

INVENTORY using Auto-Graphics

Inventory is discussed in AGent VERSO Cat Administration User Guide

Inventory the collection section-by-section (by location). Use a laptop and attached scanner to build a file of barcodes using Online Barcode Entry representing the items in the location collection selected for inventory.

Staff logins will need access to Cat Admin to access the Inventory module. To set permissions for that staff user, contact the LMN Coordinator or the Director.

Online Barcode Entry (Recommended)

The recommended procedure for inventorying a collection is below:

Cat Admin -> (Inventory) Online Barcode Entry

The Online Barcode Entry function lets barcodes be entered to inventory items for a selected location collection online, either manually or by using a barcode scanner (preferred). Each barcode entered using Online Barcode Entry is saved to a “master” inventory file (for the selected location collection) in the ILUMINAR database, allowing inventory processing to occur over several sessions. Any discrepancies in status, location, etc., are immediately identified upon submittal (scan) of the barcode, and can be rectified immediately.

To begin, select the Location/Collection to be inventoried. [Submit] (Try a small collection first)
Scan/enter each item barcode associated with that location collection.

For each scanned barcode, the screen refreshes to display status information for the entered barcode.

A good scan has 2 lines: **Last Item Barcode Entered** and **Item Status**.

If 3 lines appear, there is a problem and the audible beep will be different.

~ **Last Item Barcode Entered** – shows the last (most recent) item barcode submitted

In the event the barcode was previously submitted during inventory processing the message “Duplicate barcode removed” (from the input file) is shown following the barcode.

~ **Item Status** – shows the current status of the item

Items with a status other than Available should be investigated, and the exception changed as appropriate

In the event an invalid barcode is entered, the Item Status field shows the message “Barcode: (barcode) does not exist in the database.”

A good scan!

NU | Pac Admin | **Cat Admin** | User Admin | Statistics | Circ Admin | Circulation | Circ Reports | Splash Page Admin | Help

Load Inventory Item to: Library Management Network, Inc. - Adult - Nonfiction [Submit](#) [Help](#)

Enter Item Barcode:

Last Item Barcode Entered: 32350000001397

Item Status: Available

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Expected Item Location – In the event the barcode entered is not associated with the currently selected location collection, the location (library – branch – collection) with which the item is associated will display. This could be a problem because the item may be mishelved. Investigate.

The screenshot shows the 'Load Inventory Item' form in the LMN Administrator interface. The form title is 'Load Inventory Item to: Library Management Network, Inc. - Adult - Nonfiction'. It includes a 'Submit' and 'Help' button. The form fields are: 'Enter Item Barcode:' (empty), 'Last Item Barcode Entered: 3235000001264', 'Item Status: Lib Use Only', and 'Expected Item Location: Library Management Network, Inc. - Adult - Reference'. At the bottom, there is a copyright notice: 'AGent™ and Impact™ are trademarks of Auto-Graphics Inc. Copyright © 2001 - 2013. Auto-Graphics, Inc. Pomona, California.'

(See screenshots below for other examples.)

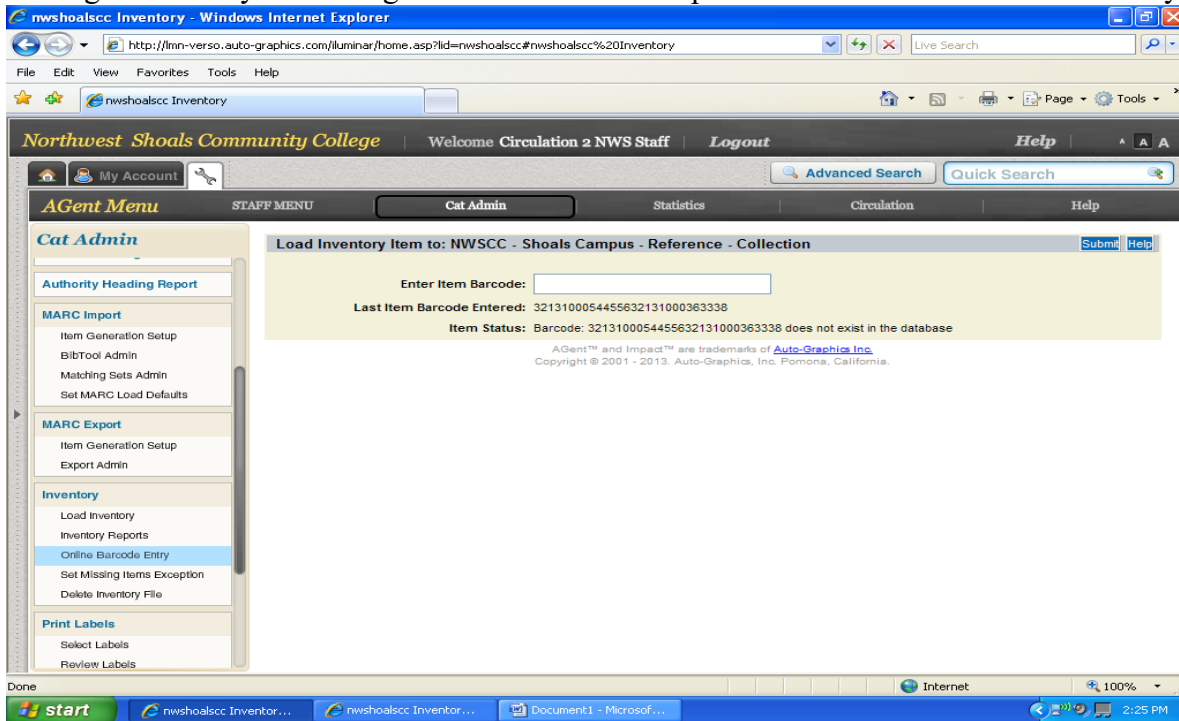
Tips on scanning:

If the barcode appears in the box **Enter Item Barcode**, the barcode has not been processed. Wait until the audible beep is heard and the barcode appears in **Last Item Barcode Entered**. Another indication of the barcode being processed are the green bars at the bottom of the screen. When there are a few green bars as in the example, the item has not been processed. All green bars indicate a processed barcode. When scanning the Reference section, there were 2 audible beeps: one beep for the scan and the other beep for the Item Status (beeps on any status but Available).

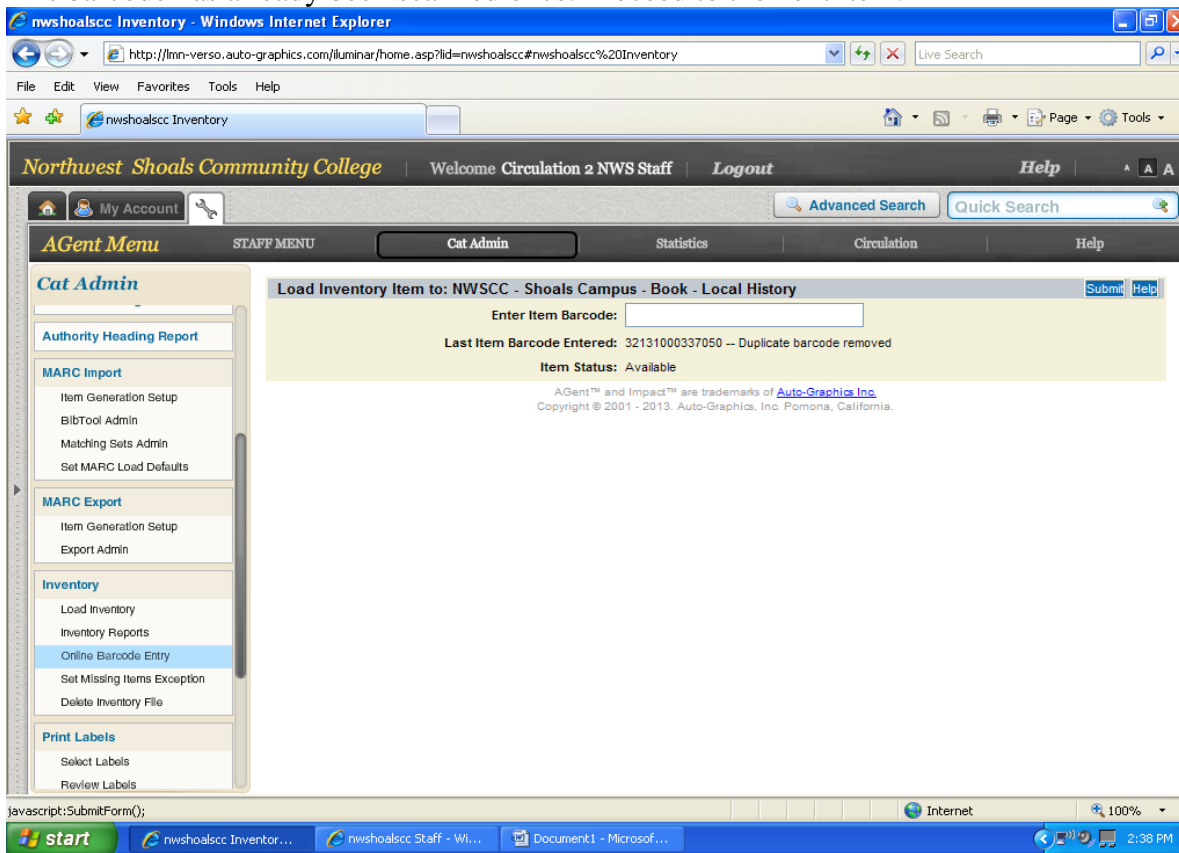
The screenshot shows the 'Load Inventory Item' form in the NWSCC Inventory interface. The form title is 'Load Inventory Item to: NWSCC - Shoals Campus - Reference - Collec'. It includes a 'Submit' and 'Help' button. The form fields are: 'Enter Item Barcode:' (containing '3213100033943'), 'Last Item Barcode Entered: 32131000339700', and 'Item Status: LIB USE ONLY'. At the bottom, there is a copyright notice: 'AGent™ and Impact™ are trademarks of Auto-Graphics Inc. Copyright © 2001 - 2013. Auto-Graphics, Inc. Pomona, California.' Two red arrows point to the 'Enter Item Barcode' field and the progress bar at the bottom of the form.

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Don't get in a hurry. Scanning two barcodes will not process either barcode. Wait on the system to process.

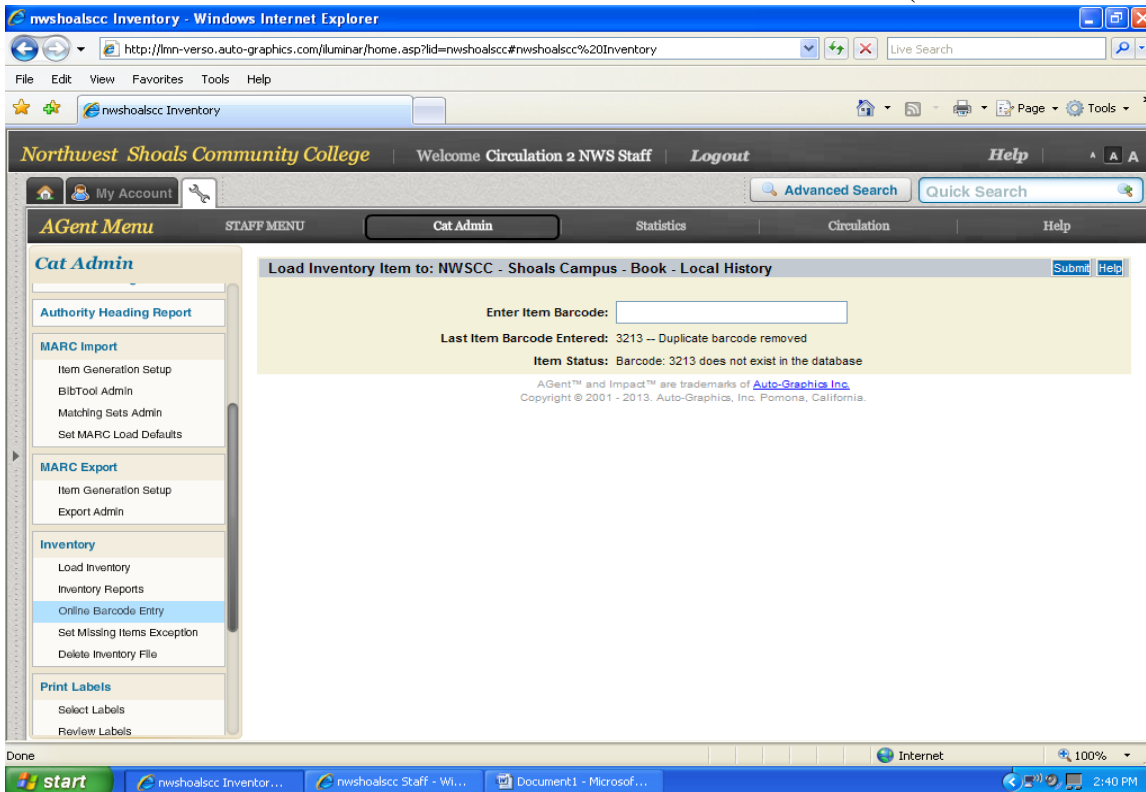


This barcode has already been scanned once. Proceed to the next item.

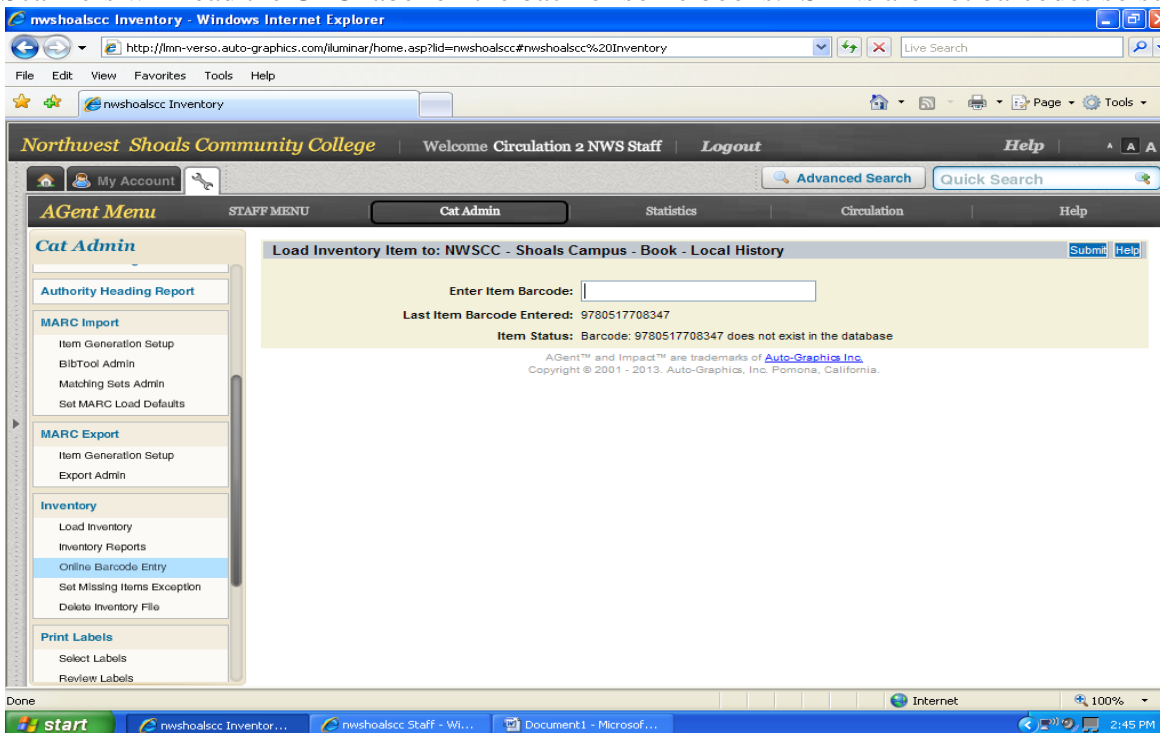


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Watch the screen! Scanners sometimes do not read the entire barcode (this was the first 4 digits of a barcode)



Scanners will read the UPC label on the back of some books. ISBNs are not barcodes so scan only the barcode.



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It was very advantageous for the barcodes to be positioned on the outside of the book near the spine. The position of the barcode allowed staff to slide out the book from the shelf slightly without removing the book from the shelf and scanning was very fast.

The day inventory is started, any items that were checked out and returned, must be inventoried **before** shelving.

3. Once the inventory of all locations is complete, generate an inventory report. The Inventory Report reconciles the physical inventory with the item records in the library's database. It lists items that are unaccounted for, items that are in the wrong location, and checked out items.

Only run an inventory report when inventory processing is entirely completed.

The Inventory Report screen shows a listing of “master” inventory files for all locations for which inventory is currently in process, or which were previously inventoried.

- * Click the Submit Report link for the Location to generate an inventory report.
- * A confirmation dialog displays the message “Continue to Submit this Report?”
- * Click the OK button to proceed with the inventory report request.
(Click the Cancel button to cancel the request and return to the Request Inventory Report screen.)
- * The Schedule Inventory Report screen displays.
- * Click the Submit button to submit the inventory report request.

Action	Location	Last Report	Last Data Load	Last Cleared	Comments
1. Submit Report	Library Management Network, Inc. - Adult - Nonfiction		3/28/2013		
2. Submit Report	Library Management Network, Inc. - Adult - Reference		3/28/2013		

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The status = Completed Inventory Report can be viewed/saved in Circ Reports -> View Reports

Delete	Name	File Name	Frequency	Run Date	Status	Specifications	Home Location	Comments
<input type="checkbox"/>	Inventory Report	INVENTORY_REPORT_3282013_2852_34.XLS	Once	3/28/2013 8:21:00 AM	Completed		Library Management Network, Inc.	

4. A-G recommends very careful use of the Set Missing Items Exception menu option in Inventory. It will apply the Missing exception to all “unreconciled” items inventoried for a particular location. A-G strongly recommends that an inventory report be generated for the location and verify ALL “unreconciled” items are truly missing **before** using the Set Missing Items Exception function. Once the Missing exception is applied to “unreconciled” items, it cannot be easily undone and usually has to be changed manually.

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Note: When any inventory of a collection has been completed previously (i.e. any time after having completed the first inventory & are ready to conduct the next inventory of the same collection), be sure to use the Delete Inventory File menu option to clear each of the Inventory Report files [Clear File] that were generated and used as a result of the previous inventory. Do this so that a completely new file of barcodes is built for the collection to inventory rather than add to an existing file.

Adding to an existing/old inventory file would seriously skew the result of the inventory. (Currently, all inventory files should be empty for each account).

Once the inventory process has been completed, clear the contents of the inventory file for a selected location in preparation of a ****new**** inventory for the location. (This is usually done next year)

To delete an inventory file:

1. From the CAT Admin menu, select Inventory - Delete Inventory File.

The Clear Inventory File screen displays. The screen shows a listing of “master” inventory files for all locations for which inventory is currently in process, or which were previously inventoried.

2. Click the Clear File link for the Location for which you wish to clear the inventory file.

The current contents of the selected inventory file is cleared, and the Clear Inventory File screen refreshes with the Last Cleared field for the inventory file updated to the current calendar date.

Once the old inventory file has been cleared out, start over by using these instructions to begin building a new, current file of barcodes & complete the inventory process by submitting an Inventory Report request.

(original document from Mark Hewes; revised and expanded by Charlotte Moncrief)