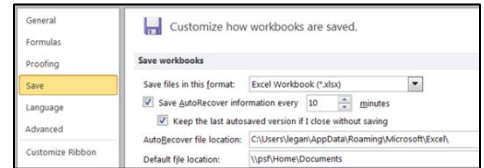


OASIS Inventory Scanning & Reconciliation Procedure

PURPOSE: An inventory involves scanning the collection during a time period to compare what is actually on the library shelves with what is listed in the catalog. Inventory can be done at any time throughout the year.

To BEGIN SCANNING

1. Login to the computer that the scanner(s) you will be using for inventory are hooked up to.
2. Open **MS EXCEL** or similar type of spreadsheet program and open a new worksheet.
3. If you are using **MS EXCEL**:
 - a.
 - i. Select **ZOOM** and click **200%** magnification (makes it easier to see), click **OK**
 - b. Right Click on column header “**A**”
 - i. Select **COLUMN WIDTH**, type in **30** and click **OK**
 - c. Click **FILE** tab, select **OPTIONS**
 - i. Click on **SAVE**
 - ii. Make sure box is checked next to “*Save AutoRecover info every:*”
 - iii. Click **OK** button
4. Click **FILE** on menu bar, select **SAVE** (save file somewhere easy to locate and name it something like **2013 Inventory**)
5. Quit any program that uses popup’s, email is a big offender. If those **popup windows** appear while you’re scanning, they **WILL INTERFERE** with barcodes going into the spreadsheet properly.
6. Click cursor in **1ST FREE CELL IN COLUMN A** (*you will be staying in column A the whole time*) and start scanning.
7. Close file at end of day or whenever you’re done for the day, saving any changes.
8. Open the file the next day, **CLICK CURSOR IN NEXT FREE CELL IN COLUMN A**
9. Begin scanning, stop and check to make sure barcodes are going in accordingly and continue on.
10. It doesn’t matter if you scan in a barcode more than once, Mandarin will ignore it.



Scan books that are RETURNED into the spreadsheet BEFORE shelving them unless you haven’t scanned that section of the library yet. You can setup a separate spreadsheet at the Circulation Desk just for this purpose.

To BEGIN RECONCILIATION

Converting your Spreadsheet(s)

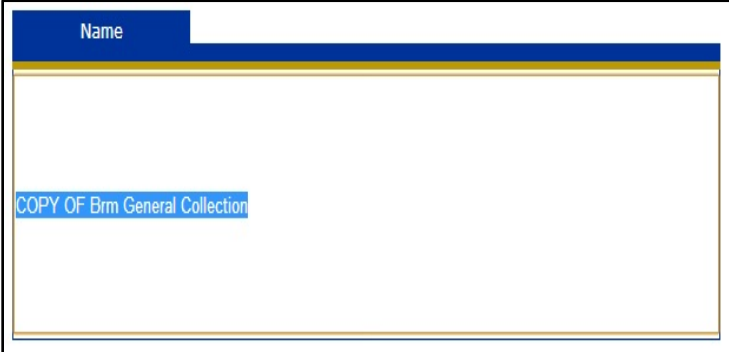
1. Create folder named **INVYYYY (INV2013)** on your *desktop* and **move spreadsheet(s) containing your scanned barcodes into that folder.**
2. Open the **EXCEL** Spreadsheet(s) you scanned your barcodes into:
 - a. Click **FILE** on the menu bar & Select **SAVE AS**
 - b. Change **Save as type** dropdown box to **CSV (Comma delimited)** by selecting it from the list
 - c. Click **SAVE**
 - d. You’ll see **2** message windows from **EXCEL**, answer **OK** to the **1st** and **YES** to the **2nd**
 - e. Exit **EXCEL** click **NO** to the **SAVE CHANGES** message

GROUP EDITOR

Open **OASIS Group Editor** and check to see if you have the following 2 groups: **INV Missing** and **INV Found**. You'll use these two groups for inventory reconciliation.

If you **DON'T**, follow the steps below:

1. Locate your **GENERAL COLLECTION GROUP**
2. Click the **DUPLICATE** link. This creates an empty **COPY** of the group.
3. Click **EDIT** button
4. Highlight text in the Name field and type in "**INV Missing**" (*figure 1*)
5. Click **APPLY** button & **OK** button.
6. Repeat these steps to make your **INV Found** group.



The screenshot shows a window titled 'Name' with a text input field. The text 'COPY OF Brm General Collection' is highlighted in blue. The window has a blue header bar and a yellow border.

If you **DO**, check for the following:

1. Are there members in your **INV Missing** group?

If YES:

- a. Move them back to their proper group, it will still leave them with a status of Missing.

2. Are there members in your **INV Found** group?

If YES:

- a. See [Removing the Missing Designation for Inventory Found Group Items](#) at the end of this document
- b. Move them to their proper collection/group – general, reference etc.

If at any time you want a list of everything in your catalog that is missing, open **M3 Report Application** and run the following report, **Item-List(Shelflist-ItemStatus).rpt**

USING THE OASIS INVENTORY APPLICATION

1. **Make sure no one else is working in the catalog on item records at this point.**
2. Click the **Inventory** tab in **OASIS**
3. Click **Create New Session** button.

A. Setup Screen:

1. Type your school name in the “**Institution Name**” box.
2. Make sure your catalog appears as the “**Database Set:**”
3. **Uncheck** boxes next to “**Barcodes are case sensitive**” and “**Check call number sequence**” if necessary.
4. Click **Save Changes**

B. Call Number Ranges Screen:



Here, you specify what areas you’ve scanned, so that the Inventory application will ignore everything else.

To ADD a range:	Click “ Create New Call Number Range ” button
To REMOVE a range:	Click box next to range , Click “ Remove Selected Items ” button
To MODIFY a range:	Click on “ Yes or No ” in the “ Ignore Prefix ” column

The Call Number Range Box:

Call No equal to or > (Think **START OF** whatever Range or Classification Code you scanned: 000, FIC, E, SC)

To Call No. < (Think **END OF** whatever Range or Classification Code you scanned: 999, FID, EA, SD) go one “letter” beyond for Class. Code

Library 1:

<input type="checkbox"/> Ignore Prefix	Prefix	From Classification	To Classification
<input type="checkbox"/> Yes		000	999
<input type="checkbox"/> Yes		FIC	FID
<input type="checkbox"/> Yes		B	C

Library 2:

<input type="checkbox"/> Ignore Prefix	Prefix	From Classification	To Classification
<input type="checkbox"/> Yes		000	999
<input type="checkbox"/> Yes		FIC	FID
<input type="checkbox"/> Yes		E	EA

Both these examples show libraries that have scanned the following for Inventory purposes:

All their **Non-Fiction (000-999)**
 All their **Fiction (FIC-FID or F-G)** regardless of Genre

In Addition:

Library 1 scanned their **Biography Collection (B-C)**
 Library 2 scanned their **Easy Collection (E-EA)**

No Magazines were scanned.

Since we’ve stated what areas/ranges we want checked and Magazines aren’t on it, they’ll be ignored w/out having to temporarily delete them beforehand.

Non-Fiction Example:

You've scanned ALL your Non-Fiction items regardless of Prefix.

1. Click the "Create New Call Number Range" button: Create New Call Number Range
2. We're **ignoring** Prefix (852#k) subfield - leave it unchecked
3. Beginning Non-Fiction Call# Range is: **000** so, type the following:
 - Call No. equal to or > is: **000**
 - To Call No. < is: **999**
 - Click **OK**

If you scanned items w/**NO Prefix** (852#k) in their record **OR** that field doesn't matter to you. Don't check the Prefix Box.

Think **START OF** whatever Range or Classification Code you scanned:
000, FIC, E, SC, NF

Think **END OF** whatever Range or Classification Code you scanned:
999, FID, EZ, SD, NG

Call Number Ranges

<input type="checkbox"/>	Ignore Prefix	Prefix	From Classification	To Classification
<input type="checkbox"/>	No	REF	000	999
<input type="checkbox"/>	Yes		000	999

This says:
"I scanned **ALL Non-Fiction** with a **Prefix** (852#k) of **REF**, in their records.
Compare my scanned barcodes list to only those type of records in my catalog and ignore all the others (FIC, SC, Mags, etc)."
We got this by **checking** Prefix Box **and typing "REF"** in the box next to it.

This says:
"I scanned **ALL Non-Fiction**.
Compare my scanned barcodes list to **ALL** of those type of records in my catalog whether they have a Prefix (852#k) or not and ignore all the others (FIC, SC, Mags, etc)."
We got this by **not checking** Prefix box.


Fiction and Genre Examples:

<p>FICTION w/NO Prefix (852#k) in their record. ✓ Check the Prefix Box but don't enter anything</p>	
<p><u>ALL</u> FICTION with AND w/out a Prefix (852#k) ✓ Do Not Check the Prefix Box</p>	
<p>FICTION in SPECIFIC Areas/Genres (852#k) ✓ Check the Prefix Box AND Enter the <u>Genre/Prefix</u> you scanned (852#k) Note: You must do a New Range for each unique genre that you scanned.</p>	

Click "**Create New Call Number Range**" button to enter each unique area that you scanned.

C. Barcode Sets Screen:

Setup Barcode Sets Call Number Ranges Barcode Patterns Union Restrictions

1. Click **Add Barcodes From File** button 
2. Click the “**Choose File**” button
3. **Locate** and **Select** your **inventory file** and click the OPEN button.
4. Click **OK** button
5. The file will load and display how many barcodes the file contains.
6. Click **OK** button
7. If there is more than one barcode file to load, repeat above steps for each one.

After you have uploaded all your barcode file(s)

1. Click the “**Do Inventory**” button

The **OASIS Inventory** program will start and compare all the barcodes you scanned as well as those in transaction against the barcodes in all your holdings records. It will then display inventory results.

INVENTORY BUTTONS AND REQUIRED ACTIONS


Newly Found Missing Invalid Barcodes Misplaced Loaned Shelved No Barcode Duplicate Barcode Out Of Range Statistics

1. **Newly Found Items** – These are previously missing items that were found as a result of this inventory.
Required Action: Change status of items to "Normal". Click **Mark Newly Found Items**.
At confirmation prompt, click **OK**.
2. **Missing Items** – Items missing from this barcode upload. **RED** signifies the item was listed as missing during this inventory. **BLACK** signifies the item was listed as previously missing.
Required Action:
 - a. Click on **Date** column. *This will separate this years missing from past years missing.*
 - b. Mark Items Missing - places a “missing” status in the holding records
(This **adds** the **field/subfields 994#a** [missing designation] and **994#c** [missing date])
 1. Click **Mark Missing Items**.
 2. At the prompt, click **OK**.
 3. **DON'T** print list out here. Use **REPORT APPLICATION** to print an easy-to-use shelflist later.

Note: **TOTAL NUMBER MISSING** listed **INCLUDES** any previously missing items that haven't been reconciled. That's why it's **IMPORTANT** to remove the Missing Designation from items once you've found them.
3. **Invalid barcodes** – Items that don't belong in the collection, have wrong barcode length or scanned in wrong.
Required Action: Use your internet browser's **Print** function. Item may be located next to one indicated in report.
4. **Misplaced** – This is for items not in shelf list order.
Required Action: None, we unchecked this option earlier.
5. **Loaned Shelved** – Items that have an availability status of loaned, but are actually on the shelf.
Required Action: Use your internet browser's **Print** function. Resolve by Returning them in Circulation
6. **No Barcode** – Items that have no barcode on file in the catalog in the **holding record - 852/p** field.
Required Action: Use your internet browser's **Print** function and **Resolve** ASAP.
7. **Duplicate Barcode** – Items that have duplicate barcodes
Required Action: Use your internet browser's **Print** function and **Resolve**.
8. **Out of Range(s)** – Items not in the inventory call number range, but are in the barcode upload in shelf list order.
Required Action: None
9. **Statistics** – A summary of inventory results.
Required Action: Use your internet browser's **Print** function.

RECONCILIATION OF MISSING ITEMS:

Moving Missing Items to a Group

1. Click **Groups** tab.
2. Open your **INV Missing** group.
3. Click the **Members** tab.
4. Click the **down arrow** to the right of the **“Display”** box
5. Select **Search** and **type in the search criteria shown below** in your Search window. (figure 4)
6. Click the **Search** button
7. Click the **Select All** button to select the records
8. Click the **Move**  **invento** button
9. Select the **INV Missing** group from the list

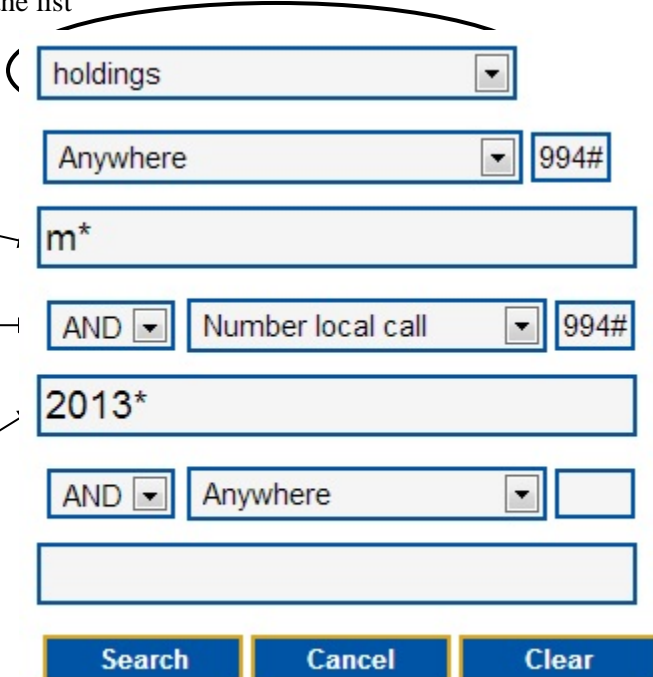
The search **m*** will look for items that have been marked **Missing**.

Include (AND)

Year, Month, Day of Current Inventory Session (ex. 20130612*).

Type in **“994#a”**. This is the MARC tag where the **Missing Status** is stored.

Type in **“994#c”**. This is the MARC tag where the **Missing Date** is stored.



The screenshot shows a search window with the following elements:

- A dropdown menu with "holdings" selected.
- A dropdown menu with "Anywhere" selected and a "994#" input field.
- A text input field containing "m*".
- A dropdown menu with "AND" selected, a dropdown menu with "Number local call" selected, and a "994#" input field.
- A text input field containing "2013*".
- A dropdown menu with "AND" selected, a dropdown menu with "Anywhere" selected, and an empty input field.
- An empty text input field.
- Three buttons: "Search", "Cancel", and "Clear".

Printing the Report

1. Click **OASIS Reports** tab
2. Click **Bibliographic or Item List**
3. Click **Shelf List**
4. Click **OK to skip** (this is an option you don't need to use)
5. Leave **Call Number Range** **blank**, Click **OK**
6. Sort by **Call Number**
7. At "*Specify Group*" window, enter the **name** of the group, for example **Inventory Missing**
8. Click **Submit Report**

When Report is ready:

1. Open Report
2. Print Report
3. Take the list/report and search the shelves again for these items.
4. Draw a single line through each item found on the list.

10:11:2	Shelf List					6/4/2013
BRM Ray Middle School						
Title	Call Number	Author	Publisher	Pub Date	Barcode	
On the court with-- Michael Jo...	Biography 796.32 JOR	Christopher, Matt.	Little, Brown and Co...	c1996.	BRM21021	
<small>Shelf List.Location.Call-Number-Range (*).Sorted-By-Call-Number (*).Group(Inventory Missing) Page: 1</small>						
End of Report						
Shelf List						

RECONCILIATION CONTINUED:

When done searching the shelves, take the revised list and:

1. Open **OASIS Group Editor**
2. Open **INV Missing** group.
3. Click the **Members** tab.
4. Put a check next to each item in Missing Group that has a matching line through the same item on the missing list.

Inventory Missing

Call Number	Barcode	Group	Location	Title	Author
<input checked="" type="checkbox"/> Biography 796.32 JOR	BRM21021	Inventory Missing	BRM	On the court with-- Michael Jordan /	Christopher, Matt.

Select All Deselect All Selected holding records:1

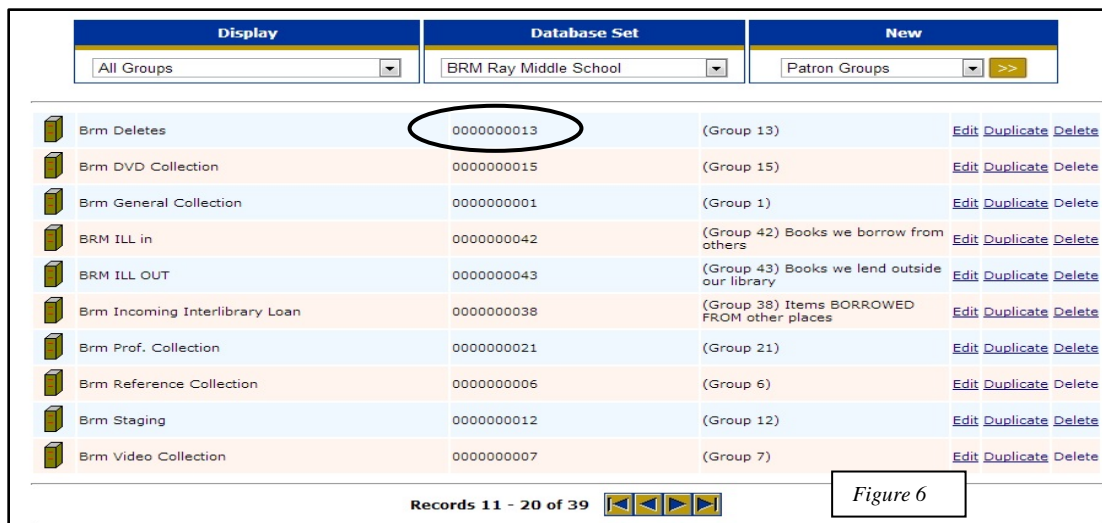
Records 1 - 1 of 1

5. Move the items you checked from the **INV Missing** group to the **INV Found** group.
6. Click on the drop down box, **Specified Items** and select **Items in Current Group Only**. (figure 5 - circled item)
Note: This refreshes the view of what's left in the Missing Group
7. **You are now ready to remove the missing designation from the found items.**

REMOVING THE *Missing Designation* FROM INVENTORY FOUND GROUP ITEMS

1. Open **OASIS Group Editor** and get the Group Number of the **INV Found** group.
 - a. In the second column, the Group # will appear. (figure 6)

Note: The Group # is listed to the right of your group name. You will preface it with zeroes **OR** an asterisk (*) to make it a 10digit number when searching.

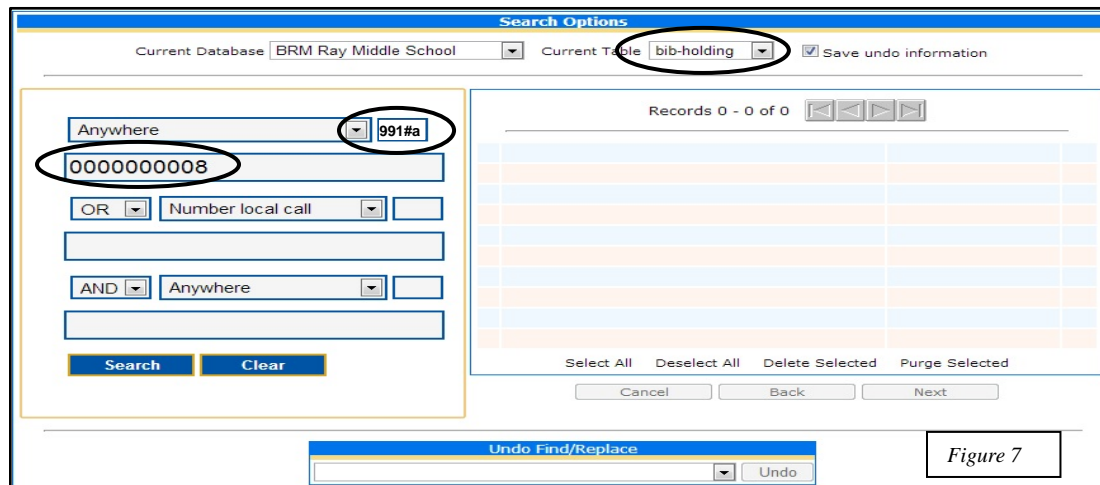


Display	Database Set	New
All Groups	BRM Ray Middle School	Patron Groups >>
Brm Deletes	000000013	(Group 13) Edit Duplicate Delete
Brm DVD Collection	000000015	(Group 15) Edit Duplicate Delete
Brm General Collection	000000001	(Group 1) Edit Duplicate Delete
BRM ILL in	000000042	(Group 42) Books we borrow from others Edit Duplicate Delete
BRM ILL OUT	000000043	(Group 43) Books we lend outside our library Edit Duplicate Delete
Brm Incoming Interlibrary Loan	000000038	(Group 38) Items BORROWED FROM other places Edit Duplicate Delete
Brm Prof. Collection	000000021	(Group 21) Edit Duplicate Delete
Brm Reference Collection	000000006	(Group 6) Edit Duplicate Delete
Brm Staging	000000012	(Group 12) Edit Duplicate Delete
Brm Video Collection	000000007	(Group 7) Edit Duplicate Delete

Records 11 - 20 of 39

Figure 6

2. Click the **Catalog** tab
3. Click **Cataloging Tools** (lower left sidebar)
4. Click **Find and Replace** button
5. Change “**Current Table**” dropdown to “**bib-holding**”
6. Fill in search criteria as shown below to pull up the records in a selected group. (figure 7)



Search Options

Current Database: BRM Ray Middle School | Current Table: **bib-holding** | Save undo information

Anywhere | **991#a**

000000008

OR | Number local call

AND | Anywhere

Search **Clear**

Records 0 - 0 of 0

Select All Deselect All Delete Selected Purge Selected

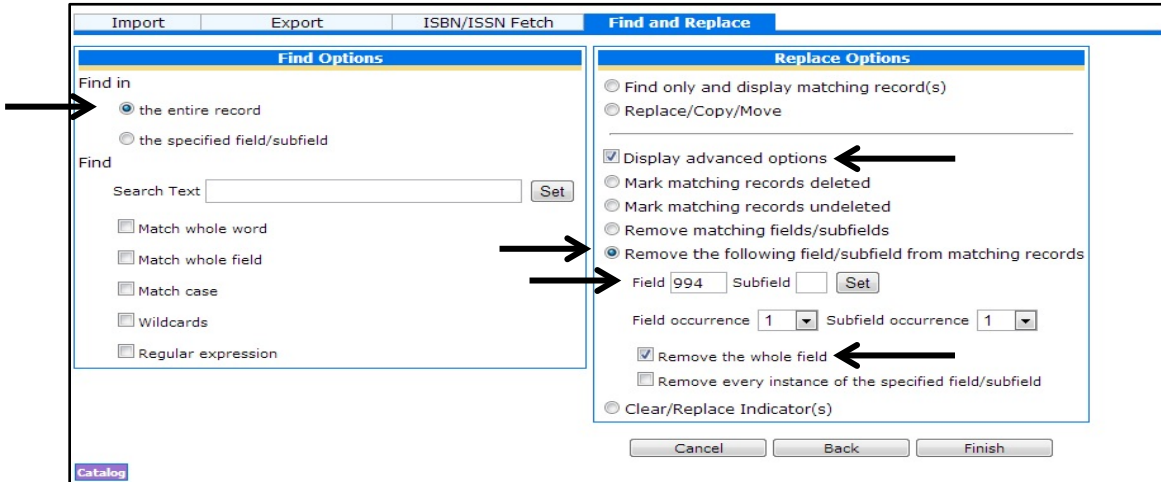
Cancel Back Next

Undo Find/Replace | Undo

Figure 7

7. Click **Select All** on results window of search
8. Click **Next**

9. In **Find Options** window
 - a. Check **“the entire record”**
10. In **Replace Options** window
 - a. Check **“Display advanced options”**
11. Check **“Remove the following field/subfield from matching records”** and type **994** into field text box.
12. Click **“Set”**
13. Check **“Remove the whole field”**



14. Click **Finish** button. This starts the removal of the *Missing designation* from the items you selected.
15. Return to **OASIS Group Editor** and open **INV Found** group.
 - a. **Sort** members by clicking the **“Call #”** header.
 - b. **Select** members, move them back to their respective groups/collections – General, Reference etc.
16. Open **INV Missing** group.
 - a. **Sort** members by clicking the **“Call #”** header.
 - b. **Select** members, move them back to their respective groups/collections – General, Reference etc