

DYNIX INVENTORY INSTRUCTIONS

This guide has been written to assist you in successfully completing the Inventory process. The steps in this guide explain how to use the Dynix software to inventory items in your collections.

First, is the 'Inventory Checklist', which briefly lists the basic inventory steps. Second, those steps are discussed fully in the 'Detailed Inventory Instructions' section that follows. Finally, there are two appendices. The first contains troubleshooting tips and the second is a glossary of terms.

INVENTORY CHECKLIST

NOTE: Step two is for inventory via a Terminal, whereas steps three through six are for Inventory via a Telxon unit. If using a terminal, go to step seven after completing step two. If using a Telxon, skip step two.

1. **Prepare the System for Inventory**

- **Clear the Exceptions report from last year.** This can only be done by printing the report, then choosing the option to delete after it's printed.
 - If you need the file cleared because the report is too large to print, call Dynix.
 - **Check DID** to see if there are any collections that are still 'In Progress'. If there are, write down each collection code (not the collection name), and the agencies that need to be updated. Dynix personnel will be able to update the collections more quickly if you provide this information.
 - **Set up the collection codes (UCOLL) for the Misshelve report.** (See 'Detailed Inventory Instructions - Step 1 - Prepare the System for Inventory - Updating Collection Codes')
 - **Set up the item status codes (UISC) for inventory action.** (See 'Detailed Inventory Instructions - Step 1 - Prepare the System for Inventory - Updating Item Status Codes')

2. **Inventory via a Terminal**

- If a Telxon was used for barcodes in the same collection, be sure those have been downloaded **before** using IAT.

3. **Set up the Communication Station**

- For a terminal, make sure the port and terminal baud rates are set to 9600.
- Connect the A/B switch box.
- For a PC, make sure the **TELXON DOWNLOAD TO PC** software is installed on the PC. Otherwise, you won't be able to transfer the data from the Telxon to the PC. If it is not, and you don't have the disk from which to install it, call Dynix.

4. **Set up the Telxon**

- If not using alkaline batteries in the Telxon unit, charge it the night before it will be needed. Overnight should be sufficient.
- Clear old barcodes from the Telxon by holding down the 'E' key and letting it beep three times.
- Set the Telxon's baud rate to 9600.

5. **Scan the Barcodes**

- **Test** by scanning and dumping about 20 barcodes from one collection. This is **critical** in avoiding problems. Take the barcodes through ALL stages of the inventory. Several libraries in the past have lost large amounts of data and time because they neglected the test run.
- Inventory one collection code at a time.
- **SCAN NO MORE THAN 500 BARCODES INTO THE TELXON AT A TIME.**
- If you are prompted to override a bad barcode, answer "No". Otherwise the data could be lost, or experience problems being transferred.
- Keep track of the order.

6. **Transfer Data from the Telxon to the System**
 - If using a terminal, hook up the telxon and terminal to an A/B Switchbox. Then, download the Telxon to the terminal.
 - If using a PC, use the 'Telxon Download to PC' software to transfer the data. Then transfer it from the PC to the Dynix system in one of two ways:
 - a. Use the PC's FTP software to move the data to the Dynix server. Then pull the file from the Dynix server into the Dynix software via IFN.
 - b. Activate the PC's FTP server, then use IFN to pull the data directly from the PC into the Dynix software.
7. **Print the Exceptions Report (RIE)**
 - Make sure last year's reports have been cleared, otherwise the old data will print out (see step one, 'Prepare the System', above).
8. **Resolve Problem Items**
 - This works best for DDC items or those in a numerical order.
 - RIE will **not** print an accurate misshelved report for items that belong to an **LC** collection – this is a reported bug and will be fixed in a future release. The work around is either: go into the collection code (UCOLL) and turn off the option to print the misshelved report; or: ignore the misshelved items on the report.
9. **Run Find Missing Inventory (FMI)**
 - This sets items to the 'Missing Inventory' (MI) status. No report is generated. Run this only once per collection code. If all items in the collection get set to 'Missing Inventory', call Dynix.
10. **Print the Missing Inventory Report (RIS)**
 - This is done by date, whereas everything else is done by collection. Use the **DATE FMI WAS RUN**, which is found in DID. Enter the same date in both the 'AFTER OR ON DATE' and the 'BEFORE OR ON DATE' fields. For example, if FMI was run on March 04, 2000, enter "March 04, 2000" in each of these fields in RIS.
11. **Resolve Missing Inventory Items**
 - When you find an actual item that has been marked as 'Missing Inventory', check it back in as if it were checked out. Do not scan the item in with the Telxon.
 - If an item is truly missing, change its status from 'Missing Inventory' (MI) to 'Missing' (M) with USI.

DETAILED INVENTORY INSTRUCTIONS

Overview

A Brief Summary of Inventory

There are several reasons for doing inventory. They are:

- Identify existing items.
- Identify misshelved items.
- Correct the status of an item.
- Correct an item's collection or agency code.
- Identify items missing from a collection.

Inventory is designed to operate on a **collection** level, such as 'Fiction' or 'Non-Fiction'.

Scanning a collection requires the use of a light pen or scanner. Either a portable Telxon unit or a light pen / scanner on a terminal can be used. Both methods can be used at the same time. Barcodes scanned with a Telxon will need to be downloaded and sent to a file on the CPU, which then must be processed. Barcodes scanned on a terminal using IAT (Inventory at Terminal) are inventoried and processed immediately, and need no further processing.

During the inventory process, the system corrects invalid statuses on any holdings records according to how the item status codes (UISC) are set up. For example, the 'Claimed Returned' UISC record's 'INVENTORY ACTION' field is set to 'In', and an item with a 'Claimed Returned' status is inventoried. Its status will be changed to 'In' automatically. Invalid statuses that are not automatically corrected, along with other problem items (such as those belonging to another collection), are reported on the Exceptions Report (RIE).

The Exceptions Report lists the problem items for each group of barcodes. It should be printed after each group of barcodes is processed. If you wait until an entire collection is inventoried, the exceptions report may be overwhelmingly large. The items in the report are listed in the order in which they were found. This makes it easy for librarians to make one organized pass through the inventoried shelves to find the problem items.

When all items in a collection have been scanned, the holdings records for that collection are processed using FMI to determine which books are missing inventory. Then, a Missing Inventory Report (RIS) is created which allows staff to confirm whether or not those items are actually missing.

The system tracks the last inventory date for items and collections.

- To view the inventory date of a particular item, log to the cat account and bring up the item's holdings record via UBR. The date is found in the 'ADD/MOD/CD/INV' field.
- To view the inventory date for a collection, log to the circ account for that agency and type "DID".

The time required to complete the inventory for an entire collection will vary, depending on its size and the time available. For this reason, you are encouraged to adapt the procedures to best fit the needs of your library.

Practical Tips for Conducting Inventory

Inventory generally disrupts regular library functions. To have an orderly inventory, you must put up with some temporary disorder. (Some staff members may have to postpone their regular

duties, volunteers may need to be trained, or a terminal may need to be borrowed from somewhere else in the library). However, with good planning, inventory can be accomplished without too much inconvenience to staff or patrons. The following scheduling tips from librarians and Dynix staff should help the inventory process go more smoothly.

- Divide collections into bite-sized pieces, such as one column of books. This is generally easier and more efficient than trying to inventory an entire collection at once.
- Allow time after each inventory session to process the barcodes, print the Exceptions Report and resolve problem items. The sooner this is done, the greater the chance of finding the problem items.
- Base the inventory schedule on realistic expectations. Although processing barcodes with a Telxon or terminal is fast and accurate, there is still much to do once the data has been collected. This includes resolving problem items on the Exceptions Report, reshelving misshelved books, and tracking down the missing items from the Missing Inventory Report.
- If using Telxons, allow extra time for downloading and processing the barcodes (15 to 20 minutes per 500 barcodes).
- Find Missing Inventory (FMI), which is run after an entire collection has been inventoried, will take time and will tie up a terminal until it's done. To minimize the inconvenience, FMI can be run overnight, and it can be run for several collections at once. (It takes the same amount of time to run FMI, regardless of the number of collections it is processing).
- It might be best to schedule inventory sessions during slow times or when the library is closed.
- Check ahead of time to make sure that the Telxon is fully charged. Doing a test batch on a small number of books before starting inventory will save both time and frustration.
- Borrow extra Telxons. Two or three Telxon units can be used so that staff can continue entering data while one Telxon is downloading. (Telxons are only necessary during the first phase of inventory, not for resolving problems or generating the FMI report).
- Since inventory usually involves several people, there is a great chance for errors (i.e. skipping, overlapping, or losing reports). Develop a method for monitoring who is doing what, and ensuring that the important steps are completed (i.e. downloading the barcodes from the Telxon or printing the Exceptions Report). One library has staff members fill out forms with starting and ending call numbers to keep track of where they are.
- Delete the Exceptions Report after each printing. The Exceptions Report should be deleted after each group of barcodes is processed. Otherwise, subsequent RIE's will include both old and new data.

Pros and Cons of Inventory Methods

NOTE: Different methods can be used for different groups in the same collection.

Either a Telxon unit or a terminal can be used to enter the barcodes of inventory items. The pros and cons of each method are discussed below:

- Ease of use. If you have a large library or if several people are doing inventory at once, Telxon units might be easier to handle than terminals. On the other hand, smaller libraries and those with one staff member doing inventory may find a terminal easier to use.
- Speed. When barcodes are scanned on a terminal, additional time may be required to transport the terminal to the books, or vice versa. On the other hand, when barcodes are scanned on a Telxon unit, additional time is required to transfer the barcodes from the Telxon unit to the system. Once the barcodes are transferred, however, inventory continues at the same pace for both.

- Quantity of barcodes. With a terminal there is no limit to the number of barcodes that can be scanned at one time. However, with a Telxon you are limited by the unit's available storage space. Although it will hold more than 1,000 barcodes, Dynix recommends scanning no more than 500 barcodes before transferring them to the system.
- Added feature. When scanning barcodes on a terminal, the system displays a message if it is an exception item. For example, if an item belonging to another collection is scanned, a message such as '*Item belongs in Fiction collection*' appears. This allows you to immediately re-shelve the item if you wish. With the Telxon, you must wait until the item appears on the Exceptions Report.

Step 1 – Prepare the System for Inventory

Before your library begins inventory for the very first time, the system must be set up so that the inventory will work properly. This includes updating two types of records: collection codes (UCOLL) and item status codes (UISC). These must be edited as follows:

- Update UCOLL to determine whether misshelved items are reported (see 'Updating Collection Codes' below).
- Update UISC to assign an 'INVENTORY ACTION' to every item status on your system (see 'Updating Item Status Codes' below).

Additionally, before beginning inventory each year:

- Check DID for collections with a status of 'In Progress'. If any exist, contact Dynix to have these changed to 'complete' before beginning inventory on these collections. (See 'Checking Display Inventory Dates (DID)' below before calling Dynix). DID can also be used to establish your libraries inventory policies and procedures.

The last section in 'Prepare the System for Inventory' discusses how to handle items on the shelving cart. (See 'Items on the shelving cart' below).

Updating Collection Codes (UCOLL) - telling the system to track misshelved items

When a collection is inventoried, the system will track the number of misshelved items only if it is told to. If you wish to track misshelved items for a collection, an organized call number system must be assigned to the collection code (UCOLL) and the MISSELVE RPT option must be set to 'Yes'.

If misshelved items are reported for a collection, the following things happen:

- After a group of barcodes is processed, the number of misshelved items in that group appears on the screen. This is explained in 'Step 2 – Inventory via a Terminal' and in 'Step 6 – Transfer Data from the Telxon to the System – Processing Barcodes'.
 - If scanning barcodes on a terminal, a message appears whenever the barcode of a misshelved item is scanned. (These exception messages are explained in Step 8 – Resolving Problem Items). This allows you to immediately re-shelve the item if you wish.
 - Statistics about misshelved items can be included on an inventory statistical report.
 - Items that are misshelved are included on the Exceptions Report.
- NOTE:** If there are multiple misshelved items together on the shelf, it will instruct you to check the shelf for a group of items, rather than listing each one.

To have the system report misshelved items, complete the following steps before beginning inventory on that collection. This must be done for each collection you wish to track.

1. At any Circulation system menu type "UCOLL". A list of collections appears.

2. Select the desired collection.
3. Fill in the CLASSIFICATION SCHEME and MISSELVE RPT fields on the screen. These fields are explained below. (The other fields are explained under the heading ISTATS in the System Administrator Manual.)
 - Classification Scheme. Make sure the classification scheme is based on an organized call number system, such as DDC (i.e. Local or 0). If not, make sure the classification scheme has a numerical ascending order. Otherwise, most items will be considered misshelved and an extensive Exceptions Report will result.
NOTE: Currently, the Dynix system will **not** print an accurate Exceptions report for LC classifications. For collections with LC call numbers, enter "N" in the 'MISSELVE RPT' field (see below).
 - Misshelve Report. This field determines whether misshelved items are tracked for the collection. Type "Y" (for Yes) to track them. "N" (for No), or leaving this field blank will not track them.
4. After updating the collection record, type "F" to file the changes.

Updating Item Status Codes – Telling the system to change an item's status and add items to the 'Exceptions Report'

The Item Status Code Record (UISC) determines whether or not the system changes an item's status automatically during inventory, and whether items of that status are included in the Exception's Report.

There are three possible inventory actions. The system comes with inventory actions already assigned for all default item status types, and Dynix recommends keeping these settings. However, inventory actions must be assigned for any item statuses created by your library.

The inventory actions are explained below:

- IN. This means the system automatically checks in the item when its barcode is inventoried, (meaning its status is changed to something like 'Checked In' or 'Shelving Cart', depending on your library's checkin procedures). The system levies a fine depending on how the itype (UIT) and ptype (UPT) records are set up on the system. Dynix recommends this inventory action for the following statuses: 'Bindery', 'Claimed Returned', 'Lost', 'Missing', 'Mending', and 'Missing Inventory'.
- NRPT (for No Report). This means no changes are made, nor is the item added to the Exceptions Report. Dynix recommends this for the statuses 'Checked In' and 'Shelving Cart'.
- RPT (for Report). This means no changes are made, but the item is added to the Exceptions Report. Dynix recommends this for the following statuses: 'On Order', 'Just Received', 'Being Held', 'Trace', 'Transit Hold', and 'In Transit'.
NOTE: If an item is inventoried on a Telxon unit and its status is changed on a date after it is inventoried, it will not be added to the Exceptions Report.

To assign an inventory action to an item status, follow the steps below.

1. Type "UISC" at any Cataloging or Circulation system menu. This brings up a screen listing all item statuses on the system. The INV ACTION column on the right shows the Inventory Action assigned to each.
2. Select the desired status by typing in its line number.
3. Type in the 'Status Action' field number (usually 5) and enter the desired action (see the list of possible Inventory Actions above). To determine which action to assign, consider whether items with that status need to be resolved in some way. For example, 'IN' might be assigned for the 'In Processing' status because such items are shelf-ready. On the other hand, 'RPT' might be assigned to the 'Display Case' status because these items need to be returned to that case.

4. Type "F" to file the record.

NOTE: Make sure every item status code has an inventory action assigned. Statuses without inventory actions will be considered exceptions, and every such item inventoried will appear on the Exceptions Report. In addition, if scanning on a terminal, the system will display a message for each such item.

Checking Display Inventory Dates (DID)

Display Inventory Dates (or DID) reports when inventory was started, last done, and if it was completed for each collection. To access DID, simply type "DID" at the Circulation Master Menu.

NOTE: DID is agency specific, so be sure you are in the account whose items you wish to view.

This screen lists the following information:

- Collection. This is the name of each collection in your library.
- Inventory Start. This is the date when the first group of barcodes was processed for that collection, and is blank if it has never been inventoried.
NOTE: The system always lists a date three days prior to the actual load date. (See 'Appendix A – Inventory Troubleshooting – Frequently asked questions #1').
- Inventory Finish. This is either the date inventory was completed (if 'Complete' appears in the 'In Progress/Complete' column), or the last date a group of items was inventoried (if 'In Progress' appears in the 'In Progress/Complete' column).
- In Progress/Complete. This shows the current inventory status of the collection. The two possibilities are 'Complete' and 'In Progress'.
NOTE: Inventory is considered complete if FMI has been run for the collection.

Use this information (i.e. how much of the library has been inventoried, which collections remain, and how long inventory is taking) to set up and adjust the inventory policies and schedules.

Items on the shelving cart

It is best to reshelve all returned items for a collection before inventorying it. Otherwise, those items will likely end up as either 'Missing Inventory' or 'Exceptions'. It is not necessary to inventory (scan) items that are checked in after the collection has been inventoried. The system tracks items with a checked out status, and will not include them with the missing inventory items.

NOTE: If you plan to report misshelved items for a collection, you may wish to disable the MISSHELVE RPT option on the collection code record (UCOLL) while inventorying the items on the shelving cart. Otherwise these items will be considered misshelved. Turn the option back on once the barcodes have been processed. (The MISSHELVE RPT option is explained in 'Step 1 - Preparing the System for Inventory - Updating Collection Codes').

Step 2 – Inventory via a Terminal

After completing this section, skip to 'Step 7 - Printing the Exceptions Report'. (Steps three through six are for Inventory via Telxon only).

This section assumes that you have setup your system for inventory (see 'Step 1 – Prepare the System for Inventory'). Below are instructions for entering a group of barcodes on a terminal. Remember that a terminal can be used for some barcode groups even if a Telxon unit was used for others in the same collection. (For information about the differences between using a terminal and a Telxon unit, refer to 'Overview – Pros and Cons of Inventory Methods' above).

NOTE: Before inventorying anything on a terminal, be sure the same group of items was not previously done on a Telxon unit waiting to be processed.

1. On the terminal, type "IAT" at the MINV menu in Circulation. A screen appears showing the name of your agency and prompting you to enter a collection.
2. Enter the collection code for the items you wish to inventory. If an invalid collection code is entered, a list of valid collections appears from which to select the desired one. Once a valid collection has been entered, the inventory starting date appears. This is the date inventory began for this collection. If you are just starting to inventory or re-inventory the collection, the starting date will display as three days prior to today's date. The system always displays an Inventory Start Date that is three days prior to when the items were initially inventoried. This is to accommodate libraries that use Telxons. The system will not accept data downloaded from a Telxon if it has a date stamp that precedes the Inventory Start Date in DID. Since it's not always possible to download a Telxon the same day the barcodes were entered, the Dynix software was written to allow three days for this to occur. Once the first Telxon dump has been made, there is no time limit to finish the collection.
3. After the starting date appears, type "C" to continue. If you wish to change the displayed agency or collection, type "R" (for Reenter). If you type "C", a screen will display with agency, collection, inventory start date, and two counts. The counts are explained below:
 - # Inventoried. The cumulative number of barcodes being inventoried in this group.
 - # Misshelved. The cumulative number of misshelved items being found in this group of barcodes. This refers to items that are in the wrong collection and items that are misshelved in the right collection. This count appears only if the collection record is set up to report misshelved items (see 'Step 1 – Prepare the System for Inventory – Updating Collection Codes'). A barcode prompt is also displayed.
4. Scan the barcode of the first item. The system processes it in much the same way the Telxon unit does, but with one added feature. When certain types of exception items are scanned, the terminal displays a message describing the problem. You can resolve the problem immediately if you wish, or wait until the item appears on the Exceptions Report. A list of all exception messages and possible resolutions is provided in Step 8 – Resolving Problem Items.

NOTE: If a message appears relating to the setup of inventory actions, note the message and correct the problem status immediately.
5. If the '*Item has already been inventoried*' message appears, simply re-shelve the item and press <RETURN>. Items that have already been inventoried are still included in the '# Inventoried' count.

NOTE: Already inventoried items do not appear on the Exceptions Report.
6. After responding to the exception message as desired, press <RETURN> to re-display the barcode prompt.
7. Always scan barcodes at the barcode prompt. Scan as many barcodes as you wish. However, be sure to allow enough time to print the Exceptions Report and resolve the exceptions the same day those items are scanned. The longer you wait to resolve the exceptions, the less likely the exception items will still be on the shelf. As scanning proceeds, the screen shows the cumulative number for this group inventoried thus far.
8. Once all the barcodes for a group have been scanned, type ".Q" at the barcode prompt. The screen will display: '*Print the Inventory Exceptions Report as soon as possible. Press Return to return to Menu*'. Printing quickly keeps the exception data current. Press <RETURN> to continue and the MINV menu appears.

OVERVIEW OF INVENTORY VIA A TELXON

There are seven steps for using a Telxon to inventory items:

1. Scan a group of barcodes on the Telxon.
2. Set up a Communication Station.
2. Prepare the Telxon to send the barcodes to the terminal.
3. Prepare the terminal to receive the barcodes.
4. Transfer the barcodes to the terminal.
5. Verify the collection for the group of barcodes.
6. Process the barcodes.

When inventorying a group of items, it is important to complete all seven steps as quickly as possible. The longer it takes, the less useful the inventory data is. And with a Telxon, the first batch of barcodes for a particular collection must be downloaded within three days, otherwise the inventory data will be invalid, and the items must be re-inventoried. (The entire collection does not need to be completed within the three days, just the first batch).

To proceed with inventory via a Telxon, see steps three through six below.

Step 3 – Set Up the Communication Station

A Communication station is a terminal used for transferring data between the Telxon and the Dynix system. There are three parts to the communication station: 1) a Telxon unit; 2) a Dumb terminal, including the cable to the CPU; and 3) a Communications switchbox and cables, provided by Dynix.

Configuring the Terminal

Usually, the terminal baud rate must be set to 9600. If your terminal is configured for a different baud rate, follow the steps below to change it:

- Wyse 50 Terminals
 1. Press the <SHIFT> and <SETUP> keys simultaneously. Release both keys. At the bottom of the screen appear several boxes that display the terminal's configuration. The first box on the bottom left is 'Handshake', and it will be highlighted.
 2. Press the down arrow key until the words 'Data Bit' appear in the first box on the bottom left.
 3. Press the right arrow key three times to highlight the last field on the bottom, which should say 'Modem Port Baud Rate'. There will be a number to the right of the words. If this number is not '9600', use the <SPACEBAR> to change it.
 4. To exit SETUP, press the <SHIFT> key. While holding this key down, press the <SETUP> key. At the top left of the screen, the following question appears: 'Save Changes for Power – On?'
 5. Press the 'A' key. The configuration boxes will disappear from the screen.
- Wyse 150 or Wyse 325 Terminals:
 1. Press the <SHIFT> and <SETUP> keys simultaneously. Release both keys. At the bottom of the screen appear several boxes.
 2. Press the <F4> key. Three columns of boxes appear on the screen.
 3. Press the <SPACEBAR> until the baud rate is '9600'.
 4. Press the <F12> key.
 5. Press the <SPACEBAR> once to display 'Yes'.
 6. Press the <F12> key to save the changes. The configuration boxes disappear from the screen.

The Communication Station

Ordinarily, information is sent and received from the CPU via a terminal. However, inventory data is sent to the CPU via a Telxon unit. A switchbox allows a terminal and a Telxon to share access to the CPU (a 'Communication Station'). By selecting either 'Terminal' or 'Telxon Unit' on the switchbox, (these are labeled 'A' and 'B', respectively), you can easily change back and forth from the one to the other. To set this up, you will need the cables provided by Dynix for connecting the terminal and the Telxon to the switchbox. Follow the steps below:

1. Disconnect the black modtap and CPU cable from the terminal.
2. Take the modtap and CPU cable just disconnected, and attach it to the connector labeled 'CPU' or 'C' on the back of the switchbox. This connector is centered above the two slots labeled 'Telxon Unit' (or 'B') and 'Terminal' (or 'A').
3. Attach one end of the terminal/switchbox cable (or TLX1) to the connector on the terminal from where you removed the modtap and CPU cable.
4. Attach the other end of the TLX1 cable to the connector on the switchbox labeled 'Terminal' (or 'A').
5. The Telxon cable (or TLX3) has one end labeled 'A/B Switch End'. Attach this end to the connector on the switchbox labeled 'Telxon Unit' (or 'B'). The other end of this cable will be connected to the Telxon unit when you are ready to send data.

The communication station is now ready to transfer data from the Telxon unit to the Dynix system.

Step 4 – Set up the Telxon

Before proceeding with Telxon inventory, see the section 'Overview of Inventory via a Telxon' above.

1. To clear the Inventory or Circulation file from the Telxon unit:
From the Telxon Inventory menu, select number 3: 'Erase inv file'.
From the Telxon Circulation menu, select number 4: 'Erase circ file'.
2. Hold down the <EXIT> key until the Telxon beeps three times. If there is data on the Telxon it will prompt to erase the file. Respond by hitting the <YES> key. (Yes/no questions must be responded to by pressing either the <YES> key or the <NO> key. Do not use the 'N' key as it is the same key as the <YES> key on the 701). Once the file has been erased, the following will display:
'1 – Portable circ 2 – Inventory'.
3. To set the configuration of the Telxon (baud rate, data bits, stop bits, parity, etc), select number 1: 'Portable circ'. At the circulation menu, hold down the <EXIT> key until the unit beeps three times. It will then return to the main menu.
4. To access the inventory menu, select number 2: 'Inventory'.
5. Select 'Record inv' by either pressing number '1', or advancing the pointer to that option via an arrow key and then pressing <ENTER>. Then the Telxon will display the current date and time.
6. If the date and time are correct, press the <YES> key to continue. If not, press the <NO> key, which then allows them to be changed. Once they have been accepted, the Telxon displays its 'memory remaining'.
7. After viewing the 'memory remaining' information, press the <ENTER> key. A barcode prompt ('#-----') appears.

Step 5 – Scan the Barcodes

Before beginning inventory, make sure that the Telxon has been cleared since the last time it was used to ensure that any remaining barcodes are not included with the inventory. (This section assumes you have completed 'Step 1 – Preparing the system for inventory').

Scanning Barcodes on the Telxon

1. At the barcode prompt ('#-----') begin scanning barcodes. Each barcode will appear on the screen once it is scanned.
2. Scan items in shelf order. Be sure to stay in the same collection as the Telxon will not alert you otherwise. (Items from another collection will appear on the Exceptions Report). Remember to scan no more than 500 barcodes before transferring the data to the CPU (see 'Overview – Pros and Cons of Inventory Methods' above). Once a group of barcodes has been scanned, press the <EXIT> key and the Inventory Menu will reappear.

Bad Barcodes

While scanning barcodes into the Telxon, the following message may appear: '*Bad barcode – Override?*'. Respond <NO> to the prompt and try scanning the barcode again. If the Telxon still gives the error, write down the barcode, finish scanning the current group of items, and then try entering the barcode with IAT. If the terminal doesn't take it, the barcode may need to be replaced in UBR. If you answer <YES> to override and accept the bad barcode, you run the risk of having to erase the file and scan all the items again.

NOTE: If you try to override and accept a bad barcode, and then when transferring the data to the system it responds with '*No response received*', do the following:

1. Go into the 'Record Inventory' option
2. Hit the "B" (Review) key,
3. Then hit the "A" key to go to the beginning of the file, or the "C" key to go to the end of the file.
4. Look for the bad barcode by stepping through all the barcodes using the arrow keys (located above the <ENTER> key). Usually, it will be obvious. Simply hit the "G" key to erase the bad one.

Step 6 – Transfer Data from the Telxon to the System

Barcodes scanned into a Telxon unit must be transferred to the Dynix system for processing. This can be done in one of two ways:

1. Via a PC. For instructions using this method, see the document 'The Telxon/Percon Download process via Network'. (If you downloaded these instructions from our web site, a link for that document can be found on the same page).
2. Via a terminal.

Transferring data from a Telxon via a terminal

The barcodes are transferred from the Telxon to the Dynix system via the Communication Station (see 'Step 3 – Set Up the Communication Station' above). After setting up the communication station, you can send the barcodes entered into the Telxon to the Dynix system. If you used several Telxons for inventory, barcodes can only be transferred from one Telxon at a time. The barcodes should be transferred in shelf list order.

Follow the instructions below:

1. Press the "2" key at the Inventory menu on the Telxon to select 'Send inv' file. A sequence of messages which require responses appear on the Telxon's screen. The first

- message tells you to connect the Telxon to the switchbox: *'Connect Telxon to A/B switch'*.
2. At the communication station terminal, connect the end of the cable labeled 'Telxon' (TLX3) to the connector on the top of the Telxon.
 3. Press <ENTER> on the Telxon to continue. If the Telxon displays a *'Not connected'* message, make sure you have the correct cable attached, and that it is secure. Press <ENTER> on the Telxon, and the Telxon re-displays the *'Connect Telxon to A/B switch'* message. If the Telxon is properly connected, the message *'Be sure the Dynix system is ready'* displays. When this message appears, the Telxon is ready to transfer the group of barcodes. The Dynix system must now be prepared to receive the data.
 4. Make sure that the switch on the switchbox is set to 'Terminal' (or 'A').
 5. On the terminal, type "IFP" at the MINV menu in Circulation. The purpose of IFP is displayed, along with two fields for the agency and collection of the group of barcodes being inventoried. The name of your agency automatically appears on this screen.
 6. If the agency displayed is correct, press <RETURN>. If it is not, type the name of another agency at the command line. After entering the agency, you are prompted to enter a collection.
 7. Enter the collection code for the group of items being inventoried. An inventory starting date appears. The starting date is the date when the first group of barcodes was inventoried for this collection. If the collection has not yet been inventoried, the date shown is three days prior to today's date (see 'Appendix A – Inventory Troubleshooting - Frequently asked questions #1').
 8. After the starting date appears, type "C" (for Continue) on the terminal. If you wish to change the displayed agency or collection, type "R" (for Re-enter). After typing "C", the following message appears: *'Make sure the portable unit is ready. The portable unit's display should read: 'Press ENTER to begin transfer'. Turn the A/B switch to the portable unit and press the <ENTER> key on the unit. When the transfer is complete or an error occurs return the A/B switch to the terminal position and press <Enter> on the keyboard.'* When this screen appears, the terminal is ready to receive the data from the Telxon unit.
 9. Press <ENTER> on the Telxon. The Telxon displays the message *'Press ENTER to begin the transfer'*.
 10. Turn the switch on the switchbox from 'Terminal' (or 'A') to 'Telxon' (or 'B').
 11. Press the <ENTER> key on the Telxon. If everything is set up correctly, the data transfer will begin. The data is sent as a series of data blocks. Each data block contains about four barcodes. After the data transfer begins, the Telxon unit beeps and displays the word *'Sending'*, meaning that the barcodes are being transferred to the CPU. It also displays the number of data blocks sent until all the data has been transferred. The time required to transfer the data depends on the number of barcodes. It normally takes about 15-20 minutes to transfer 500 barcodes. It is not necessary to stay with the terminal while the barcodes are being transferred. When the transfer is complete, the message *'File Transfer Complete'* appears on the Telxon. If an error message appears on the Telxon or terminal during the transfer, you may need to contact Dynix for assistance. (See 'Appendix A – Inventory Troubleshooting – How to avoid problems transferring data from the Telxon to the terminal').
 12. Now that the data has been sent to the CPU, return the switch on the switchbox to 'Terminal' (or 'A').
 13. Press <RETURN> on the terminal. The following message appears: *'Inventory transactions successfully loaded from portable unit. Press Return to continue'*.
 14. Press <RETURN> again. The system immediately begins a Collection Check, as explained below.

Verifying the Collection (Collection Check)

When the system runs a collection check, it processes the group of barcodes just transferred to see how many belong to the collection inventoried. If most items belong to this collection, the system begins processing the barcodes (see 'Processing Barcodes' below for further explanation). On the other hand, if most items belong to another collection, the system will prompt before proceeding.

For example, suppose you inventory items that are mostly from the Fiction collection, yet in IFP you enter the collection 'Non-fiction'. In this case, the system displays: *'It appears that the barcodes came from the Fiction collection. Proceed with Original or New?'*. Type "N" (for New) to change the collection to 'Fiction'. (If you type "O" (for Original) the collection will not change, and items from the 'Fiction' collection in this batch will then be inventoried under the 'Non-fiction' collection. Also, all the Fiction items in this group will appear on the Exceptions Report for Non-fiction).

Processing Barcodes

After the collection check is complete, the system begins processing each barcode. It normally takes about 5-7 minutes to process 500 barcodes.

NOTE: You must stay with the terminal during the processing.

While the system is processing each barcode, the screen displays agency, collection, inventory start date, and two counts. The counts are explained below:

1. **# Inventoried.** The cumulative number of barcodes being inventoried in is group.
2. **# Misshelved.** The cumulative number of misshelved items found in this group of barcodes. This refers to items that are in the wrong collection and items that are misshelved in the right collection. This count appears only if the collection record is set up to report misshelved items as explained in 'Step 1 – Prepare the System for Inventory – Updating Collection Codes'.

When the system has processed each barcode in the group, a message may appear reporting how many items in the '# Inventoried' count above have already been inventoried. This can occur for a several reasons, such as if some of the items in this group were inventoried previously with another collection, or if the barcode was scanned twice. If this message appears, press <RETURN> to continue. Finally, the following message may appear: *'Processing complete. Remember to delete the inventory file on the portable unit. Press Return to continue.'*

Before deleting the inventory file on the Telxon after the barcodes are processed, you may want to verify that the transactions are complete. There have been cases where libraries have received the message that processing is complete, but due to incorrect setup or problems with the Telxon, the records did not make it to the system. Verify the transactions by searching for a few of the holdings inventoried in the cataloging account in UBR or UHR, then checking the 'DATE INVENTORIED' field. (UBR and UHR are explained in the Cataloging Manual). The item's inventory date is the fourth value of the 'ADD/MOD/CD/INV' field. This should be the most recent date that the item was inventoried, If it is not, or if it is blank, the data did not transfer successfully.

Once the barcodes have been processed, proceed as follows:

1. If the Telxon screen is blank, press the <ON/OFF> key. Then press <ENTER> to return to the Inventory menu.
2. Select number 3: 'Erase Inv File' to erase the barcodes that were previously transferred to the CPU. The message *'Ok to erase inv file? YES/NO'* appears on the Telxon screen. Press the <YES> key to erase the inv file. The Telxon informs you that the inv file was erased and returns to the Inventory menu. The Telxon is now ready to scan more barcodes.

3. Press <RETURN> on the Terminal. The following message displays: *'Print the Inventory Exceptions Report as soon as possible. Press Return to return to Menu'*.
4. As soon as possible, print the Exceptions Report for this group of items so that the exceptions data is current. This is explained in 'Step 7 – Print the Exceptions Report'.
5. To continue, press <RETURN>. The MINV menu reappears.

Step 7 – Print the Exceptions Report (RIE)

An Exceptions Report can be printed after processing one or more groups of barcodes. It lists the exception or “problem” items (such as those which are misshelved or belong to another agency), along with why it’s included, so the problems can be resolved. A complete list of exception messages and resolutions is provided in 'Step 8 – Resolve Problem Items'.

It is important to print the Exceptions Report after each group of barcodes has been processed. Doing this will give a manageable report of inventory exceptions. The longer you wait to print exceptions, the greater the possibility that an exception item may be checked out or otherwise moved before the exception can be resolved. If several people are doing inventory on a collection, be sure to coordinate the printing of exceptions to avoid the loss of data. After verifying that the Exceptions Report has printed without problem, delete that group of exceptions. If each group of exceptions is not deleted, they will appear on subsequent Exceptions Reports and may confuse the report results in the future.

NOTE: RIE only prints for one collection at a time.

To print the Exceptions Report, follow the steps below:

1. Type “RIE” at any Circulation menu. The 'Inventory Exceptions Report' screen appears, displaying the local agency and a place to fill in the collection to be covered by the report.
2. Enter the collection code for the collection whose exceptions will be included on the report. If an invalid collection code is entered, a list of collections appears from which to select the desired one. If a collection is entered that has no entries in the exceptions file, the message *'No exceptions to report for this collection'* appears, and another collection must be selected. Once that is done, the screen displays the agency, the collection, and the inventory starting date (which is three days prior to when inventory began for this collection. See 'Appendix A – Inventory Troubleshooting – Frequently asked questions #1' for further explanation of the inventory start date)
3. If you wish to change the collection, type “R” (for Re-enter). The collection prompt reappears where another collection can be entered.
4. Next, indicate where to send the report. Type “S” to send the report to the system printer, or press <RETURN> to send the report to the auxiliary printer. The report can not be printed to the screen without a workaround (see 'Workaround for printing report to the screen' below). Type “Q” to quit without printing the report. After a printer is selected, the system begins printing the report. The screen displays where the report is being printed followed by the command line: *'Warning! Deleted exception records cannot be printed on the Exceptions Report again. rePrint, Delete exception records, Reselect printer, Quit'*.
5. Before deleting the report, make sure the report was printed correctly. If it was not, or if you want another copy, type “P” (for rePrint). The system immediately reprints the report, and the above options reappear. If you have a problem printing the Exceptions Report and need to save it, type “Q”. The exception records just printed will be saved in the exceptions file and will appear on the next Exceptions Report. **NOTE:** The Quit command should be used only if there are problems printing the report. After typing “Q”, the MINV menu appears.

6. If you wish to reprint the report at another printer, type "R" (for Reselect printer). Select the desired printer from the list of printing command options.
7. After the report is printed successfully, type "D" to delete it. The message '*Exception records being deleted*' appears.
NOTE: The Delete option deletes only the exceptions just printed; exceptions for other collections are not affected. **These items cannot be printed again on another Exceptions Report and once deleted, Dynix personnel cannot retrieve them.**
8. After the exceptions records are deleted, the screen shows the agency, collection, inventory start date, where the Exceptions Report was printed, and the number of deleted records. To continue, press <RETURN>, and the MINV menu displays.

Workaround for printing report to the screen

There is no option to print the Exceptions Report to the screen, but it can still be printed to the screen as follows:

1. Go into 'CSPS' from the Circulation Master Menu
2. Enter "NOPRINT" in the 'RPT DESTINATION' field. (The field will display 'PRINT TO TERMINAL').
3. File the record.
4. Go into 'RIE' and choose to print to the aux printer.
NOTE: The terminal may lock during this attempt. If so, press the <SETUP> key on the upper right-hand side. If this doesn't allow the data to print to the screen, or if the terminal hangs again, call Dynix to unhang the terminal and clear out the file.

Explanation of Exceptions Report

The Exceptions Report heading shows the date the report was printed, the agency and the collection. (If the report covers multiple collections, the report is divided by collection). Below the heading is a key to symbols on the report. The rest of the report lists each exception. For each, the following information will display:

- 'Before' item. This is the item inventoried immediately before the corresponding exception along with its author, title, and call number. It is marked with the '@' symbol. (It should be shelved to the left of the exception item).
NOTE: If the very first item inventoried in a group of items is an exception, a 'before' item is not reported for that exception.
- Exception item. This is the current exception item along with its author, title, call number, the date it was inventoried and the reason for its inclusion. It is marked with the symbol '***'. Exception items are listed in the order in which they were found during inventory. 'Step 8 - Resolve Problem Items' provides a list of exception messages and possible resolutions.
- "After" item. This is the item inventoried immediately after the corresponding exception item along with its author, title and call number. It is marked with the '!' symbol. (It should be shelved to the right of the exception item).
NOTE: If the very last item inventoried in a group of items is an exception, an 'after' item is not reported for that exception.

The 'before' and 'after' item's call number can assist in finding the exception item, if needed.

Step 8 – Resolve Problem Items

The Exceptions Report assists in resolving a collection's problem items. This section provides a list of exception messages and possible resolutions.

Some of the following messages can also appear on the screen when exception items are inventoried on a terminal. The message appears so it can be addressed immediately, if desired.

If, however, the exception is ignored, it will appear on the printed Exceptions Report. Items on the report should be resolved as soon as possible to avoid its being checked out or removed from the shelf in the interim.

If the Report covers multiple groups of barcodes or collections, it may be desirable to have more than one staff member resolve the exceptions. And when dividing the task among staff members, it may be helpful to duplicate the printout, or separate the report by group or collection. Remember, if the printout is lost, it cannot be re-printed once the exceptions have been deleted.

Several exception messages can be responded to by updating or creating a holdings record. In those cases, refer to the Cataloging manual ("Holdings Record" chapter) for information.

Below are messages that appear on both the Exceptions Report and the terminal screen:

- Item is misshelved or it has items misshelved in front of it. Locate the item on the shelf and make sure it is shelved correctly. If it is, check several of the items in front of it until the misshelved item is located.
- Item belongs in the Fiction collection. Re-shelve the item in the correct collection. If an item's current collection is incorrect, the collection on the item's holdings record should be updated.
- Item has no call #. Assign a call number to the item by updating its holdings record in UBR.
- Holdings Record is missing Collection information. Assign a collection to the item by updating its holdings record in UBR.
- Item is possibly in the wrong Collection. This indicates that the item's collection might be invalid. To verify the item's correct collection, access its holdings record. If the displayed collection is not valid, enter a valid collection code and reshelve the item correctly.
- Holdings Record is missing Secondary Agency information. Assign a secondary agency to the item by updating its holdings record in UBR.
- Item has no Holdings Record. This indicates one of two things.
 1. The item has no holdings record, in which case one must be created.
 2. The barcode was scanned incorrectly. Count the number of digits. (Dynix barcodes should have 14).
- Item has an invalid barcode. Attach a new barcode to the item. Then access a holdings update screen for the item and replace the item barcode. (Replacing an item's barcode is explained under 'Holdings Records – Replacing an Item's Barcode' in the Cataloging Manual).
- No status S.A. record in CODES file. Assign a valid item status to the item. This is done by using Update Status of Items (USI) (explained in 'Step 11 - Resolve Missing Inventory Items'). Another option is to create a new item status code using UISC.

Following are several additional messages that appear only on the Exceptions Report during inventory, but not on the screen. There are a variety of ways to respond to these.

- Item has item status of Checked Out. Resolve possible inconsistency. Item status was changed same date Inventory was taken on this item. The item's status might be incorrect because it was changed on the same day the item was inventoried.
NOTE: This message applies only to items inventoried on a Telxon.
Some possibilities for resolving this problem are:
 1. Check the shelf for the item and verify its actual status. If the listed status is incorrect, either check in the item or manually update its status via USI.
 2. Relocate the item.
- COLL.T record missing in CODES file. The item's collection is invalid. Either create a UCOLL record for that collection, or enter another collection on the item's holdings record via UBR.

Finally, there is a message that only appears on the terminal screen, not on the Exceptions Report:

- Item has ALREADY been inventoried. Re-shelve the item.

Step 9 – Run Find Missing Inventory (FMI)

'Find Missing Inventory' (FMI) is used to identify potentially missing items and changing their status to 'Missing Inventory' (MI). Before running FMI for a particular collection, all its shelved items must be inventoried and its Exceptions Report entries should be resolved. **NOTE:** The system does not consider a collection's inventory complete until FMI has been run for it.

When FMI is run, it processes every holdings record on the system, checking for the collection(s) specified. Of those items, it considers any 'Missing Inventory' that were not inventoried or used since that collection's inventory began, and changes their status to 'MI'. Although FMI can be run for one collection at a time, it saves time to run it for multiple collections (as it takes just as long to process the entire holdings file regardless of how many collections it checks). The length of time depends on the size of the holdings file and the activity on the system. It may be best to run FMI overnight so that it will not affect the response time for other users on the system.

NOTE: FMI must be run for each collection so that the system considers inventory complete. Otherwise, the inventory dates and statistical reports for that collection might be inaccurate. For this reason, run FMI even if you do not wish to view Missing Items for a collection.

Running the FMI Utility

To run FMI follow the steps below:

1. Type "FMI" at any Circulation system menu. The name of the local agency appears on the screen.
2. To run FMI for a collection at this agency, simply press <RETURN>. However, to run FMI for a collection at another agency, type in the name of that agency. If an invalid agency is entered, a list of valid ones appears.
3. Next, enter the desired collection code. If an invalid code is entered, a list of valid ones appears.
 - If FMI was already run for this code, a message such as: '*FMI has already been run for this collection on 15 FEB 2000*' will appear. Before running FMI again for this collection, it must be re-inventoried.
 - If the collection has not been inventoried, the message '*This collection has never been inventoried*' appears.

Press <RETURN> after either of the above to enter another collection code.

4. If you wish to run FMI for more than one collection, enter the next collection code, and it will be added to the screen. Up to 10 collections can be selected at once.
5. Press <RETURN> after adding all desired collections. The screen will then show the name of the selected agency and several columns of information:
 - Collection. This lists the name of each collection for which FMI is being run.
 - Inventory Start. This lists the date when inventory started for this collection. It will be three days prior to when inventory actually began. (See 'Appendix A – Inventory Troubleshooting – Frequently asked questions #1' for more information).
 - # Checked. As FMI processes, this column will show how many items in the collection have been checked. (FMI checks each item in the collection).
 - # Missing. As FMI processes, this column will show the cumulative number of missing items in the collection.
6. Next the system prompts to continue running FMI for the displayed collection(s). Type a "Y" to continue with the selected agency and collections. However, if you wish to modify

the agency or collection list, type "N". Type "Q" to quit without running the report. Once you proceed with the report, the number of items processed will be displayed at the bottom of the screen. This is the number of holdings for the selected collection(s) that have an 'In' status AND that were not inventoried, used, or modified during that collection's inventory period. FMI changes these items' status to 'MI'.

NOTE: FMI only changes the status of items that should be currently in. Other statuses (such as 'Mending', 'Lost', and 'Missing') are not changed, as the system assumes that these items are not supposed to be on the shelf and will be inventoried in some other way.

If FMI is run overnight and an item's status is changed after midnight, the date of the item's status change is the day FMI began, not when the status was actually changed. This allows the missing report and RECALL statements to work properly.

7. When FMI is finished, the message '*Processing complete *** Press Return to return to menu*' appears, along with the number of items in the collection, the number of items whose status was just changed to 'MI', and the total number of holdings checked by FMI. Pressing <RETURN> here brings up the MINV menu.

Step 10 – Print the Missing Inventory Report (RIS)

After running FMI, print a report of items whose status was changed to 'MI' via Report of Item Status (RIS). This allows you to verify whether these items are actually missing and take the appropriate action.

Setting up a Missing Inventory Report via RIS

1. Type "RIS" at a Circulation system menu. The Report Summary screen appears which lists the existing item status reports, and allows you to create, print, and update them.
2. If a report for Missing Inventory already exists, simply select it by typing its line number.
3. If there is no Missing Inventory report, create it by typing "N" (for New). At the prompt "Insert as what number?" type the line number where the report will appear on the list.
4. When the new report screen appears, the command line automatically prompts for the first field: 'REPORT NAME'. Type in 'Missing Inventory' and press <RETURN>.
5. Type 'MI' in the STATUS(ES)' field and press <RETURN> twice.
6. Type in the date that FMI was run for a specific collection or group of collections in the 'AFTER OR ON DATE FIELD', then press <RETURN>.
7. Type in the date that FMI was run for a specific collection or group of collections in the 'BEFORE OR ON DATE FIELD' and press <RETURN>.

NOTE: It is best to enter the same date in both fields as this helps limit the size of the report so it is more manageable. If the date fields are left blank, all items in the database with the MI status will be included. For example, suppose you wish to print the missing report for the Fiction collection. If you ran FMI for this collection on 15 Feb 2000, enter this date in both fields, and the report will list missing items from the Fiction collection. However, if FMI was run more than once on this date or if FMI was run for more than one collection, the missing report covers those collections as well. (The report will be sorted by collection.) If FMI began on this date, but did not finish until the following day, the collection will still appear on the report.

If you do not know when FMI was run for a collection, use Display Inventory Dates (DID) to display the date. The Inventory Finish date in DID is the date that FMI was run for the collection. (DID is explained in 'Step 1 – Prepare the System for Inventory – Checking Display Inventory

Dates'). If a time period is selected when FMI was not run at all, the system generates a blank report.

Printing the Report

1. Type "P" followed by the number of the report to be printed. The selected report is highlighted on the screen. A message such as: '*Select Items that changed status after 15 FEB 2000*' appears at the command line. This prompt shows the 'AFTER OR ON DATE' currently specified in the report's record in RIS, if any. If one is not specified, the message '*Select Items that changed after no specific date*' appears.
2. If this date is correct, press <RETURN>. Otherwise, enter the desired date and press <RETURN>.
3. The same applies for the 'ON OR BEFORE DATE'. If it is correct, press <RETURN>. Otherwise, enter the desired date and press <RETURN>..
4. The report can be printed to the system printer, the auxiliary printer or to the screen, by entering: "SY", "A", or "SC" (respectively) and pressing <RETURN>.

The items on the report appear in call number order so you can easily check the shelves for the missing items.

Step 11 – Resolve Missing Inventory Items

After printing the missing inventory report, check the shelves and other areas of the library for the items listed. If an item is located, it can be checked in. When such an item's barcode is scanned at Checkin, the system will display '*Missing Inventory item found*'. Press "M" to continue. The item's status is changed from 'Missing Inventory' to 'Checked In' or 'Shelving Cart' (depending on your checkin procedure).

If Missing Inventory items are not located in the library, the status must be changed from 'Missing Inventory' to 'Missing'. This is done via USI.

Creating a saved list for use with USI

An easy way to change the status of a group of items (such as those on the missing report), is to create a saved list and run USI on that list. This procedure is outlined below:

To create a saved list for items on a Missing Inventory report, do the following:

1. Type "TCL" at the circulation master menu. This will drop the cursor to a '>' prompt.
2. Depending on the type of library system, do one of the following:
 - If this is a stand-alone site, type this recall statement:

```
SELECT HOLDINGS WITH STATUS = "MI"
```

- If this is a system with multiple agencies, type this recall statement (replacing XXX with the desired agency code).

```
SELECT HOLDINGS WITH STATUS = "MI" AND WITH AGENCY2 = "XXX"
```

NOTE: if you don't know your agency code, go into your circ account and type: "UAG". The code is listed in the 'AGENCY CODE' field.

Press <RETURN>.

3. After several minutes, the system will identify the number of items selected and bring up a '>>' prompt. At this prompt, type:

SAVE-LIST MISINV

5. Press <RETURN>.
6. The system reports that the list was saved, and returns to a '>' prompt.
7. Type "MM" <RETURN> to return to the circulation master menu.

Using USI to change 'Missing Inventory' to 'Missing'

The above saved list can now be used in USI to change the status of the 'Missing Inventory' items to 'Missing', as outlined below:

1. Type "USI" at the Circulation menu.
2. Type "S" for Saved list.
3. At the prompt '*Enter the name of the list that was selected previously at TCL:*' type "MISINV". Press <RETURN>.
4. The status codes file appears with a prompt asking for the status to change items to. Enter 'Missing's' line number. Do not use 'Missing Inventory'.
5. The system will proceed to change the status of each item from the saved list. When all the items have been processed, the following appears at the bottom of the screen: '*Print items whose status did NOT change?*'.
6. Type "Y" to print the report. Otherwise, type "N".

These items will be listed in any Item Status Report (RIS) that includes the status 'M' (for Missing). RIS is explained in 'Step 10 – Print the Missing Inventory Report (RIS)'.

Appendix A – Inventory Troubleshooting

How to avoid problems transferring data from the Telxon to the terminal.

- Check baud rates on the Telxon, terminal and port. (See 'Step 3 – Set Up the Communications Station' to set the baud rates on the terminal. See 'Step 4 – Set Up the Telxon' to set the baud rate on the Telxon).
- Before starting inventory you must go into portable circ to set the configuration on the Telxon (most crucial is making sure that the **date** is correct on the Telxon; otherwise inventory data could be lost).
- Check the cables as described in 'Step 4 – Set Up the Telxon' to ensure a proper connection.
- Make sure the Telxon's batteries are still good.
- **Don't enter more than 500 barcodes on the Telxon before processing.**
- Bad barcodes – While scanning barcodes into the Telxon, the following message may appear: '*Bad barcode – Override?*'. Respond "No" to the prompt and try scanning the barcode again. If the Telxon still gives the error, write down the barcode, finish scanning the current group of items, and then try entering the barcode with IAT. If the terminal doesn't take it, the barcode may need to be replaced in UBR. If you answer "Yes" to override and accept the bad barcode, you run the risk of having to erase the file and scan all the items again.

NOTE: If you try to override and accept a bad barcode, and then when transferring the data to the system it responds with '*No response received*', do the following:

5. Go into the 'Record Inventory' option
6. Hit the "B" (Review) key,
7. Then hit the "A" key to go to the beginning of the file, or the "C" key to go to the end of the file.
8. Look for the bad barcode by stepping through all the barcodes using the arrow keys (located above the <ENTER> key). Usually, it will be obvious. Simply hit the "G" key to erase the bad one.

How to avoid problems with RIE.

- If you want misshelved items to print on RIE, make sure the collection code (UCOLL) is set up so that "RPT" is in the Inventory Action field. (See 'Step 1 – Prepare the System for Inventory – Updating Collection Codes').
- To avoid printing old data, make sure to delete the report after each printing. Otherwise the data will remain in the file and be printed with the new. Also, make sure you have a hard copy of the report before deleting it, because once it's deleted, there's no way to get it back.

How to avoid problems with FMI.

- There is bug regarding DID and IFP or IAT. It goes like this. If you go into IFP or IAT and enter the wrong collection by accident, the unwanted collection gets opened up for inventory, which causes the collection's status in DID to be set to 'In Progress'. Should this occur, contact Dynix, either when you're ready to begin inventorying this collection or when you wish to run FMI, so that they can reset its status to 'Complete'. Otherwise, these items could be incorrectly set to a 'Missing Inventory' status by FMI.
- If you have been using a Telxon, make sure the data has been processed correctly before running FMI on that collection. Do this by going into one of the holdings records and checking to be sure there is an inventory date in the record. This date is located in the fourth value of the ADD/MOD/CD/INV field. If there is no date (or no recent date) in the fourth value, the data from the Telxon did not make it and if FMI is then run, those items will get set to a 'Missing Inventory' status. If you need help determining why the data from the Telxon didn't make it onto the system, call Dynix.

How to avoid problems with RIS.

- Most problems with RIS are related to the 'AFTER OR ON DATE' and the 'BEFORE OR ON DATE' fields. For inventory, both fields should have the **date FMI was run**. If you ran FMI on March 01, 2000, and are printing the report on March 03, 2000, enter March 01, 2000 in both fields (the date FMI was run). If you can't remember the date FMI was run, check the 'INVENTORY FINISH' value in DID for the collection. Remember, the status in DID must be 'Complete' in order to get a Missing Inventory report for that collection.

Frequently asked questions

1. Why is the 'Inventory Start Date' a date three days prior to when the inventory actually began on the collection?

- The system displays an 'Inventory Start Date' that is three days prior to when the items were initially inventoried. This is to accommodate libraries that use Telxons. The system will not accept data downloaded from a Telxon if it has a date stamp that precedes the 'Inventory Start Date' in DID. Since it's not always possible to download a Telxon the same day the barcodes were entered, the Dynix software was written to allow three days for this to occur. Once the first Telxon dump has been made, there is no time limit to finish the collection. **The only concern is dumping a collection's first batch of data within three days of scanning it into the Telxon.**

2. How long do I have to finish inventorying a collection?

- Once you have made the first Telxon dump (which must be done within three days of entering the first barcode on the Telxon – see questions number 1, above), you can take as long as you need to finish the collection.

3. What's the difference between the status of 'Missing Inventory' and 'Missing'?

- The status of 'Missing Inventory' indicates only that the item was not present at inventory. The status of 'Missing' means that an item should be in the library, but you have been unable to locate it.

4. How do I respond to the following prompt when running IFP or RIE?: *'It appears that the barcodes came from the XXXXX collection. Proceed with Original or New?'*

- If this appears, type "N" (for New) to change the collection to the correct one (whatever it says in place of 'XXXXX'). If you type "O" (for Original), the collection will not be changed, and items from the 'XXXXX' collection will then be inventoried under the collection you entered when first accessing IFP or RIE. All items in this group that are not in that collection will appear on the Exceptions Report.

5. Are there any advantages to using a terminal instead of a Telxon to inventory?

- A terminal has an added feature. When scanning some types of exception items, the system immediately displays a message describing the problem. This gives you a choice. You can either resolve the problem immediately, or wait until the item appears on the Exceptions Report.

NOTE: For items that have already been inventoried, a message will appear on the screen, but the item will not be included in the Exceptions Report.

(See also 'Overview – Pros and Cons of Inventory Methods - Differences Between Using a Telxon and a Terminal' for additional information).

APPENDIX B – Explanation of Inventory Terms

Inventory is done using menu options on the Inventory Menu (MINV), which is found on the Circulation Master Menu. Each of the options is explained briefly below:

1. Inventory From Portable (IFP). Allows you to transfer a group of inventory barcodes from a portable Telxon unit to the Dynix system.
2. Inventory At Terminal (IAT). Allows you to scan a group of inventory barcodes on a terminal.
3. Inventory From Network (IFN). Allows you to process inventory data into the Dynix system that you have loaded on your PC or transferred from your PC to the Dynix server.
4. Report Inventory Exceptions (RIE). Prints a report of inventory exceptions from a group of items. These exceptions can include items whose status is incorrect, items that belong to another collection or agency, misshelved items, items that are not on the system, and other items.
5. Find Missing Inventory (FMI). Allows you to process the entire HOLDINGS file to identify which items are missing from a collection. Items that are missing are given the status 'Missing Inventory' (MI). FMI is run after an entire collection (or collections) has been inventoried.
6. Report Item Status (RIS). This is the same RIS function found in other modules. It can be used here to list items that were set to a status of 'Missing Inventory' by FMI.
7. Update Status of Items (USI). This is the same USI function found in other modules. After library staff have confirmed that 'Missing Inventory' items are not on the shelves, USI is used to change these item's status to 'Missing'.
Display Inventory Dates (DID). Displays a collection's start and end inventory dates, along with its inventory status. If the collection has not been completed, DID shows the last date for which items in that collection were inventoried.
8. Collection codes (UCOLL). UCOLL is the control record that allows updating the collection codes. For inventory purposes, these records determine whether misshelved items are tracked during inventory (see 'Step 1 - Prepare the System for Inventory - Updating Collection Codes').
9. Item Status codes (UISC). UISC is the control record that allows updating the item status codes. For inventory purposes, these records determine what action inventory will take when encountering items with a particular status. (See 'Step 1 - Prepare the System for Inventory - Updating Item Status Codes').