletion process to occur immediately after inventory. On the one hand this carried the risk that items just mis-shelved would turn up but be no longer in the collection. However the librarians felt it was worth the risk in order to clean up our records. They agreed that should any items miraculously appear after deletion they would handle adding them back into the catalog if they really wanted to keep the item. This alleviated any additional work for catalogers and forced the librarians to truly assess the value of the item, an item that had not circulated in 18 months.

After deletion the worksheets were routed to each librarian responsible for that area of the collection. This became a targeted weeding list for the collection since we knew that the items listed as present on the shelf had not checked out in over 18 months.

The process is not fool proof as the last edit date field isn't 100% accurate. However this is also a problem for the full inventory method.

REPORTS USED

- Modified Thorntown's F2 report and manipulated in excel to create worksheets.
- Post Inventory – modified Thorntown's F2 report adding the Copy Status field so that the data could be limited to items with a "MISSING" status.

What would we (MTCPLM) have done differently?

- Printing the initial report as close to the date of inventory reduces the number of items not on the shelf and checked out.
- Books in series were a challenge as they appeared on the worksheets in one order and in many cases on the shelf in another.
- Fiction was much harder to check than non fiction particularly with prolific authors and authors that shared the same first three letters of their last name. Including author information on the worksheets may have assisted in this regard.

Please keep your worksheets in numerical order

Step 1

Go to the appropriate shelf.

Put a mark in the N column on the data sheet if you are unable to locate item. Look around!

Put a mark in the Y column if you are able to locate item on the shelf.

If you locate an item on the list that has an incorrect spine label pull the item and place it on a problem cart.

If you locate an item on the list that has obvious condition issues place it on a problem cart.

Step 2

F5 - Change Item Status

Key in all barcodes for items that you were unable to find

Select all and mark as "missing" **EXCEPTION: Do not mark those with a status of checked out as missing.**

Initial bottom corner of each sheet you complete.

Step 3

At the end of the day route completed sheets to XXX.

Sample Item Worksheet

Barcode	N Y	Call Number	Title				
643843-173001		A LAWYER'S LIFE	INDIANA STATE LIBRARY BOOKS LARGEPRINT				
36823000710544		AUDIO 128 ANG	EVEN THE STARS LOOK LONESOME [SOUND RECORDING				
36823000626195		AUDIO 152.4 REM	KITCHEN TABLE WISDOM, STORIES THAT HEAL				
36823001058943		AUDIO 152.4 RHO	DEALING WITH CONFLICT & CONFRONTATIONHOW TO KEEP YOUR COOL, STAND YOUR GR				
36823000187594		AUDIO 153.4 COO	DISCOVER YOUR GIFTEDNESS				
36823000187552		AUDIO 153.4 COO	DOUBLE YOUR POTENTIAL				
36823000582703		AUDIO 155.2 HAR	I'M OK, YOU'RE OK: A PRACTICAL GUIDE TO TRANSACTIONAL ANALYSIS				
36823000187578		AUDIO 155.4 COO	DISCOVER THE GIFTEDNESS IN YOUR CHILD				
36823000187602		AUDIO 155.4 COO	PARENTING THE GIFTED: UNDERSTANDING YOUR ROLE				
36823000067200		AUDIO 155.4 FRE	T. A. FOR TEENS AND OTHER IMPORTANT PEOPLE				
36823000187610		AUDIO 155.4 NPR	GIFTED AND TALENTED CHILDREN				
221109-1001		AUDIO 157 CUR	LESS STRESS				
36823000550981		AUDIO 158 MCG	CREATE YOUR OWN EXCITING FUTURE: THE EXPANSIVE THINKING SERIES				
36823000743982		AUDIO 158 MOO	THE RE-ENCHANTMENT OF EVERYDAY LIFE				
226157-1001		AUDIO 158 WAI	THE PSYCHOLOGY OF WINNING				
36823000655244		AUDIO 158.1 CHA	ONE HUNDRED WAYS TO MOTIVATE YOURSELF: CHANGE YOUR LIFE FOREVER				
341651-6001		AUDIO 158.1 COV	THE 7 HABITS OF HIGHLY EFFECTIVE PEOPLE				
36823000550999		AUDIO 220.5 BIB B	BIBLE				
36823000551005		AUDIO 220.5 BIB C	BIBLE				
36823000551013		AUDIO 220.5 BIB D	BIBLE				
225554-1001		AUDIO 226.1 MIT	THE GOSPEL ACCORDING TO JESUS				
36823000772064		AUDIO 248.4 SCH	THE TEN COMMANDMENTS: THE SIGNIFICANCE OF GOD'S LAWS IN EVERYDAY LIFE				
225771-1001		AUDIO 296.7 KUS	HOW GOOD DO WE HAVE TO BE?: A NEW UNDERSTANDING OF GUILT AND FORGIVENESS				
36823001027864		AUDIO 299.93 WIL	A RETURN TO LOVE				
36823000770308		AUDIO 326 BER	REMEMBERING SLAVERY: AFRICAN AMERICANS TALK ABOUT THEIR PERSONAL EXPERIENC				
244293-1001		AUDIO 332.024 ORM	NINE STEPS TO FINANCIAL FREEDOM				
232551-1001		AUDIO 371.2 OLN	WHERE THERE'S A WILL THERE'S AN... AHOW TO GET BETTER GRADES IN HIGH SCHOOL				
36823000929102		AUDIO 372.4 HOO #2	HOOKED ON PHONICS #2				
36823000938905		AUDIO 372.4 HOO #3	HOOKED ON PHONICS #3				
36823000927601		AUDIO 372.4 HOO/PAR	HOOKED ON PHONICS PARENTS' TOOLBOX				
36823000678774		AUDIO 448 LAN	LANGUAGE / 30: FRENCH				
36823000903297		AUDIO 448 ULT	ULTIMATE FRENCH				
36823000187909		AUDIO 453 MAR	LIVING LANGUAGEITALIAN				
36823000657760		AUDIO 470 LAT	LANGUAGE 30: LATIN				
36823000187925		AUDIO 510.76 COO	CREATIVE PROBLEM-SOLVING				
36823000069750		AUDIO 574.3 FRE	THE DOCTOR TALKS TO YOU ABOUT GOOD HEALTH AFTER 50				
36823000673569		AUDIO 613 LUN	JOAN LUNDEN'S HEALTHY LIVING				
36823000187958		AUDIO 613.2 LOS	LOSE WEIGHT- SELF-HYPNOSIS AND SUBLIMINAL LEARNING				
36823000187966		AUDIO 613.2 RED	THIS IS LIVING				