



Paperless Inventory

Sierra & Excel©

Trina Kirk

Rapides Parish Library



#IUG2020

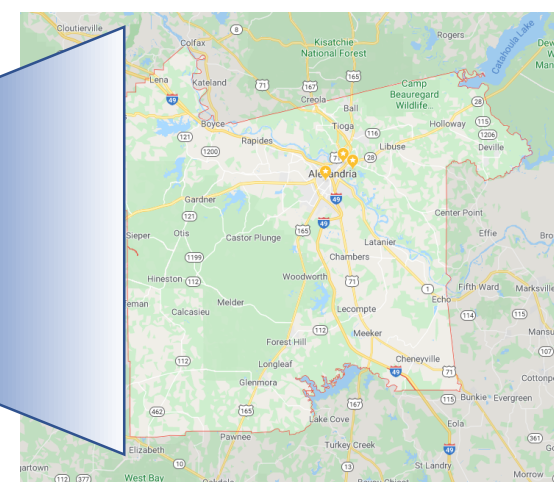
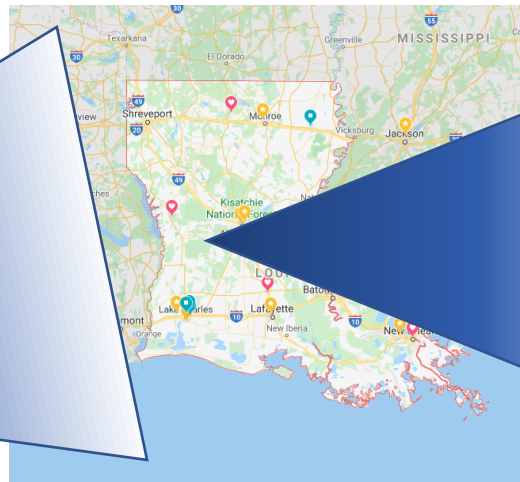
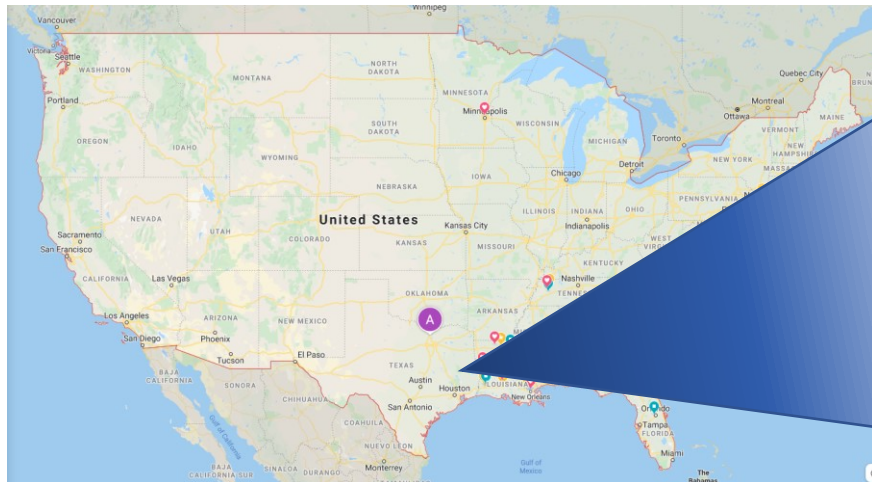
Pre-Conference • Wednesday, April 15th

Main Conference • Thursday, April 16th – Saturday, April 18th

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



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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

The screenshot displays the Microsoft Excel interface with the 'Data' tab selected. The ribbon includes 'Sort & Filter', 'Data Tools', and 'Forecast' groups. Below the ribbon, the 'sierra' application is open, showing a 'FUNCTION Create Lists' dropdown menu. The main area of the application displays a table of records with the following columns: File, Name, Current Records, Max Records, Type, Status, Login, and Created [date/time].

File	Name	Current Records	Max Records	Type	Status	Login	Created [date/time]
23	BILLED NOT SUPPRESSED	240	10000	i	complete	admtmk	02-03-2020 03:33PM
5	Stacy-january	46530	60000	p	complete	admtmk	02-14-2020 08:10AM
1	MC WEEDS	73	300000	i	complete	admtmk	02-14-2020 08:11AM
62	eResources	3	1000	b	complete	admtmk	01-29-2020 08:39AM
28	BIB HOLDS	2	10000	b	complete	admtmk	02-03-2020 03:36PM
14	MISSING	354	10000	i	complete	admtmk	02-06-2020 10:48AM
10	BILLED THIS MONTH	327	25000	i	complete	admtmk	02-03-2020 03:12PM
11	WITHDRAWN	2115	25000	i	complete	admtmk	02-03-2020 04:27PM
52	DELETE MISSING	0	2500	i	complete	admtmk	12-02-2019 11:40AM
13	L&P III MARKED OFF	43	25000	i	complete	admtmk	02-03-2020 03:13PM
74	PATRON CHECK	12	500	p	complete	admtmk	02-13-2020 09:16AM
15	INCORRECT ITEM LOCATION CODE	18	10000	i	complete	admtmk	02-03-2020 03:17PM
76	TEEN DAILY CHECK	2	500	p	complete	admtmk	02-13-2020 09:22AM
77	BCODE3 ! N	2	500	b	complete	admtmk	02-13-2020 09:12AM
18	ILL LIST	236	10000	i	complete	admtmk	02-03-2020 03:30PM
19	CHECK HOME LIBRARY	0	10000	i	complete	admtmk	02-03-2020 03:30PM
20	INACTIVE PATRONS BK	1	10000	p	complete	admtmk	02-03-2020 03:31PM
21	DAMAGED	0	10000	i	complete	admtmk	02-03-2020 03:32PM
32	bad item location	95	10000	i	complete	admtmk	02-12-2020 12:03PM
53	AR - STILL?!	391	2500	i	complete	admtmk	02-14-2020 08:26AM
79	BILLED SUPPRESSIONS	75	500	i	complete	admtmk	02-13-2020 09:12AM
25	BCODE3	359	10000	b	complete	admtmk	02-03-2020 03:34PM



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

INVENTORY 02/05/2020 MN ADULT NONFICTION, 000-999 DUE DATE 2020 02 19

1. CALL # = 001.9 SAG.
AUTHOR = Sagan, Carl, 1934-1996.
TITLE = The demon-haunted world : science as a candle in the dark / Carl Sagan.
COPY # = 1.
BARCODE = 33331001456219.
DUE DATE = - -LOCATION = Main Adult Nonfict.STATUS = AVAILABLE. RECORD # = i11456218.
CREATED = 07-24-98. LCHKIN = 01-21-2020. YTDCIRC = 1. TOT CHKOUT = 19.

2. CALL # = 001.94 BER.
AUTHOR = Berlitz, Charles, 1914-2003.
TITLE = The Dragon's Triangle / Charles Berlitz.
COPY # = 1.
BARCODE = 33331000993519.
DUE DATE = - -LOCATION = Main Adult Nonfict.STATUS = AVAILABLE. RECORD # = i10993514.
CREATED = 07-23-98. LCHKIN = 01-04-2020. YTDCIRC = 0. TOT CHKOUT = 8.

3. CALL # = 001.94 CAS.
AUTHOR = Castleden, Rodney.
TITLE = Atlantis destroyed / Rodney Castleden.
COPY # = 1.
BARCODE = 33330000156622.
DUE DATE = - -LOCATION = Main Adult Nonfict.STATUS = AVAILABLE. RECORD # = i12704921.
CREATED = 07-31-98. LCHKIN = 08-21-2018. YTDCIRC = 0. TOT CHKOUT = 13.

4. CALL # = 001.94 LAF.
AUTHOR = De La Croix de Lafayette, Jean-Maximilien.
TITLE = Inside the extraordinary world of the Anunnaki and Anunnaki-Ulema : what I saw, what I learned, and what I can teach you, Book 1.
COPY # = 1.
BARCODE = 33330005592920.
DUE DATE = - -LOCATION = Main Adult Nonfict.STATUS = AVAILABLE. RECORD # = i19174500.
CREATED = 06-21-2011. LCHKIN = 02-02-2019. YTDCIRC = 0. TOT CHKOUT = 11.

5. CALL # = 001.94 PIN.
AUTHOR = Pinkham, Mark Amaru.
TITLE = Guardians of the Holy Grail : the Knights Templar, John the Baptist, and the water of life / by Mark Amaru Pinkham.
COPY # = 1.
BARCODE = 33330003035351.
DUE DATE = 12-27-2019. LOCATION = Main Adult Nonfict.STATUS = AVAILABLE. RECORD # = i19812206. CREATED = 10-23-2012. LCHKIN = 04-17-2019. YTDCIRC = 0. TOT CHKOUT = 6.

6. CALL # = 001.942 BIR.
AUTHOR = Birnes, William J.
TITLE = The everything UFO book : an investigation of sightings, cover-ups, and the quest for extraterrestrial life / William J. Birnes.
COPY # = 3.
BARCODE = 33330005821121.
DUE DATE = - -LOCATION = Main Adult Nonfict.STATUS = AVAILABLE. RECORD # = i19709754.
CREATED = 07-26-2012. LCHKIN = 02-13-2019. YTDCIRC = 0. TOT CHKOUT = 4.



Sent

Returned



INVENTORY 02/05/2020 MN ADULT NONFICTION, 000-999 DUE DATE 2020 02 19

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AUTHOR = Sagan, Carl, 1934-1996.
TITLE = The demon-haunted world : science as a candle in the dark / Carl Sagan.
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CREATED = 07-24-98. LCHKIN = 01-21-2020. YTDCIRC = 1. TOT CHKOUT = 19.

2. CALL # = 001.94 BER.
AUTHOR = Berlitz, Charles, 1914-2003.
TITLE = The Dragon's Triangle / Charles Berlitz.
COPY # = 1.
BARCODE = 33331000993519.
DUE DATE = - -LOCATION = Main Adult Nonfict.STATUS = AVAILABLE. RECORD # = i10993514.
CREATED = 07-23-98. LCHKIN = 01-04-2020. YTDCIRC = 0. TOT CHKOUT = 8.

3. CALL # = 001.94 CAS.
AUTHOR = Castleden, Rodney.
TITLE = Atlantis destroyed / Rodney Castleden.
COPY # = 1.
BARCODE = 33330000156622.
DUE DATE = - -LOCATION = Main Adult Nonfict.STATUS = AVAILABLE. RECORD # = i12704921.
CREATED = 07-31-98. LCHKIN = 08-21-2018. YTDCIRC = 0. TOT CHKOUT = 13.

4. CALL # = 001.94 LAF.
AUTHOR = De La Croix de Lafayette, Jean-Maximilien.
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CREATED = 07-26-2012. LCHKIN = 02-13-2019. YTDCIRC = 0. TOT CHKOUT = 4.



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 CHECKOUT

Item – Status

Item – Location

Item – Record #

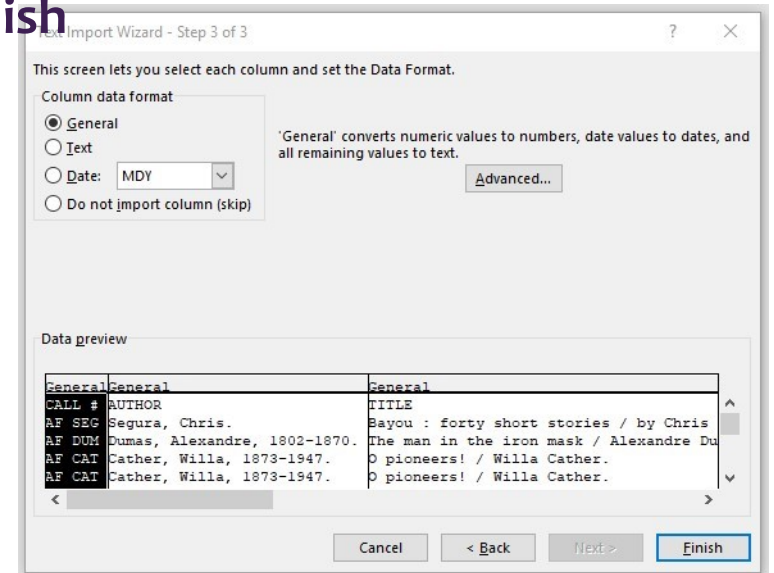
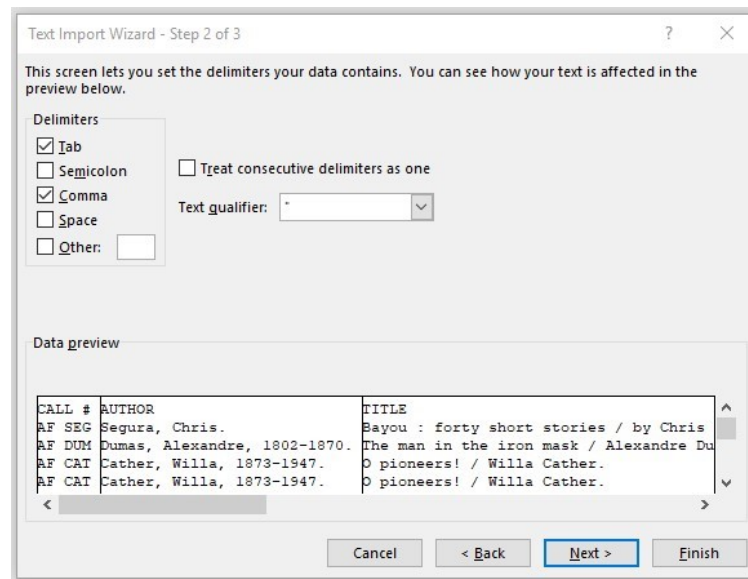
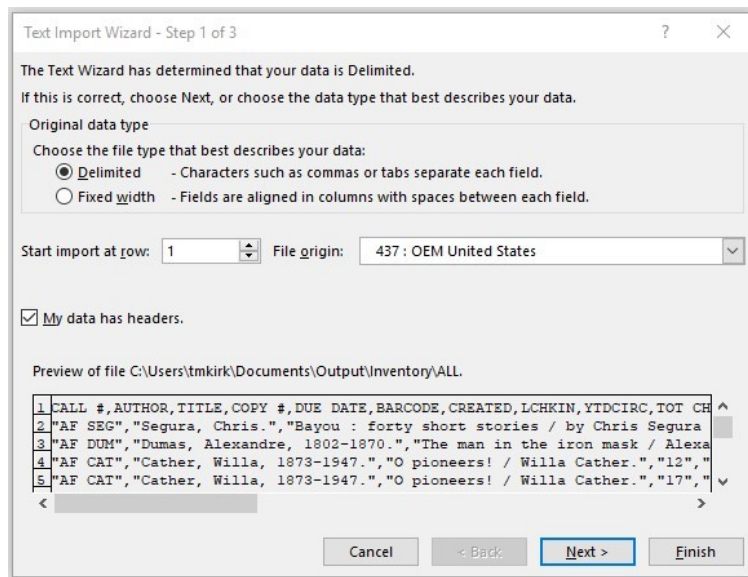


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Formatting in Excel©

- 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...

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	CALL #	AUTHOR	TITLE	COPY #	DUE DATE	BARCODE	CREATED	LCHKIN	YTDCIRC	TOT CHKO	STATUS	LOCATION	RECORD #	
2	AF SEG	Segura, Ch	Bayou : fo	3	- -	3.33E+13	#####	#####	0	4	-	mna	i1000768	
3	AF DUM	Dumas, Al	The man i	1	- -	3.33E+13	#####	#####	0	22	-	mna	i10001001	
4	AF CAT	Cather, W	O pioneer	12	- -	3.33E+13	#####	#####	0	17	-	mna	i10002935	
5	AF CAT	Cather, W	O pioneer	17	- -	3.33E+13	#####	#####	0	14	-	mna	i10002984	
6	AF FIT	Fitzgerald	This side c	4	- -	3.33E+13	#####	#####	0	21	-	mna	i10004701	
7	AF LEW	Lewis, Sin	Main Stre	3	- -	3.33E+13	#####	#####	0	12	-	mna	i10005997	
8	AF LEW	Lewis, Sin	Main Stre	9	- -	3.33E+13	#####	#####	0	14	-	mna	i10006023	
9	AF LAW	Lawrence, W	omen ir	3	- -	3.33E+13	#####	8/1/2018	0	12	-	mna	i10006278	
10	AF WRE	Wren, Per	Beau Gest	7	- -	3.33E+13	#####	#####	0	9	-	mna	i10006400	
11	AF CAT	Cather, W	Death con	6	- -	3.33E+13	#####	#####	0	16	-	mna	i10006679	
12	AF WIL	Wilder, Th	The bridge	1	- -	3.33E+13	#####	#####	0	14	-	mna	i10006680	
13	AF WIL	Wilder, Th	The bridge	7	- -	3.33E+13	#####	#####	0	7	-	mna	i10006722	
14	AF BUC	Buchan, Jc	Prester Jo	1	- -	3.33E+13	#####	#####	0	2	-	mna	i10006825	
15	AF FAU	Faulkner, S	artoris /	1	- -	3.33E+13	#####	#####	0	9	-	mna	i10006862	
16	AF AND	Anderson	Winesbur	1	- -	3.33E+13	#####	5/3/2017	0	17	-	mna	i10006874	
17	AF FAU	Faulkner, T	The sounc	11	- -	3.33E+13	#####	#####	0	42	-	mna	i10007040	
18	AF JAM	James, He	The amba	4	- -	3.33E+13	#####	8/4/2009	0	4	-	mna	i10007295	
19	AF CAT	Cather, W	Shadows c	3	- -	3.33E+13	#####	5/2/2018	0	6	-	mna	i10007349	
20	AF NOR	Nordhoff, M	utiny on	16	- -	3.33E+13	#####	#####	0	11	-	mna	i10007581	
21	AF HIL	Hilton, Jar	Lost horiz	7	- -	3.33E+13	#####	1/8/2020	0	9	-	mna	i10007763	
22	AF HIL	Hilton, Jar	Lost horiz	11	- -	3.33E+13	#####	#####	0	8	-	mna	i10007799	
23	AF GRE	Grey, Zan	The trail d	8	- -	3.33E+13	#####	#####	0	13	-	mna	i10008366	
24	AF EDM	Edmonds, D	Drums alo	7	- -	3.33E+13	#####	4/7/2010	0	9	-	mna	i1000841x	

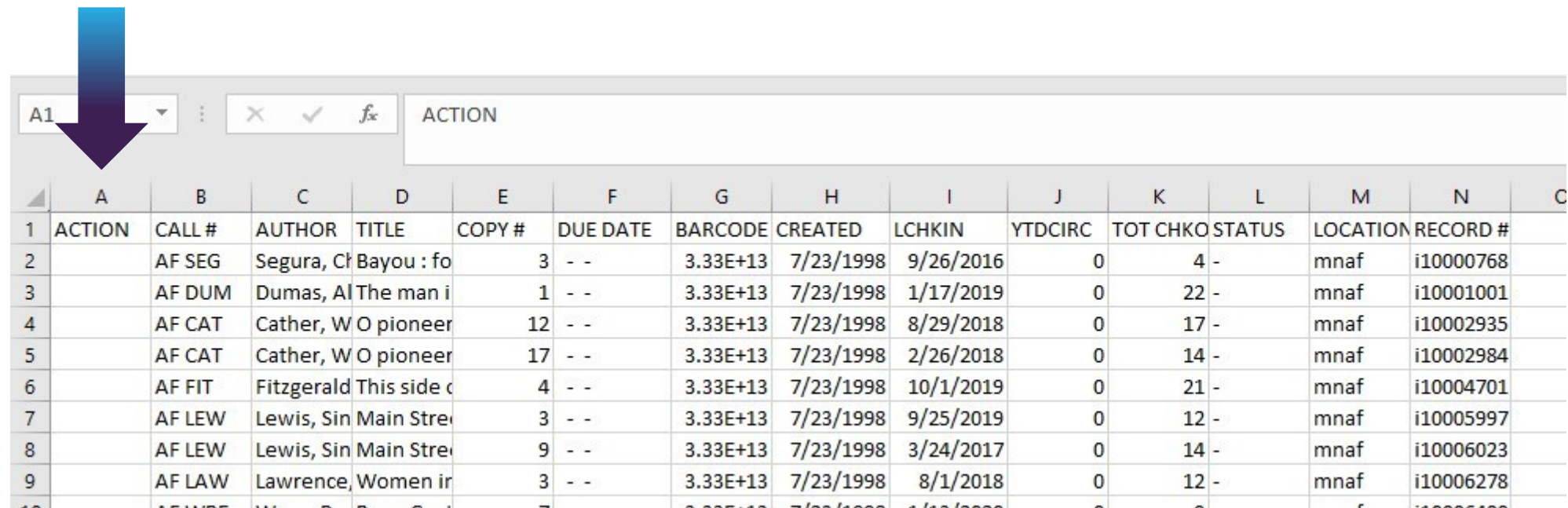


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Formatting in Excel©

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



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	ACTION	CALL #	AUTHOR	TITLE	COPY #	DUE DATE	BARCODE	CREATED	LCHKIN	YTDCIRC	TOT CHKO	STATUS	LOCATION	RECORD #	
2		AF SEG	Segura, C	Bayou : fo	3	- -	3.33E+13	7/23/1998	9/26/2016	0	4	-	mnaf	i10000768	
3		AF DUM	Dumas, A	The man i	1	- -	3.33E+13	7/23/1998	1/17/2019	0	22	-	mnaf	i10001001	
4		AF CAT	Cather, W	O pioneer	12	- -	3.33E+13	7/23/1998	8/29/2018	0	17	-	mnaf	i10002935	
5		AF CAT	Cather, W	O pioneer	17	- -	3.33E+13	7/23/1998	2/26/2018	0	14	-	mnaf	i10002984	
6		AF FIT	Fitzgerald	This side c	4	- -	3.33E+13	7/23/1998	10/1/2019	0	21	-	mnaf	i10004701	
7		AF LEW	Lewis, Sin	Main Stre	3	- -	3.33E+13	7/23/1998	9/25/2019	0	12	-	mnaf	i10005997	
8		AF LEW	Lewis, Sin	Main Stre	9	- -	3.33E+13	7/23/1998	3/24/2017	0	14	-	mnaf	i10006023	
9		AF LAW	Lawrence,	Women ir	3	- -	3.33E+13	7/23/1998	8/1/2018	0	12	-	mnaf	i10006278	



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
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							



Formatting in Excel©

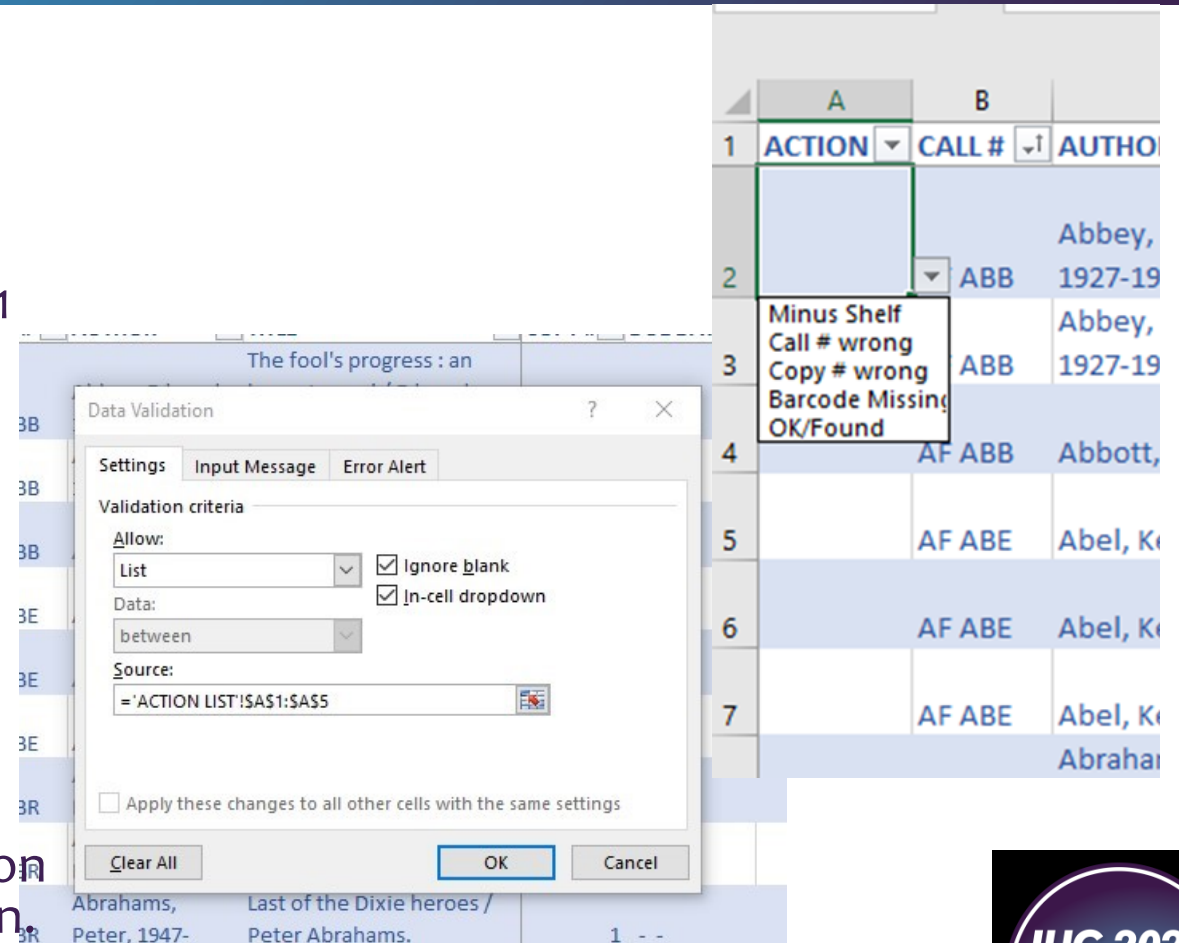
Create a drop-down list

- 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.



The screenshot shows an Excel spreadsheet with columns A, B, and C. Column A is labeled 'ACTION', column B is 'CALL #', and column C is 'AUTHOR'. The data rows are as follows:

1	ACTION	CALL #	AUTHOR
2		ABB	Abbey, 1927-19
3		ABB	Abbey, 1927-19
4		AF ABB	Abbott,
5		AF ABE	Abel, K
6		AF ABE	Abel, K
7		AF ABE	Abel, K

A 'Data Validation' dialog box is open, showing the 'Settings' tab. The 'Validation criteria' section is set to 'List' with 'Ignore blank' and 'In-cell dropdown' checked. The 'Source' is set to '=ACTION LIST!\$A\$1:\$A\$5'. The 'Error Alert' tab is also visible, showing a list of error messages: 'Minus Shelf', 'Call # wrong', 'Copy # wrong', 'Barcode Missing', and 'OK/Found'.



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 **Customize 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.

	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			
11						
12						
13						
14						
15						
16	Copy Worksheet Multiple Times and Sequentially Rename					
17	Step 1: First click on the “ Developer ” tab.					
18	Step 2: Click on “ Visual Basic ”					
19	Step 3: Click “ Insert ”					
20	Step 4: Click “ Module ”					
21	Step 5: Now copy & paste the Vba code below where "ALL" is the name of the sheet being copied:					
22	Sub Copier ()					
23	Dim x As Integer					
24	x = InputBox("Enter number of times to copy ALL")					
25	For numtimes = 1 To x					
26	ActiveWorkbook.Sheets("ALL").Copy _					
27	After:=ActiveWorkbook.Sheets("ALL")					
28	Next					
29	End Sub					
30	***Delete this text box before sending to branches***					
31						
32						
33						
34						
35						



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.



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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.



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THANK YOU!

Questions?

Trina Kirk

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