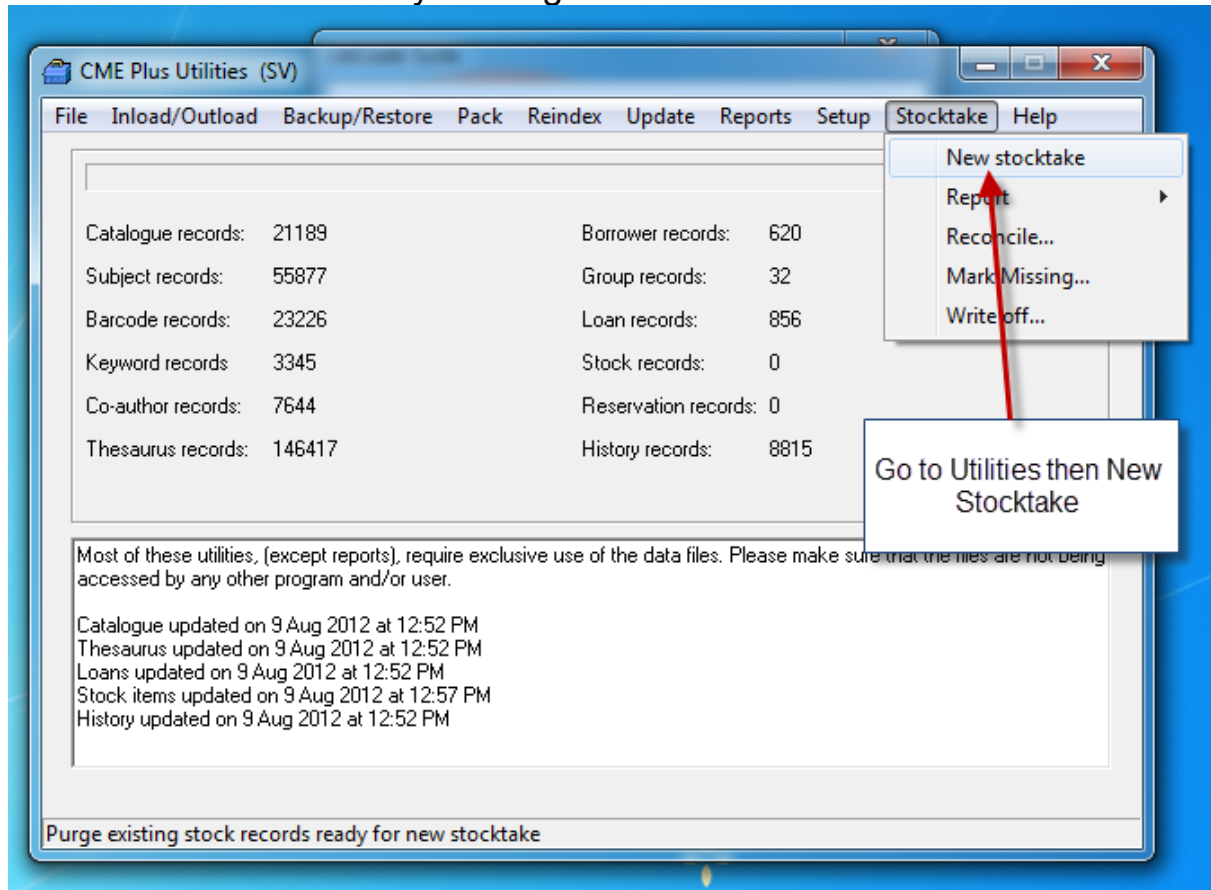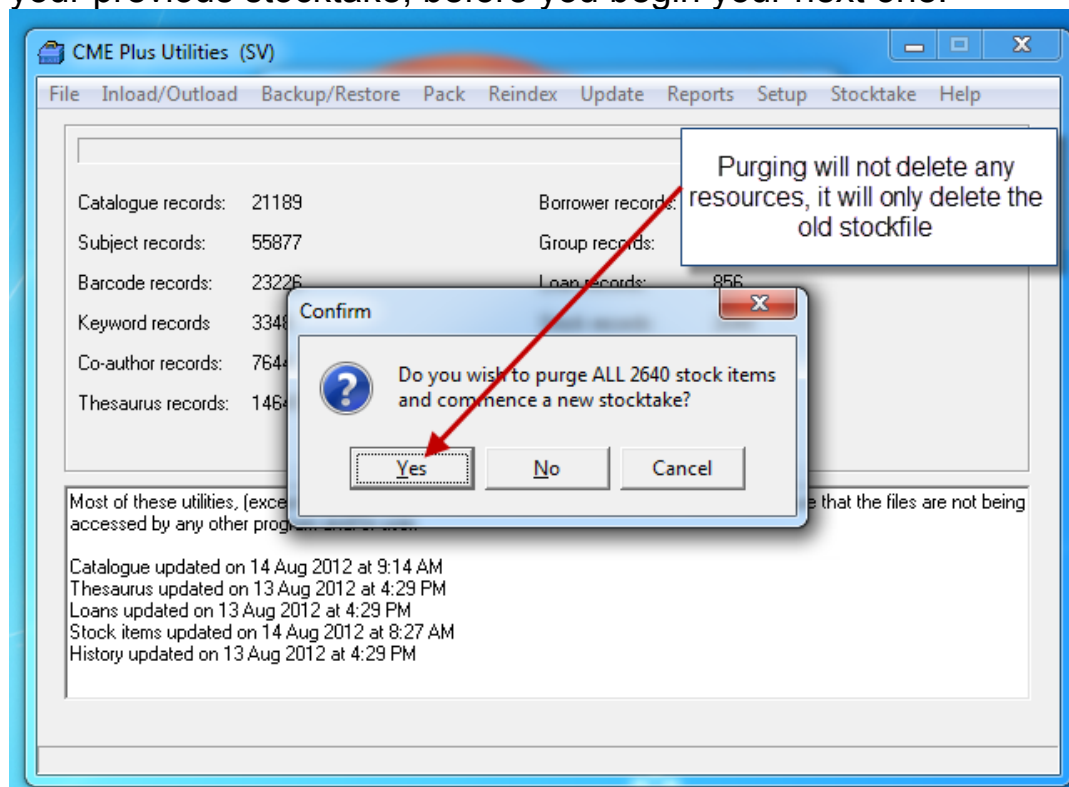# STOCKTAKE
## **REMEMBER TO ALWAYS DO AN EXTERNAL BACKUP BEFORE STARTING

1. Start a new Stocktake by clicking Utilities/New stocktake

2. Purging : All this does is delete the previous stockfile, no records etc. are deleted, just the file containing when the barcode was entered and barcode number. So there is nothing to worry about as long as you have finished with your previous stocktake, before you begin your next one.
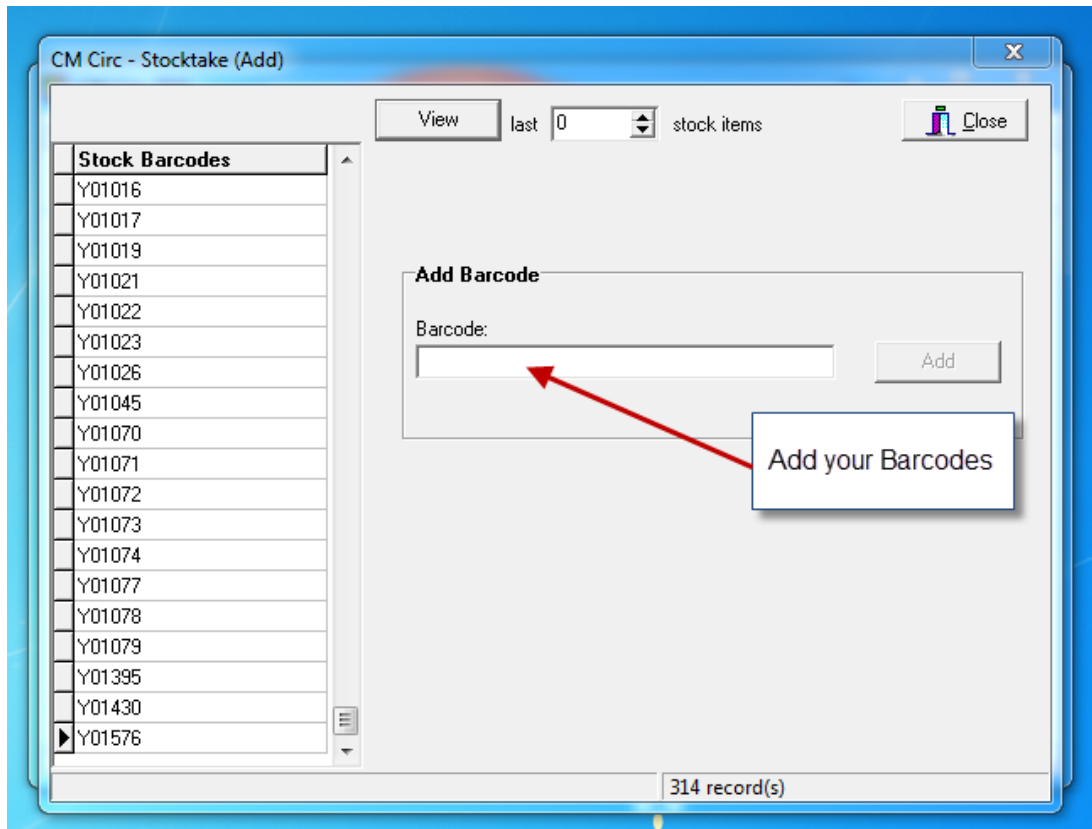
3. Now we need to go to Circulation – Click on Stocktake, then Add to add barcodes
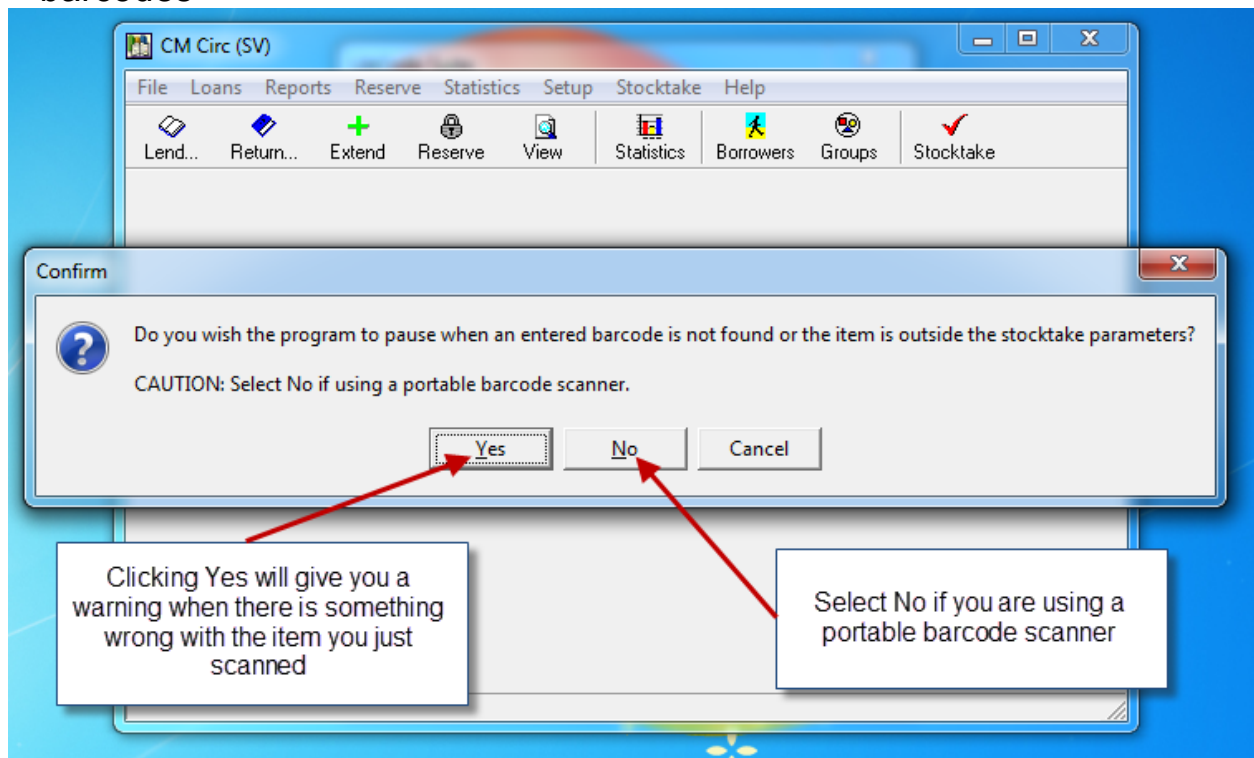
4. Once chosen, enter Parameters and click OK. You may want to start on the Fiction section or between particular Classification Numbers e.g. 100 – 199.99. You may want to use a location, maybe Teacher Resources. Don't forget to add your M.E. AAA to ZZZZZ.
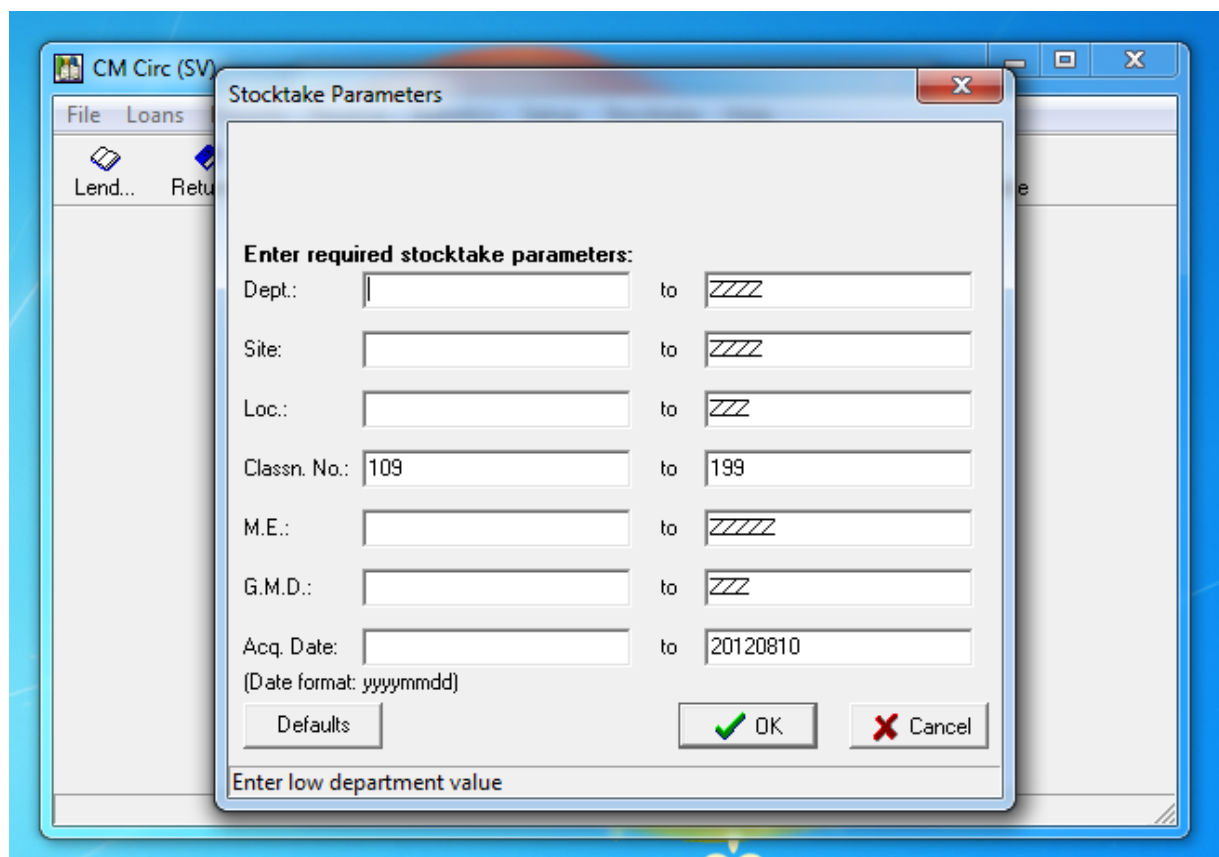
** Remember there are a number of ways to scan your items:

- By bringing the resources to the main library or circulation desk, where they are scanned directly into the computer.
- By using a portable memory scanner that will allow you to take the scanner to the location of the resources. Resource barcodes are scanned and stored in your portable scanner and then downloaded into LibCode Suite. This option saves you carrying loads of resources to the computer and speeds up stocktake (Further information is available at LibCode Help Online – Stocktake using a Cipher Lab Memory Scanner).
- A laptop can also be used, although you will require a Barcode Scanner with a USB connection and a USB Pen Drive for backups. (If this is the direction you want to go, further information is available at LibCode Help Online – Adding to the Stockfile)

5. Appending a file.
    You can scan your barcodes into a Text File (right click on the desktop, go to New, then Text File and ensure you name it with the Section and Date so you remember which file to append!). Then follow the steps below:
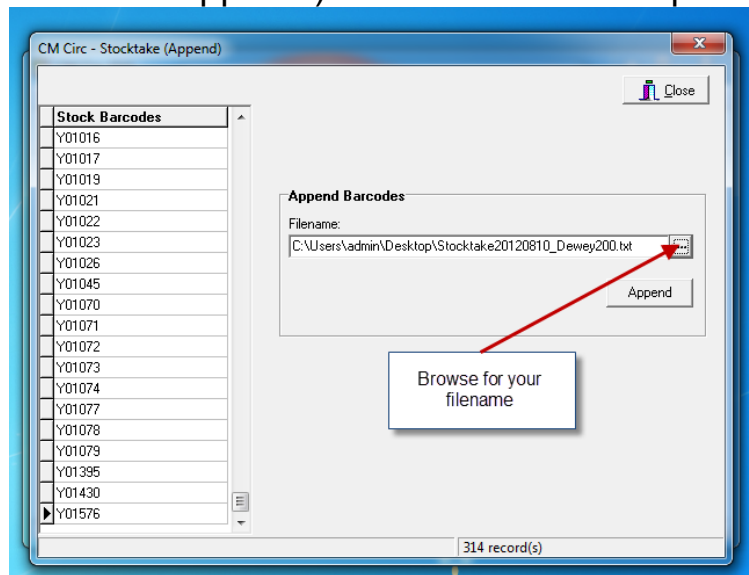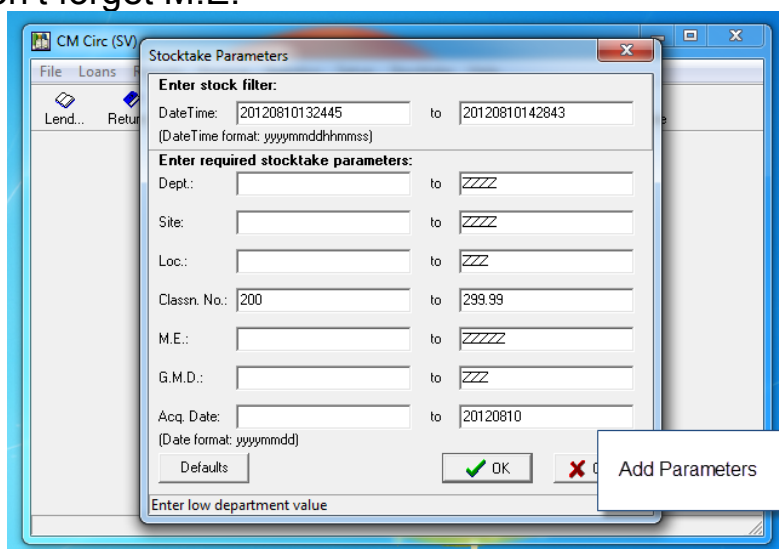
** If more than one person is scanning ensure that you keep your files in the same place.

6. Exporting files – go to Circulation/Stocktake/Export/Export
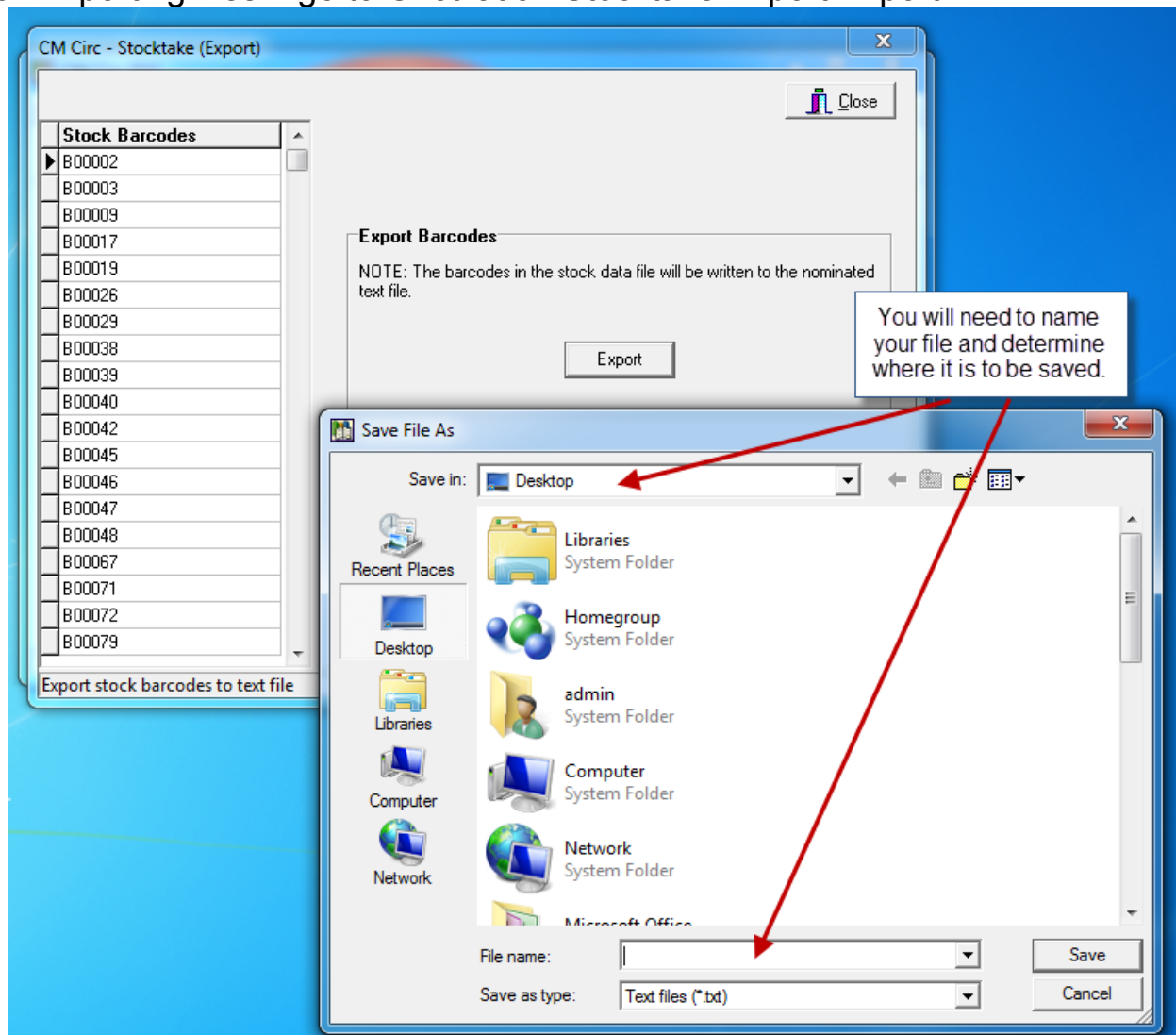

You will then be able to access this report to load barcodes into any LibCode stocktake.

7. View – Circulation/Stocktake/View – This will give a report of matched records. Don't forget M.E.

8. Reports: The reports are here so you can view and check on your process. Also when you are in Circulation you can view the Loans Found report, this is not available in the Utilities Module. Please make sure you return these resources before you continue with your stocktake.
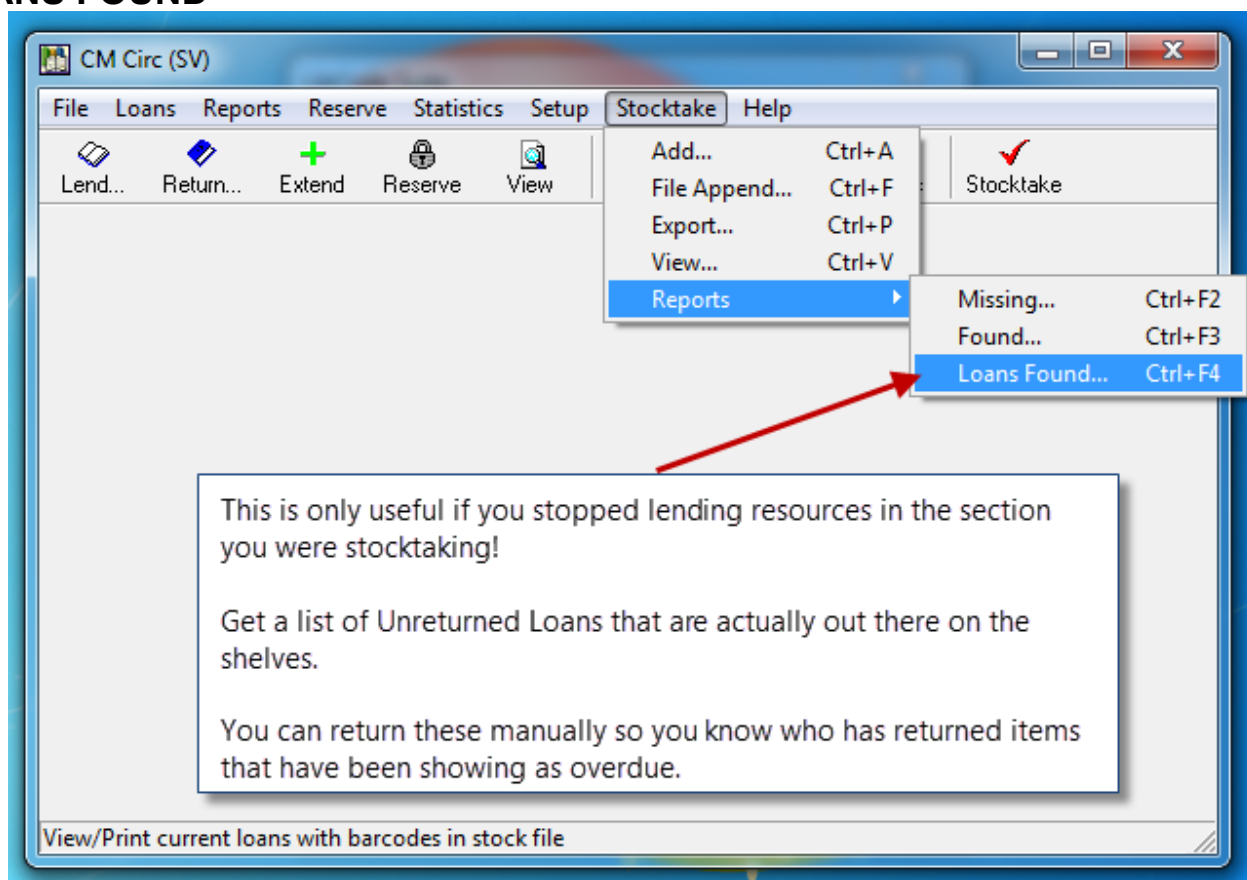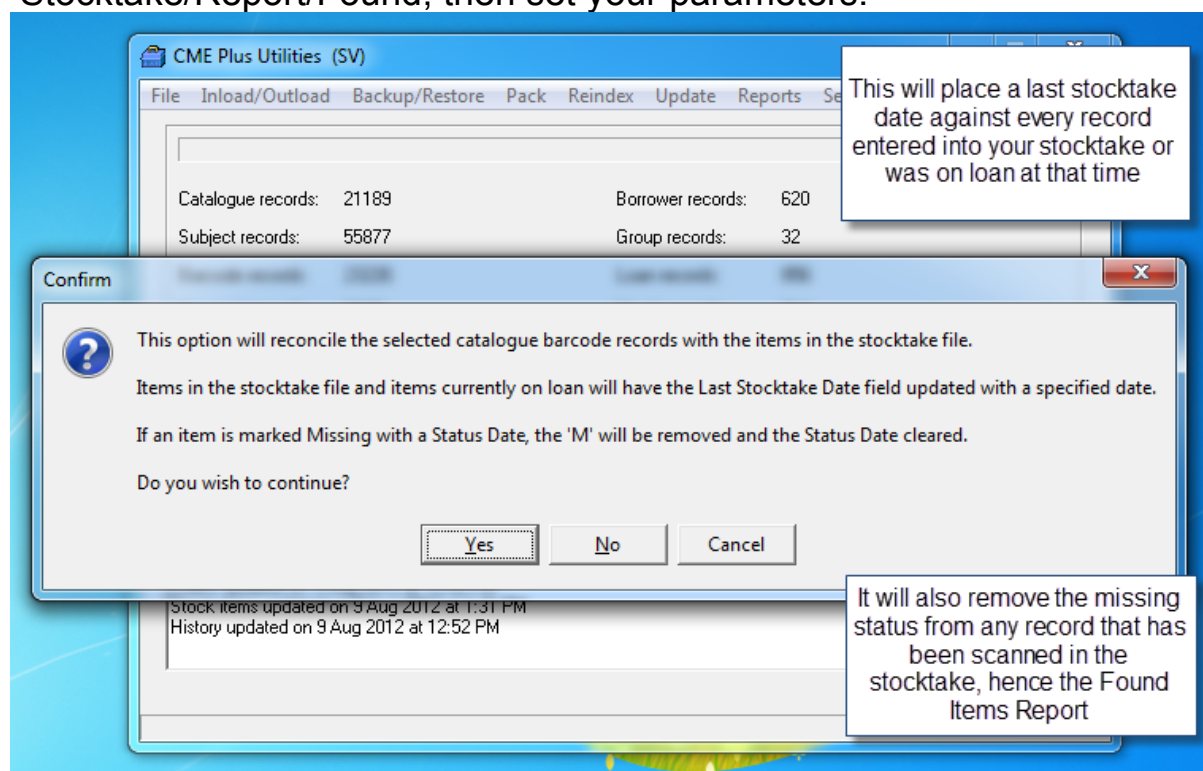
Missing
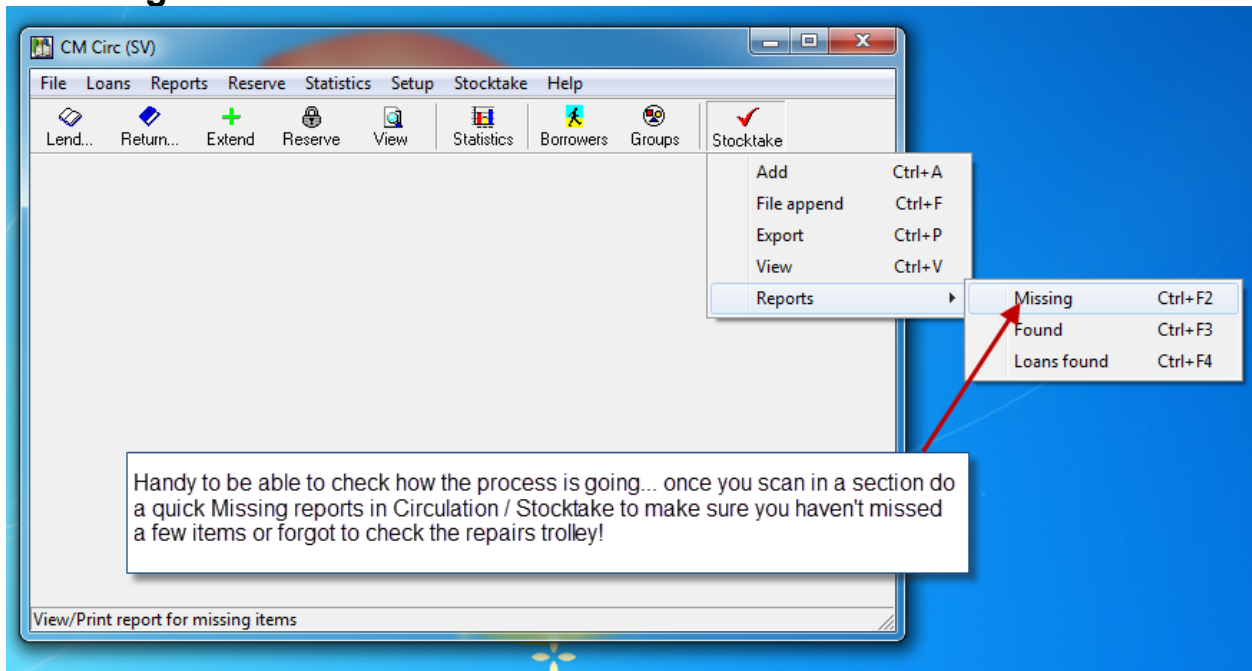
Found
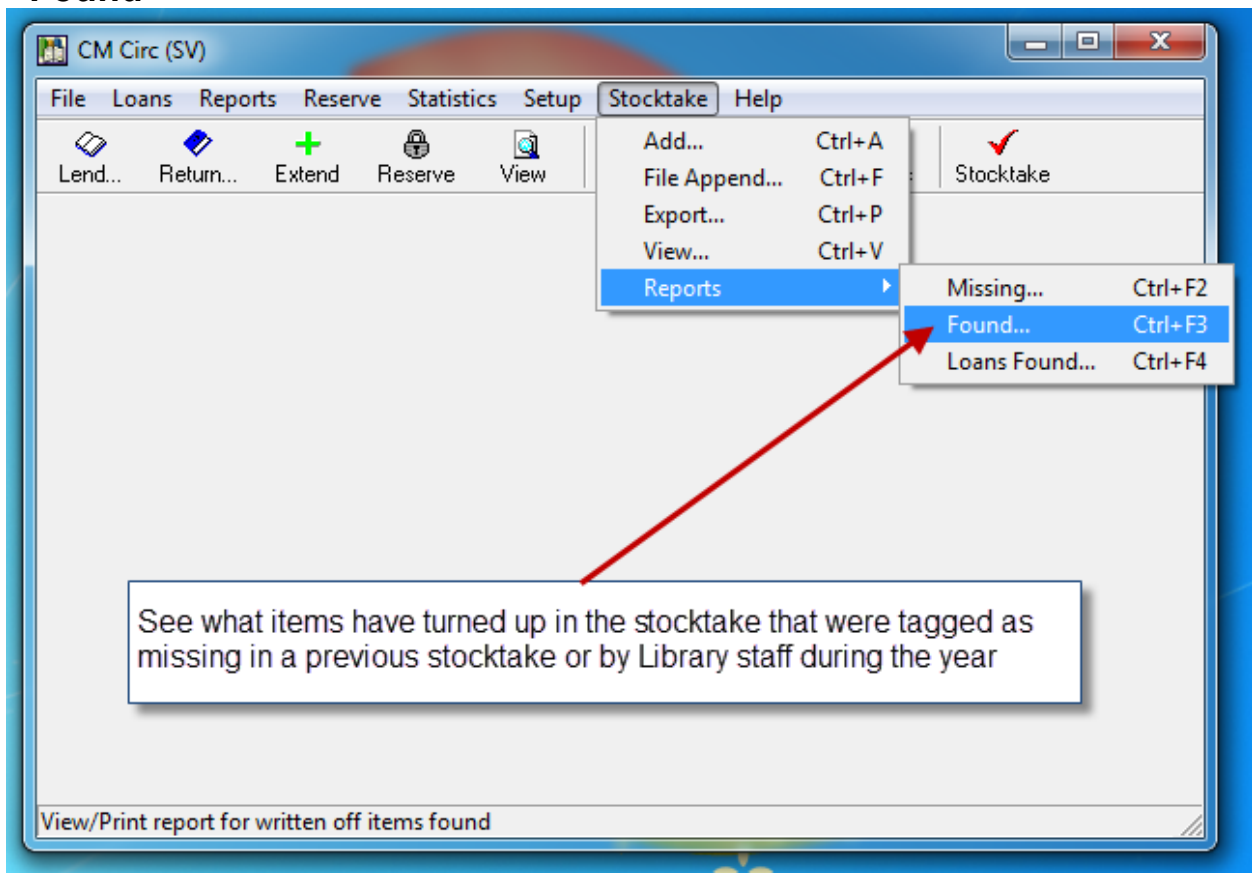
LOANS FOUND

9. Reconciling : Before reconciling, print a Found Items Report :
   Stocktake/Report/Found, then set your parameters.

10.	You can then set your parameters and Click OK.

These dates are set by default

The defaults button can be used here

Just remember to reset you defaults when you use the Mark Missing Report

11.	You can use the defaults button to reconcile all items in your stocktake but remember to reset your defaults when you use the Mark Missing Report shown below. ** Please do a Backup before you run the Mark Missing Report**

This will mark the items not found in the stocktake with an 'M' for missing

12.	Don't forget to reset your defaults…

13. Write off means that all Items marked missing will be marked written off. This is not necessary as items can be culled by date when marked missing e.g. culling items missing for over two years can be done globally.