Paperless Inventory

Sierra & Excel©

Trina Kirk

Rapides Parish Library

Who are we?

- Rapides Parish Library
  - We are a medium-size public library, serving Rapides Parish (pop. ~132,000) located in central Louisiana.
  - The library consists of a Main Library, 5 urban branches, 4 rural branches, a bookmobile – which includes service to rural areas not serviced by a branch and the homebound, nursing home residents and adult day care facilities, and a van service to approximately 30 child development centers.
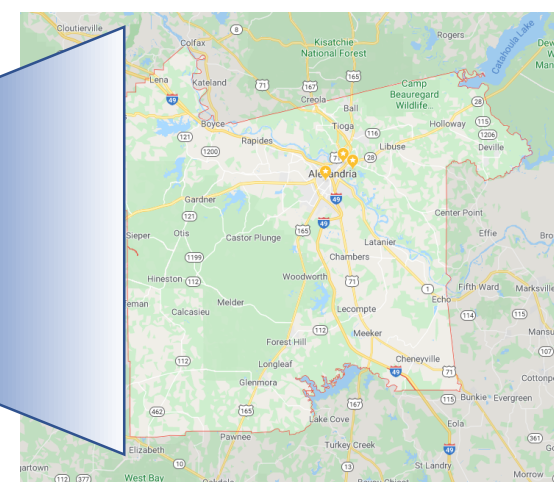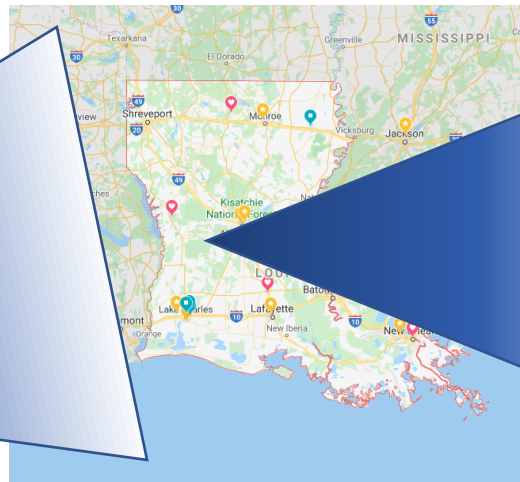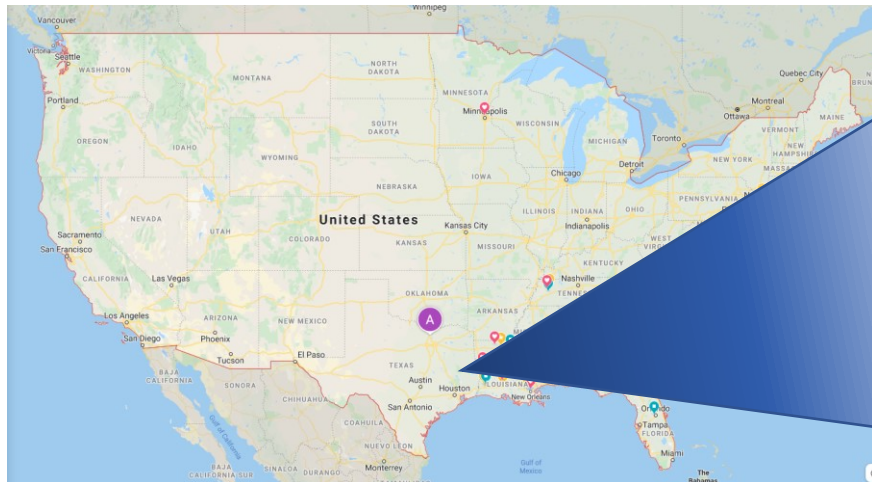
Why paperless?

- Savings
  - Time
  - Paper
- Flexibility
  - List easily reordered
  - Allows for weeding during inventory
  - Create display list

What do I need?

- Sierra
- Microsoft Excel©
- Email
- Laptop or other portable device able to run Microsoft Excel© like the Microsoft Surface
- Barcode Scanner

What do I need to know?

- Create Lists
- Intermediate Excel

What we were doing… or WHAT were we doing?!

Sent
Returned

What if Trina took a vacation or got sick?

Getting started in Sierra

- Create an ITEM Review File for the collection to be inventoried

Example -

	Item	Location	=	mnaf
AND	Item	ITYPE	<	100

- For us, this would pull a list of all Adult Fiction items housed at our Main Library that are NOT ILL

Exporting to Excel©

Select **Export Records** and export on the following fields:

Bib – Call #	Bib – Author	Bib – Title	Item – Copy #
Item - Due Date	Item – Barcode	Item – Created	Item – LCHKIN
Item – YTDCIRC	Item - TOT CHKOUT	Item – Status	Item – Location
Item – Record #			

Formatting in Excel©

- Use Excel to Open the text file you exported and saved. Follow the Excel Text Import Wizard.
- Select **Delimited** and check the **My data has headers.** box. Click **Next>**
- Check the **Comma** box in the **Delimiters** section. Click **Next>.** Click **Finish**
- Click **Finish.**
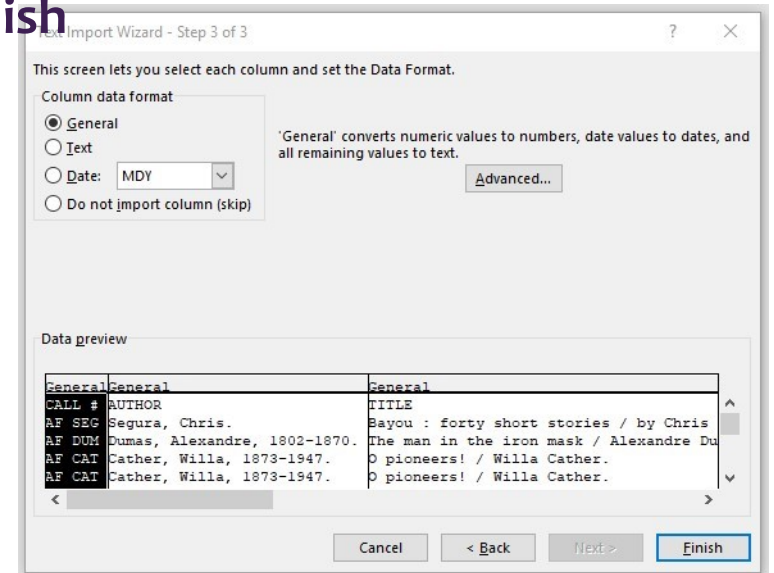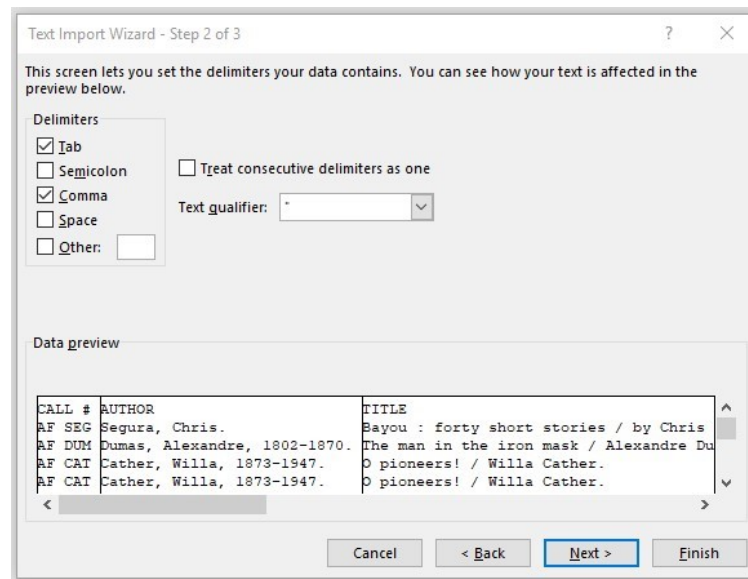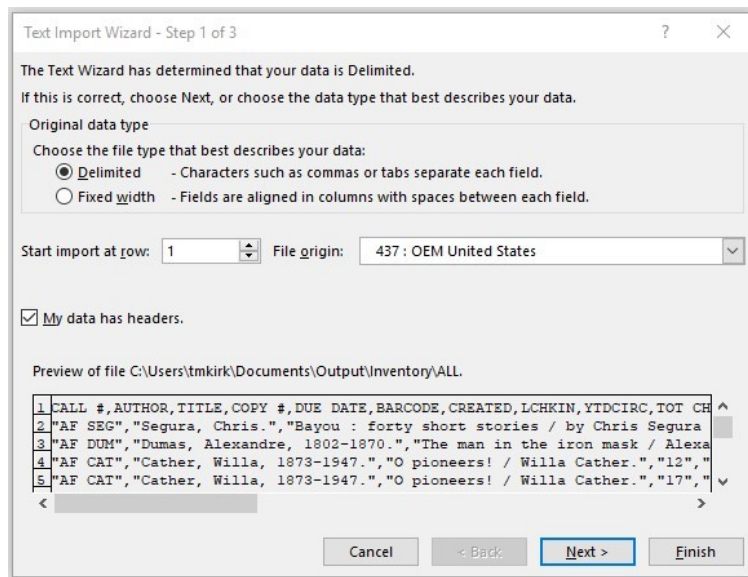
Formatting in Excel©

- The data is here but is not pretty. Time to apply some formatting and drop down menus…

Formatting in Excel©

- Insert a column before column A and label it the **ACTION** column

Formatting in Excel©

- Format as Table
- Adjust column widths
- Wrap Text
- Freeze Panes
- Custom Sort

	A	B	C	D	F	G	H	I	J	K	L
1	ACTION	CALL #	AUTHOR	TITLE	DUE DATE	BARCODE	CREATED	LCHKIN	YTDCIRC	TOT CHKOUT	STATUS	L
2		AF ABB	Abbey, Edward, 1927-1989.	The fool's progress : an honest novel / Edward Abbey.	- -	33331000903914	7/23/1998	- -	0	0	-	n
3		AF ABB	Abbey, Edward, 1927-1989.	The Monkey Wrench Gang / Edward Abbey.	- -	33331000290148	7/23/1998	7/25/2019	0	15	-	n
4		AF ABB	Abbott, John.	Scimitar : a novel / by John Abbott.	- -	33331001193275	7/24/1998	12/2/2019	0	12	-	n
5		AF ABE	Abel, Kenneth.	Cold steel rain / Kenneth Abel.	- -	33330001202334	10/3/2000	1/28/2020	1	24	-	n
6		AF ABE	Abel, Kenneth.	The blue wall / Kenneth Abel.	- -	33331001476019	7/24/1998	12/2/2019	0	37	-	n
7		AF ABE	Abel, Kenneth.	The burying field / Kenneth Abel.	- -	33330001851759	6/7/2002	2/1/2020	1	22	-	n
			Abrahams,	A perfect crime / Peter								

IUG 2020
MINNEAPOLIS

Formatting in Excel©

Create a drop-down list
- Eliminates inconsistent responses.

Add a sheet to your workbook. Beginning in cell A1 create the following list:

Minus Shelf

Call # wrong

Copy # wrong

Barcode Missing

OK/Found

Return to your inventory list and use Data Validation to create a drop down menu in the ACTION column.

Creating multiple copies of a worksheet

Copy Worksheet Multiple Times and Sequentially Rename

- Step 1: First click on the "**Developer**" tab.
    - If you do not have the **Developer** tab: In Excel go to **File**. Select **Options** on the left side, then **Cusotmize Ribbon**. Click **Developer** box under **Main Tabs**, then **OK**. The **Developer** tab should now be enabled.

- Step 2: Click on "**Visual Basic**"

- Step 3: Click "**Insert**"

- Step 4: Click "**Module**"

- Step 5: Now copy & paste the Vba code below:
    ```
    Sub Copier ()
    Dim x As Integer
    x = InputBox("Enter number of times to copy ALL")
    For numtimes = 1 To x
    ActiveWorkbook.Sheets("ALL").Copy _
    After:=ActiveWorkbook.Sheets("ALL")
    Next
    End Sub
    ```
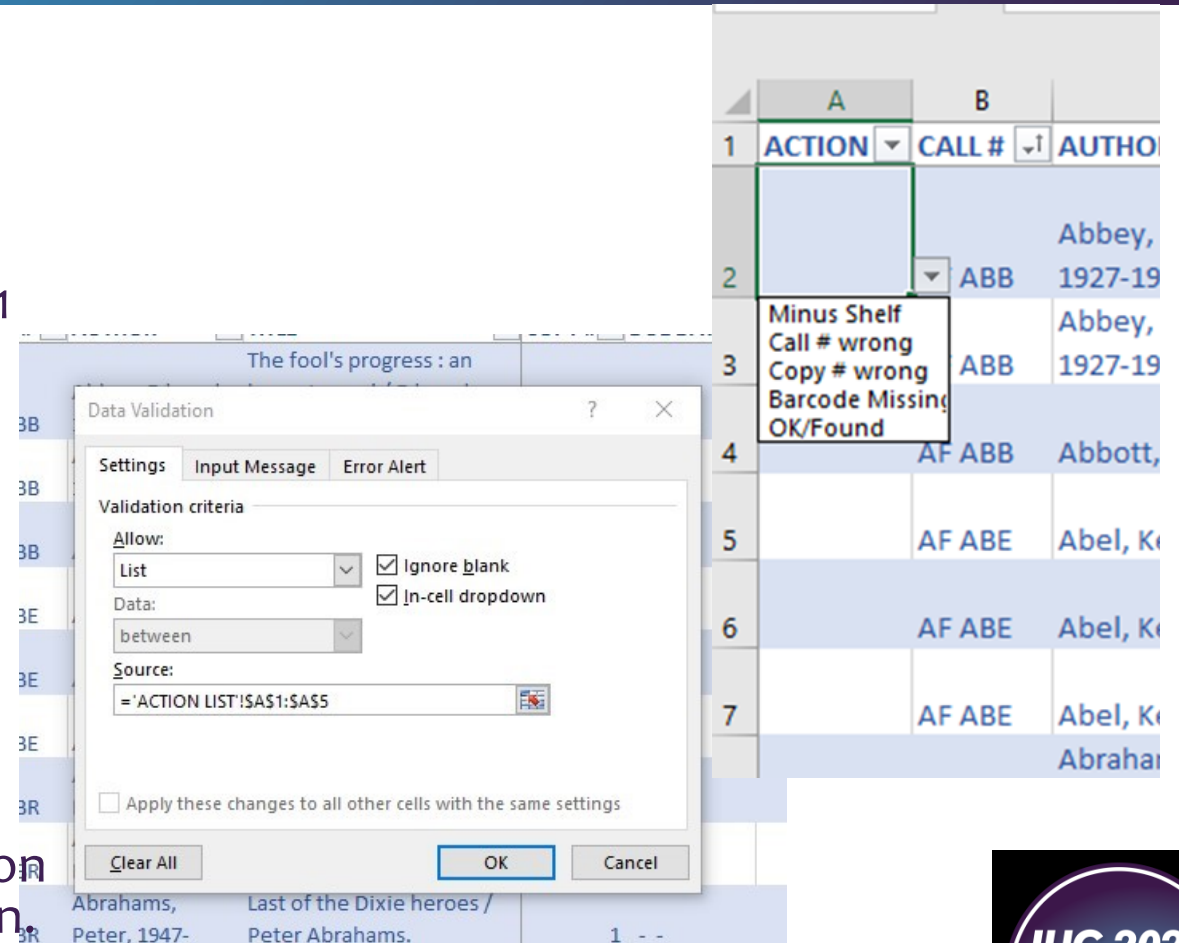
- Note: In the above code, replace "ALL" with the name of the sheet **to be copied.**

- Step 6: Click **F5** or the "**Run**" button and a new dialogue box will open

- Step 7: Specify how many copies you need.

- Step 8: Click "Ok" Done. You have successfully copied and renamed a worksheet multiple times in excel. *Save as a regular Excel Workbook – **not** Macro Enabled.*

Spreadsheet screenshot:

	A	B	C	D	E	F
1	Click on your branch.					
2	Select the appropriate selection in the ACTION field.					
3	EMAIL the completed Excel sheet back to Trina by the DUE DATE.					
4						
5						
6	BOYCE	BOOKMOBILE	HINESTON	JOHNSON		
7						
8	KING	LIBUSE	MCDONALD	MAIN		
9						
10	MARTIN	ROBERTSON	WESTSIDE			

Text box:

Copy Worksheet Multiple Times and Sequentially Rename

Step 1: First click on the "**Developer**" tab.
Step 2: Click on "**Visual Basic**"
Step 3: Click "**Insert**"
Step 4: Click "**Module**"
Step 5: Now copy & paste the Vba code below where "ALL" is the name of the sheet being copied:

```
Sub Copier ()
Dim x As Integer
x = InputBox("Enter number of times to copy ALL")
For numtimes = 1 To x
ActiveWorkbook.Sheets("ALL").Copy _
After:=ActiveWorkbook.Sheets("ALL")
Next
End Sub
```

Delete this text box before sending to branches

Sending via email

Send via email to the branch email and copy the branch manager(s)

Sample email text:

Attached is the next section of your inventory. Please note any items missing in the **ACTION** column (*see Inventory procedure*), SAVE AS and send this back to me **BY THE DUE DATE LISTED IN THE FILE NAME**.

Since this is in an Excel spreadsheet you can sort on status, due date, etc. and take care of items that may be on the holdshelf, checked out, etc before you head to the shelves. Use CREATED or LCHKIN to determine potential weeds.

When the Inventory is returned:

- Filter the ACTION column on *Missing* items
- Copy the item **Record #** (last column)
- Save the list of **Record #**'s as a text file
- **Import** into Sierra **Create Lists** to create an **Item Review** file
- Use **Rapid Update** or **Global Update** to update the item records as Missing @ Inventory.

THANK YOU!

Questions?

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