



INVENTORY

In the ILS, inventory is a four step process. The inventory process can be applied to the entire library or a part of it. Inventory may be completed over several days.

Items can be scanned directly into the Inventory window by bringing the items to the computer, using a laptop to move around shelves on a cart, or with a wireless scanner. If a wireless scanner is used, the barcodes may be scanned into a Notepad file (1 barcode per line). The scanner should be setup with a carriage return which will drop the barcode to one barcode per line. After the file is saved, it can be imported using the Import From File button. This way, incoming records held in the import file are compared with the current shelf collection to discover unexpected lost copies.

Administration > Inventory

Inventory Criteria
100 Series: 2013-04-25 School Libraries Step 2: Scan Barcodes

Copy Call No From: To: Circ Type: All
Material Type: All Collection Type: All Location: All

Buttons: Clear, Preview, Refresh, Delete, Print No-Shelved, Refresh, Invalid Barcode

Step 1: Initialization
☒ Library Books ☐ Textbooks

Step 2: Scan Barcodes
☒ Scan Copy Barcode ☐ Check No-Shelved ☐ Normal Barcode
☐ Ignore Duplicate Warning ☐ Dewey Differences: 10
☐ Import From File ☐ Checkin Checked Out Book

Buttons: Import From File, Import Offline, Import Online, Update Offline Data, Offline Status

Status	Total	Inventory
Available	6	0
Bindery	1	0
Bounded	2	0
Claimed Returned	21	0
Discarded	0	0
Display	1	0
In	3381	157
In transition	0	0
Intobard	0	0
Lost	37	0
Lost and Paid	73	0
Lost and Waived	7	0
Maintenance	1	0
Missing	6	0
On Order	77	0
Out	111	0
Outbound	1	0
Print Barcode	0	0
Scannable	3,434	173
Total	3,859	

Step 3: Finalize Inventory
Change All Unscanned Items To Missing

Step 4: Delete Missing Copies
Inventory Date From: 04/25/2013 To: 07/13/2017 ☐ Delete Items Without Copy

STEP 1. INITIALIZATION

SPECIFY CRITERIA

This step will either prepare specific sections of records or all of your records in your library for inventory.

1. Go to **Administration > Inventory**.
2. Choose to inventory the entire library or part of it.
 - 2.1. To do a partial inventory, specify the criteria for it. You can specify call number range, circulation type, material type, collection type, and/or Location.
 - 2.2. To do a complete inventory, leave all criteria as <ALL> and leave the call number fields blank.
3. Button options:
 - 3.1. **Clear:** Click to clear the selected inventory. This is useful if you want to view another inventory or start a brand new one.
 - 3.2. **Delete:** Click to delete the currently selected inventory.
 - 3.3. **Refresh:** Click to refresh the inventory numbers for the selected inventory.

Tip: Use the Shelf List window under **Catalog > Cataloging > Shelf List** to help you block off call number ranges. Note the number of characters of the longest call number and include that length of characters in your call number range (i.e. 100.34 - 110.89 can become the range 100.00 to 110.99 in inventory). You can also exclude collection types, such as magazines, from your inventory by going to **Administration > Library Setting > Configuration** and looking under Inventory.



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INITIALIZATION

1. Use the radio buttons to select if you are doing an inventory for Library Books, Assets, or Textbooks.
2. Click **Initialize Library System For Inventory And Confirm It**. The Initialization button **should only be clicked on once at the beginning of the inventory cycle each year** when inventorying the entire library or until the section is completed.
3. Enter a name that will appear in the Inventory Criteria dropdown when reopening the Inventory.
4. Please note any prompt that describes the number of copies in your inventory range. This number should match the number of books that need to be scanned. The prompt will also remind you to check your reserve shelf for copies included in your inventory.

STEP 2. SCAN BARCODES

This step contains multiple settings that will organize your scanned barcodes and create specific inventory statistics and pop-ups during your inventory process. The following are the main settings to be aware of when conducting an inventory.

1. **Scan Copy Barcode:** This radio button will allow individual barcodes to scan into the system one at a time. Ensure you have your speakers on, as the system plays a confirmation sound when an item has been successfully scanned into inventory.
2. **Import From File:** When this radio button is selected, it enables the import area below it so Notepad files containing multiple barcodes can be imported.
 - 2.1. Click **Import From File** to browse your computer for the notepad file containing the barcodes. Alternatively, drag and drop the file into the *drop files* area.
3. **Checkin Checked Out Book:** Copies checked in while performing inventory can have their status changed to "In" if they were previously checked out to a patron.
4. The next time a user works on the inventory, select the Inventory name from the dropdown list. **Do not click the Initialize button again.**

Tip: If the copy scanned did not belong to the initialized section and the copy is modified to match the criteria after the inventory is initialized, the system will automatically include the copies updated in the inventory.

STEP 3. FINALIZE INVENTORY

This step will change the status of all copies that have not been scanned in to Missing, unless they have been marked as another appropriate status indicating that the barcode could not be scanned in inventory. For example, items that are currently checked out do not need to be re-scanned.

1. To finalize the inventory process and change the status to Missing, click **Change All Unscanned Items To Missing**.
2. A checklist of missing copies will appear. If a missing copy has been found from this list, deselect the checkmark beside the copy title and it will not be marked as missing. When finished, click **Mark Missing**.
3. Once the inventory is complete, click **Print Mis-Shelved** to print a list of all the items that were Mis-shelved. User must select the Check Mis-Shelved checkbox from the Step 2 area in order to retrieve a complete list.
4. You can also view a printable list of barcodes scanned as invalid by clicking **Invalid Barcode**.
5. To view all of the copies marked missing, click **Preview**. This report will also provide inventory statistics at the bottom of the list.

STEP 4. DELETE MISSING COPIES

Please note that this step can wait up to two years after completing your inventory process to prevent deleted records of missing copies from being cataloged again if materials are found.



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1. Choose a date range when inventory was completed where the system will delete copies.
2. Select the Delete Items Without Copies checkbox if item records also need to be deleted.
3. Click **Delete**.