



SWAN Inventory Training

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Overview

- Welcome
- Overview
- Introductions
- Inventory Preparation
- Scanners Operations
- Inventory Process
- Error Messages
- Results
- Lessons Learned
- Question / Answer Session



Welcome

- Logistic Items
 - Restrooms
 - Drinks / Food Policy
- Breaks
 - Lunch 12:00
 - Break 2:30
 - Stop 4:00



Introductions

- Name
- Institution
- Position
- Role in Inventory Process



Inventory Preparations

Training Files Access

- Inventory Manual (PDF)
- Inventory Procedures (DOC)
- SWAN Training (PPT)
- MCO Server
 - <ftp://mco.mobius.missouri.edu>
 - Username: swan
 - Password: swan1
- Deleted 8/2/04



Inventory Preparations

Stating the Obvious

- Weed Collection
 - Take things out that no longer fit your needs
 - If it's not there, you don't have to inventory it
- Shelf Read
 - Errors are generated based on location code in combination with call number
 - 1st barcode in file determines location and call number
 - Last barcode identifies last call number in sequence
 - Look for collection mismatches
 - Do it again



Inventory Preparations

Helpful Suggestions & Must Do

- Rethink Internal Policies
 - SBU policy – newsletters have no call number
- Create List
 - Keep list until inventory complete
 - Download Collection(s) to Excel / Access
 - Ex: Mountain View file
 - Procedures ??
- Empty Call Number Field
 - Compare process crashes
 - File processing stops
 - Difficult to determine the culprit
 - Error message = “Second Call Number Field is Empty”
 - Any item record after the first record



Inventory Preparations

Must Do

- Barcode Anomalies
 - Entire inventory is based on accurate barcodes
 - SBU barcodes “not within”
33438000000000 – 33438999999999
 - 12,756 Anomalies (excluding 16,325 e-books)
 - Drury – 653 “not within”
33331000000000 – 33331999999999
 - SMS – 25,000+ “not within”
32356000000000 – 32356999999999
- Causes (MTV Example)
 - Empty
 - Duplicated barcodes
 - Hand keyed incorrectly
 - Negative barcodes



Scanner Operations

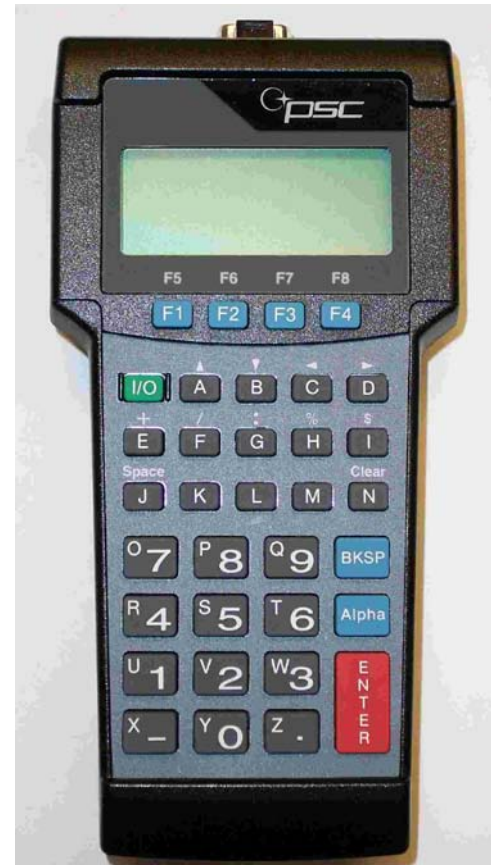
Scanner Equipment

- B321 Software (3.5 floppy)
- Scanner Module
- Wand (Light Pen)
- Interface Cord (PC)
- Interface Adapter
- Manual – Not Included
 - <http://swan.umsystem.edu/manual>
 - Search ID# 102530

Scanner Operations

Scanner

- On/Off – Green
- F1 - F3 Buttons
 - Functions vary depending on menu
- F4 – Menu Selection
- Keypad Allows Data Entry



Scanner Operations

First (Main) Menu

- Circ Functions
- Size of Checkout Determines Value
- <100 – Effort Questionable
- >100 – Effort May Be Worth It



Scanner Operations

Second Menu

- F1 – Set Checkout Due Date
- F2 – Renew a Book
- F3 – Scan Barcodes For Inventory



Scanner Operations

Third Menu

- Three Different Count Files
- Counts usage



Scanner Operations

Fourth Menu

- F1 – Erase a File
- F2 – Restart the Handled Scanner
- F3 – Send a File to the PC or Server





Scanner Operations

B321 Software

- Install Software on PC
- Windows 3.1 Software
- Use Default Settings
- Creates c:\b321 Folder
- Interfaces Through COM Port 2
 - Start Menu -> Settings -> Control Panel
 - System
 - Hardware -> Device Manager
 - Ports



Scanner Operations

-- Demonstration --



Inventory Process

Overview

- Scan
- Transfer File to SWAN Server
 - Scanner to PC
 - PC to MOBIUS
 - MOBIUS to SWAN Server
- Compare Inventory File



Inventory Process

Important Reminders

- Maximum Records
 - Scanner can hold 8,000
 - III system can process 5,000
 - Manual recommends 1,000
- New vs. Resume Scanning
 - New → Make sure the file is empty
 - Resume → Pick up where you left off
- First Scanned Barcode Important
 - 1st barcode in file determines location and call number
 - Last barcode identifies last call number in sequence



Inventory Process

File Transfer Protocols

- FTP Site
 - <ftp://mco.mobius.missouri.edu>
 - Username: swan
 - Password: swan1
- FTP Session
 - SBU uses WS_FTP LE application
 - Other institutions may have other programs
 - IE & Netscape can FTP, not efficient
- Barcode File on Local Computer
 - C:\B321



Inventory Process

Procedures File

-- Demonstration --

Inventory Procedure File



Error Messages

- **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.
- **OK checked out**
 - Checked out: The item is checked out and *not* on the shelf.
- **OK ST = [code]**
 - STATUS = [code]: The item's STATUS field is non-blank, and the item is not on the shelf.
- **ERR missing**
 - The item is not checked out and its STATUS is blank and therefore should be on the shelf, but it is not.
- **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**).
- **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.
- **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.
- **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.
- **ERR wrong loc**
 - Wrong location: The item's location code differs from that of the first and last items in the range.
- **LAST ITEM SHELVED**
 - The item was the last correctly shelved item; followed by an ERR msh item.
- -- Review Salem's Error Message Files --



Results

- Process Accomplishes?
 - Populates INVDA field with date
 - Generates a list of errors
- What's Next
 - Clean up database
 - Track down problem
 - Correct errors
 - In collection
 - In database
- Inventory Stragglers
 - Create lists of items not inventoried
 - Locate and inventory



Lessons Learned

System Limitations

- Cataloger / Technical Services are intimately involved in the process
- Inventory Field
 - Cannot be manually updated
- E-Books – Cannot Be Inventoried
 - Barcode not assigned
 - Barcode is required to identify item records
- Periodicals
 - Different location codes must be inventoried separately
 - Bound vs. Loose vs. Microfiche vs. Microfilm
 - Call numbers must match
- File Nomenclature
 - Location ##



Lessons Learned

Catastrophic Errors

- Systems Doesn't Update INVDA Field
 - Duplicated barcodes
 - Duplicated item records
- Negative Barcodes
 - Scanner does not scan a negative barcode
 - Conflicts with patron ID number
 - Conflicts with other institutions' barcodes



Lessons Learned

Manual Inventory

- Create List
- Export to Excel Spreadsheet
 - Fields: location, record#, created, barcode, call number, volume, title, author
 - Sort by location -> call number -> title
 - Insert "n:" in front of barcodes
- Print and Inventory
- Delete Items Not Found
- Copy Barcode Column of Remaining Items To Text File
- Run Compare Process



Question & Answers Session

Questions?