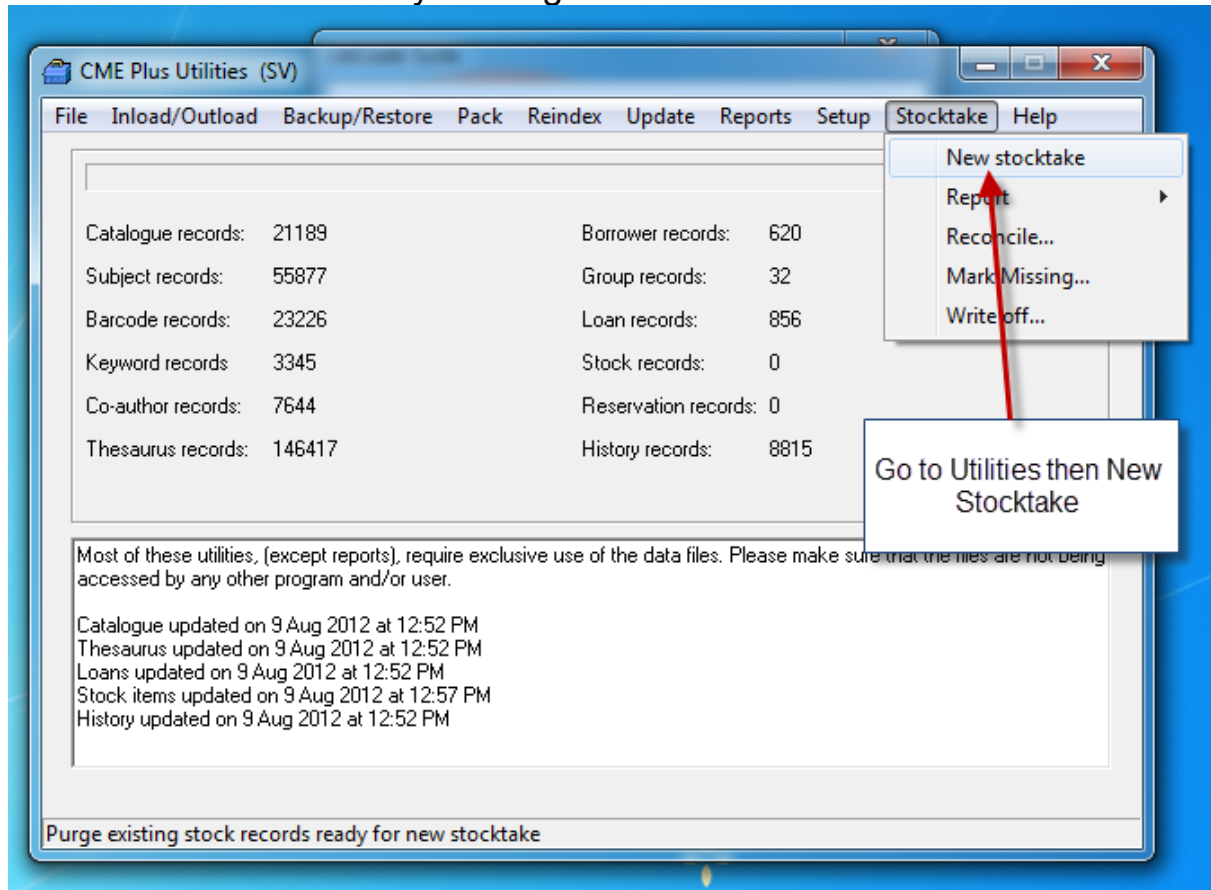


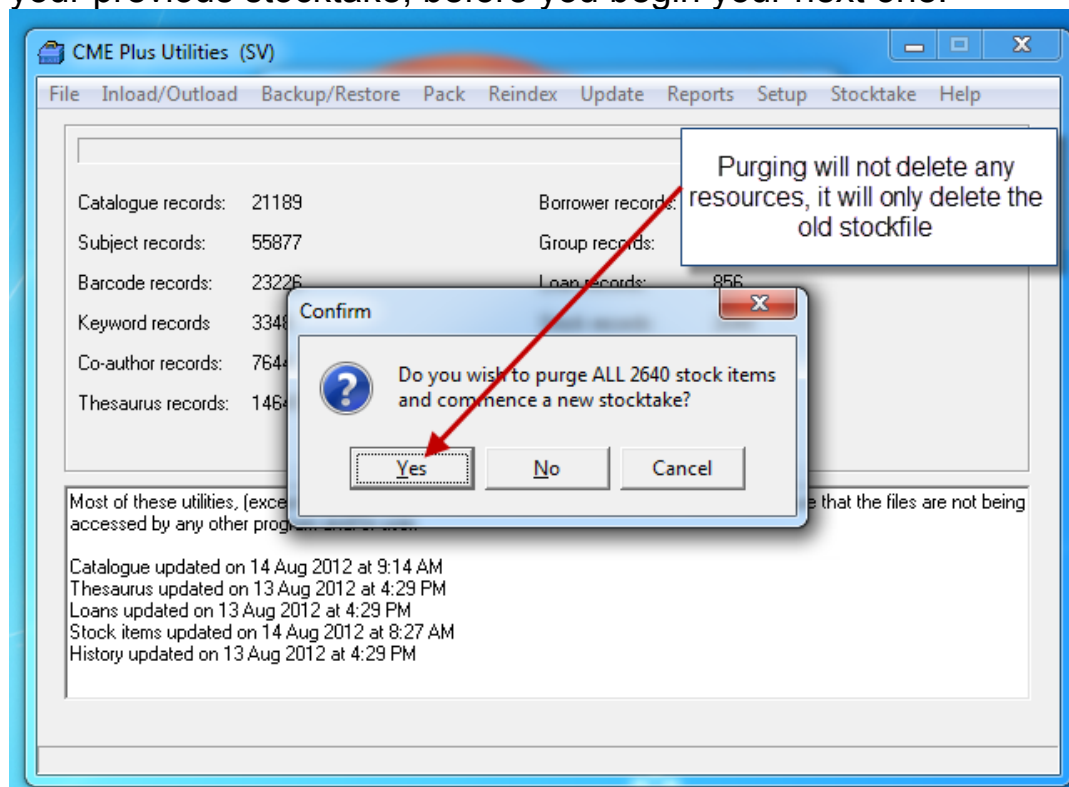
# STOCKTAKE

**\*\*REMEMBER TO ALWAYS DO AN EXTERNAL BACKUP BEFORE STARTING**

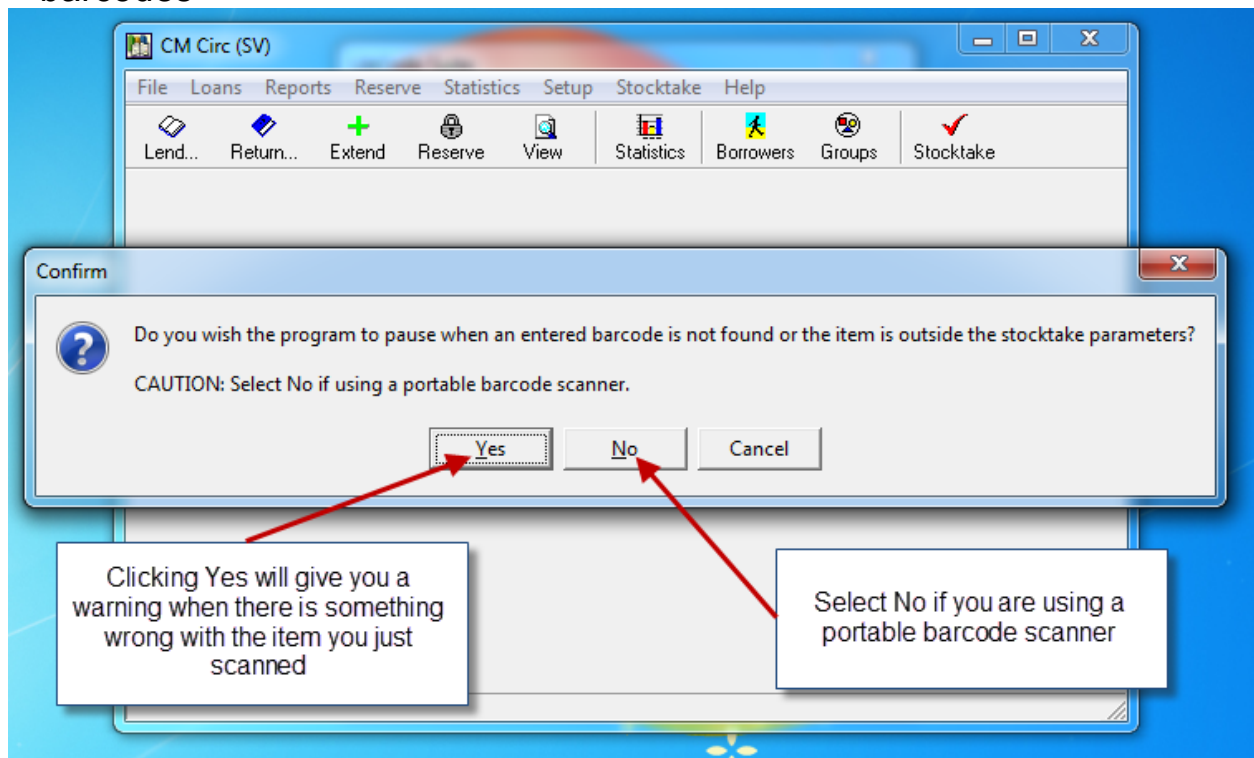
1. Start a new Stocktake by clicking Utilities/New stocktake



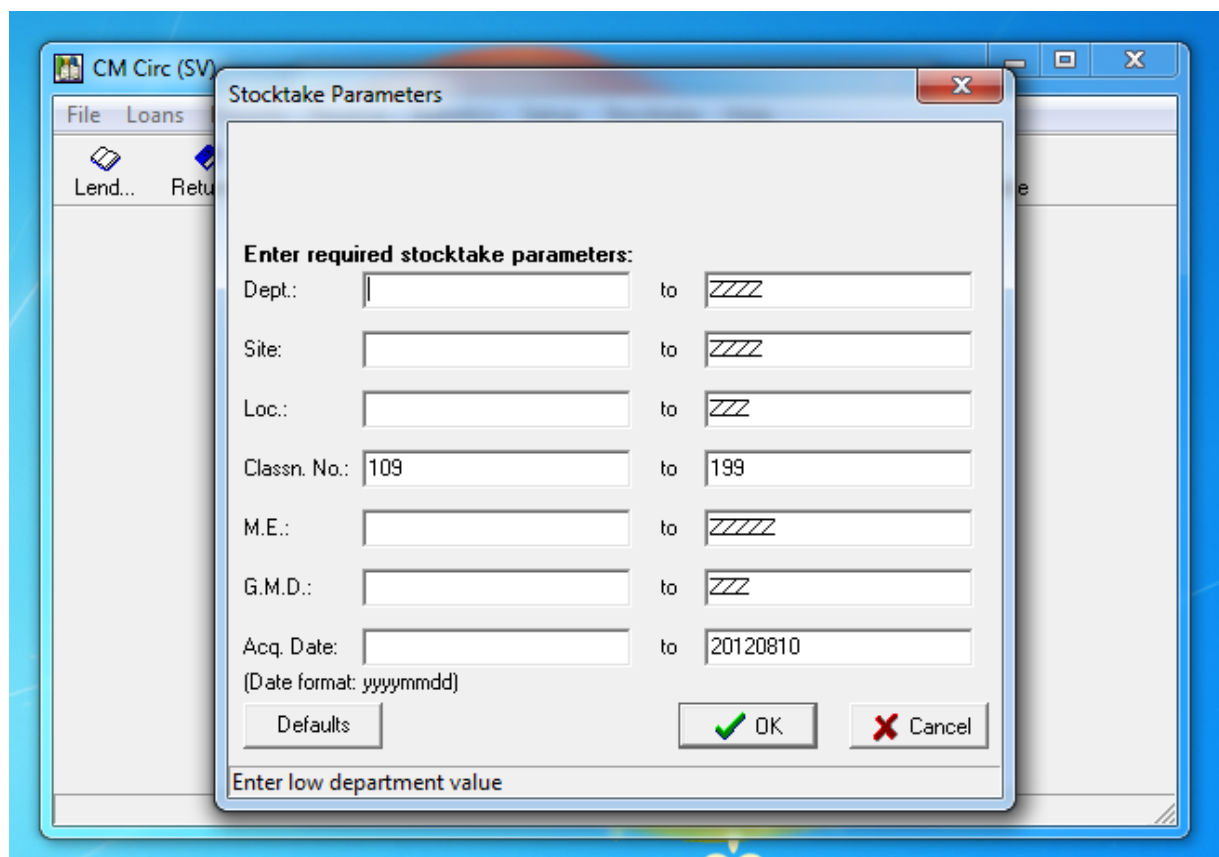
2. Purging : All this does is delete the previous stockfile, no records etc. are deleted, just the file containing when the barcode was entered and barcode number. So there is nothing to worry about as long as you have finished with your previous stocktake, before you begin your next one.

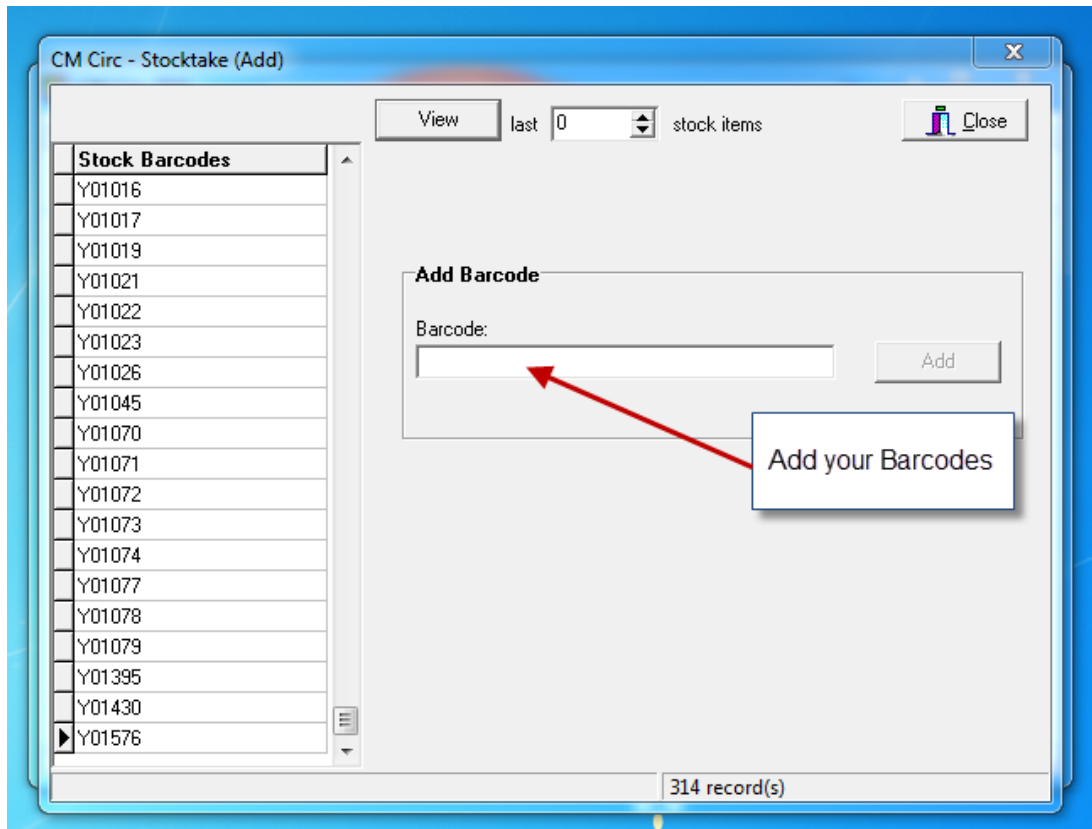


3. Now we need to go to Circulation – Click on Stocktake, then Add to add barcodes



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.



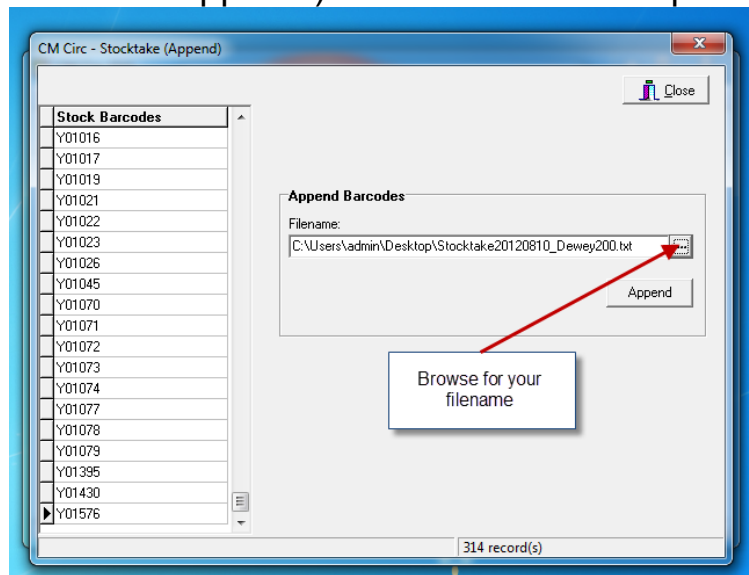


**\*\* Remember there are a number of ways to scan your items:**

- 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)

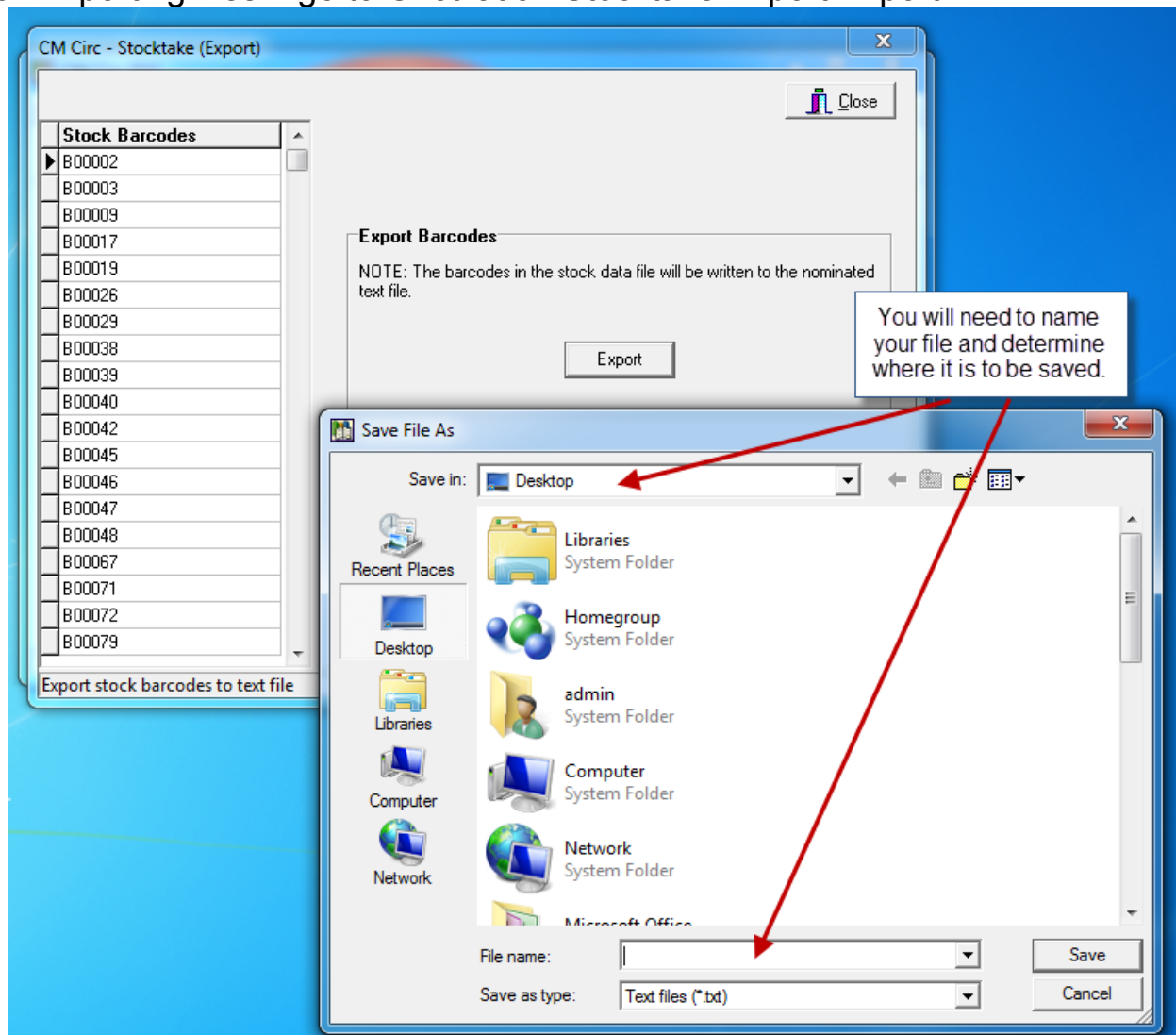
## 5. Appending a file.

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:



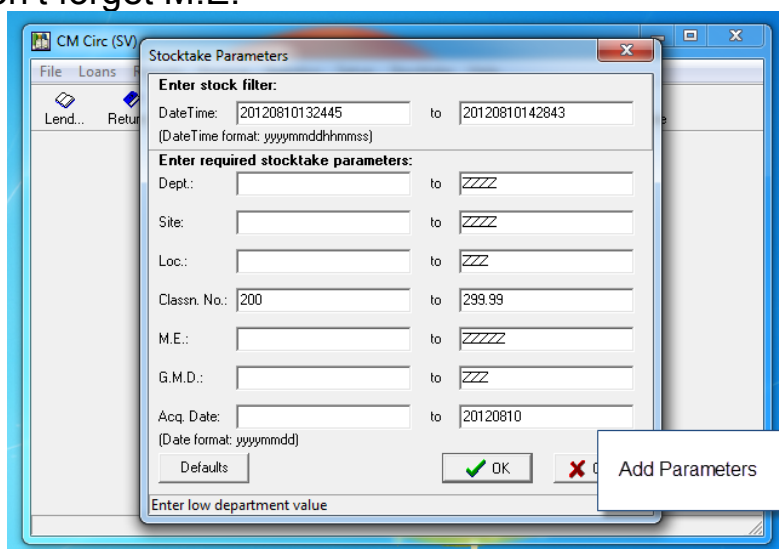
\*\* If more than one person is scanning ensure that you keep your files in the same place.

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



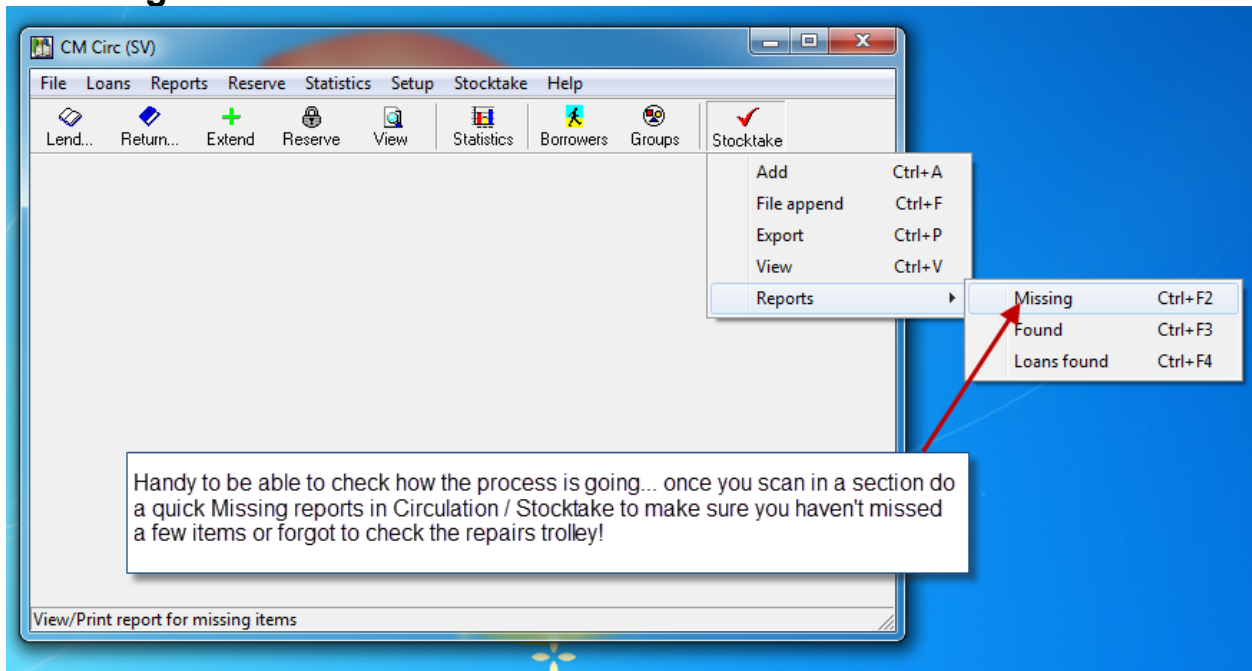
You will then be able to access this report to load barcodes into any LibCode stocktake.

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

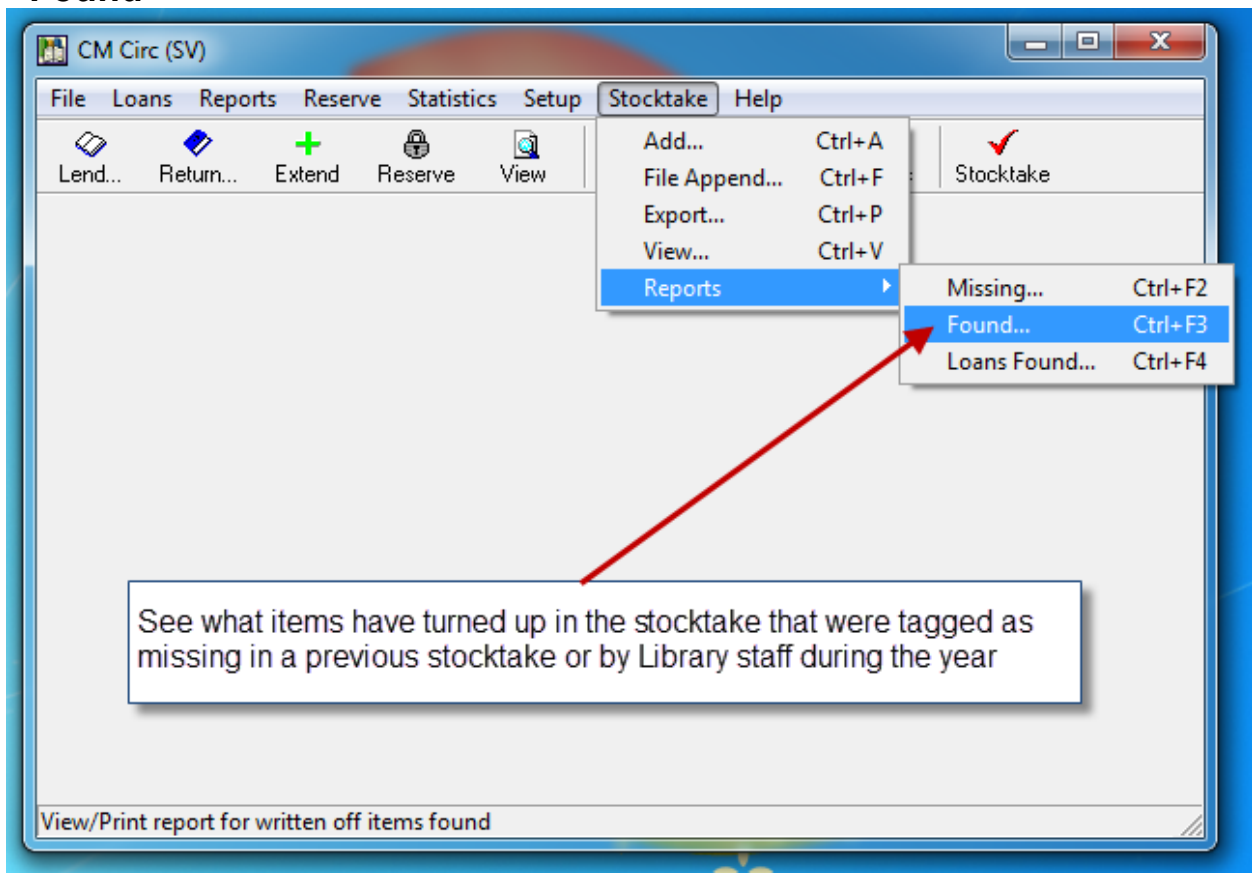


8. Reports: The reports are here so you can view and check on your process. Also when you are in Circulation you can view the Loans Found report, this is not available in the Utilities Module. Please make sure you return these resources before you continue with your stocktake.

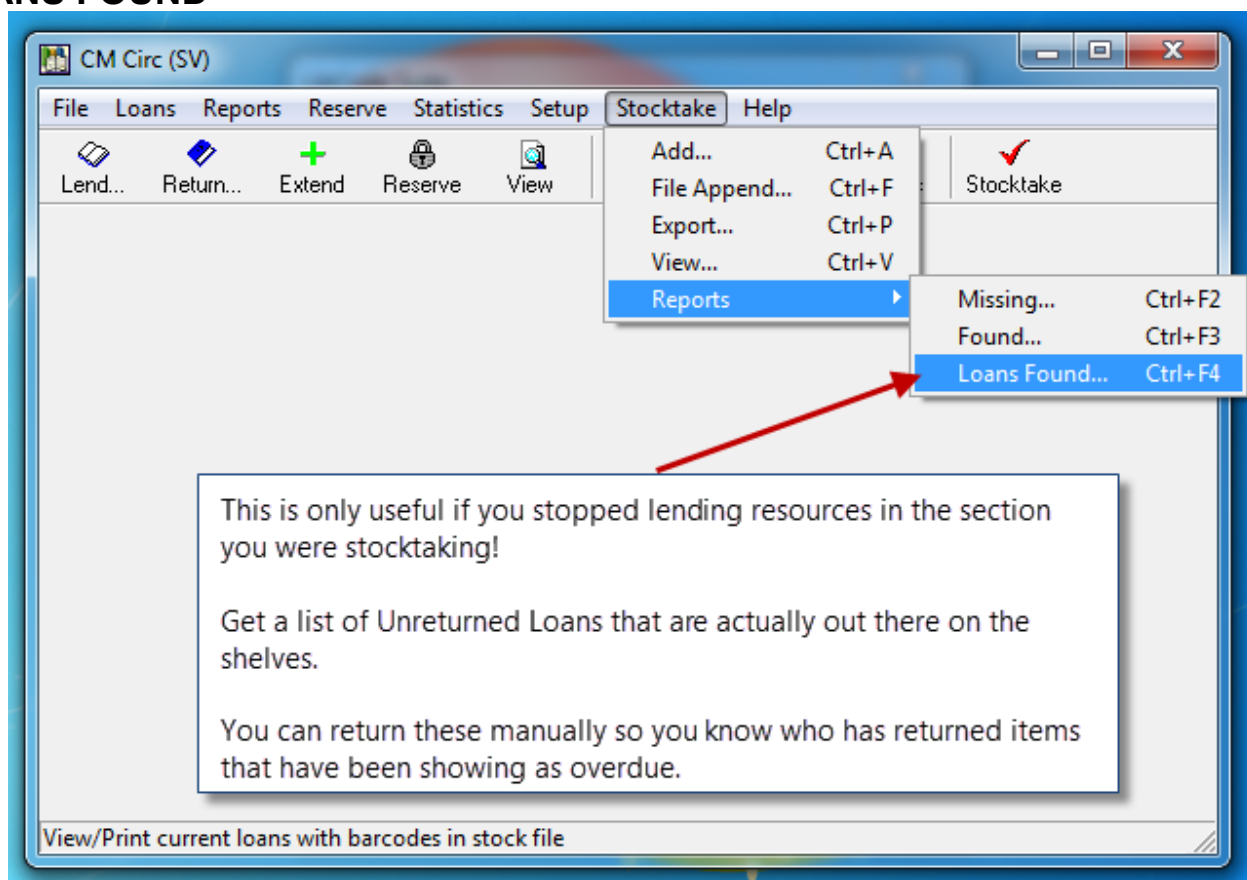
## Missing



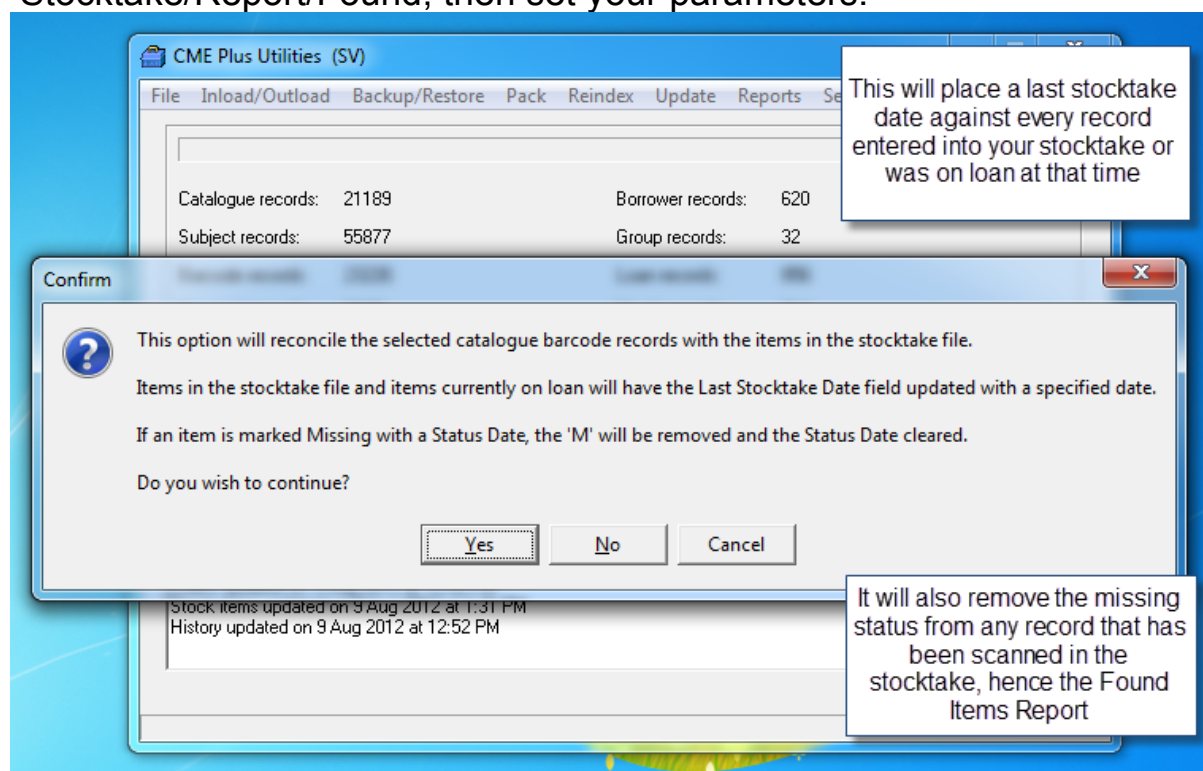
## Found



## 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.

The screenshot shows the 'Stocktake Parameters' dialog box. It has a title bar 'Stocktake Parameters' and a close button. The main content is divided into two sections. The first section, 'Set the new Last Stocktake Date for:', contains two date pickers: 'Items found in stocktake' set to '10/08/2012' and 'Items currently on loan' set to '09/08/2012'. Both have a callout box stating 'These dates are set by default'. The second section, 'Enter stocktake parameters, if required:', contains several input fields: 'Dept:' (empty), 'Site:' (empty), 'Loc:' (empty), 'Classn. No.:' (109), 'M.E.:' (empty), 'G.M.D.:' (empty), and 'Acq. Date:' (empty). Each field has a 'to' field next to it. The 'Acq. Date' field has a callout box stating 'Just remember to reset you defaults when you use the Mark Missing Report'. At the bottom, there are three buttons: 'Defaults', 'OK', and 'Cancel'. A red arrow points from the 'Defaults' button to the 'Acq. Date' field. Below the dialog box, there is a text label 'Enter low department value'.

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\*\***

The screenshot shows the 'CME Plus Utilities' window with a menu bar (File, Inload/Outload, Backup/Restore, Pack, Reindex, Update, Reports, Setup, Stocktake, Help). Below the menu bar is a table with the following data:

| Category          | Count |
|-------------------|-------|
| Catalogue records | 21189 |
| Borrower records  | 620   |
| Subject records   | 55877 |
| Group records     | 32    |
| Barcode records   | 23226 |
| Loan records      | 856   |

Overlaid on this is a 'Confirm' dialog box with a question mark icon. The text inside reads: 'This option will update the Status Date to the current date and insert 'M' in the Status field for those selected catalogue barcode records which are not found in the stocktake file. If a Status Date is already present, the date will be left. Do you wish to continue?'. There are 'Yes', 'No', and 'Cancel' buttons. A callout box on the right says 'This will mark the items not found in the stocktake with an 'M' for missing'. At the bottom of the 'CME Plus Utilities' window, there is a status bar with the following text: 'Loans updated on 9 Aug 2012 at 12:52 PM', 'Stock items updated on 9 Aug 2012 at 1:31 PM', and 'History updated on 9 Aug 2012 at 12:52 PM'.

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.

