

## End of Year - Library



## Table of Contents

|  |           |
|--|-----------|
| <b><u>End of Year - Library</u></b> .....  | <b>2</b>  |
| Backup.....                                | 3         |
| Stocktake.....                             | 4         |
| Prepare for New Stocktake .....            | 4         |
| Data Entry .....                           | 4         |
| Portable Scanner Interface.....            | 5         |
| Summary.....                               | 6         |
| Reporting .....                            | 7         |
| Error Log.....                             | 8         |
| Finalise the Stocktake .....               | 8         |
| Basket Item Removal .....                  | 9         |
| Print the Basket.....                      | 11        |
| <b><u>Update the Patron File</u></b> ..... | <b>13</b> |

### ***End of Year - Library***

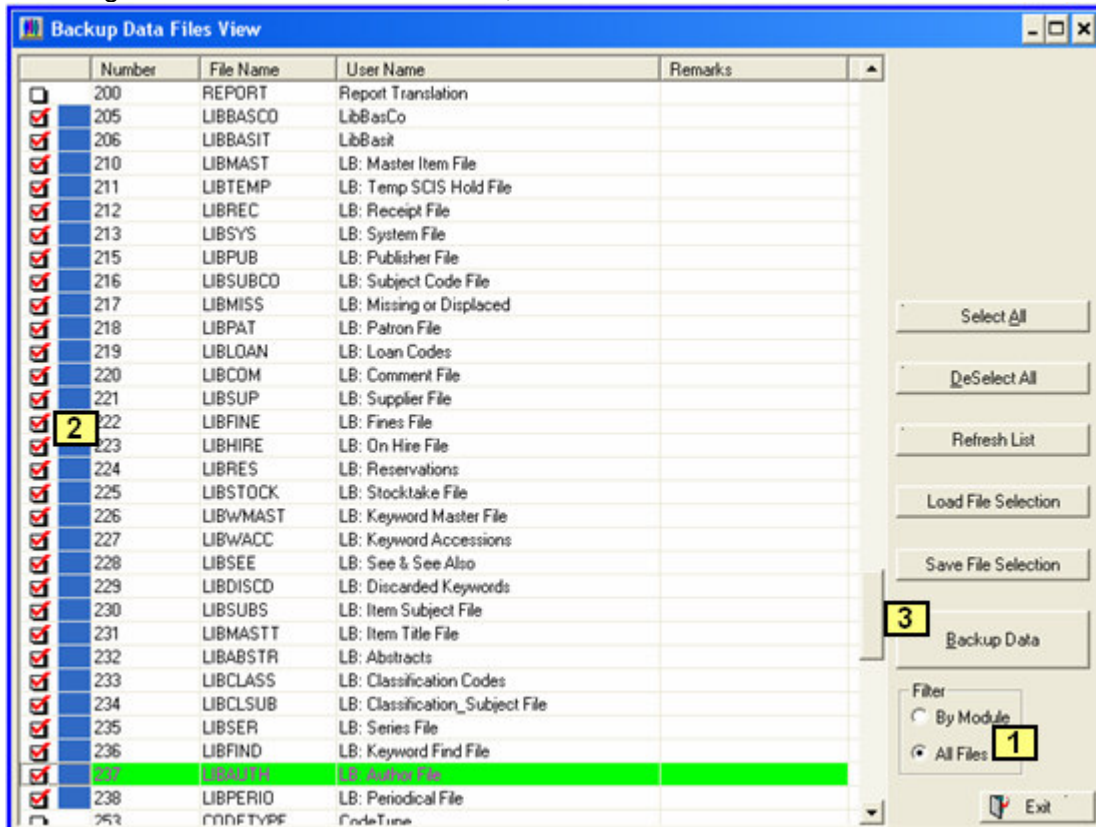
For the end of the year the Library would need a stocktake done and once the students have been updated in Administration a Patron update is required for the Library.

Backup Your Library Data before starting.

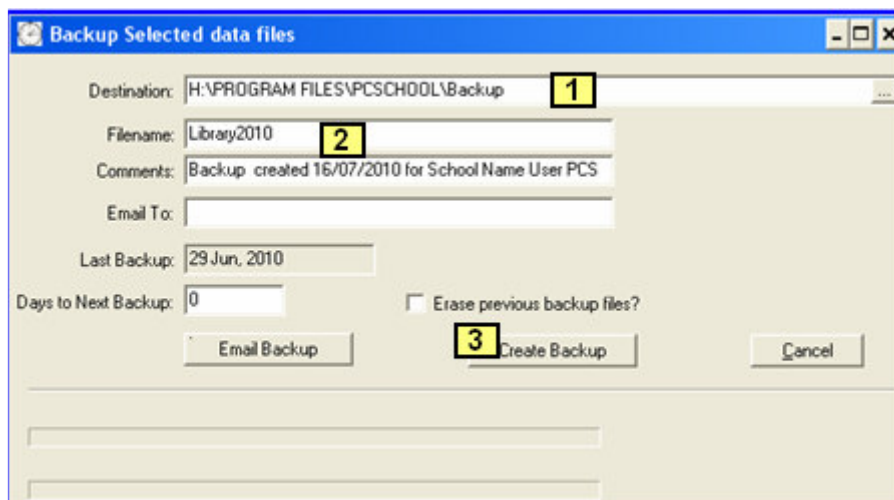
## Backup

**Path:** Scholastic → Utilities → Backup

The Backup cannot be completed from the Library but can be done from Utilities in most other Modules. If using Book Hire also select files 54, 55 and 56.



- |    |   |
|----|---|
| 1. | Make sure you select All Files.   |
| 2. | Tick files 205 to 238 for the Library, if using Book Hire also tick files 54, 55, 56. |
| 3. | Click Backup Data.  |



- |    |  |
|----|--|
| 1. | The Destination will default to your local drive.                  |
| 2. | A Filename will Default, this can be changed to have more meaning. |
| 3. | Click Create backup.   |

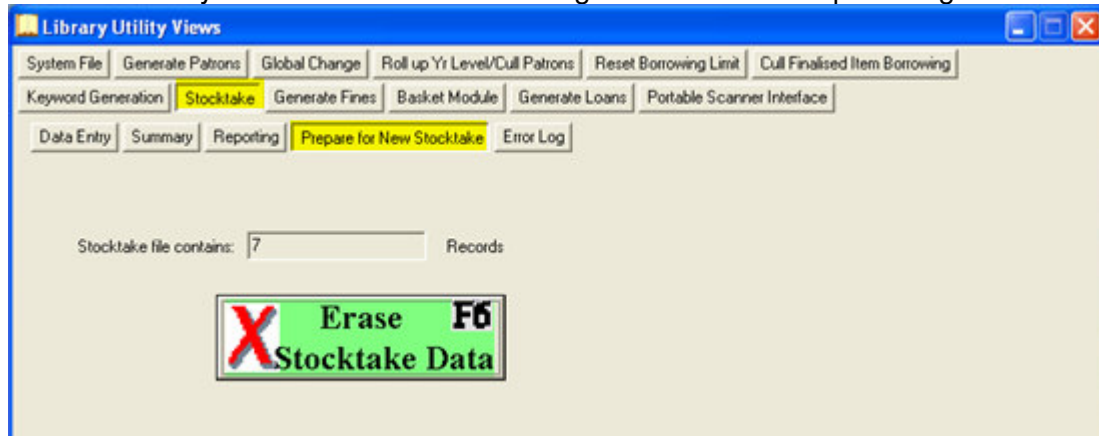
## Stocktake

You can run a Stocktake while normal library operations continue. Stocktake is a simple and fast method of performing the Library Stocktake. It is based upon items that are on hand and does not count those items which are currently on loan.

### Prepare for New Stocktake

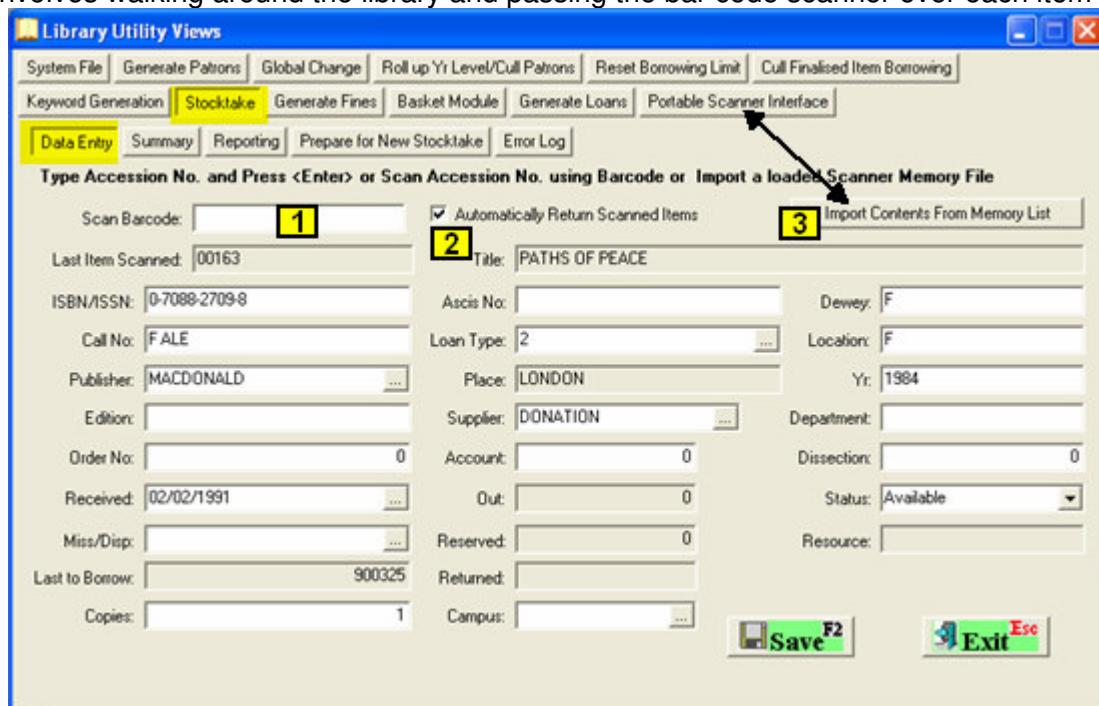
**Path:** Back Office → Stocktake

Before you commence any Stocktake run the Prepare for Stocktake Routine to clear out details of the last stocktake. This may take time and if the screen goes white let it keep running.



### Data Entry

You can enter the data by hand, by the use of a portable bar code scanner or by Importing a Memory list through the Portable scanner interface. If the library has a portable bar code scanner, the process simply involves walking around the library and passing the bar code scanner over each item in turn.

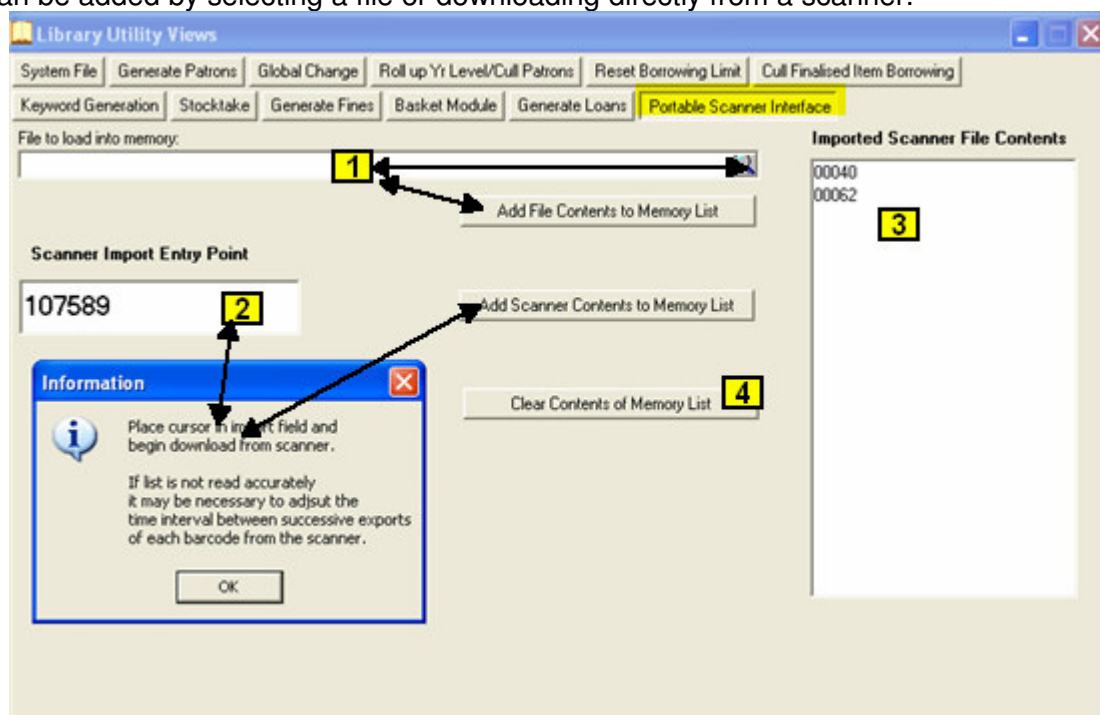


|           |  |
|-----------|--|
| <b>1.</b> | Place the cursor in the Scan Barcode field and download from the Bar Code reader; <ul style="list-style-type: none"> <li>• If necessary codes can be entered manually, use the enter key after each entry.</li> <li>• If using a scanner it may best to run some tests so you can adjust items such as between Barcode delays in the portable reader. If the reader dumps to the computer too quickly you will get inaccurate data.</li> </ul> |
| <b>2.</b> | Placing a tick in Automatically Return Scanned Items will return, from the patrons, any scanned items that are still flagged as being out on loan.   |
| <b>3.</b> | You can Import the contents of a Memory List from the Portable Scanner Interface.  |

### Portable Scanner Interface

The Portable Scanner Interface is used to bring in Lists of books by creating Memory Lists and importing them into the Library, this List can then be imported into Stocktake/Data Entry.

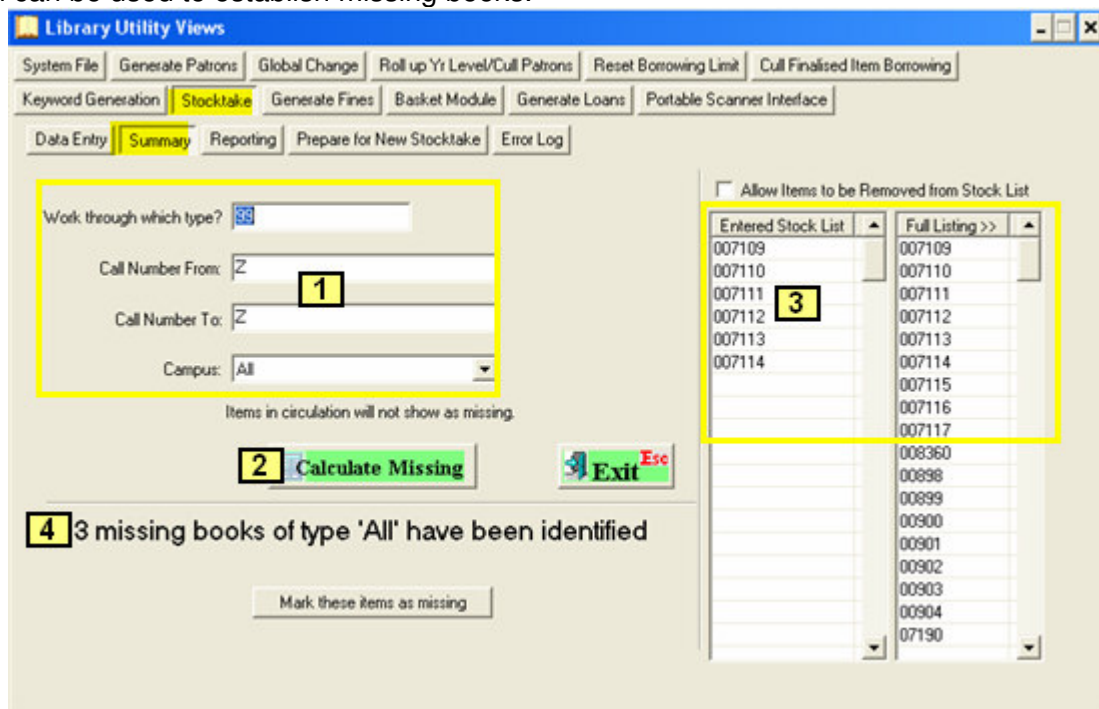
Items can be added by selecting a file or downloading directly from a scanner.



|           |  |
|-----------|--|
| <b>1.</b> | Browse for the scanned file the click Add File Contents to Memory List.  |
| <b>2.</b> | You can add the Contents of a Scanner and create a Memory List by clicking Add Scanner Contents to Memory List. <ul style="list-style-type: none"> <li>• Accession numbers can be added manually, enter the Accession number then click the Enter Key on your Keyboard.</li> </ul> |
| <b>3.</b> | View the Items in this Memory List.  |
| <b>4.</b> | Click Clear Contents of Memory List to remove the Items.   |

### Summary

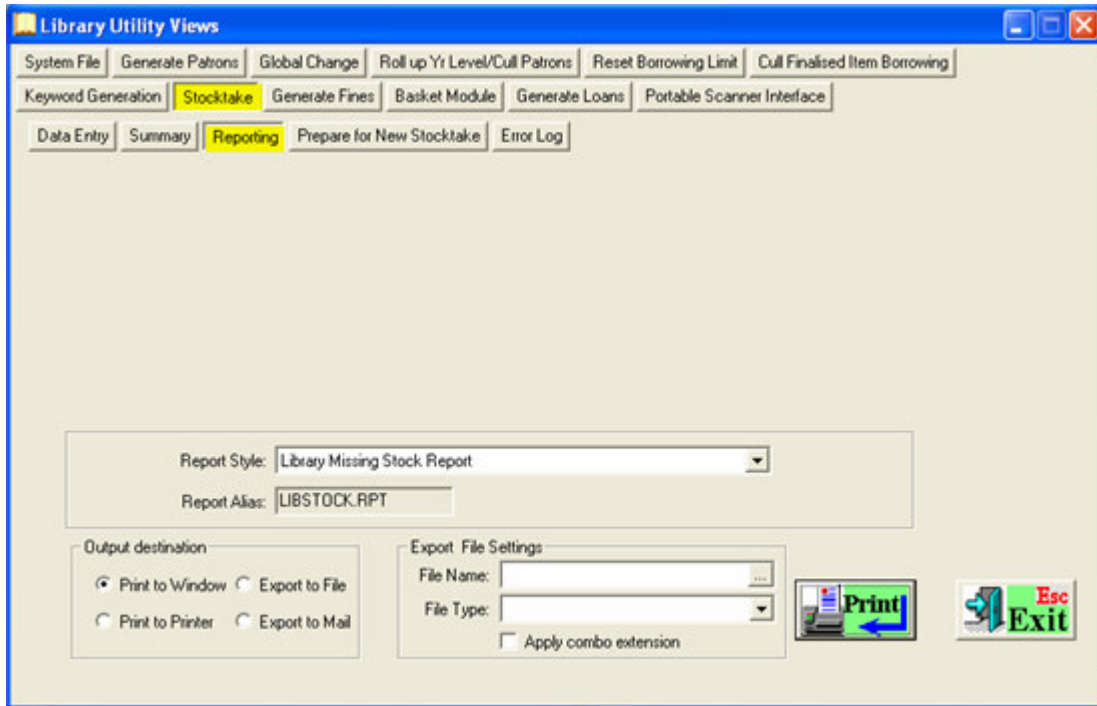
If you have restricted your stocktake to a Type of book, a range of Call numbers or a Campus this criterion can be used to establish missing books.



|    |   |
|----|---|
| 1. | It is optional to enter filters for running the Stocktake;  |
| 2. | Click Calculate Missing;  |
| 3. | With the restriction on Call Number I am only working with the 007 books; <ul style="list-style-type: none"> <li>• Entered Stock List shows the items processed in Data Entered'</li> <li>• Full Listing will show all the books in the catalogue.</li> </ul> |

### Reporting

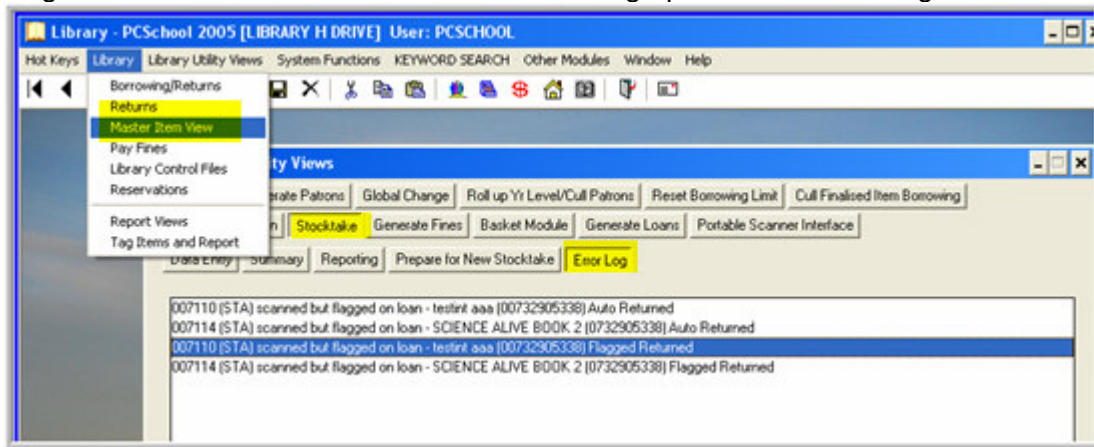
Print a list of the missing stock, this will give you the opportunity to locate any possible items and enter them into the data tab.



| Library Missing Stock Report |       |                          |                |             |                     |  |
|------------------------------|-------|--------------------------|----------------|-------------|---------------------|--|
| Call Number                  | Title |                          | Accession      |             |                     |  |
| Location                     | Type  | Devey                    | Stocktake Date | Value       | Current Item Status |  |
| <b>Missing Items</b>         |       |                          |                |             |                     |  |
| Z                            |       | ABOARD THE SPACE SHUTTLE |                |             | 007115              |  |
| RM                           | TR    |                          | 16/07/2010     | 0.00        | On Shelf            |  |
| Z                            |       | ABOARD THE SPACE SHUTTLE |                |             | 007116              |  |
| RM                           | TR    |                          | 16/07/2010     | 0.00        | On Shelf            |  |
| Z                            |       | ABOARD THE SPACE SHUTTLE |                |             | 007117              |  |
| RM                           | TR    |                          | 16/07/2010     | 0.00        | On Shelf            |  |
|                              |       |                          |                | <b>0.00</b> |                     |  |

### Error Log

The error log will show any discrepancies with the Data entry and Stocktake. Clicking onto an error and opening either Returns or Master Item View will bring up the Item for editing.



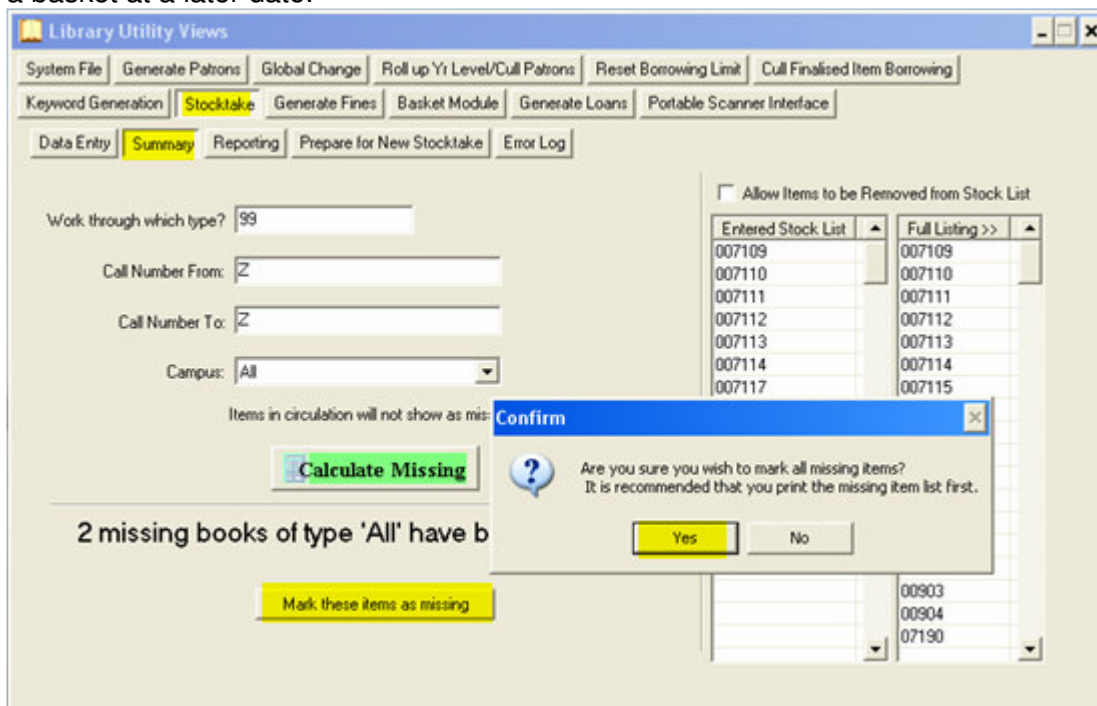
### Finalise the Stocktake

Once all the Missing Books have been checked, if any changes have been made, in the Summary tab click Calculate Missing again to refresh the Entered Stock List.

Reprint the updated Missing Item list.

### Mark as Missing

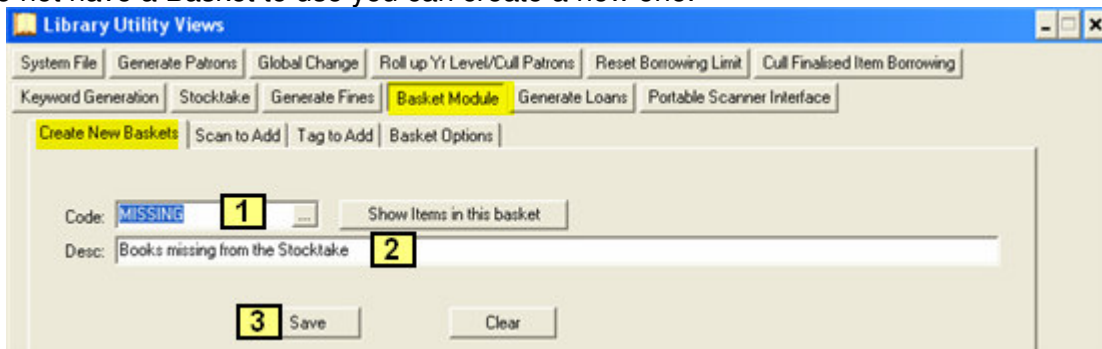
If the Items are marked as Missing they will be given a Status of Missing in the Item Details tab of the Catalogue. This will allow further investigation into the Items whereabouts; the Items can be removed through a basket at a later date.



### Basket Item Removal

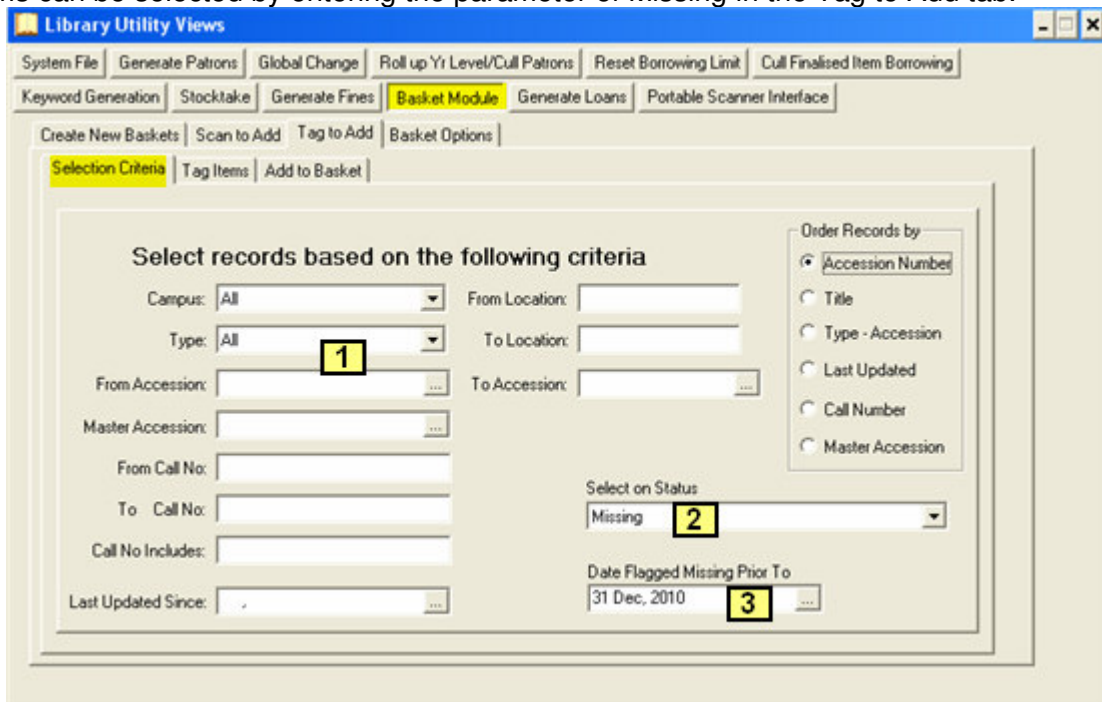
If books are marked as Missing they can be removed from the Catalogue via a basket.

If you do not have a Basket to use you can create a new one.



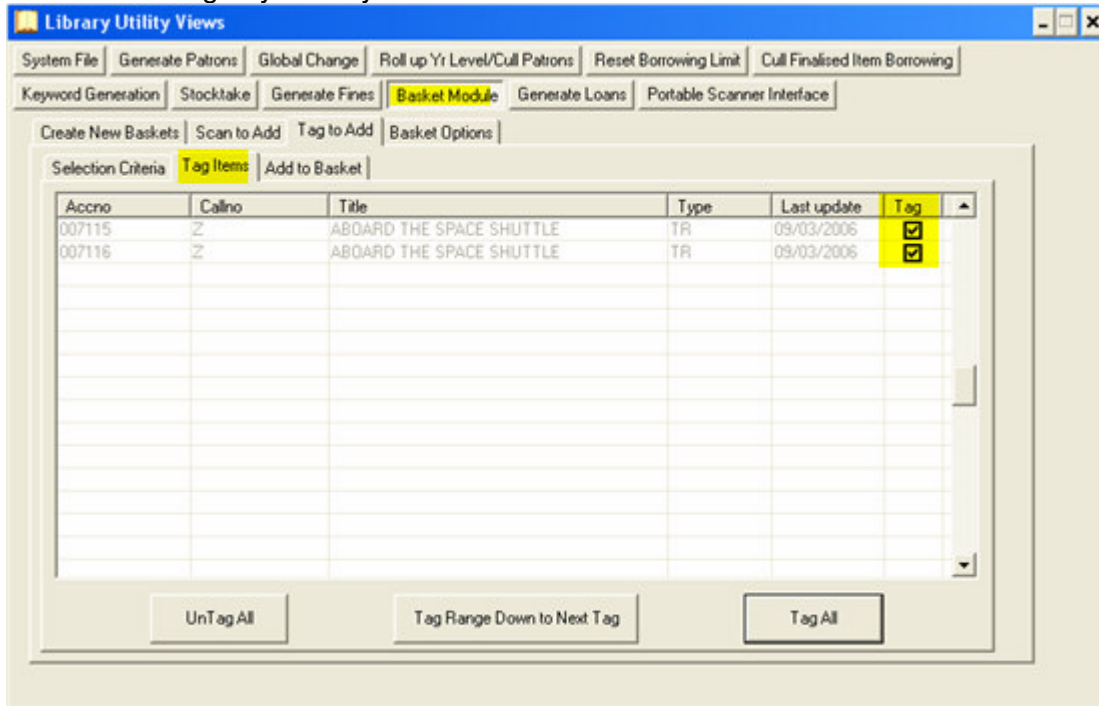
|    |                                      |
|----|--------------------------------------|
| 1. | Enter a Code for this basket.        |
| 2. | Enter a Description for this basket. |
| 3. | Click Save.                          |

The Items can be selected by entering the parameter of Missing in the Tag to Add tab.

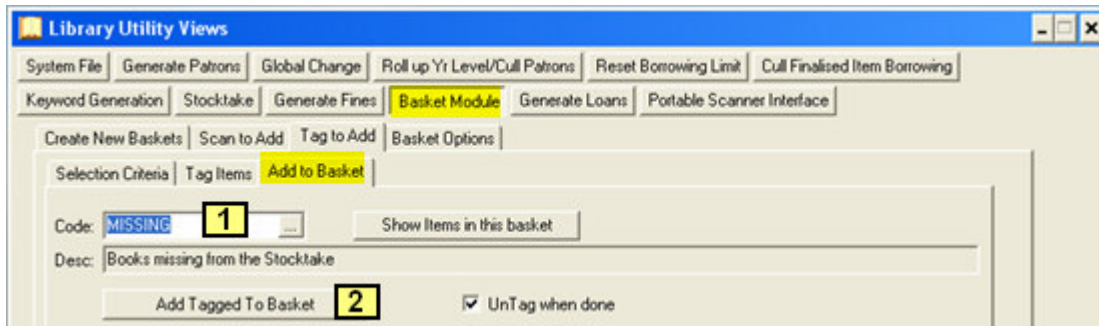


|    |  |
|----|--|
| 1. | Enter any relevant details or leave All and Blank. |
| 2. | Select the Status of Missing.                      |
| 3. | It is optional to enter a Date.                    |

When you go to the Tag Items tab only the books matching the selected criteria will be available to add to the basket. Untag any items you do not wish to remove.



Add the Items to the Basket.

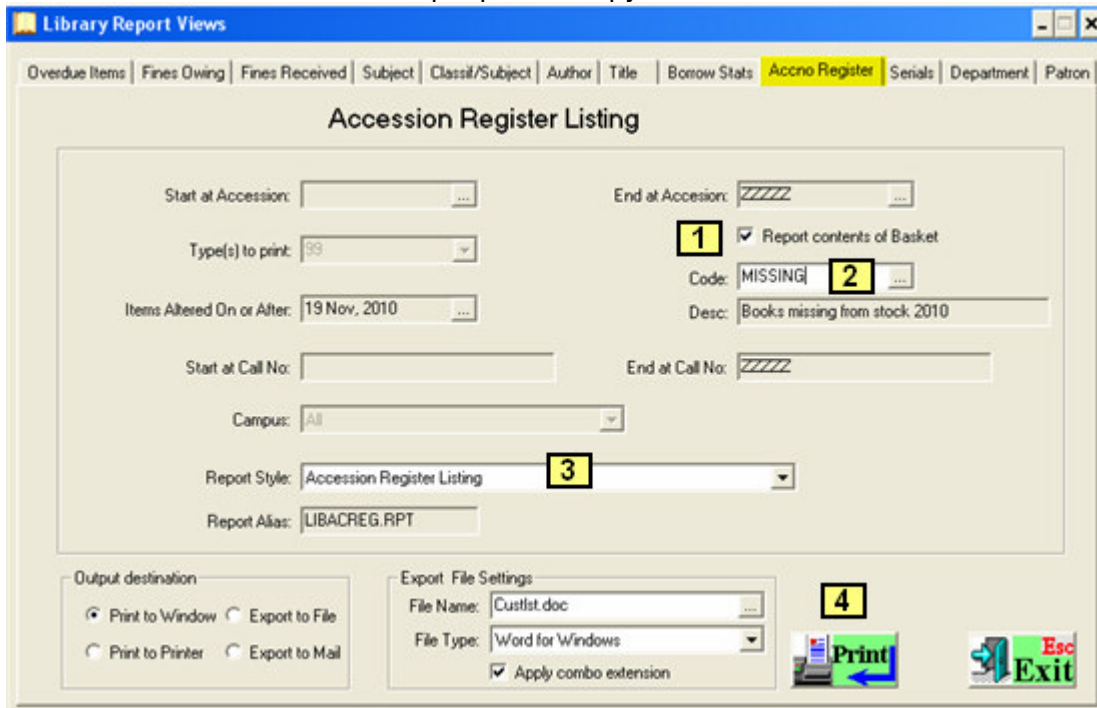


- |    |  |
|----|--|
| 1. | Select a Basket.   |
| 2. | Click Add Tagged to Basket, you will receive a Process Complete message once this is done. |

### Print the Basket

Path: Reports → Accno Register

For future reference it is advisable to keep a printed copy of the books to be removed.

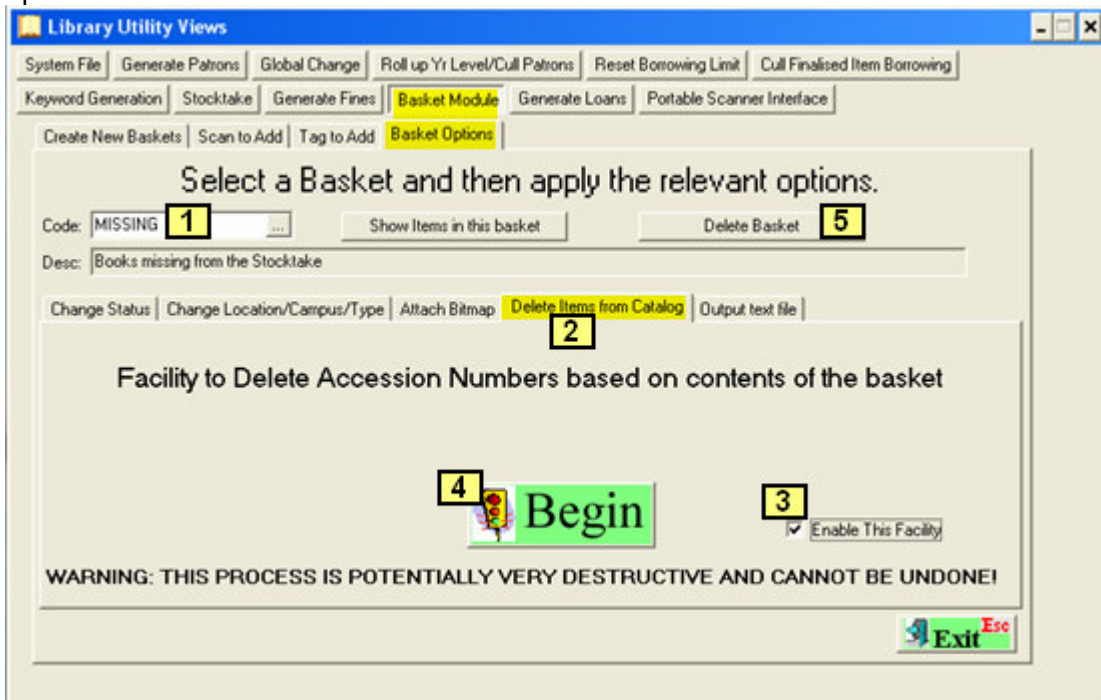


- |    |  |
|----|--|
| 1. | Tick Report contents of Basket.                        |
| 2. | Select basked Code you created for the missing Basket. |
| 3. | Select the Report Style.                               |
| 4. | Click print.   |

Keep a record for future reference.

| Accession Register Report |                |                             |       |                  |                  |           |
|---------------------------|----------------|-----------------------------|-------|------------------|------------------|-----------|
| Accession No.             | Author         | Title                       | Theme | Type             | Call No.         |           |
| Date Received             | Publisher      | Year                        | Price | Replacement Cost | Missing/Disposed |           |
| 333333                    | LAVAYRE Noelle | BOOK FULL OF IDEAS A        | 0.00  | 0.00             | F BEN            | 19110010  |
| 21650008                  |                |                             |       |                  | F                | F BLU     |
| 9719                      | BLUME Judy     | DEKHE                       | 4.00  | 0.00             | F BEN            | 19110010  |
| 11/01/1985                | FAN            | 1983 BCF                    |       |                  | F                | F BLU     |
| BRAMLEY BOO               | SIMONS Peter   | CHRONICLES OF THE GREAT WAR | 0.00  | 0.00             | 940 3 SH4        | 19110010  |
| CS                        |                |                             |       |                  | CS               | 822 3 SH4 |
| 22010004                  | LONOMAN        | 1965                        | 0.00  | 0.00             |                  | 19110010  |

Once you remove the Items from the Catalogue, there will be no record left of these books the printed report will be the best record.

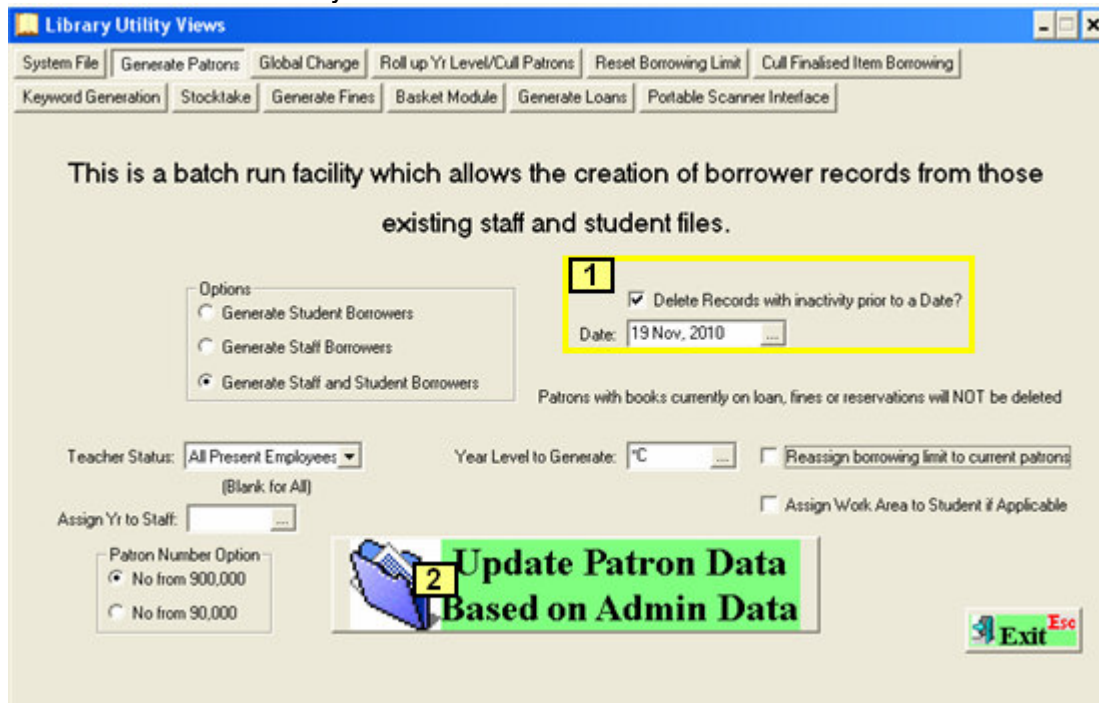


|    |  |
|----|--|
| 1. | In Basket Options, select the correct Basket.  |
| 2. | Go to the Delete Items from Catalogue tab.   |
| 3. | Click Enable This Facility.  |
| 4. | Click Begin to start the process.  |
| 5. | The Basket can be deleted afterwards or kept for further use; <ul style="list-style-type: none"> <li>• The book lines will be completely removed once the basked is used again.</li> </ul> |

### Update the Patron File

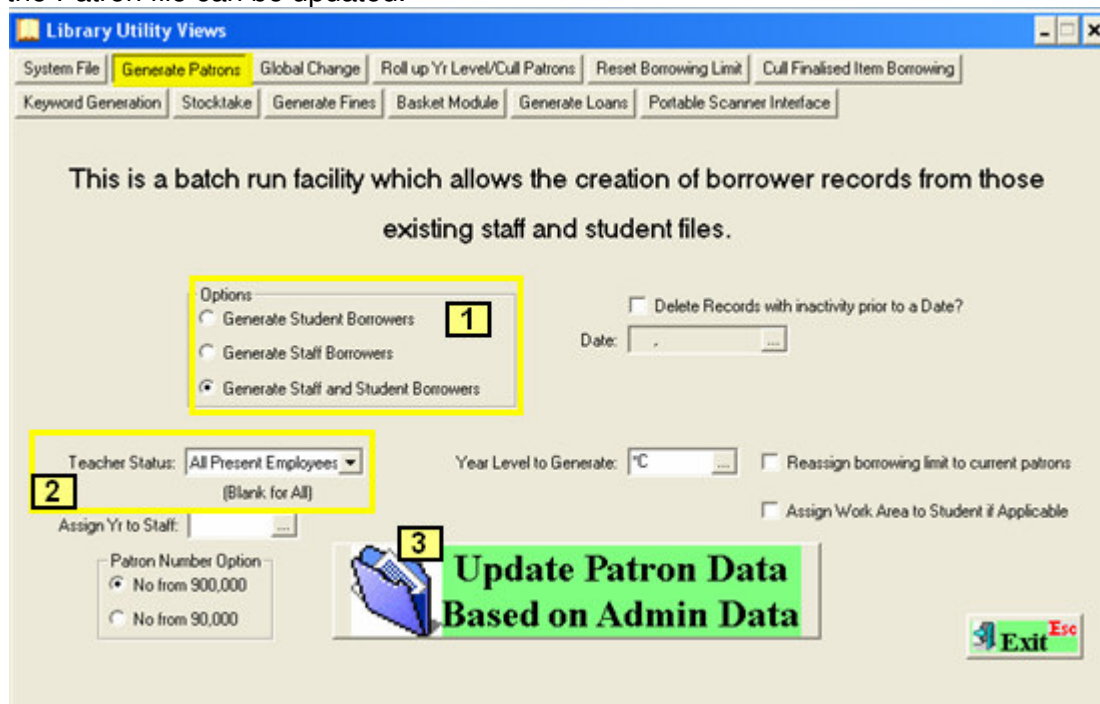
**Path:** Library → Back Office → Generate Patrons

Patrons with no activity to a certain date can be removed; this will remove all current and past students up to the date selected. Once this is finished you can Update your Patrons to bring Current Staff and Students into the Library.



|           |  |
|-----------|--|
| <b>1.</b> | Tick to Delete Records and select the Date, it is up to the schools what date is selected; <ul style="list-style-type: none"> <li>• This will remove current students and staff with no activity up to the date selected</li> <li>• The patron file can then be regenerated and it will bring only Current Students and if selected only Current Staff.</li> </ul> |
| <b>2.</b> | Click to Update the Patron Data.   |

Once the Students have been rolled into the following year by the Admin staff via the Scholastic Module the Patron file can be updated.



|    |  |
|----|--|
| 1. | You can select to Update Student, Staff or both as Patrons.  |
| 2. | If updating Staff you may wish to select the option of All Present Employees to avoid bringing in Staff who may have left.                             |
| 3. | Click Update Patron Data based on Admin Data this will update the Year Levels of the Students and bring any current student or staff into the Library. |