



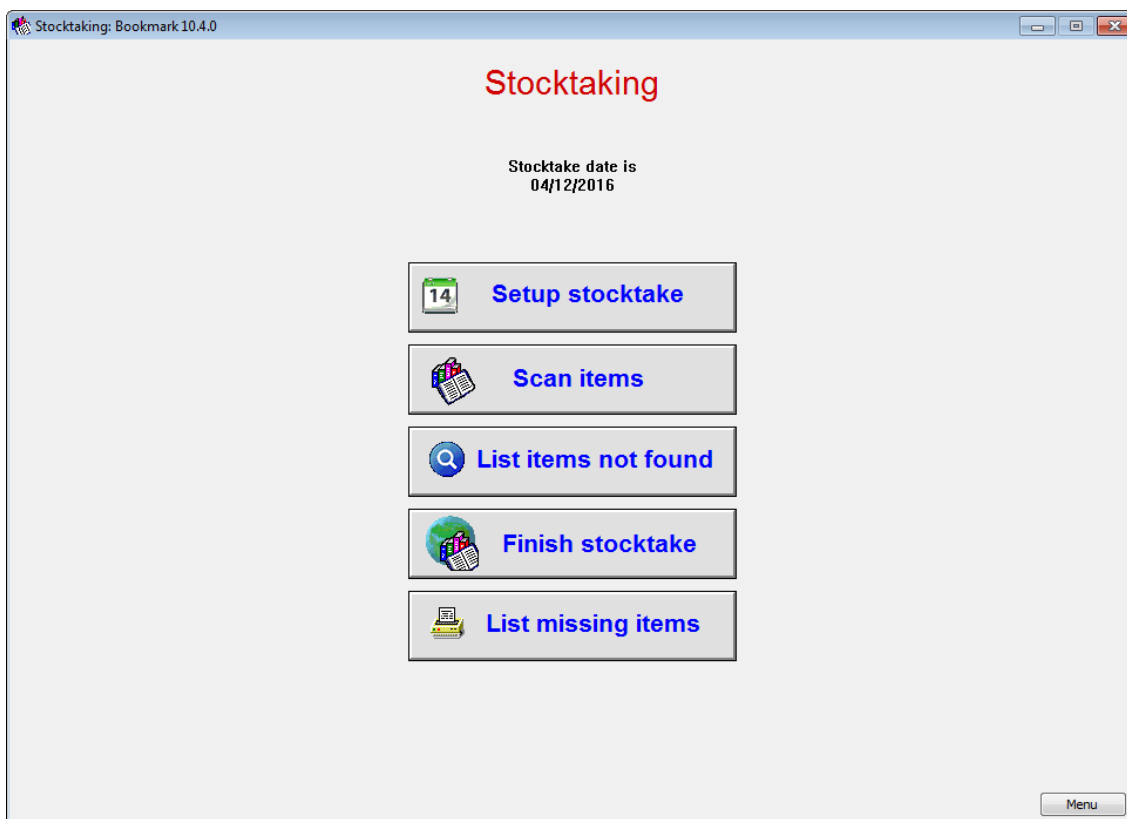
BOOKMARK FACT SHEET

Stocktaking

November 2019

The purpose of stocktaking is to check to see if the data in the database reflects the actual items on the shelves.

The result of stocktaking is a list of items not found and a cost summary of these items. Stocktaking is finished when the items are formally declared as missing.



The steps to stocktake are:

- Step 1 Set the date at which stocktaking began.
- Step 2 Enter barcodes. This can be done by direct scanning or via a portable barcode reader or a list of barcodes in a text file.
- Step 3 List items not found. Print and chase them up. Input any found.
- Step 4 Finish the stocktake by assigning the missing items a "missing" status.
- Step 5 Clean up the mess.
- Step 6 Relax.

- Items can still be borrowed from the library while the stocktake is in progress.
- Turning the machine off at night will not lose anything.
- Several computers can be used at the same time to stocktake.
- Memory barcode scanners can be used to collect barcodes which can then be downloaded into Bookmark in batches
- Or a normal reader can be attached to a laptop or Windows tablet and the barcodes scanned into a Notepad file and saved to a flashdrive, which can then be imported into Bookmark in matches

(A chocolate placed on the end shelf of each bay can be a useful incentive. Brandy might even be better, but it could produce skewed results by the end of the day, and the principal might frown on this practice. (Tip: invite him/her in to help))

Step 1 – Start Stocktake

Initialize stocktake

Setup Stocktake

The steps to stocktake are:

1. Start a new stocktake by setting the date at which scanning commences.
Optional - create a 'missing in stocktake' status (see below)
Optional - delete long-term missing items (in List missing items)
2. Enter barcodes by scanning directly or downloading from a portable reader or importing from a plain text file of barcodes.
3. List items not found in stocktake. Print out list and chase up if possible.
4. Finish the stocktake by printing a cost report and assigning a missing or lost status to the items not found.

Enter the stocktake-begins date:
(Items not found have last scanned dates prior to this date.)

04/12/2013

December 2013						
Mon	Tue	Wed	Thu	Fri	Sat	Sun
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

Today: 14/03/2017

Edit status list OK Cancel

Set the date at which stocktaking begins.

After this, *do not change the date until the next stocktake is begun*. This could even be next year.

Step 2 Scan Items

Open Scan Items.

Make sure that "return items on loan" is ticked. Only untick it if you do not want to return the items if they're on loan. The rest is optional.

Choose the method of entering barcodes:

- List format
- Detailed format
- Download barcodes
- Import barcodes

The first two are "live scanning". The moment the item's barcode is scanned, it is noted and saved immediately. A "save" button does not have to be pressed.

Use the List format for normal live scanning. To edit an item, highlight it in the list then click on Edit Record.

Use the Detailed format to see cataloguing details of each item as it is scanned. Again, they can be edited.

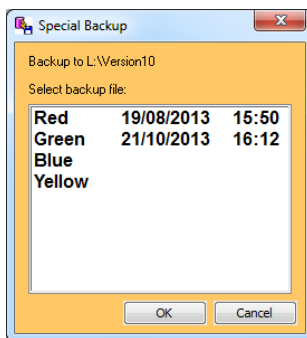
Use Download Barcodes, if using a portable reader with a memory.

Use Import Barcodes if using a laptop and saving barcodes with Notepad into a file.

Backups

In addition to doing a normal backup each night, it is a good idea to make frequent backups while stocktaking. Should the computer have a nasty hiccup, a backup can be restored without losing too much work.

Use the backup button at the top right on the Scan Items screen to make quick backups during the day. Backups can be done frequently, as often as every thirty minutes.



At night, before leaving for the day, do the normal backup from Utilities.

Step 3. List Items Not Found

The next stage is to obtain a list of *possible* missing items.

This is not a necessary step but may be useful.

When all the items have been scanned, click on "List Items Not Found". This can be a section, not necessarily the the entire collection.

Stocktake: List items not found in stocktake

List items not found in stocktake

Stocktake date is 04/12/2013

Set the criteria to list items not found.

All items
 Location
 Item type
 Sublocation
 Query

Collect all items

Retrieve setup
Save setup
Change date

Include items with these status types...
 1 - Available
 2 - On loan

Click on Collect to see the list

Collect

Close

1: If doing a particular section – e.g. fiction - work out the search to identify those items. Locations, sublocations and Item type will show a list. Tick the locations or item types that have been done.

Query is a little trickier and a call to the Help Desk for assistance might help. It is only used if the other options are not enough to identify the section scanned.

2: Determine whether or not to include items on loan. Normally they are not included.

3: Click on Collect

Tip: Save the setup criteria for future re-use!

Stocktake: review

Items not found

Item	Title	Call number	Status	Type	Location	Loan date	Last scanned	Cost
1101	How Green Was My Mouse	F Kin	1 Available	Fiction	Staffroom	25/03/2014	04/12/2012	9.95
1297	Bloomability	F Cre	1 Available	Fiction	Staffroom	29/11/2013	29/11/2013	10.95
1392	Local Government	CS 320.809 Bar	1 Available	Class Sets	Staffroom	25/03/2014	04/12/2012	24.95
1393	Federal Government	CS 321.02 Bar	1 Available	Class Sets	Staffroom	25/03/2014	04/12/2012	24.95
1396	State Government	CS 321.02 Bar	1 Available	Class Sets	Staffroom	25/03/2014	04/12/2012	24.95
1407	Government	320.994 MCN	1 Available	Non-Fiction	Staffroom	25/03/2014	04/12/2012	24.95
1408	Government in Australia	320.994 MCN	1 Available	Non-Fiction	Staffroom	25/03/2014	04/12/2012	27.95
1442	Democracy	CS 321.809 Bar	1 Available	Class Sets	Staffroom	25/03/2014	04/12/2012	26.96
1481	The Magician's Nephew	F LEW *	1 Available	Fiction	Staffroom	25/03/2014	06/12/2012	10.95
1544	Housing	CS 306.46 Bar 1...	1 Available	Class Sets	Staffroom	25/03/2014	31/05/2013	10.95
1545	The Spear	CS 306.46 Bar 2...	1 Available	Class Sets	Staffroom	25/03/2014	04/12/2012	10.95
1551	The High King	F ALE *	1 Available	Fiction	Staffroom	29/11/2013	29/11/2013	8.95
1553	Boomerangs and Throwing Sticks	CS 306.46 Bar 3...	1 Available	Class Sets	Staffroom	25/03/2014	04/12/2012	10.95
1554	Fibrecraft	CS 306.46 Bar 4...	1 Available	Class Sets	Staffroom	25/03/2014	04/12/2012	10.95
1555	Fire	CS 306.46 Bar 5...	1 Available	Class Sets	Staffroom	25/03/2014	04/12/2012	10.95
1556	Trade	CS 306.46 Bar 6...	1 Available	Class Sets	Staffroom	25/03/2014	04/12/2012	10.95

1,260 items not found in stocktake

Print the list.

These are items not scanned. They can be rechecked, chased up with teachers, checking the staffroom, principal's office, the mending shelf etc. Just scan them in if found.

Step 4 Finish Stocktake

When you are satisfied the list of items is missing, click on the Finish button.

Re-enter the same criteria to see the list or retrieved from a saved setup.

Use the same search criteria as for Items Not Found. (Retrieving from a saved setup ensures this.)

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1297	Bloomability	F Cre	1 Available	Fiction	Staffroom	29/11/2013	29/11/2013	10.95
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1,260 items not found in stocktake

Cost of items not found

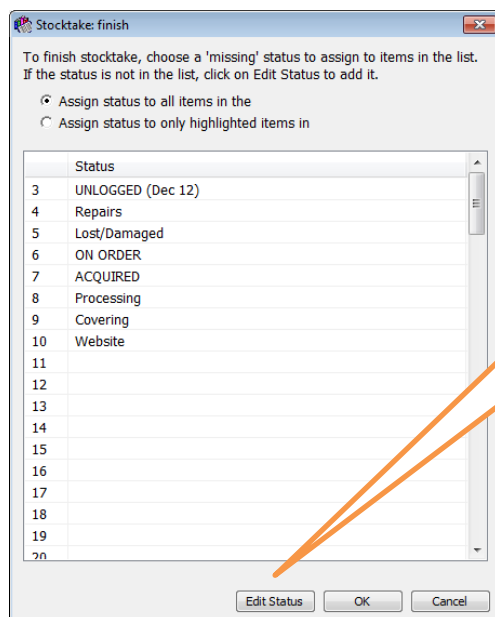
Assign missing status to finish stocktake

Close

Click on the Cost Report to print. This shows the value of the missing items.

Last thing to do!

Click on Assign Missing Status to Finish Stocktake.



A stocktake is finished when the items not found are given a "missing" or "lost" status.

Note: if you do not have an appropriate status – e.g. Missing in stocktake 2016 - click on Edit Status to add it to the list, then select.

Highlight the status to be used and press OK to mark the missing items.

Phewww! That's done. The stocktake is over.

Step 5

Cleaning up the mess.

Delete any long term missing items.

Sort the library back into some form of order.

Step 6

Congratulate all concerned on a job well done and thank goodness it is over for another year or so. Celebrate with chocolates, champagne or any leftover brandy. (If there is any such thing...)