Inventory Overview

Inventory is done in Horizon based on location and collection. You first decide which collections to do. For the first inventory, start with a small collection. The best results are with collections which are shelved separately, not intermixed with other collections. The inventory will report problems called "exceptions".

We recommend doing inventory with a laptop (with Internet access). You will see exception messages as you go. With a laptop you can take care of problems as they arise, or put them aside until later.

Examples of exceptions are:

- Wrong location
- Wrong collection
- Wrong status (not checked in, i.e. lost, transit, in cataloging, missing, trace, etc.)
- Item not found in database

These exceptions are dealt with by moving them to their proper location or collection, changing their location or collection, checking them in, or cataloging them. For those that get their location or collection changed or are cataloged, if they will remain in the collection being inventoried they will need to be scanned again to make sure they are included. It doesn't hurt to rescan items for the inventory.

Items that are checked out before or during the inventory will be counted as inventoried, but make sure that you inventory items on the shelving cart, as they would be expected to be on the shelf.

In the collection code table, you can also see inventory statistics for each collection telling when it was last inventoried. To see this table, double-click on Table Editor in the Administration folder of Horizon. In the inventory area of the collection code table, you will see indications of when the last inventory was "finished" and "completed". Finished means when the **last session** was finished, completed means when the inventory was **closed out**.

When you close an inventory, all uninventoried items go to a status of "missing inventory" or "mi". This can be used as a weeding list. It's important not to close the inventory prematurely, as this would put numerous items in "mi" status. It can be reversed by checking the items in, but that would be time consuming!

There could be some problems if we have multiple libraries running inventories at the same time. They might print out and clear each other's exception reports and accidentally close each other's inventories, causing uninventoried items to change to a "missing inventory" or "mi" status. Be careful about closing the inventory (See Find Missing Inventory on the next page).

If you are curious about an item, the item record shows when an item was last inventoried. You can see this by searching the item with f2, sending it to the copy/item list, and clicking Edit. The inventory information is found under the item status.

Inventory Procedure

Doing a Workstation Inventory

1. Open Horizon
2. Open Workstation Inventory under the Inventory folder
3. Enter or select from Codes the location and collection you are inventorying
4. Don't Check "Display misshelved books"
5. Check "Display exception messages"
6. Always check "Override call no. Checks"
7. Click OK
8. Start scanning barcodes
9. If you fix something that an exception message highlights, rescan it in the inventory window. If you reshelve it to another collection this is not necessary, unless that collection is being inventoried at the same time.
10. When you need a break or leave for the day (or any time really), click complete and write down Exceptions Table # (Session ID#). This is a backup in case you didn't correct the exceptions as you went along.

Reports and Finishing Inventory

(Optional) Report Inventory Exceptions – Do this only if you didn't deal with exceptions as you went along

1. Open Report Inventory Exceptions under the Inventory folder.
2. Enter or select from Codes the collection you would like an inventory report
3. Enter Session ID# from doing inventory (if you know it).
4. Click OK.
5. This report will show all the exceptions from the inventory session. The "problem" book is always the middle title.
6. Print, review, or close.
7. Deal with exceptions by finding the books and checking them in or changing the codes, and re-inventory them if they belong in the collection you are inventorying.
8. Clear exceptions when done dealing with them.

Find Missing Inventory – This will give you progress statistics, or if you click OK it will **close out the inventory.**

1. Open Find Missing Inventory under the Inventory folder
2. ** IMPORTANT NOTE: DO **NOT** CLICK **OK** **
3. If you are in the middle of a collection inventory (i.e.- NOT DONE), you can see how much you have left by selecting STATS ONLY – this is informational only. You can do this as many times as you want during the inventory to check your progress.
4. Finally, If you are done inventorying an entire collection, then click OK. In doing this, all missing will have their status changed to missing inventory (mi).

Report Missing Inventory

After you are done with the Inventory, you will want to take action on the items that were missing

– usually by weeding them, but perhaps by searching for them further, or re-ordering particular titles. Using Item Group Editor, you can get a report of all missing inventory titles in a particular collection.

1. Open Report Missing Inventory (this is just a version of Item Group Editor) under the Inventory folder.
2. Create a compound search, with your inventoried collection as the collection, and status = 'mi' as the criteria.
3. Use 'Display' to choose what fields to include
4. Use 'Sort' to sort by call number, if desired
5. You can print or export this list from the File menu. Exporting it with a .xls extension would allow you to use it in Excel, or with a .txt extension would allow you to use it with Notepad.
6. You can also repeat this procedure to batch change the "mi" items to "w" for withdrawn if you are ready to do that.

Updating or Checking the Collection Table

1. Open Table Editor
2. Open "Collection" table
3. Select collection you would like to review inventory status.
4. Page down to Inventory box.
5. Finished date is the partially completed date for today.
6. Completed date tells the system we are completely done and we have run the missing inventory report.
7. Manually enter data in the fields when inventory is complete. This allows you to keep track of which collections have been inventoried.