


Inventory Panel

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Structure for today

- Different methods of Inventory
 - Shut-down-circulation Inventory
 - Spot Inventory
 - Rolling Inventory

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Inventory is not scary!

(Seriously, it's not)

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Shut-down-circulation Inventory

- Set a Date!

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Planning the Inventory

- Set a Date!
- Talk to Staff
 - Discussion, Education

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Planning the Inventory

- Set a Date!
- Talk to Staff
 - Discussion, Education
- Talk to RSA
 - One main contact

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Gather Your Tools

- Laptops & Scanners On Carts
- Extension Cords



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Planning the Inventory

- Set a Date!
- Talk to Staff
 - Discussion, Education
- Talk to Consortia
 - One main contact
- Gather your Tools
 - Test them out!
- Schedule extra help
- Define Home Locations

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Define Locations

Count Items by Home Location

Item Library Code	Item Collection (Home Location)	Number of Items
DUNLAP-PLD	AUDIOBK	1,194
	AV-MUSIC	382
	BIOGRAPHY	14
	CATALOGING	1
	DESK-CIRC	42
	DVD	4,770
	EASY	6,910
	EDUCAREA	22
	EXPL-STATN	74
	FICTION	10,730
	J-AUDIOBK	389
	J-AV	138
	J-CD	213
	J-FICTION	4,437
	J-NONFIC	4,576
	JPLUS	4
	LARGEPRINT	789
	NONFICTION	4,126
	OFFICE	4
	PERIODICAL	851
	REFERENCE	37
	VIDEOGAME	161
Total	YA-AUDIOBK	9
	YA-FIC	2,765
	YA-NF	528
	Total	43,166
	Total	43,166

Finished By:	Item Collection (Home Location)	Maybe Number of Items
	AUDIOBK	1,194
	AV-MUSIC	382
	BIOGRAPHY	14
	Bluestem Award	
	Board Books	
	CATALOGING	1
	DESK-CIRC	42
	DVD	4,770
	EASY	6,910
	EDUCAREA (white bins)	22
	EXPL-STATN (Board games & flashcards)	74
	FICTION	10,730
	J-AUDIOBK	389
	J-AV	138
	J - Biography	
	J-CD	213
	J-FICTION	4,437
	J - Graphic Novels	
	J - Magazines	
	J-NONFIC	4,576
	JPLUS	4
	LARGEPRINT	789
	Level Books	
	Monarch Books	
	New Juvenile	
	New Young Adult	
	New Adult	
	New Media	
	NONFICTION	4,126
	OFFICE	4
	PERIODICAL	851
	REFERENCE	37
	Return Cart	
	VIDEOGAME	161
	YA-AUDIOBK	9
	YA - Caudill Award	
	YA-FIC	2,765
	YA - Lincoln Award	
	YA Magazines	
	YA-NF	528

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Five Tables

- Not found in Catalog
- Items for Repair
- Items for Re-Shelving
- Items on Hold
- Items found Lost

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Five Tables



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Keep your staff happy!



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Sticky Notes



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What to Expect when you're Scanning

- Weird stuff
- Un-cataloged stuff
- Damaged stuff
- Mis-shelved stuff
- Old stuff
- Missing stuff
- Lost stuff

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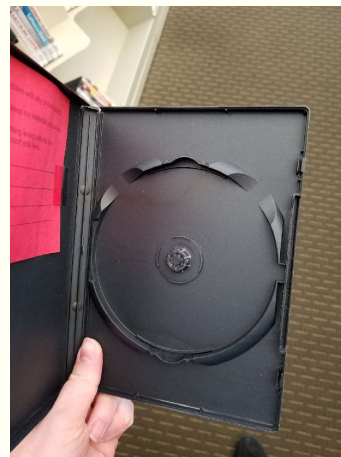
So many items!



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What to Expect when you're Scanning

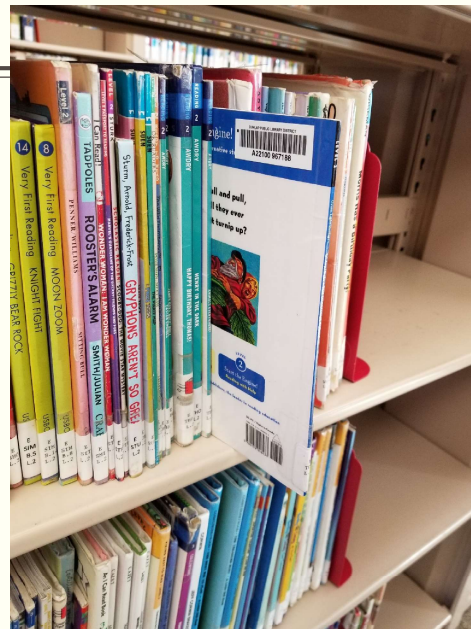
- Weird stuff
- Un-cataloged stuff
- Damaged stuff
- Mis-shelved stuff
- Old stuff
- Missing stuff
- Lost stuff



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Barcodes



Tipping Out Books



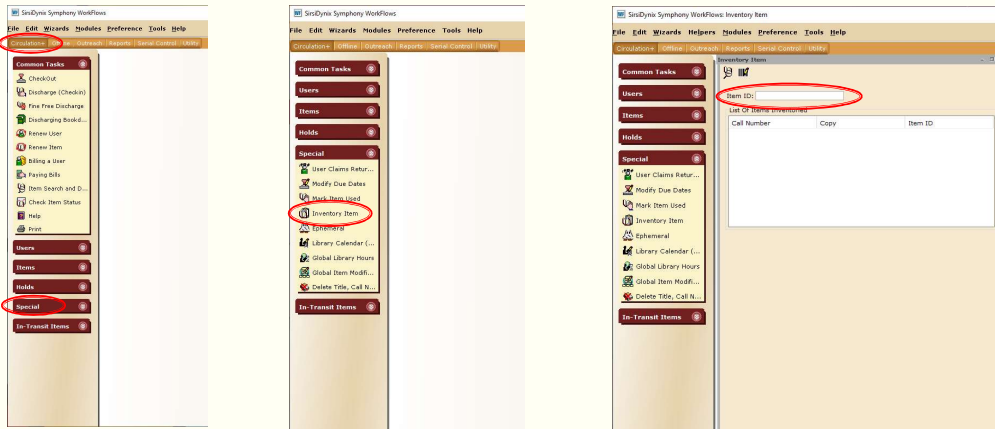
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Scanning Items

- Items checked out = Inventoried
- Items In Transit = ?
- Physically handle each item in the library

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Scanning Items



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Tidying Up




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Problem Items

- Items not found in Catalog
- Items for Repair
- Missing Items
- Items checked out to patrons
- Items not ours
- Items for Re-shelving
- Items on Hold

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Planning the Inventory

- 
- | | |
|-------------------------|-------------------------|
| ▪ Set a Date! | ▪ Schedule extra help |
| ▪ Talk to Staff | ▪ For the day after |
| ▪ Discussion, Education | ▪ Define Home Locations |
| ▪ Talk to Consortia | ▪ Find other Locations |
| ▪ One main contact | |
| ▪ Gather your Tools | |
| ▪ Test them out! | |

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Find those items!



...or mark them missing...

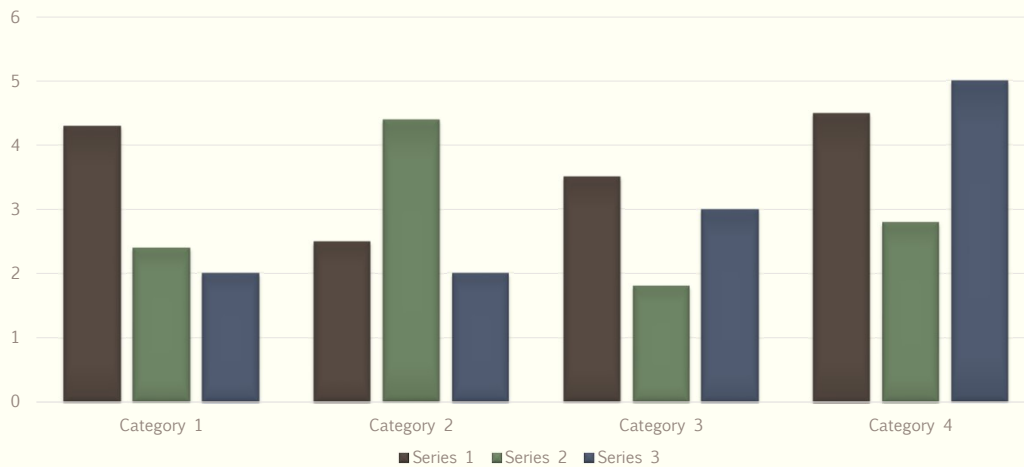
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Fun with Data!

- Share with your Staff & Board

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Use the Data to create smart-looking charts



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Fun with Data!

- Share with your Staff & Board
- Use the Data for good
- Use the Data for collection development
- Use the Data for Insurance

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Obtain Feedback from your Staff

- What went well?
- What didn't work well?
- Ideas for next time?

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ANOTHER TAKE ON:
SHUT-DOWN-
CIRCULATION INVENTORY

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Fondulac District Library

- 106,129 items in the collection (at time of inventory)
 - Day 1: 47,281 items inventoried
 - Day 2: 46,393 items inventoried
 - Total inventoried: 93,674 items
- 30 members of staff



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Setting a Date: Length of Closure

- Priorities
 - Print materials first
 - Media and Library of Things collections second
- "Count Items By Home Location" report
- Shelves & ranges
- Practice scanning session
- WorkFlows vs. Mobile Circ
- Announce closures early

Collection	Total Ranges	Shelves per Range	Rows of Ranges	Estimated Time per Range	Estimated Time Per Collection
Biographies	16	7	1	0:15	4:00
Adult Graphic Novels	4	6	1	0:35	2:20
Large Print	42	5	6	0:12	8:24
BKCD	36	5	9		0:00
Playaway	4	5	1		0:00
CD	12	6	2		0:00
DVD/Blu-Ray	36	6	6		0:00
Paperback	28	6	5	0:20	9:20
Reference	5	3	1	0:10	0:50
Oversized	2	2	1	0:10	0:20
Spanish	2	3	1	0:10	0:20
Great Courses	1	3	1	0:10	0:10
Fiction	107	7	13	0:15	26:45
Non-Fiction	104	7	10	0:35	60:40

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Setting a Date: Staffing

- Schedules
 - ☐ Base schedule vs. 9-5 schedule
 - ☐ Extra staff
- Working in teams
- Black out schedule days



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Talk to RSA

- Pre-inventory tasks
 - ☐ Advice
 - ☐ Technology
- At time of inventory
 - ☐ Batch inventory of checked out items
- Post-inventory reports

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Systems to use

- WorkFlows
 - Inventory Wizard
 - Status pop-ups
 - Available on PC or laptop
- Mobile Circ
 - Displays more information
 - Detecting errors (beeps and text color)
 - Need RSA assistance to install
 - Available on tablets and Chromebooks
- Hybrid process



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Mobile Circ: Inventory screen

Inventory Item	
Barcode	A12803410049
Library	FONDULAC
Home	NEW-BOOK
Classification	DEWEY
Status	NEW-BOOK
Call #	FIC ADA
Title	When in Rome : a novel
On Reserve	No

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Mobile Circ: Inventory Screen with Issue

The screenshot shows a mobile application interface for library inventory. On the left is a vertical menu with options: Check Out, Check In, Renew by User, Renew by Item, In-house Use, Item Status, Holds Pull List, Holds by User, Hold Shelf, Inventory (highlighted), Deselect, Add User, Copy User, and Modify User. The main area displays the 'Inventory' screen for item A12803105424 Great Britain. It includes a barcode input field, a search icon, and a list of item details.

Inventory Item	
Barcode	A12803105424
Library	FONDULAC
Home	NONFICTION [wrong collection]
Classification	DEWEY
Status	NONFICTION
Call #	NF 914.104 RIC 2020
Title	Great Britain
On Reserve	No

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Mobile Circ: Inventory Screen All the Issues

The screenshot shows a desktop version of the Mobile Circ inventory application. The left sidebar menu is identical to the mobile version, with 'Inventory' highlighted. The main area displays the 'Inventory' screen for item A37100385678 Homecoming at Hickory Ridge. It includes a barcode input field, a search icon, and a list of item details.

Inventory Item	
Barcode	A37100385678
Library	LAHARRP-CAR [wrong library]
Home	LARGEPRINT [wrong collection]
Classification	DEWEY
Status	INTRANSIT [not on shelf]
Call #	AF COR [previous NF 289.3092 BEA]
Title	Homecoming at Hickory Ridge
On Reserve	No

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Gather Your Tools

- Devices
 - Staff laptops, tablets, Chromebooks
 - Barcode scanners paired to specific devices
 - Battery packs and power strips
- Paper supplies
 - Post-it Notes
 - Paper slips
 - Handouts and guides for staff with screenshots



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Gather Your Tools

- Miscellaneous
 - Sharpies
 - Shelf markers
 - Carts
 - Tape
- Helpful BCA reports
 - ☐ "Count Items By Home Location"
 - ☐ "Inventory List Builder w/last activity date"
 - Updates daily
 - Run day before, daily during inventory, day after
 - Sort by item status (Lost, Missing, On-hold, etc.)

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Staff Preparations

- Weeding and shelf reading
- Test Cart and Mobile Circ
 - Lost Item
 - Missing Item
 - In-Transit Item
 - Not our Item
 - Different Home Location
 - Discarded Item
 - Item on Hold



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During Inventory: Designated Areas

- Home base
 - Staff assignments
 - Technology
 - Charging center
 - Clear labels
 - Project leader
 - BlueCloud Analytics reports
- Problem Item Area
 - Cataloging staff
 - Separate tables and carts per type of issue



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Item Problems

▪ Common

- Misshelved items
- Damaged items
- Missing status
- Outdated items
- Cataloging issues
 - Spine labels
 - Wrong home location

▪ Unique

- ☐ Series call numbers
- ☐ Checked out items
- ☐ Other library's items
- ☐ Bugs

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During Inventory: Incoming Items

▪ Items returned in book drops

▪ In-transit items

- Items in-transit or on hold at other libraries didn't get bulk inventoried by RSA
- Staff checked for Fondulac items en route to shelf vs. filling holds
 - En route to shelf: checked in and inventoried
 - Filling holds: waited until first day we reopened to check in
- Over the course of the next several weeks, staff checked in transit items and inventory items we hadn't touched

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During Inventory: Communications

- Make social media posts
- Online programs.



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Post-inventory Tasks

- BCA "inventory list builder w/last activity date"
- Collecting and sorting data
 - Missing and miscellaneous items
- Items that were missed
- Placed holds for renewed and in-transit items
- RSA: batch delete items

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Spot Inventory

- Annually
- Areas
 - High-volume areas
 - Weeding
 - Higher likelihood of theft
- Library remains open

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ROLLING INVENTORY

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Rolling Inventory

- Small inventory every month
- 3-month delay
- Items not previously inventoried
- Used in combination with other reports

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Instructions for Staff

1. Pull and inventory the items on your list.
 2. If an item is not on the shelf, put a dash next to the call number.
 3. When you have finished your list, put it on my desk.
 4. I will then take the lists and catch stragglers.
-
- **Each person gets a portion of the collection**
 - **Usually amounts to 1-4 pages worth of items**

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Follow Up

- Inventory any items checked out
- Check every couple days until everything is inventoried
- Anything not inventoried at the end of the month is brought to the collection leads
- Repeat each month

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BCA Reports Used

- Inventory List Builder
 - Used for rolling inventory
- Item List Builder (From WR)
 - Used for monthly lost/missing
- Item List Builder (From WR)
 - Used for 6+ months lost/missing

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Supporting Reports

Monthly Lost/Missing

- Each month I create a report of all items considered LOST, LOST-ASSUME, LOST-CLAIM, LOST-PAID, LOST-TRANS, and MISSING.
- I look for everything from the most recent 3 months

6+ Lost/Missing

- June and December each year I create a lost/missing report
- I look at things that have been lost/missing for 6 months or longer only
- Each item is assessed in WorkFlows for payment status and sent along to the collection leads to decide on whether to charge/forgive items
- Patrons are given a month to return these items before they are stuck with the bill

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Savannah's last thoughts:

- WDL only has a full inventory about every 3-4 years
 - The combination of rolling inventory and supporting reports has worked well for us
- Collection size of over 72,000
 - Only about 300 items are considered lost/missing
- Rolling inventory works best when accomplished by a team
- Each library is unique
 - Choose your method

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Nick's last thoughts:

- Run reports early and often
- Mobile Circ is a very useful tool
- Talk with other libraries
- Label everything

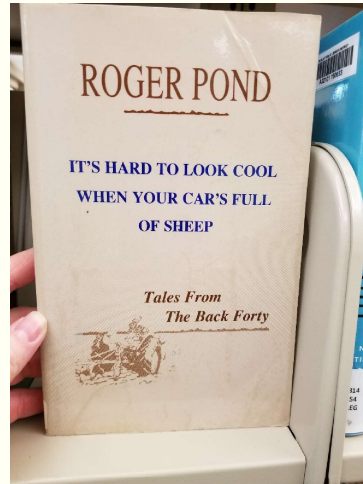
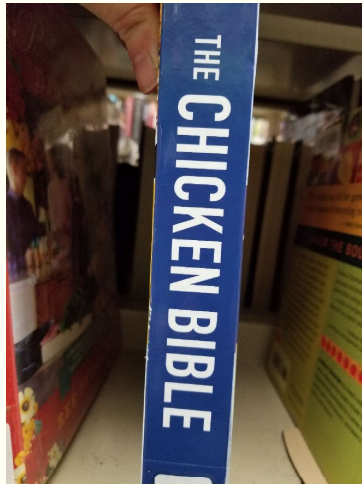
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Laura's last thoughts:

- Don't have music playing
- Don't have races
- Create contests:
 - Most bookmarks found
 - Most date due receipts found
 - Oddest book title in the collection

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Oddest Book Titles



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Questions?

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