Overview

The Inventory functions let you inventory your library’s holdings either through online barcode entry or by uploading an inventory file, generate an inventory report to resolve discrepancies (missing items, items in the wrong collection, etc.), apply a Missing exception to all missing items, and clear the contents of the inventory file once inventory processing is complete.

Using Online Barcode Entry

The Online Barcode Entry function lets you enter barcodes for inventoried items for a selected collection online, either manually or by using a barcode scanner. Barcodes entered using Online Barcode Entry are saved to “master” inventory file (for the selected collection) in your VERSO database, allowing you to perform inventory processing over several sessions.

Online Barcode Entry is the recommended method for performing inventory as any discrepancies in status, location, etc., are identified upon submittal of the barcode, and can be rectified immediately if desired.

To perform an Inventory using Online Barcode Entry:

1. From the CAT Admin menu, select Inventory - Online Barcode Entry.
   - The Load Single Inventory Items screen displays.

2. Select the desired collection from the Select Inventory Location menu.
   - The Select Inventory Location menu lists all currently active collections defined for your library.

3. Click the Submit button to continue.
   - The Enter Barcode screen displays.

4. Enter a barcode for the selected collection in the Enter Item Barcode text box.
   - You can use a barcode scanner to enter the barcode, or you may enter the barcode manually.

   If your library has enabled searching by partial barcode (see the Circulation Administration User Guide for details), you cannot enter a partial barcode in the Load Single Inventory Items screen.
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5. Click the Submit button to continue. The screen refreshes to display status information for the entered barcode. Depending on the status of the associated item, the screen may include some or all of the following information:

- **Last Item Barcode Entered** – shows the last (most recent) item barcode submitted

  In the event the barcode was previously submitted during inventory processing the message “Duplicate barcode removed” is shown following the barcode.

- **Item Status** – shows the current status of the item

  Items with a status other than **Available** should be investigated, and the exception changed as appropriate (see the Circulation User Guide for information on changing item exceptions).

  In the event an invalid barcode is entered, the **Item Status** field shows the message “Barcode: (barcode) does not exist in the database.”

- **Expected Item Location** – in the event the barcode entered is not associated with the currently selected collection, shows the location (library – branch – collection) with which the item is associated.

6. Repeat steps 4 and 5 to enter additional item barcodes.

If desired, you can generate an inventory report for the collection once the inventory is complete (see Requesting an Inventory Report on page 73 for details). After all discrepancies have been rectified, you can clear the contents of the inventory file (see Deleting an Inventory File on page 76 for details).

### Uploading an Inventory File

When inventorying your library, an inventory file (essentially a list of barcodes) should be prepared for the desired library, branch or collection. If necessary, due to the size of a given collection, you may create multiple inventory files for a single library, branch or collection. Barcodes entered using the **Load Inventory** function are saved to “master” inventory file (for the selected library, branch, or collection) in your VERSO database, allowing you to perform inventory processing over several sessions.

#### To upload an inventory file:

1. From the **CAT Admin** menu, select **Inventory – Load Inventory**.

   - The Load Inventory File screen displays.

2. Click the **Browse** button locate the inventory file you wish to upload.

   - A standard Find File dialog displays. Locate the desired file, then click the **Open** button on the Find File dialog. The file name for the selected file is displayed next to the **Browse** button.
3. Select the appropriate inventory type from the Select inventory type menu:
   - Select Collection if the inventory file contains barcodes for a single collection only.
   - Select Branch if the inventory file contains barcodes for multiple collections within a single branch only.
   - Select Library if the inventory file contains barcodes for multiple branches within a library.
4. Click the Submit button to continue.
   - Depending on the inventory type previously selected, the Select Library/Branch/Collection screen displays, as appropriate.
5. Select the library, branch or collection, as appropriate, for which the inventory file was prepared, from the Select Library (Branch) (Collection) Inventory Location menu.
6. Click the Submit button to complete the upload.
   - An advisory screen displays the message "(##) records loaded," indicating the total number of barcodes contained in the selected inventory file.
     - If the inventory file contains multiple occurrences of the same barcode, or, if a barcode contained in the inventory file was included in a previously uploaded inventory file for the same library/branch/collection, the advisory screen includes the message "(##) duplicate barcodes found."

Duplicate barcodes included in inventory files are removed by the system automatically.

You can generate an inventory report for the collection once the inventory is complete (see Requesting an Inventory Report on page 73 for details). After all discrepancies have been rectified, you can clear the contents of the inventory file (see Deleting an Inventory File on page 76 for details).

**Requesting an Inventory Report**

The Inventory Report reconciles your physical inventory with the item records in your library's database. The Inventory Report lists items that are unaccounted for, items that are in the wrong location, and checked out items.

It is recommended that an inventory report be run only when inventory processing for the associated library, branch or collection is completed (all items for the location have been inventoried, and barcodes have been entered or uploaded for all inventoried items).

Managing Inventory
To request an Inventory Report:

1. From the CAT Admin menu, select Inventory – Inventory Reports.
   - The Request Inventory Report screen displays. The screen shows a listing of “master” inventory files for all locations for which inventory is currently in process, or which were previously inventoried. Each line in the list provides the following information:
     - **Location** – the location with which the inventory file is associated
     - **Last Report** – the most recent date on which an inventory report for the associated location was requested
     - **Last Data Load** – the most recent date on which data was added to the inventory file (by either Online Barcode Entry or through the Load Inventory function)
     - **Last Cleared** – the most recent date on which the contents of the inventory file were cleared (deleted)
     - **Comments** – any system generated comments associated with the inventory file
   - If desired, you can reconfigure, sort and filter table content (see Sorting and Filtering Tables on page 14 for details).

2. Click the Submit Report link for the Location for which you wish to generate an inventory report.
   - A confirmation dialog displays the message “Continue to Submit this Report?"

3. Click the OK button to proceed with the inventory report request. (Click the Cancel button to cancel the request and return to the Request Inventory Report screen.)
   - The Schedule Inventory Report screen displays.

4. Click the Submit button to submit the inventory report request.
   - Depending on the size of the selected location, it may take from several minutes to more than an hour for the inventory report to complete.

Once the inventory report has completed, you can view the report through the Circulation Reports module (see the Circulation Reports User Guide for details).
Setting the Missing Items Exception

The Set Missing Items Exception lets you automatically apply the Missing exception to all "unreconciled" items for a selected location. An item is considered to be "unreconciled" if an item record for a given item exists in the database for a selected location, but a barcode for the item was not scanned or uploaded during inventory processing for the location.

DO NOT use the Set Missing Items Exception function until ALL inventory processing for the associated location has been completed. It is STRONGLY recommended that you generate an inventory report for the location and verify that ALL "unreconciled" items are truly missing before using the Set Missing Items Exception function. Once the Missing exception is applied to "unreconciled" items, it cannot be "undone" automatically. The exception for any items incorrectly identified as Missing must be changed manually.

To set the Missing Items Exception:

1. From the CAT Admin menu, select Inventory - Set Missing Items Exception.
   - The Set Missing Items Exception screen displays. The screen shows a listing of "master" inventory files for all locations for which inventory is currently in process, or which were previously inventoried. Each line in the list provides the following information:
     - **Location** – the location with which the inventory file is associated
     - **Last Report** – the most recent date on which an inventory report for the associated location was requested
     - **Last Data Load** – the most recent date on which data was added to the inventory file (by either Online Barcode Entry or through the Load Inventory function)
     - **Last Cleared** – the most recent date on which the contents of the inventory file were cleared (deleted)
     - **Comments** – any system generated comments associated with the inventory file

2. Click the **Set exceptions** link for the Location for which you wish to apply the missing exception to all items determined to be missing as a result of inventory processing.
   - A confirmation dialog displays the message "Continue to Process this?"

3. Click the **OK** button to continue. (Click the **Cancel** button to cancel the request and return to the Set Missing Items Exception screen.)
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- The Schedule Set Exception Missing screen displays.

4. Click the Submit button to complete the process.

Once the process has completed, you can choose to delete items identified as missing using the Delete Item Exceptions report available through the Circulation Reports module (see the Circulation Reports User Guide for details).

Deleting an Inventory File

Once the inventory process has been completed, you can clear the contents of the inventory file for a selected location in preparation of a new inventory for the location.

To delete an inventory file:

1. From the CAT Admin menu, select Inventory - Delete Inventory File.
   - The Clear Inventory File screen displays. The screen shows a listing of "master" inventory files for all locations for which inventory is currently in process, or which were previously inventoried. Each line in the list provides the following information:
     - Location - the location with which the inventory file is associated
     - Last Report - the most recent date on which an inventory report for the associated location was requested
     - Last Data Load - the most recent date on which data was added to the inventory file (by either Online Barcode Entry or through the Load Inventory function)
     - Last Cleared - the most recent date on which the contents of the inventory file were cleared (deleted)
     - Comments - any system generated comments associated with the inventory file
   - If desired, you can reconfigure, sort and filter table content (see Sorting and Filtering Tables on page 14 for details).

2. Click the Clear File link for the Location for which you wish to clear the inventory file.
   - The current contents of the selected inventory file is cleared, and the Clear Inventory File screen refreshes with the Last Cleared field for the inventory file updated to the current calendar date.