**IUG2022 -- Simply LEAP through Inventory presentation notes**

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Welcome to **“Simply LEAP through Inventory”**. Is your conscience or your director bothering you because you haven’t done an inventory in years? In this presentation we’re going to show you how the Orion Township Public Library uses a laptop, an RFID pad and Simply Reports to inventory our holdings by their Collection. **We use both the Polaris Staff Client and Leap to do inventory.** If you don’t use RFID you can still use this process to inventory your collection by scanning your barcodes.

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Anne is the Polaris System Administrator at the Orion Township Public Library. Shannon is the Head of Support Services which includes circulation, materials ordering, processing, and cataloging.

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Inventory has always been important at the Orion Township Public Library. We have 132,000 physical holdings. It is very easy for materials to get misplaced. Inventory is a way to find those materials. When we first started the inventory process, we had around 172,000 items. We have used a number of different processes to take an inventory.

Before we migrated to Polaris we used a Telxon handheld barcode scanner and our previous ILS to take the inventory. The barcodes were stored in the Telxon and then uploaded to our ILS system. Reports were then run to clear up the items that weren’t on the shelf. Every summer we inventoried a third of our holdings, so every 3 years we had a complete inventory of the library.

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When we first migrated to Polaris, we tried to use the built-in Polaris Inventory process to do inventory. That didn’t work very well for us. The PIM software heavily relies on call numbers not collection codes. Our previous ILS only had one field for the call number, it didn’t have a prefix field, nor a shelf location field. Many of our call numbers had location information and/or material type before the Dewey number. The PIM software also required a staff member with the appropriate permissions to do preliminary setup before the staff member doing inventory could start the process. Staff couldn’t do inventory on the fly. It had to be planned in advance.

Using Simply Reports we came up with another way to take an inventory, but since we had to scan each barcode it was very time consuming and we only did an inventory every few years.

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When we installed RFID we purchased a bibliotheca RFID paddle to scan shelves of books. Because our bookshelves are metal the wand didn’t work very well. We got a lot of false readings. The wand had to be run back and forth across the shelves numerous times to hopefully catch most of the tags. If an item had multiple tags then not all of the tags would be read. When a staff member was done with inventory for the day, a staff member with more permissions had to upload the scanned barcodes from the RFID paddle into a text file, and then into Polaris. Then they had to log into Simply Reports to run the inventory report. Again, staff needed to make sure someone was working who could upload the barcodes.

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Our IT manager found an RFID pad that can be powered by a laptop. We found that putting a block of plywood between the RFID pad and the metal cart improved the read accuracy of the pad. Now we take the cart containing the RFID pad and a laptop out to the stacks and scan materials until the battery on the laptop gets too low.

Items scanned that have a status of other than “IN” are put aside and given to the staff member who is going to run the report, to handle the exceptions, before the report is run.

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We created an Item List Report in Simply Reports and saved it so staff does not have to create the report each time inventory is taken. The **Output** and **Sort Columns** we include in the report are on the slide. We check the Excel file box so that the report can be exported to Excel. The **Item General Filters** and **Item Call Number Filters** can be edited as different collections are inventoried.

(Note: If interested, there is a separate presentation handout with screenshots from Simply Reports and a list of the columns and filters we use.)

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I include inventory shifts on my desk schedule. Each Support clerk gets one -- 2 hour shift per week, I try to keep them on the same day and time each week. Inventory is also a good fill in when we are slow in other areas of our department.

We have trained our shelvers to do inventory as well. They are scheduled during their 4 hour night shift after the shelving area has been cleaned up for the day.

I created an Excel spreadsheet to keep track of what collections and call #’s in that collection have been done and the last call # that was run in the Simply Report. All staff that do inventory fill out the spreadsheet.

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The scheduled clerk gets a laptop from the IT Dept. We have a dedicated inventory cart that we keep in the Support Service workroom that has a mini RFID pad on it, the inventory tracker spreadsheet, and a barcode reader. Clerk takes the cart out to area to be inventoried. Clerk logs into LEAP on the laptop, opens check-in in inventory mode, connects RFID pad and opens RFID check-in software. Clerk places each item on the RFID pad, 1 at a time. If any items show an exception in LEAP, i.e. item status is other that “IN”, clerk sets that item aside and fixes the problem after they are done doing inventory. Exceptions must be resolved prior to running the Simply Report.

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Inventory is a good time to do any item record or spine label cleanup. We are currently in the process of cleaning up all of our Adult Non-Fiction item records and spine labels. When we moved from Horizon to Polaris our call #’s and cutters did not come through in the correct fields and some of our items have old labels with incorrect cutter information. Instead of taking the mobile cart out to the stacks, we are bringing a cart of books back to a staff desk that has an RFID pad connected and doing the inventory there and then checking item records to make sure the call # and cutter are in the correct fields and that it is correct on the spine label. We have already done all of the youth area.

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Once the clerk is done with the section of items, they give the collection and call # information to one of the three staff members that has access to Simply Reports. That staff member edits the already created Inventory Report in Simply reports by updating the collection and call number field in the class field in Simply reports. We sort the report by last inventory date.

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The report of items without that day’s date on it is given back to clerk to look for. Any items found are checked in by using the inventory check in mode in LEAP. Sometimes these are items that have a shelf location of “storage” or “just returned” or “New”. Any items not found, have their status changed in Polaris to “misplaced” or your current missing status.

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Clerk then fills out the inventory tracker with date, area inventoried on their shift and how many items were missing.

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The positives outweigh the negatives of doing inventory this way. The biggest being, what’s on our shelves matches what’s in Polaris. It is very easy to do, does not require a lot of staff training. Completely portable and can be done at staff desks. We also find mis-shelved items or items that have a status of other than “in”.

The only negatives are the inventory date does not update for items that are not in. The battery life of the laptop determines how long we can do this for, as the RFID pad is also powered by the laptop battery.

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Thank you watching our presentation “Simply LEAP through Inventory”. We look forward to seeing you at the scheduled Question and Answer session. Our email addresses are also included on the last slide in case you can’t attend the Q&A session.