



Inventory Processing – from collection to finalizing

Quick Start Instructions

Software and collection devices require individual instructions particular to that system, but we hope this document will help to get you through some of the general challenges and a few common obstacles ...

Data Collection & Upload

Data collection can be completed in a number of ways –

portable data collector – scan bar codes anywhere with Portable Data Terminal (PDT) or Portable Handheld Device (PHD), then connect to computer to upload. Depending on the portable unit, upload may be done directly into your software's inventory module, or into a Word file (.doc, or .txt). Follow the upload instructions that came with your system. (Legacy can provide detailed collection and upload instructions for Sunmax 2000, IBS800, or NovaScan 5000 units.)

wireless scanner – the base/charger on the wireless scanning system is connected to your computer, and the scanner itself can scan bar codes from 30 ft. to 100 ft. from the base (depending on model). Bar codes scanned will go directly to your computer – either into your software program, or to a Word file.
(To send the information directly into your inventory software program would require a second person at the computer to respond to messages from the software. Sending the information into a Word document would not require an extra person at the computer.)

laptop with scanner, or bringing books to the desk – the information can go directly into the software inventory program, or can be collected in a document file.

To send information directly to your software Inventory module – follow directions in your software manual.

To send the information into a Word document – the opened document will accept data uploaded from a portable data collection unit, or from your wireless or corded scanner as you scan your bar codes. Either way, the result will be a list of collected bar code numbers, which would be saved as a .doc or .txt file, depending on the software you are using. And the file will then be imported into the inventory module of your software.

(We are somewhat familiar with procedures in Follett and Childs software, and have added some quick steps that might be helpful.)

For Remote Inventory on FOLLETT Software

Open a Notepad or Word document.

At the very top of the document, type the first three prefix lines below (exactly as shown):

00000
0000000
INVENTORY

Then start sending the bar code information on this line.

You can upload your inventory data from your portable data collector, or start scanning bar codes with your wireless scanner or with your laptop/scanner combination, or by bringing the books to the desk.

When you've scanned a section and have a list of bar codes, then

Save as a ".txt" file (.doc won't work) ...

click on "File" button at top left of screen

click on "Save As"

find "Save as type" pull down menu

click on the down arrow and select "Plain Text (*.txt)"

enter the appropriate "File Name"

click on "Save" (*Be sure to remember the file name and where you can find it!*)

Each batch of scanned bar codes can be saved in separate files, named by the section scanned, or date, or whatever works for you. You do not have to have your entire collection in the file – partial inventory is OK.

Your file with collected bar code numbers should now start with the 3 prefix lines, followed by a list of numbers, and saved as a .txt file which must be accessible by Follett software (i.e. same computer, or on a portable floppy or flash drive).

Enter Inventory Data to Follett Inventory Software

Circulation – click on separate icon (stack of books) marked "Follett Inventory"

Textbook – in "TextLink" – click on "Inventory" button across the top of screen (stack of books)

Prepare for inventory by clicking on "Begin", and follow the Follett instructions for partial or complete inventory. When "Begin Inventory" process is complete, the "Begin" icon will be faded, and the available items in your collection will be "unmarked". See Follett Manual for details.

When you are ready to upload your data into Follett ...

click on "Remote" button

then click on "Data File" (under Source of Remote Inventory).

click on the "Browse" option, find the ".txt" file you saved above, and highlight your file

click the "Proceed" button.

(If you get a message that Follett does not recognize your file, then double check that the .txt file has been saved properly.) Follett will process the numbers in that file, and prepare an exception report at the end, which may be viewed and/or printed. We recommend printing that file (for detailed reference and/or investigation), then it can be deleted. The status of the items you have scanned and processed here will be changed to "marked".

Repeat this process with each section that you scan. Follett allows for partial inventory, which can be processed at any time (i.e.: scanned and uploaded).

For Inventory on CHILDs Software

To get a hard copy list of your collection for inventory

Go into "Search" and type 1000 - 10,000 (or whatever your last number might be) - it will bring up a list of all your books. Then sort the list by popping up the menu and selecting "Sort" by alphabetical etc., and then print the list. Sort by kind, it will be pretty much in dewey order.

To upload your inventory items into CHILDs Software

CHILDs does not accept batch data because each item is assessed as it enters the inventory module, and if a question arises (e.g.: book is missing), then it must be answered before you move to the next item.

If you are using a wireless scanner or laptop with scanner attached, then simply go into the inventory module and scan your bar codes. Someone would be required at the computer to respond to any questions that might pop up as the inventory is being collected.

If you are using a Portable Data Terminal (Sunmax 2000, IBS 800 NovaScan 5000), go into the inventory module, and enter your collected inventory data with the "single step" option. Refer to the Sunmax 2000 detailed instructions – Uploading Data, Alternative 2 (Single Step Upload). This requires extra work in uploading the data, but it beats hauling the books to the computer desk!

Good Luck with your inventory collection! Call us if you have questions.

Sandi Tough
Legacy Library Services
Edmonton area: 780 459 3577
Toll free in N.America: 877 459 3577