



Simply LEAP through Inventory

Orion Township Public Library

Anne Barnard and Shannon Schmidt

The History of Inventory at OTPL



- Barcodes scanned and stored
- Uploaded to previous ILS
- Reports run
- A third of holdings inventoried every summer

Polaris Inventory Manager



- Software heavily relies on call number
- Previous ILS only had one field for call number.
- OTPL call numbers had location information and/or material type before Dewey number.
- Staff with higher permissions needed to setup collection to be inventoried each time a staff member was going to do inventory.

Simply Reports

- Create an Item List Report
- **Output Columns:** Item assigned branch abbreviation, Item assigned collection abbreviation, Item barcode, Item call number, Item last inventory date, Item shelf location, MARC author, MARC bibliographic record ID, MARC title, item last cko/renewal date, Item material type
- **Sort Columns:** Item assigned branch abbreviation, Item assigned collection abbreviation, Item shelf location, MARC author
- Check the Excel file box
- **Item General Filters:** Assigned branch, Collection, Record status – Final, Circ status – In
- **Item Call Number Filters** – Classification Number
- Save the Report. It's filters can be edited as you inventory different collections.

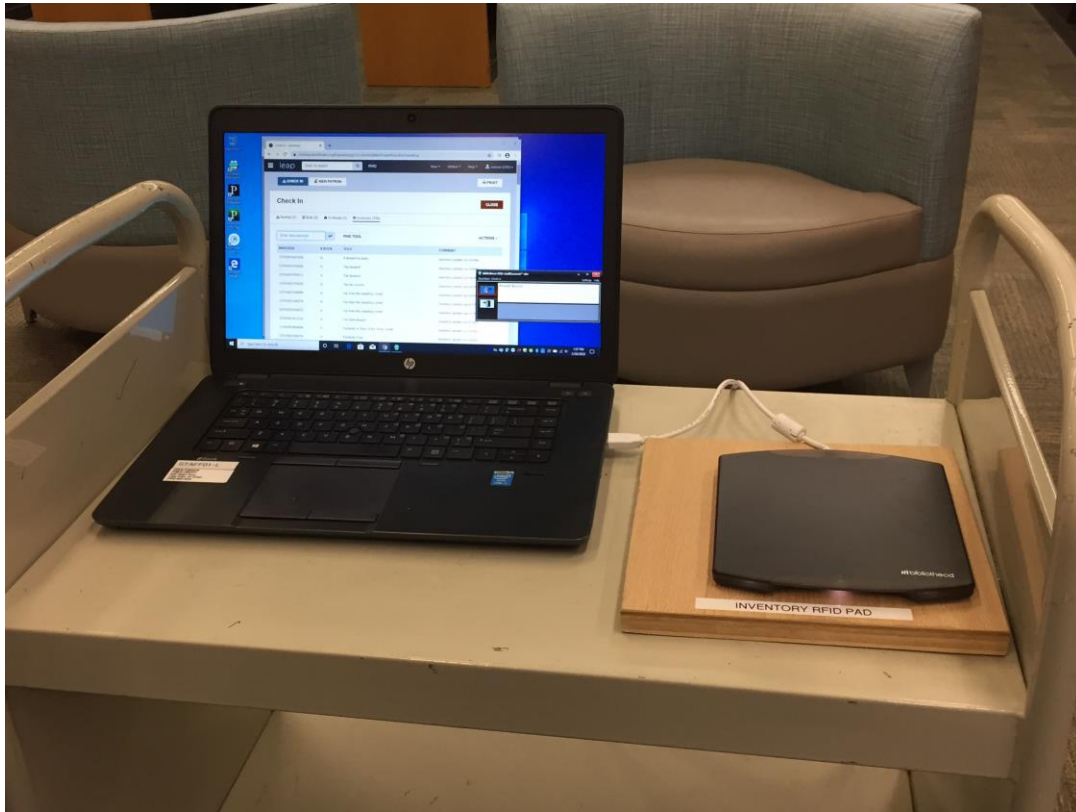
Our first try at RFID Inventory



Problems

- Metal Shelving
- Missed tags
- Items with multiple tags
- Items with status other than “IN”

Equipment needed for RFID Inventory



- Laptop
- LEAP
- RFID Pad with USB adapter

Staff Scheduling

- Support Services clerks are each schedule for one – two hour shift per week. They inventory all print materials. We inventory Adult print collections one year and Youth print collections the next.
- Pages/Shelvers are responsible for the inventory of all A-V materials. This is done annually.

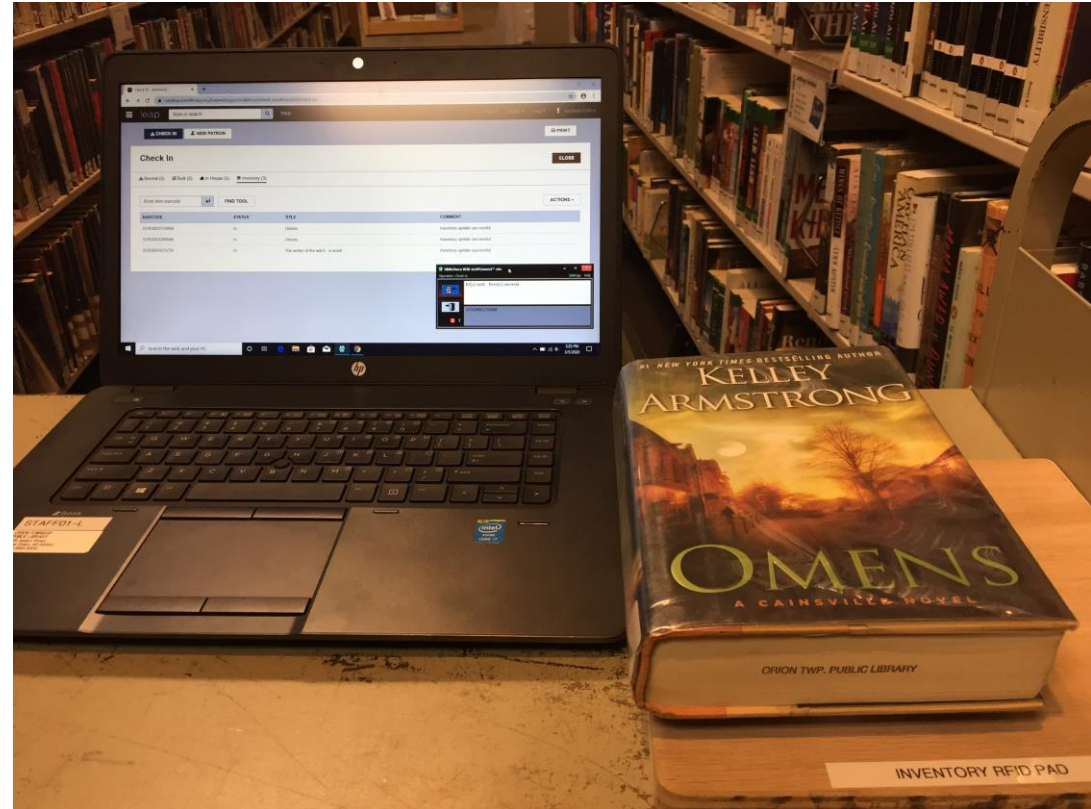
Tracking Inventory Progress

- Inventory tracker is completed by staff member doing inventory
- What's been done and what's next
- Staff accountability

	<u>SUBSET</u>	<u>DATE</u> <u>INVENTORIED</u>	<u>REPORT</u> <u>DONE</u>	<u># MISSING</u>	<u>CLERK</u>
ADULT					
Anime	all	12/11/2018	yes		0lb
BluRay (youth & adult)	all	12/29/2018	yes		0lb
Feature DVD	A-C	12/12/2018	yes		5lb
Feature DVD	D-G	12/13/2018	yes		6lb
Feature DVD	H-K	12/13/2018	yes		5lb
Feature DVD	L-M	12/15/2018	yes		6lb
Feature DVD	N-P	12/19/2018	YES		2cs
Feature DVD	Q-S	12/21/2018	yes		4lb
Feature DVD	T	12/21/2018	yes		3cm
Feature DVD	U-Z	12/27/2018	yes		8lb
TV Series	A	1/4/2019	yes		0lb
TV Series	B-F	1/4/2019	yes		0lb
TV Series	G	1/4/2019	yes		0lb
TV Series	H-Q	1/7/2019	yes		1lb
TV Series	R-S	1/7/2019	yes		0lb
TV Series	T-Z	1/8/2019	yes		0lb
Foreign DVD	all	1/8/2019	yes		0lb
Non-fic DVD	000-299	1/8/2019	yes		0lb

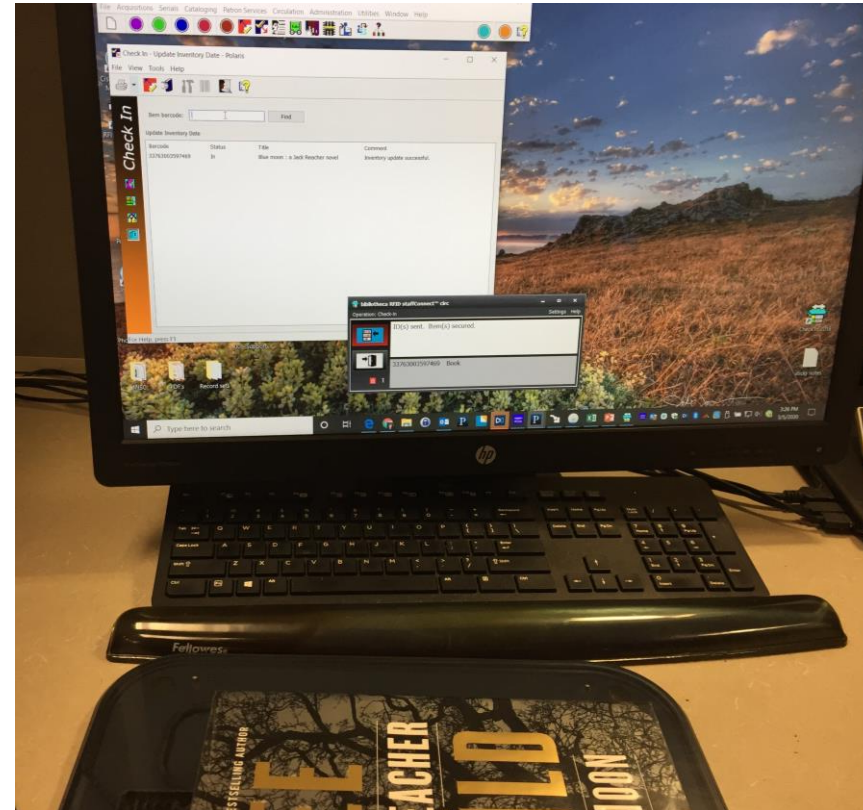
Inventory Process in the Stacks

- Login to LEAP on laptop
- Open Inventory Mode Check-in
- Insert RFID USB
- Scan items one at a time on the RFID pad
- Exceptions will pop up, i.e. status other than in, put aside with note to fix
- Keep track of call number field in collection to run report of missing items
- When done with collection, run report in Simply Report



Inventory Process at Your Desk

- Bring cart of items to desk that has an RFID pad and label printer
- Inventory all items
- Open Item Record to make sure call # and cutter are in correct field
- Update spine label if necessary



Simply Reports - Editing

- **Edit an Item List Report**
- **My Reports:** Item List Reports, Select Inventory report and edit button, Select correct collection, Call number field and continue, Save report parameters
- **My Reports:** Item List Reports, Check Inventory reports and Run Reports, Download Excel report and sort by last inventory date

Select	Report name	Report description	Creation date	Last run date	Creator	Report type	Actions
<input type="checkbox"/>	aebMissing	Missing Items	09/25/2013	09/25/2013	SimplyReports	Item list reports	Delete Edit
<input type="checkbox"/>	aebMissingReport	Missing Items	05/07/2013	05/07/2013	SimplyReports	Item list reports	Delete Edit
<input type="checkbox"/>	aebpolarisdeletions2013	Polaris deletions 2013	01/10/2014	06/12/2017	SimplyReports	Item list reports	Delete Edit
<input type="checkbox"/>	Claim Missing Parts 2016 Aug	Items with a status of Claims Missing Parts	08/03/2016	06/25/2018	SimplyReports	Item list reports	Delete Edit
<input checked="" type="checkbox"/>	Inventory Report	template for inventory 120919	12/09/2019	03/02/2020	SimplyReports	Item list reports	Delete Edit
<input type="checkbox"/>	Items lost and paid for	Items that were lost and paid for	09/02/2015	02/11/2020	SimplyReports	Item list reports	Delete Edit
<input type="checkbox"/>	Items with status of claimed	Claimed items with patron name	07/29/2016	02/05/2018	SimplyReports	Item list reports	Delete Edit
<input type="checkbox"/>	Lost Items 160 days	Lost items run for 160 days before day report is run	12/10/2015	01/08/2020	SimplyReports	Item list reports	Delete Edit
<input type="checkbox"/>	magazines circ count	test of bib level circs	06/05/2018	06/05/2018	SimplyReports	Item list reports	Delete Edit
<input type="checkbox"/>	Missing Items	Missing Items	08/12/2013	08/12/2013	SimplyReports	Item list reports	Delete Edit
<input type="checkbox"/>	Missing Items for Librarians	Missing Items Report for Librarians	02/04/2014	01/08/2020	SimplyReports	Item list reports	Delete Edit



Excel Report procedures

- Look for items not inventoried on shelves
- Items that are found, use Inventory mode check in
- Items not found, change item status to misplaced or your current missing status
- Fill out Inventory tracker with collection, call number field, and how many were misplaced

Inventory report for Feature DVD's call number H - K					
Coll	Shelf Location	Call Number	Title	Item Barcode	Last Inventory Date
DVD	Feature	HAPPY-GO-LUCKY	Happy-go-lucky	33763002065617	7/7/2017 10:41
DVD	Feature	HAPPY TEXAS	Happy Texas	33763001768682	5/6/2018 10:41
DVD	Feature	INTERPRETE R	The interpreter	33763001439367	11/6/2018 11:03
DVD	Feature	JACK AND JILL	Jack and Jill	33763002245482	3/6/2020 11:07
DVD	Feature	JOHNSON FAMILY VACATION	Johnson family vacation	33763002240392	3/6/2020 11:10
DVD	Feature	KARATE KID	The karate kid	33763002222671	3/6/2020 11:13

Pro's & Con's

Pro's

- Physical holdings match Polaris
- Does not require extensive staff training
- Portable equipment that can be taken into the stacks
- Can also be done at any staff workstation that has an RFID pad.
- Mis-shelved items are located making it easier for patrons to find items where they should be

Con's

- Items with a status of other than “in” do not get their inventory date updated
- USB is powered by laptop, therefore battery drains faster

THANK YOU!

Questions?

Anne Barnard - abarnard@orionlibrary.org

Shannon Schmidt - sschmidt@orionlibrary.org