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Inventory Software Trials

Kathryn Lybarger

University of Kentucky, kathryn.lybarger@uky.edu

Julene L. Jones

University of Kentucky, julene.jones@uky.edu

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Inventory Software Trials

Kathryn Lybarger and Julene Jones
University of Kentucky Libraries



Why do an inventory?

- Identify what is physically on your shelves
- Identify what the catalog says is on your shelves
- Find and fix problems between the two



Find some software

- Free
- Ability to work with Voyager
- “Easy” to use



What did we choose?

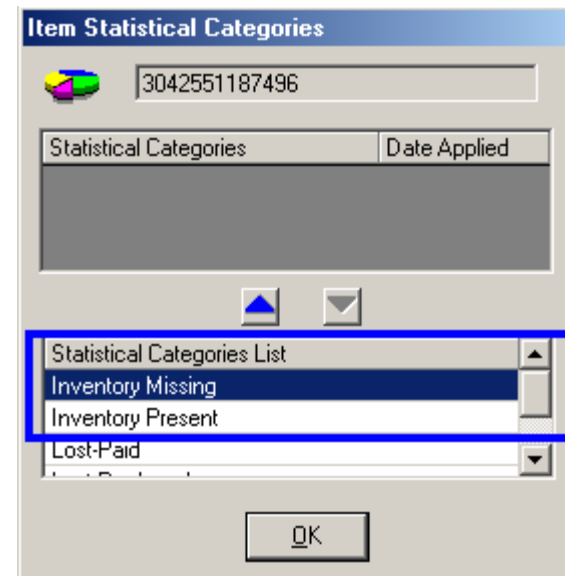
- Scan and Go
- Shelf Lister
- WISH

Scan and Go

- Created by Paul Johnson from Chattanooga State Community College
- Uses an Access database
- Downloadable from
<http://library.chattanoogastate.edu/voyagerinv/>

Scan and Go

- Establish two statistical categories in Voyager System Administration
 - Inventory Missing
 - Inventory Present



- Import Access Database

<http://library.chattanoogastate.edu/voyagerinv/>

Scan and Go

Run lots of reports



Scan and Go

Identify range and location to inventory

The screenshot displays the 'Voyager Inventory Admin Module' interface. At the top, there is a title bar with the module name and an 'Exit Program' button. Below this, three tabs are visible: 'Before Inventory Reports', 'After Inventory Reports', and 'Other Reports'. The 'After Inventory Reports' tab is currently selected. In the center, a dialog box titled 'Enter Parameter Value' is open, prompting the user to 'Enter Starting Range' with the input 'HQ'. To the right of the dialog, there are buttons for 'Preview Report' and 'Print Report'. Below these, a button labeled 'Save Barcodes to Text File' is highlighted with a blue border. On the left side of the main window, there are buttons for 'Items Record' and 'Get Barcodes by Location to'. At the bottom, a section titled 'Other Reports to Help with Inventory (These Reports May Help Locate Items to Include in the Inventory)' lists five report categories, each with its own 'Preview Report' and 'Print Report' buttons:

- Item Status - Overdue (Items you may want returned before inventory)
- Item Status - Circulation Review
- Item Status - Cataloging Review
- Item Status - Damaged
- Item Status - At Bindery

Scan and Go

Use Pick and Scan to mark list of barcodes “Inventory Missing”

The screenshot shows the 'Pick And Scan' application window. It has a title bar and two tabs: 'Item Options' and 'Items'. The 'Item Options' tab is active, showing a 'Barcode:' field with a checkmark button. The 'Items' tab is also visible, showing a 'Select File:' field with a file path and a 'Process File:' button. Below these tabs is a large table with item details. The 'Statistical Category:' field is highlighted with a blue box and contains the text '/ Inventory Missing'. At the bottom of the window are buttons for 'Print List', 'Save to File', and 'Close'.

Item Options		Items	
Barcode:		Select File:	C:\Documents and Settings\mihoff1\Desktop\mark inv...
		<input type="button" value="Process File"/>	
Barcode:	3042551769414		
Title:	Maryland manor; a novel of plantation aristocracy and its fall, by Frederic Emory; with		
Enum/Chron:			
Holding Location:	Young Library 5		
Permanent Location:	Young Library 5		
Temporary Location:			
Permanent Type:	book		
Temporary Type:			
Media Type:			
Item Status:	Not Charged		
Statistical Category:	/ Inventory Missing		
magnetic media:	no		
Sensitize:	No		
MFHD ID 1446899:	Unsuppressed		
Bib ID 1214030:	Unsuppressed		
Update Bib Status:	N/A		
Update Holding Status:	N/A		
Update Item Status:	Processed.		

Scan and Go

Go to shelves



Scan and Go

Use Pick and Scan to mark items on shelf as Inventory Present

The screenshot shows a software window titled "Pick And Scan". It has two tabs: "Item Options" and "Items". The "Item Options" tab is active, showing a "Barcode:" field with a checkmark button. The "Items" tab is also visible, showing a "Select File:" field with a file path and a "Process File:" button.

Barcode:	3042509804383
Title:	Annie Adams Fields : the spirit of Charles Street / Judith A. Roman.
Enum/Chron:	
Holding Location:	Young Library 5
Permanent Location:	Young Library 5
Temporary Location:	
Permanent Type:	book
Temporary Type:	
Media Type:	
Item Status:	Not Charged
Statistical Category:	Inventory Missing / Inventory Present
Magnetic Media:	No
Sensitize:	Yes
MFHD ID 931339:	Unsuppressed
Bib ID 813194:	Unsuppressed
Update Bib Status:	N/A
Update Holding Status:	N/A
Update Item Status:	Processed.

Buttons at the bottom: Print List, Save to File, Close.

Scan and Go

Run report of items marked “Inventory Missing”

The screenshot displays the 'Voyager Inventory Admin Module' interface. At the top, there is a title bar with 'Voyager Inventory Admin Module' and an 'Exit Program' button. Below the title bar, there are three tabs: 'Before Inventory Reports', 'After Inventory Reports', and 'Other Reports'. Under the 'After Inventory Reports' tab, there are two buttons: 'Create Table of Items with Inventory Missing Applied' and 'Create Table of Items with Inventory Present Applied'. To the right of these buttons are two 'Make Table' buttons. Further right, there is a text box that reads: 'Run both "Make Table" queries before running the Inventory (Missing items) report.' Below these buttons, there is a section with three buttons: 'Inventory (Missing Items)', 'Preview Report', and 'Print Report'. The 'Inventory (Missing Items)' button is highlighted with a blue border. Below this section, there is a yellow-bordered box with the text: 'Other Reports to Help with Inventory (These Reports May Help Locate Items found on Missing Items List)'. Below this box, there are four rows of buttons. Each row consists of a label button followed by 'Preview Report' and 'Print Report' buttons. The labels are: 'Item Status - Missing', 'Item Status - Withdrawn', 'Item Status - Lost Library Applied', and 'Item Status - Lost System Applied'.

Voyager Inventory Admin Module [Exit Program](#)

Before Inventory Reports **After Inventory Reports** **Other Reports**

Create Table of Items with Inventory Missing Applied [Make Table](#)

Create Table of Items with Inventory Present Applied [Make Table](#)

Run both "Make Table" queries before running the Inventory (Missing items) report.

[Inventory \(Missing Items\)](#) [Preview Report](#) [Print Report](#)

Other Reports to Help with Inventory (These Reports May Help Locate Items found on Missing Items List)

Item Status - Missing [Preview Report](#) [Print Report](#)

Item Status - Withdrawn [Preview Report](#) [Print Report](#)

Item Status - Lost Library Applied [Preview Report](#) [Print Report](#)

Item Status - Lost System Applied [Preview Report](#) [Print Report](#)

Scan and Go

Inventory Items - (Inventory Missing Applied)

BARCODE	CALL_NO	TITLE	DATE_APPLIED
3042538715814	HQ76.25 .M36 1995	Mapping desire : geographies of sexualities / edited by David Bell & Gill Valentine.	9/16/11 9:08 AM
304253321114T	HQ76.25 .Q38 1995	Queer romance : lesbians, gay men, and popular culture / edited by Paul Burston and	9/16/11 9:08 AM
304253502332W	HQ76.25 .S24 1997	Same sex : debating the ethics, science, and culture of homosexuality / edited by Johi	9/16/11 9:08 AM
304251031004N	HQ76.25 .H6765 1990	Homosexuality/heterosexuality : concepts of sexual orientation / edited by David P. M	9/16/11 9:08 AM
304250431639/	HQ76.25 .H677 1982	Homosexuality, social, psychological, and biological issues / edited by William Paul ...	9/16/11 9:08 AM
3042530092690	HQ76.3.E8 H57 1992	History of homosexuality in Europe and America / edited with introductions by Wayne	9/16/11 9:08 AM
304253200124Q	HQ76.3.U5 B56 1994	Gay and lesbian politics : sexuality and the emergence of a new ethic / Mark Blasius.	9/16/11 9:08 AM
3042547848226	HQ76.3.U5 G55 2006	Sexual politics : the gay person in America today / Shannon Gilreath.	9/16/11 9:08 AM
304254264131Z	HQ76.3.U5 H36 2004	Handbook of gay, lesbian, bisexual and transgender administration and policy / edited	9/16/11 9:08 AM
3042533442681	HQ76.3.U5 S53 1997	Same-sex marriage : the moral and legal debate / edited by Robert M. Baird & Stuart	9/16/11 9:09 AM
3042542288599	HQ76.2.U5 D55 2002	Queer man on campus : a history of non-heterosexual college men, 1945-2000 / Patri	9/16/11 9:09 AM
3042507555856	HQ76.2.U5 G39 1979	Gay men : the sociology of male homosexuality / edited by Martin P. Levine.	9/16/11 9:09 AM
3042501945392	HQ76.2.U5 H37	Social organization of gay males / Joseph Harry, William B. DeVall.	9/16/11 9:09 AM

Scan and Go, Pros

- + Provides lots of information:
 - Duplicate barcodes
 - Overdue, Missing, Withdrawn items
 - Circulation Review
 - Cataloging Review
 - Damaged
 - At Bindery
- + Easy to use, if already familiar with Access

Scan and Go, Pros

Voyager Inventory Admin Module		Exit Program
Before Inventory Reports	After Inventory Reports	Other Reports
Misc. Reports		
Location	Preview Report	Print Report
Item Type	Preview Report	Print Report
Inventory Items - (Inventory Present Applied)	Preview Report	Print Report
Inventory Items - (Inventory Missing Applied)	Preview Report	Print Report
Charged Items with Patron Information	Preview Report	Print Report
Item Statistical Category	Preview Report	Print Report
Shelf List by Location	Preview Report	Print Report

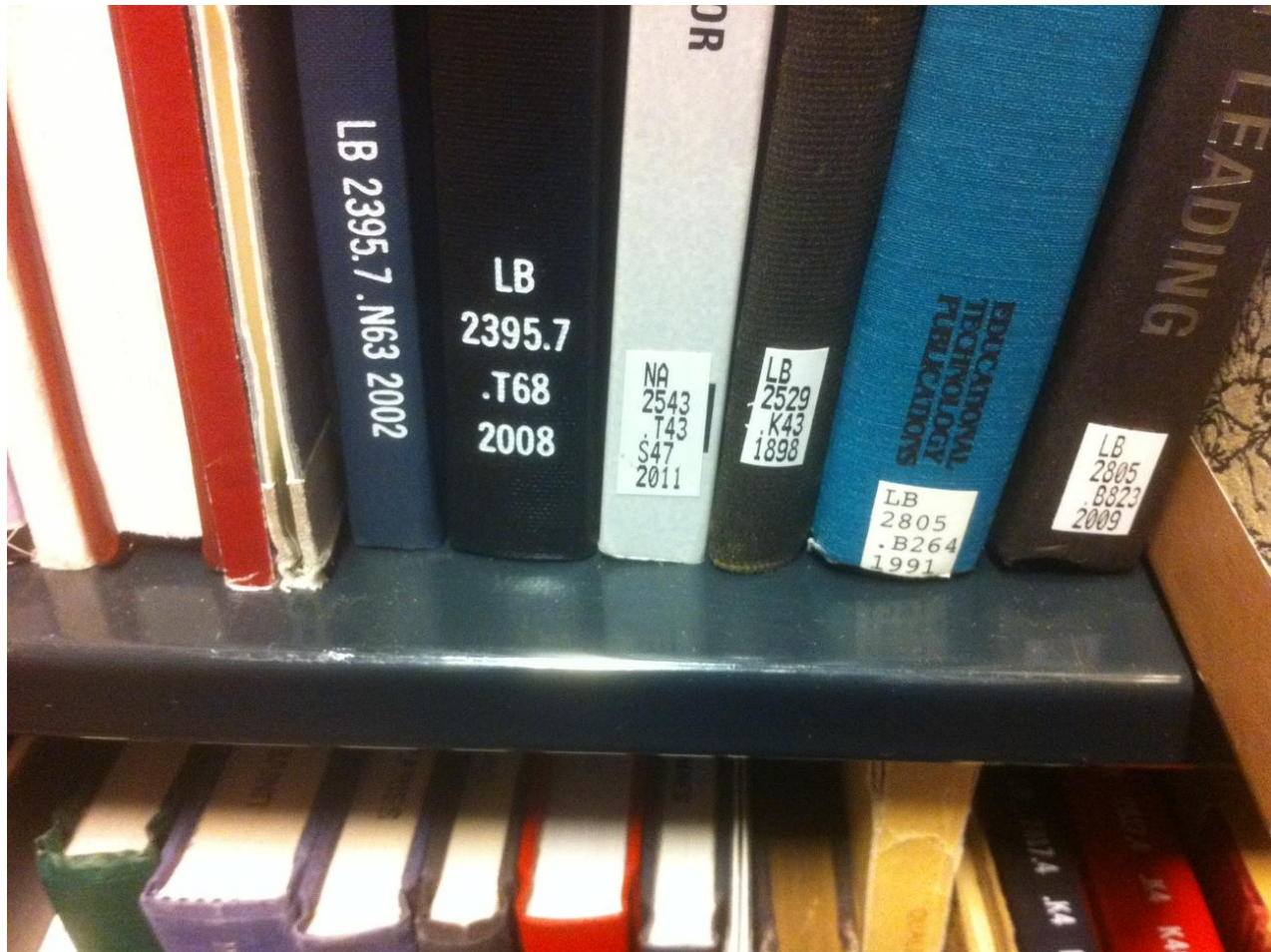
Scan and Go, Cons

- Assumes that shelves are already in shelf-list order (i.e., does not report items shelved out of order)
- Does not account for non-barcoded items
- May report on all barcodes for an item (inactive ones)

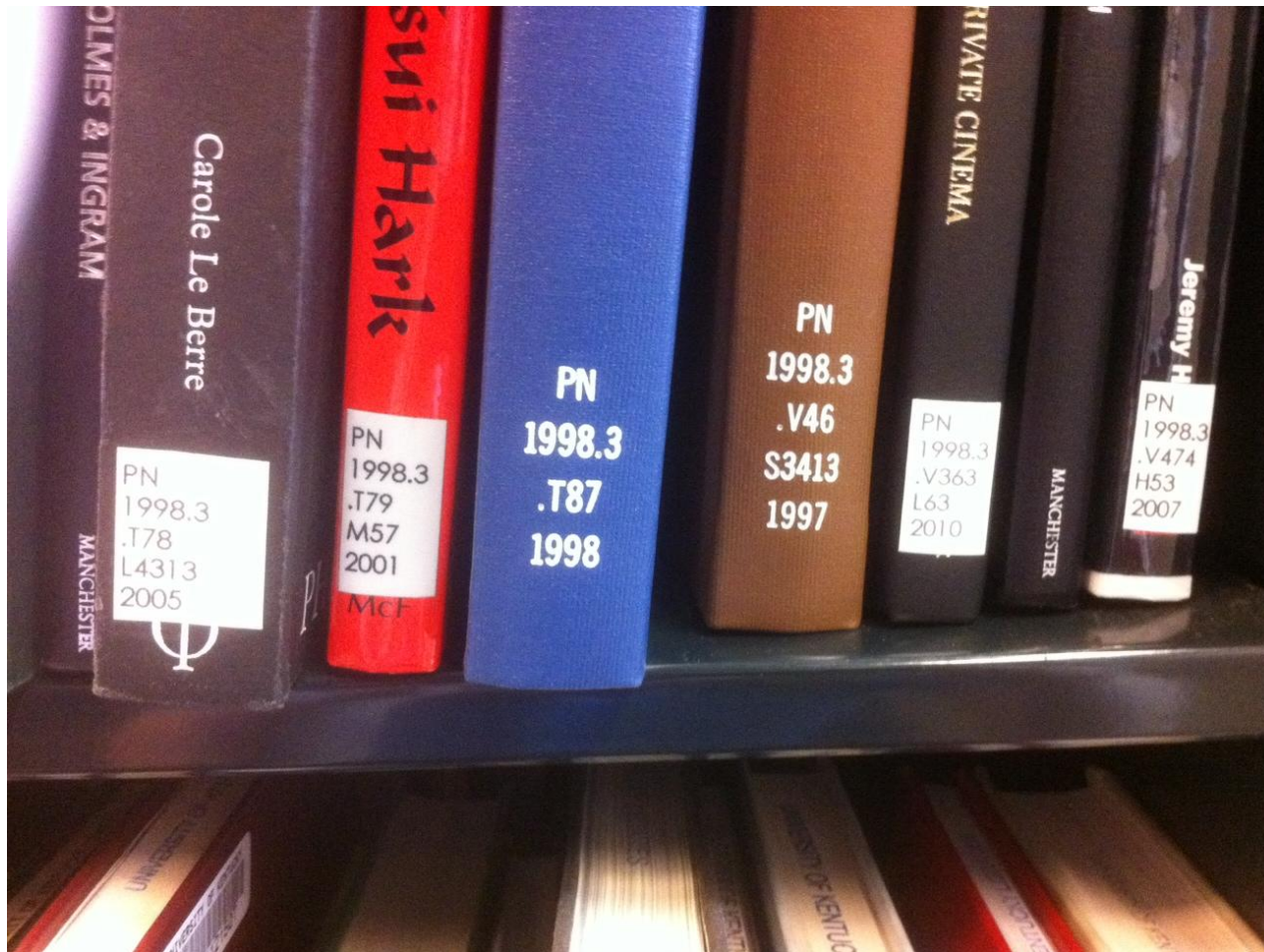
Shelf Lister

- Created by Michael Doran, systems librarian at University of Texas at Arlington
- Downloadable from:
<http://rocky.uta.edu/doran/shelflister/>
- Script installed on server, web page to bring with you to the shelf

Shelf reading without a list would
probably catch this...



... but would it catch this?

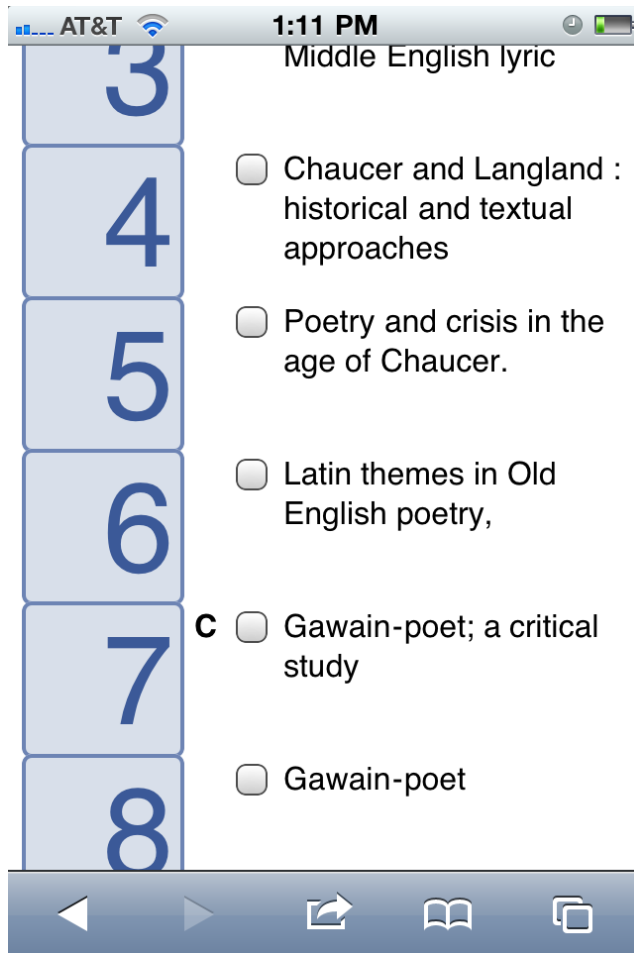


Getting started

The screenshot shows the ShelfLister mobile application interface. At the top, the status bar displays 'AT&T', signal strength, Wi-Fi, and the time '1:10 PM'. The app title 'ShelfLister : Get a Shelf List' is at the top. Below it is a search bar with the URL 'www.zemkat.org/CTS...' and a 'Google' button. The 'ShelfLister' logo is on the left, and 'Start' and 'Help' buttons are on the right. The main section is titled 'Get a Shelf List'. There are two tabs: 'By Barcode' (selected) and 'By Call Number'. Under 'By Barcode', there are two input fields: 'Barcode start:' with the value '3042506868098' and 'Barcode end:' with the value '3042508367601'. Below these are three checkboxes: 'Charges' (unchecked), 'Browses' (unchecked), and 'Item status' (checked). A 'Get List' button is to the right of the checkboxes. At the bottom is a navigation bar with icons for back, forward, search, and other functions.

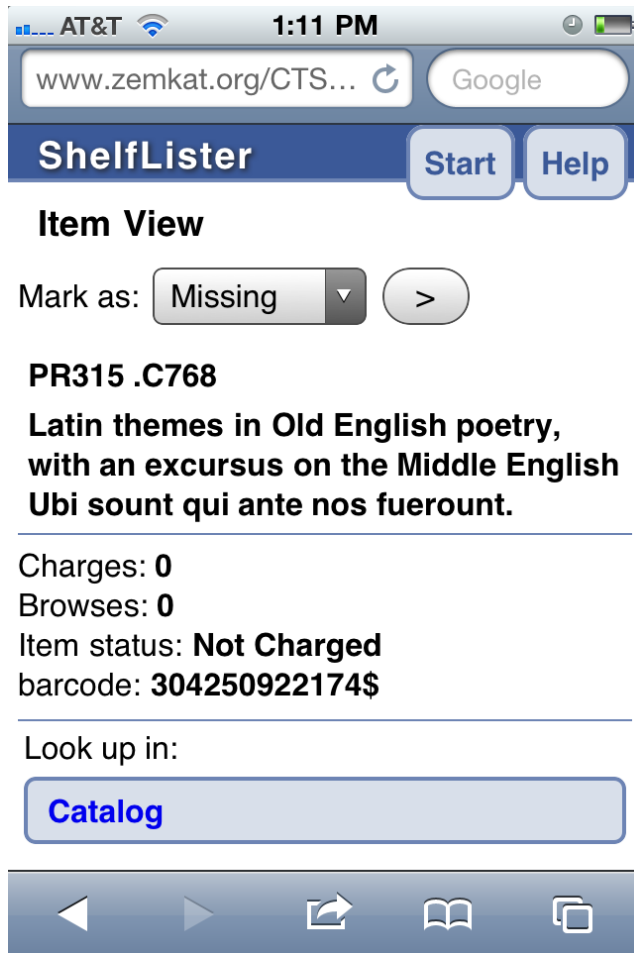
- Type in barcodes for first and last book of shelf range
- Choose columns to display
- Get list

The Shelf List



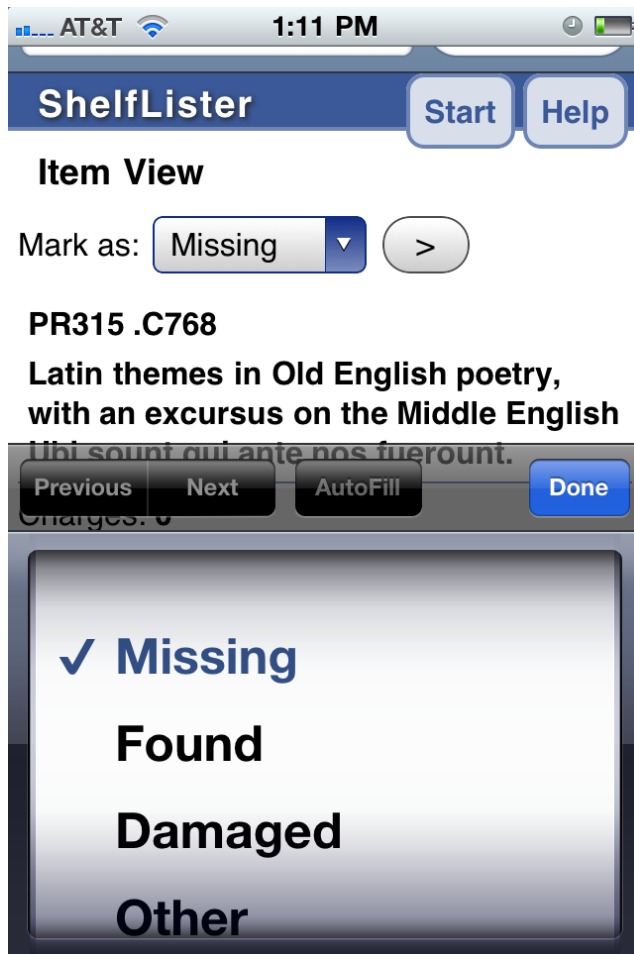
- List of titles or call numbers to compare against the shelf
- Press a numbered button for more info
- Checkboxes are for local use

More information



- More information about the particular volume
- Links to look up in catalog, WorldCat, etc.
- Option to mark volumes as missing, damaged, etc.

Mark individual items



- This list is configurable
- Marking items here does not mark them in Voyager, but in a text file on the server
- Web site has suggestions for processing log files

Shelf Lister, Pros

- Easy to set up and use
- Can be installed on any server, needs read access to Voyager database
- Works with any call number type
- Can be used by multiple users in the library at once

Shelf Lister, Pros

- Books need not be bar-coded
- Open source
- Can be used for other tasks than inventory
 - Default list also includes “Send to Storage”, “Weed”, “Circ Review”, “Cat Review”, “Damaged”

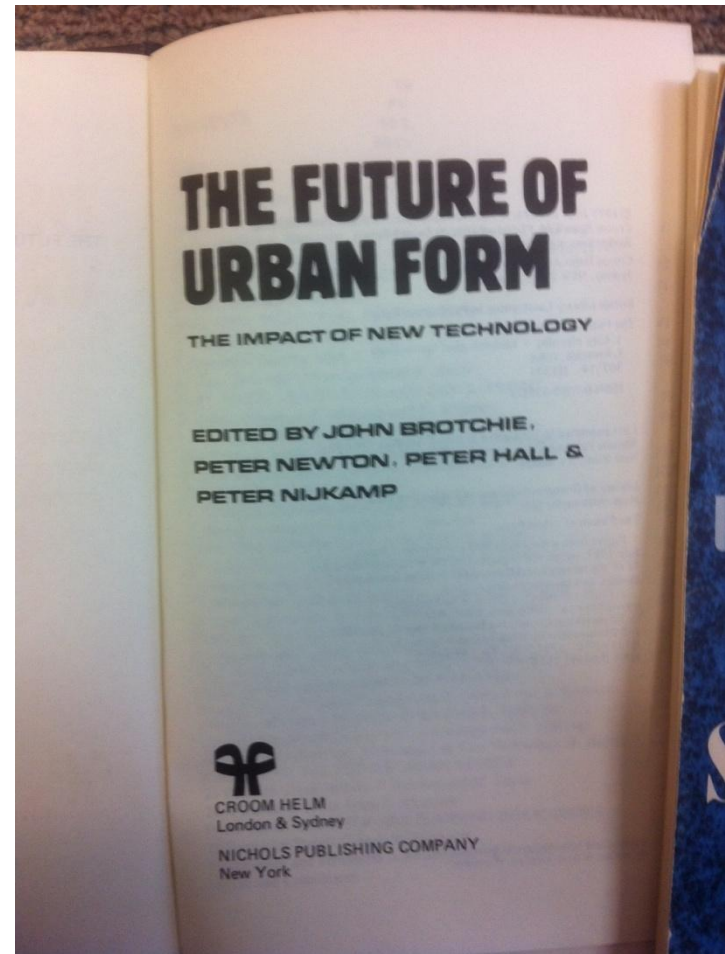
Shelf Lister, Cons

- Shelf reader must pay attention
- Problems must be determined by the shelf reader.
- Hard to switch between title list and call number list
- Number buttons are small by default

Spine may be hard to read



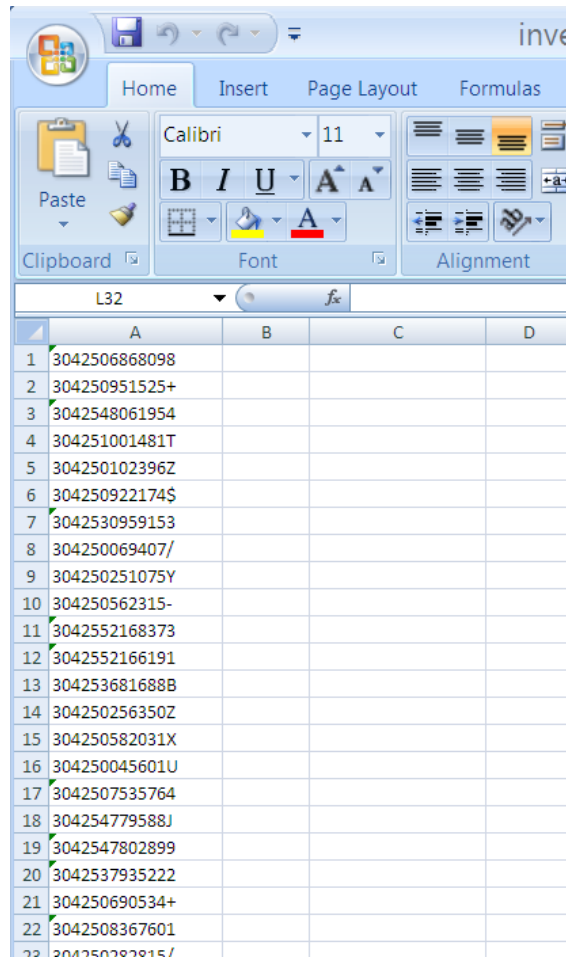
Spine may not match title page



WISH

- WISH : Web-based Inventory and Shelfreading Helper
- In development and testing at the University of Kentucky
- Script installed on server, web page to bring with you to the shelf

Scan all barcodes in a shelf range



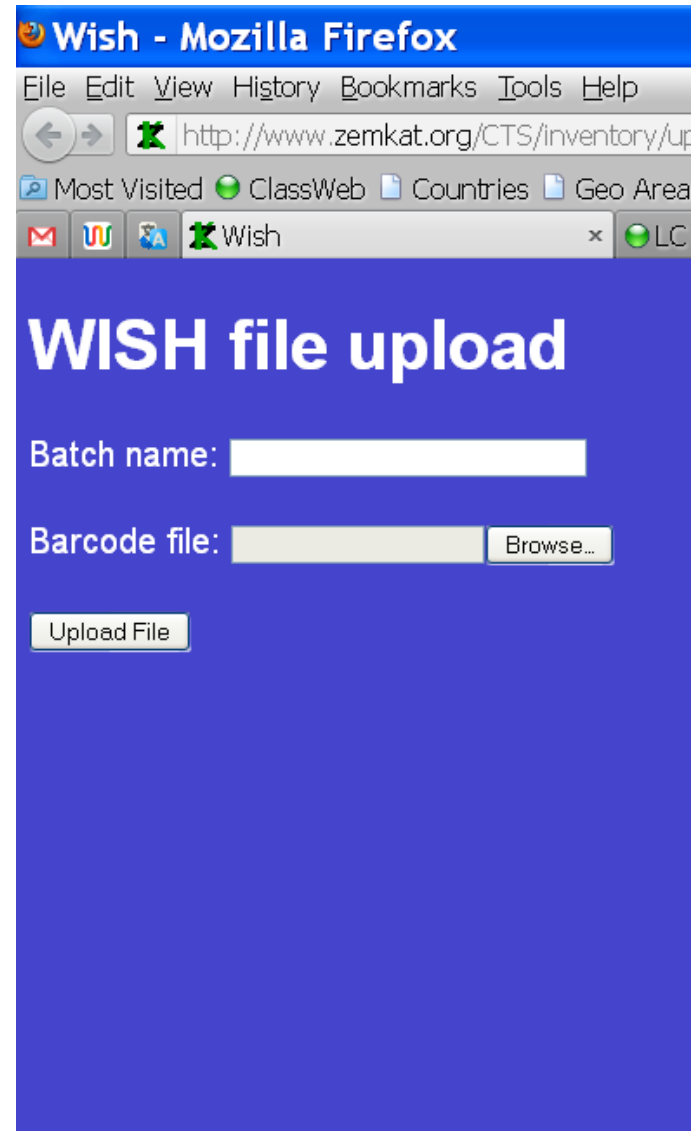
The screenshot shows the Microsoft Excel interface. The ribbon at the top includes 'Home', 'Insert', 'Page Layout', and 'Formulas'. The 'Home' ribbon is active, showing the 'Clipboard' group with 'Paste', 'Font' group with 'Calibri' font and '11' size, and 'Alignment' group. The worksheet grid shows column A containing a list of barcode numbers, with columns B, C, and D empty. The active cell is L32.

	A	B	C	D
1	3042506868098			
2	304250951525+			
3	3042548061954			
4	304251001481T			
5	304250102396Z			
6	304250922174S			
7	3042530959153			
8	304250069407/			
9	304250251075Y			
10	304250562315-			
11	3042552168373			
12	3042552166191			
13	304253681688B			
14	304250256350Z			
15	304250582031X			
16	304250045601U			
17	3042507535764			
18	304254779588J			
19	3042547802899			
20	3042537935222			
21	304250690534+			
22	3042508367601			
23	304250792815/			

- Create a text file of all barcodes
- We use a laptop with a barcode scanner
- If you use Excel, mark the column as TEXT

Upload barcodes to web site

- Upload file to web site
- Actual shelf list compared to Voyager's shelf list
- Problems identified for processing



The screenshot shows a Mozilla Firefox browser window with the title "Wish - Mozilla Firefox". The address bar displays the URL "http://www.zemkat.org/CTS/inventory/up". The browser's menu bar includes "File", "Edit", "View", "History", "Bookmarks", "Tools", and "Help". The toolbar shows "Most Visited", "ClassWeb", "Countries", and "Geo Area". The status bar at the bottom indicates "Wish" and "LC". The main content area has a blue background and features the heading "WISH file upload". Below the heading, there are two input fields: "Batch name:" followed by a text box, and "Barcode file:" followed by a text box and a "Browse..." button. At the bottom of the form is an "Upload File" button.

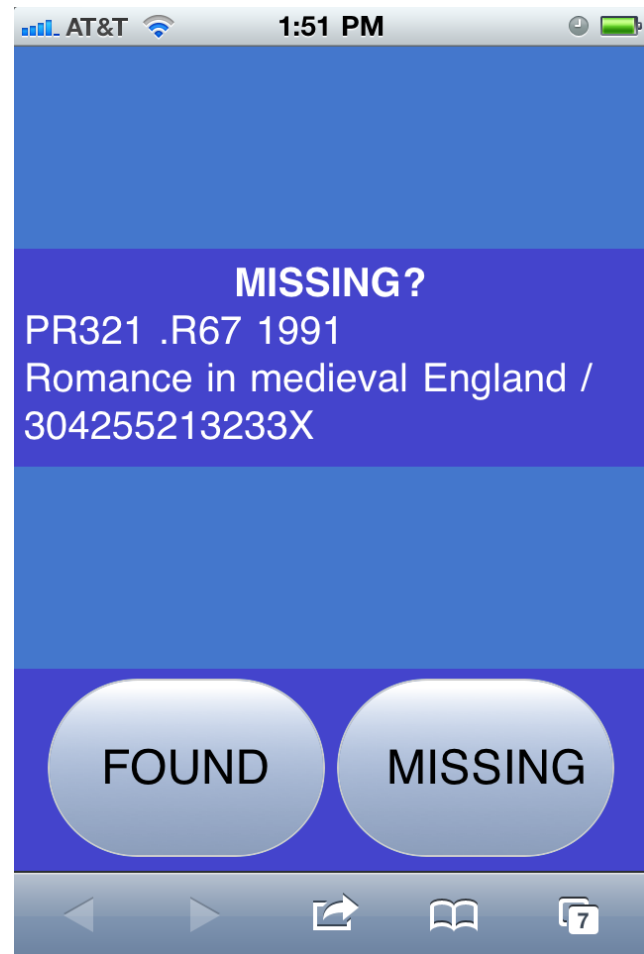
Taking care of problems



- No app to install!
- Select a batch to work on, and scan QR code with a smart phone or portable computer
- If QR code reader not available, visit the provided URL

Fix problems – missing

- Book was detected as missing from the shelf
- Is it still missing?
- Buttons are large, and easy to press on a phone



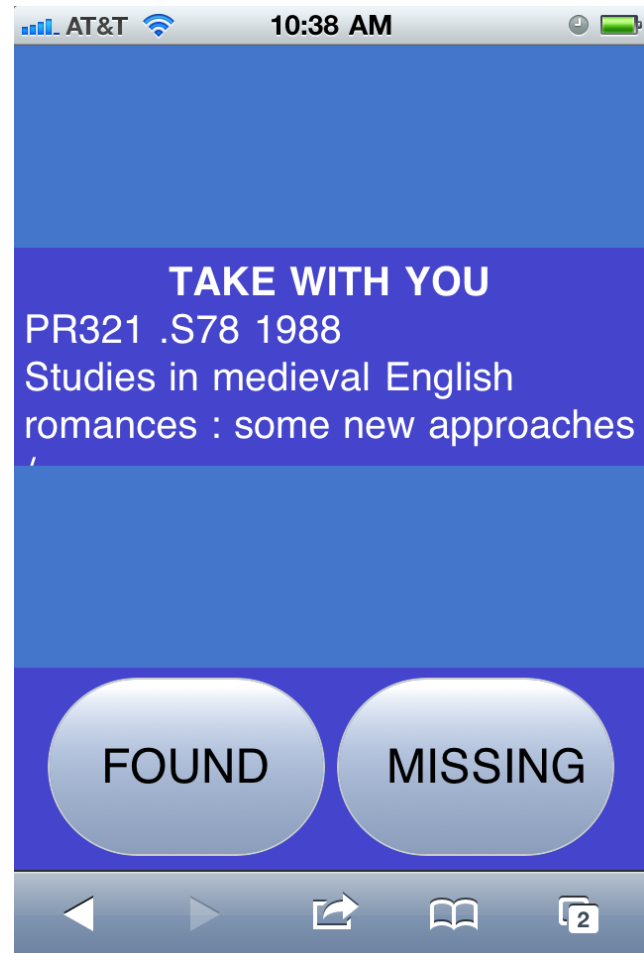
Fix problems – out of order

- Middle book is in the wrong location on the shelf
- Neighboring books show where it can currently be found
- Individual panes scroll



Fix problems – needs attention

- May belong in a different location (storage, periodicals)
- Barcode may not be in system
- May be handy to have a book cart nearby



Outstanding problem lists

- After someone has been to the shelf, you will know:
 - Books that are still missing
 - Books with detected problems
- These can be routed to the appropriate workflows.

WISH, Pros

- Most time-consuming processing is straightforward, can be done without much training
- Does not require sustained attention and focus

WISH, Cons

- Only detects problems with barcoded books
 - Working on detecting existence of non-barcoded books
- (Still a work in progress)

What we found and problems we solved!

- Mis-shelved items
- Mis-labeled items
- Items previously marked Missing
- Items without barcodes (or items without barcodes in Voyager)
- Items in wrong locations or wrong collections

