



APRIL 13-15



Cleaning Up Our Act

Using Really, Really Simple
Inventory & Other Projects

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Lakeland Library Cooperative

Agenda

- Background
- Inventory Project
- Other Clean-Up Projects





LAKELAND LIBRARY
COOPERATIVE
LEADING • LEARNING • LENDING

in a Nutshell

- 42 members; 40 share the ILS
- Covering 8 counties in West Michigan
- Public libraries ranging in size from Class 1-6 (smallest to largest)



Why Use This Method?

- Method = using COUNT USE-COPY USE + Create Lists
- Didn't want to purchase anything additional
- Needed something scalable and that 1 Systems Librarian could handle updating in bulk (without giving all members Rapid Update access)
- No major tech skills needed
- Why not use the new inventory feature, "Update inventory date from check-in workflow"?



WHY would we do this to ourselves?

- Future-ready
- Hasn't been done Cooperative-wide before
- Accountability
- Better customer service



Getting Everyone on Board



Training Everyone

- Created a Training Hub for members (documentation, videos)
- WHY We're Doing This short video
- Showing the process, live and recorded sessions, and Q&A live session
- SOP, including a FAQ section



Sierra Setup Before Starting

- Help desk ticket: allow INVDA field to be updated via Rapid or Global Update
- Use Create Lists to find any item records with a value in COPY USE already, investigate, then use Rapid Update to zero those out
- Search for items that might have an old INVDA entry and rapid update them to be blank
- Create limited access volunteer logins if needed



[< back to Users](#)

absainv

SAVE

[Basic Info](#) **Applications** [Permissions](#) [Workflow](#)

Assigned applications (1) [remove all](#)

Sierra Application

absainv **SAVE**

[Basic Info](#) [Applications](#) **Permissions** [Workflow](#)

Assigned permissions (2) [remove all](#)

Filter list by typing here All cat [\(change\)](#)

Circa Count Inhouse Use (252)
Circa Inventory Control (251)

[< back to Users](#)

absainv

SAVE **D**

[Basic Info](#) [Applications](#) [Permissions](#) **Workflows**

Assigned workflows (1) [remove all](#)

Filter list by typing here

Inventory (Inventory User)	1
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[Applications](#)

[Permissions](#)

Workflows

[User Groups](#)

[< back to Workflows](#)

Inventory (Inventory User)

[users](#) **functions**

Name: Menu Name:

Assigned functions (1) [remove all](#)

[All cat \(change\)](#)

Count Use - Copy Use	1
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Sierra – Limited Use Volunteer Login

File Edit View Go Tools Reports Admin Help

Sierra FUNCTION **Count Use - COPY USE**

INVENTORY
Count Use - COPY USE

Browse View Print Close

Title	Barcode	Count	Status
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Actually Doing the Inventory

- Laptop/scanner or barcode wand*
- Scan each section's items into Count Use-Copy Use
- Several times a week, rapid update anything with a value > 0 in Copy Use and use Rapid Update to give it an inventory date and zero out Copy Use
- Create a list to identify items that were checked out at the time of inventory when each section was done
- Rapid update those records to add the inventory date, reset Copy Use to 0



Create Lists: Items Checked Out During Inventory

Review File Name:

Store Record Type:

Range: Start: Stop:

Classic

Enhanced

JSON

Classic

Group
Ungroup
Insert Line
Duplicate Line
Append Line
Delete
Clear All

Term	Operator	Type	Field	Condition	Value A	Value B
1		ITEM	LOCATION	starts with	ab	
2	AND	ITEM	COPY USE	equal to	0	
3	AND	ITEM	INVDA	equal to	- -	- -
4	AND	(	ITEM	LOUTDATE	greater than	12-31-2024
5	OR	ITEM	LCHKIN	greater than	12-31-2024	- -
6	OR	ITEM	Last Status ...	greater than	12-31-2024	- -
7	OR	ITEM	DUE DATE	exist	- -	- -)

ITEM LOCATION starts with "ab" AND ITEM COPY USE equal to "0" AND ITEM INVDA equal to "- -" AND (ITEM LOUTDATE greater than "12-31-2024" OR ITEM LCHKIN greater than "12-31-2024" OR ITEM Last Status Update greater than "12-31-2024" OR ITEM DUE DATE exist)

Search
Use Existing Search
Retrieve Saved Query
Save
Save As
Close



Last steps

- When scanning is done, create a list to find items not on the shelves and not checked out
- Search for those items, mark missing or withdraw if not there

Review File Name:

Store Record Type:

Range

Classic

Enhanced

JSON

Group Ungroup Insert Line Duplicate Line Append Line Delete Clear All

Term	Operator	Type	Field	Condition	Value A	Value B
1		ITEM	LOCATION	equal to	ojjf	
2	AND	ITEM	COPY USE	equal to	0	
3	AND	ITEM	INVDA	equal to	- -	- -
4	AND	ITEM	LOANRULE	equal to	0	

ITEM LOCATION equal to "ojjf" AND ITEM COPY USE equal to "0" AND ITEM INVDA equal to "- -" AND ITEM LOANRULE equal to "0"





- Many training opportunities, but...
- Set a deadline and follow up
- Do more ephemeral collections last (magazines, new items, etc.)
- Inventory = good way to find issues on the shelves

Other Clean Up

- Patron Privacy
 - Reset LPATRON field to 0 in item records where LCHECKIN is 60+ days

Boolean Search

Review File Name:

Store Record Type:

Range

Classic

Enhanced

JSON

Term	Operator	Type	Field	Condition	Value A	Value B
1		ITEM	LPATRON	greater th...	p_____	
2	AND	ITEM	LCHKIN	less than	02-15-2026	- -
3	AND	ITEM	LCHKIN	exist	- -	- -

ITEM LPATRON greater than "p_____" AND ITEM LCHKIN less than "02-15-2026" AND ITEM LCHKIN exist



Other Clean Up

- Patron Privacy
 - Resetting last patron, continued: Rapid Update the LPATRON field in the item record to 0.

Select Record Type to Modify

Field : Value :

Other Clean Up

- Patron Privacy
 - Clearing old Fines Paid
 - **Caution!** Follow your library's/administrative body's accounting rules and regulations, especially for how long you'll offer a refund of fines paid, before doing this.
 - This will **remove** the entry from the Fines Paid history on the patron record.
 - Function: Fines Paid > Set Dates > View Fines Paid > [take a look at everything, and if it looks good] > Clear Database
 - It won't delete fines that are in the collections process if that product is used.



Other Clean Up: Lost & Paid Items Older than X

Keep in mind your local policies

Review File Name:

Store Record Type:

Range

Classic

Enhanced

JSON

Group Ungroup Insert Line Duplicate Line Append Line Delete Clear All

Term	Operator		Type	Field	Condition	Value A	Value B	
1			ITEM	LOCATION	starts with	oj		
2	AND		ITEM	STATUS	equal to	\$		
3	AND	(	ITEM	LCHKIN	less than	04-15-2025	- -	
4	OR		ITEM	LCHKIN	not exist	- -	- -)

ITEM LOCATION starts with "oj" AND ITEM STATUS equal to "\$" AND (ITEM LCHKIN less than "04-15-2025" OR ITEM LCHKIN not exist)



Other Clean Up: Missing

Keep in mind your local policies

Review File Name:

Store Record Type:

Range

Classic

Enhanced

JSON

Group Ungroup Insert Line Duplicate Line Append Line Delete Clear All

Term	Operator	Type	Field	Condition	Value A	Value B
1		ITEM	LOCATION	starts with	oj	
2	AND	ITEM	STATUS	equal to	m	
3	AND	(	ITEM	LCHKIN	less than	04-15-2025 - -
4	OR	)	ITEM	LCHKIN	not exist	- -

ITEM LOCATION starts with "oj" AND ITEM STATUS equal to "m" AND (ITEM LCHKIN less than "04-15-2025" OR ITEM LCHKIN not exist)



Other Clean Up: Looking for Location/Itpe mismatches

Create a List to identify all the items in the library

Review File Name:

Store Record Type:

Range

Classic

Enhanced

JSON

Classic

Group Ungroup Insert Line Duplicate Line Append Line Delete Clear All

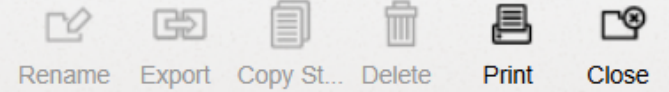
Term	Operator	Type	Field	Condition	Value A	Value B
1		ITEM	LOCATION	starts with	nc	

ITEM LOCATION starts with "nc"

Run a Statics report to find anomalies

- Statistics > New Query > Review: Report on Item > Select the Review File > Query Type: Crosstab; Vertical: Location; Horizontal: > Check “Fastest Accumulation” box > Run the Query
- When it’s done, click on its name and View Report
- Select report: Record Count > Export > Download (into Excel)



Saved Query Name: Results File Name: 

Review

Review file:

Report On

Query Type

 Field Statistics Periodic Report Cross Tab Limit the results by a time range Fastest accumulation

Split multi

Base the orders report on

 Paid dates Invoice dates

Time Resol...

- Yearly
 Quarterly
 Monthly
 Day Range

Date Range

 Last Year vs. the Year Before Select One Year Select Two Years

Cross Tab Field Selection

Pick Two Fields

Vertical Horizontal

Year

- Use Fiscal Year
 Use Calendar Year

Save the Query

Save as

Schedule the Query**Run the Query!**

Find the Mismatched Records

Report for the Sample Library collection loc itype		
Review File: 306. sample library collection shelflist (8319) (ITEM)		
8319 records were processed. (0 records had been deleted.)		
this color = mismatch		
Code	Meaning	1 Adult fiction
nc	Sample Library	0
nca	Sample Library Fiction	1554
ncb	Sample Library Nonfiction	1
ncc	Sample Library Large Print	0
ncd	Sample Library New Books and Auc	2
nce	Sample Library Reference	0
ncf	Sample Library Magazines	0
ncj	Sample Library Childrens	0
ncj6	Sample Library New Books and Auc	0
ncjf	Sample Library Childrens Fiction	1



Search for the Mismatched Records Via Create Lists & Update Codes

Review File Name:

Store Record Type:

Range

Classic

Enhanced

JSON

Group Ungroup Insert Line Duplicate Line Append Line Delete Clear All

Term	Operator	Type	Field	Condition	Value A	Value B
1		ITEM	LOCATION	equal to	ncb	
2	AND	ITEM	I TYPE	equal to	1	

ITEM LOCATION equal to "ncb " AND ITEM I TYPE equal to "1"



Thank you for attending!

Lakeland's Training Hub:
[https://llcoop.org/training-hub/
Sierra Training > For Staff > Inventory](https://llcoop.org/training-hub/Sierra%20Training%20>%20For%20Staff%20>%20Inventory)

