Introduction

Stocktaking is a process that can be carried out at any convenient time during the year, particularly if the library is either partially or fully closed. If you are new to this process, we advise contacting your MUSAC Product Specialist to give you advice on how best to Carry out a stocktake - Step by step.

Each item in the catalogue has a flag indicating whether or not the item is stocktaken (this appears under the financial tab). During the normal course of circulation this flag is set to 'stocktaken' when an item is returned. Note that the stocktake flag is not really of any significance until you actually carry out the stocktake (for example an item may be returned and marked in the catalogue as being stocktaken, however it might 'walk' from the library the next day).

The general process involved in a stocktake (steps detailed below) is to mark items as not being stocktaken (resetting the stocktake register), then registering each item by entering or scanning the barcode. Once you have completed the stocktake, you can print a list of items that are in the catalogue but not registered as stocktaken. A shelf check should then be carried out to determine which of the unregistered items are really lost or were just misplaced during the first check. This information can then be recorded in the catalogue by changing the item status, providing a true reflection of the contents of your library at the point of stocktake.

MOST IMPORTANT: Do NOT change the filter whilst undertaking the stocktake.

Notes: The entire stocktake does not have to be carried out in one day (unless you have a very small library or are incredibly efficient)! At any point during the stocktake you can exit the module (and do your regular daily backups); and then re-enter and continue from the point you left off.

When resetting the register, you can choose to keep grouped items that have no barcode and are not able to be issued separately flagged as stocktaken. Most likely you will want to do this as these items are probably short stories etc, which cannot be separated from the main catalogue.

Carry out a stocktake - Step by step
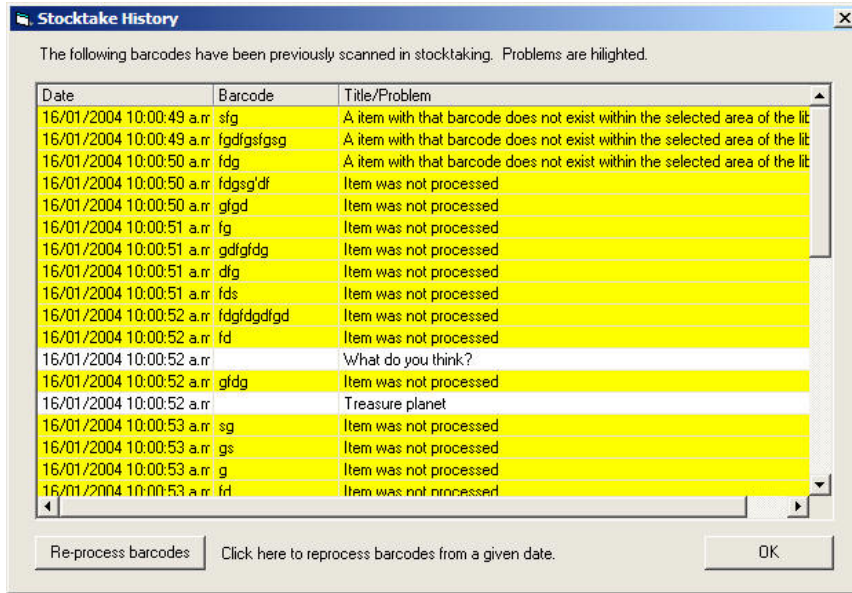
To perform a stocktake, take the following steps:

1 Select Library Utilities > Stocktaking from the main menu. This will bring up the stocktaking wizard. The steps of the stocktake process are listed on the right. Click "continue" to move to the next step.
2 Identify the portion of the library that you wish to stocktake (this may be the entire library of course). Click "Select filter" to do this.
3 The next step is to zero the register so that all the filtered items are considered not stocktaken. Remember that you should only do this once at the beginning of the stocktake. You will be notified if there are any items that do not have an accession number, and need to be stocktaken manually.
4 Carry out the stocktake by scanning accession numbers into the stocktake entry box. Continue to do this until you have completed all your titles in the portion of the library you are stocktaking. If you are using a portable barcode reader, scan your barcodes using the reader, then select the Download button and activate your barcode reader download function. Continue to do this until you have completed all your titles in the portion of the library you are stocktaking.
5 Print a list of unregistered items. This will give you the items not recorded as present during the stocktake. You can choose to omit items that are currently issued from the library. At this point you will want to re-check your shelves to ensure that the books were not overlooked during the stocktake process.
6 Once you have finished checking your shelves, click "Continue" to move to the Clean up stage. Here you can change items tagged as not being stocktaken to 'lost' or 'missing at stocktake' status. You have the option of not including any currently issued items in this change.
7 You have now finished the stocktake and your catalogue should correctly reflect the current state of your library.

The download from scanner option

In stocktaking, the "Download from scanner" option now logs the barcodes as they are read. You are notified of the number of barcodes that have been read and will be prompted to process the logged barcodes once you exit the download screen. If there are any, problems encountered during the processing of the barcodes will be displayed. You can choose not to process the barcodes when exiting, however you will again be prompted to next time you exit the screen if there are barcodes still to process.

Stocktake History screen

You can display the stocktake processing history by clicking "Show History". This will display the following screen which lists the titles processed and any problems with the barcodes scanned.

Stocktake History

The following barcodes have been previously scanned in stocktaking. Problems are hilighted.

Date	Barcode	Title/Problem
16/01/2004 10:00:49 a.m	sfg	A item with that barcode does not exist within the selected area of the lib
16/01/2004 10:00:49 a.m	fgdfgsfgsg	A item with that barcode does not exist within the selected area of the lib
16/01/2004 10:00:50 a.m	fdg	A item with that barcode does not exist within the selected area of the lib
16/01/2004 10:00:50 a.m	fdgsg'df	Item was not processed
16/01/2004 10:00:50 a.m	gfgd	Item was not processed
16/01/2004 10:00:51 a.m	fg	Item was not processed
16/01/2004 10:00:51 a.m	gdfgfdg	Item was not processed
16/01/2004 10:00:51 a.m	dfg	Item was not processed
16/01/2004 10:00:51 a.m	fds	Item was not processed
16/01/2004 10:00:52 a.m	fdgfdgdfgd	Item was not processed
16/01/2004 10:00:52 a.m	fd	Item was not processed
16/01/2004 10:00:52 a.m		What do you think?
16/01/2004 10:00:52 a.m	gfdg	Item was not processed
16/01/2004 10:00:52 a.m		Treasure planet
16/01/2004 10:00:53 a.m	sg	Item was not processed
16/01/2004 10:00:53 a.m	gs	Item was not processed
16/01/2004 10:00:53 a.m	g	Item was not processed
16/01/2004 10:00:53 a.m	fd	Item was not processed

Re-process barcodes   Click here to reprocess barcodes from a given date.   OK

If you inadvertently reset the register before completing the stocktake, click "Re-process barcodes" to 'play' back the stocktake process from a given date.

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