Sierra Inventory

A. Prep your collection and equipment

1. Select a collection / part of a collection to inventory. You will need to go piece-by-piece. A very small collection is a good place to start and get the hang of it.

2. Shelf-read the collection you plan to inventory. The report shows mis-shelved books as errors, so you will get many fewer if you tidy up first. You do not need to worry about what is checked out, but you do need to track down everything in that location you may have in mending, on display, on reserve, or on someone's desk so it won't be categorized as missing in your errors.

3. Determine what the system considers the first and last books in your selected area. The list you create is compared against the shelf list in the system, so the starting and ending points must match up for it to work.

    a. Build a review file of items in the section (by location code, probably).

    b. Sort the review file by item call number.

    c. Open the list and note down the title and barcode of the first and last items.

    d. Find these two items on the shelf and make sure that they are the first and last things in the section you plan to inventory.

4. You will need a laptop (either with an extension cord or a full battery) with a barcode scanner hooked up to it. A flat-topped book cart or rolling av cart is ideal for holding this. You will need to be able to get the text files off of the laptop, either over the internet or with some physical means.

5. You will also need an assortment of programs: FTP software (for example: FileZilla), Excel, Word, and a terminal to access the character based system (for example: Putty).

B. Scan your items

1. Open up a new Excel spreadsheet.

2. Save your file with a name that makes sense like yyyymmddin1 (ex:20120628ar1 for June 28, my initials, 1st spreadsheet of the day)

3. Adjust auto-recover time down to 1 minute (This is so you won't lose so much of your scans if something happens to the computer.)

    a. In Office 2003 or earlier: Go to tools > options and click on the "save" tab. Adjust auto recover to 1 minute and press OK.

    b. In Office 2007 or later: Click on the office button (round thing with colorful squares in the top left corner), then click "Excel Options" button, and pick "save". Change autorecover to 1 minute.

4. Format Column A so that the barcodes are recognized as 14-digit numbers.

    a. In Office 2003 or earlier: Highlight column A. Go to format > cells and pick the Number tab. Highlight Number and set the decimal places to 0. Click OK.

    b. In Office 2007 or later: Highlight Column A. In the Home ribbon view, click on the drop-down in the middle that says "General" and change to "Number". Then click the button just below that showing .00 → .0 (i.e. the number of decimal places decreasing) TWICE.

5. Select the very top left cell (A1) and Start Scanning! (Don't forget that the very first barcode you scan needs to be the first barcode in the collection as indicated above in A.3.) Every scan will enter a barcode in the cell and then move down to the next cell ready for another scan.

    a. Make sure that your barcodes are going in correctly. If not, adjust the number format again as in step B.4.

    b. Remember to manually save every so often for your peace of mind. Just reach over and hit CTRL+S after every shelf.

C. Convert your barcodes

1. *(Still in Excel)* Add n: to the start of each barcode in your file.

    a. Use find and replace to insert the characters.

    b. press the CTRL + F keys.

    c. Go to the "Replace" tab

    d. enter the first 5 (or 6 or 7 if you know the next couple are always zeroes—more is better) digits of your barcodes in the Find box (ex: 388880)

e. enter n: and the same first digits of your barcode (ex: n:388880) in the replace box.

f. Click Replace All.

g. If you have funny barcodes, you can do this a couple of times until it matches all of the beginning numbers).

2. Highlight the column of barcodes and copy.

3. Open a blank document in Word.

4. Use "Paste Special" under Edit and pick "Unformatted Text".

5. Now to save as an ASCII file, go to "Save As" (under File or the Office Button)

a. Give the file a consistent name with your library code first and date apparent. (ex: tplbi20120628). There must be no spaces or special characters like slashes or dots, or the FTP will not work.

b. Change the "Save as type" to "Plain Text". Then, when you click Save, another window will come up. Select the "other encoding" button and highlight "US-ASCII" then click OK.

c. Notice where you saved the thing so you can get it again in a sec!

6. Close Excel and Word. Phew.

D. Uploading your file to Minerva/Ursus (via maineinfonet.net)

1. Open an FTP program. You can use any one you are comfortable with. The one I use is FileZilla (http://filezilla-project.org/ you want the client).

a. Connect using the following info

Host: [contact MaineInfonet]

username: [contact MaineInfonet]

password: [contact MaineInfonet]

port:21

b. On the "Local Site" side of the FTP screen, find your barcode file that you just made in Word.

c. Move/FTP it to the "Remote site" side—probably just by dragging it and dropping it in the Remote site side.

d. Close FTP program.

2. Log in to the Character-based version of Millennium by opening PuTTY

    http://www.putty.org/)

    a. Enter the Host Name (or IP address): ***minerva.maine.edu***.

    b. A black screen will open saying "login:" (if the text in the bottom right has turned red and says "offline" you have been idle too long. Close the window and click the button again.)

    c. Enter the login ***inventor*** and the password ***OnMyShelf***

3. Get down to the FTP transfer menu by picking

    a. C > CIRCULATION subsystem

         P > PROCESS PC transactions

            initials: ***inventor***   password: ***OnMyShelf?***

    b. F > FTS Transfer of B321 or PC-CIRC transactions from PC

        i. Type 9 to pick maineinfonet.net

            username: ***nelson@maineinfonet.net*** (yes, the whole thing)

            password: ***d8mm516***

    c. Type the number of your file (which you conveniently named so you can tell what it is). The word GET appears to the left of the number.

    d. Type t for TRANFER and wait (don't press enter). You will see a message box when the transfer is complete.

    e. Type c for CONTINUE. You should see a log of your transactions with a new filename. This name begins with "rdi" and includes the date and other numbers. WRITE DOWN THE FILE NAME! If you instead see a message that says something like "bad data in file. Transfer failed." then hit space 2 times. Check that you saved your file correctly back up in step C.3. Once you've saved it correctly, get rid of the old files and follow all the steps through again up to here)

    f. As instructed, press <space> to continue. This will return you to the "Process PC Transactions" screen.

E. Processing your File (Comparing to the Shelf List)

1. (Still at the "Process PC Transactions" screen). Get into the right menu by picking

    a. C >COMPARE inventory to shelflist.

        C > COMPARE file of barcodes to shelflist

2. Name the files so that we can know what is what.

    a. type n for NAME inventory file

    b. pick the number of the "rdi" file you just created (good thing you wrote it down!)

    c. after the "rdi" put your library initials and something short to remind you (no spaces, no special characters).

3. Now just key the number of your file. (wait, don't hit enter)

4. Under "File # selected you have some options—Basically all you need to do is pick A or E, but here are explanations of the others:

    a. I > INCLUDE only items at _____. Typing I toggles between including only items in the location of the first item in your file OR only items within the login's locations served. Leave it on the specific location.

    b. S > off-shelf STATUS codes lists all of the statuses that the system would expect to not find the item on the shelf. No change.

    c. A > List ALL items. Choose this if you want a list of every item in the area, either or not it is correctly shelved. Good for small collections or when you're trying to get a feel for the thing.

    d. E > List ERRORS only. Choose this if you only want to see a list of the items that the system has decided have some sort of inventory error (see below for list of errors). Good for larger collections where you don't want to see loads of OK items.

    e. + > ADDITIONAL options lets you see options E and R

5. Pick A or E. Processing . . . . will scroll across the page for a while. Be patient. Possible messages while this is happening:

    a. If asked "The system has searched through the next 5000 items and none are in the specified LOCATION. Do you want to continue searching? pick Y.   The system is running your barcode file against ALL items in the database, and looking for

the specific locations. It is very possible for there to be a 5000 gap between call numbers in a large collection.

   b. Barcode '3XXXXXXXXXXXXX' has no item record. Write down the barcode number for later and press <space> to continue. It's possible that the barcode scanned wrong, in which case you might be able to look it up with some ingenuity later. Or, it could be something on the shelf that was deleted from the system. Hard to find, though!

6. When the system is done, you'll get the report. Fun times.

   a. You can read through it on the screen using the F and B keys to move forward and backward.

   b. To save, print, and manipulate the report, type p for PRINT. You can print either to an attached printer or to an E-mail printer (i.e., email it to yourself).

7. q > QUIT out when you are done.

8. Do you want to update the Inventory Date field in all the item records you just processed (I would say yes).

9. Do you want to remove the inventory file you just used? Again, I'd say yes. If not, then get in there and delete it later when you are good and done.

F. Read, interpret, and correct your report

This will take some time, since it requires some detective work and going into many records to make changes.

1. Here are the possible results OK and ERRORS that could be in the report:

   a. **OK on shelf** - On-shelf: The item's physical location matches the shelf list, or the status of the item is NOT an "off-shelf" status.

   b. **OK checked out** - Checked out: The item is checked out and not on the shelf.

   c. **OK ST = [code]** - STATUS = [code]: The item's STATUS field is non-blank, and the item is not on the shelf.

   d. **ERR missing** - The item is not checked out and its STATUS is blank and therefore should be on the shelf, but it is not.

      • Change item status to missing. Search as for other missing items.

e. **ERR msh** - Mis-shelved: The item is physically out of sequence according to the shelf list. If it belongs at another point within the range of this inventory report, the line number of its correct position will be given (e.g., **msh, #15**).

- Check that shelving suggestion is correct. Reshelve correctly or fix call number in item if necessary.

f. **ERR no item rec** - There is no Item record in the system for the given barcode. INNOPAC shows the barcode and call number for the next record in the database.

- Go get that item off the shelf (based on its place in the list) and figure out why it doesn't have an item record. Create one if necessary or discard book if it should be.

g. **ERR os, but co** - On-shelf but checked out: The item was found on the shelf but the system shows it as checked out to a patron.

- Check it in.

h. **ERR ST = [code]** - STATUS = [code]: The item has a code in the STATUS field which the library has specified as an off-shelf status, but the item was found on the shelf.

- Fix item status or move item.

i. **ERR wrong loc** - Wrong location: The item's location code differs from that of the first and last items in the range.

- Either move to correct location or fix location in item record.

j. **LAST ITEM SHELVED** - The item was the last correctly shelved item; followed by an ERR msh item.

G. Clean up after yourself.

Files more than 13 months old could be deleted by InfoNet systems staff without preamble.

1. To delete files from the milinventory FTP folder.
    a. Log in to FTP as in D.1 above.
    b. Find your files on the "remote" side.
    c. Delete them.
2. To delete files from the Minerva/Ursus inventory

a. Log in and get to the Process PC Transactions menu as in D.2-3.a. above.

b. pick C and C to get to the list of rdi files

c. type R to REMOVE inventory files then pick your file numbers.

Many thanks to Jennifer Lewis at Augusta Schools for her great

directions, which I have lifted and modified to make these.