Scan and Click
Inventory with a handheld scanner

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Handheld Scanners

• Scanners compatible with Workflows
  – Intermec T2090
  – Intermec 9940
  – Intermec 2410

• BPCC uses the 2410
Intermec 2410

- If ordered from SIRSI, does not need to be configured. Also you may contact SIRSI directly if you have problems.
- Startup Procedure Document
- Holds up to 3,000 barcodes but does not give a warning when limit is reached and may not load all transactions.
Basics

- Handheld Scanners can be used to inventory items or mark them as used.
- Need the All Inventory and/or the Scanner report groups added to training and production.
- Locate T24FCOPY software under `c:\Program Files\Sirsi\Workflows`; use this to load transactions from scanner to PC. I recommend saving to desktop.
FAQs

- Great FAQs:
- Making an Inventory
- Using Portable Scanners with Unicorn
Reports

- There are 2 report groups that contain reports to conduct an inventory:
  - All Inventory group
  - Scanner group
- Basically the All Inventory reports contain fewer selection criteria and output options.
<table>
<thead>
<tr>
<th>Report Name</th>
<th>Source</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Charge to MISSING</td>
<td>setmissing</td>
<td>(info)</td>
</tr>
<tr>
<td>List Inventory by Item Number</td>
<td>invlist</td>
<td>(info)</td>
</tr>
<tr>
<td>List Items Missing</td>
<td>invmissing</td>
<td>(info)</td>
</tr>
<tr>
<td>Load Personal Transactions</td>
<td>loadpersonal</td>
<td>(info)</td>
</tr>
<tr>
<td>Load Scanner Transactions</td>
<td>loadscanner</td>
<td>(info)</td>
</tr>
<tr>
<td>Set Inventory Date</td>
<td>initinv</td>
<td>(info)</td>
</tr>
<tr>
<td>Set Items to DISCARD</td>
<td>setdiscard</td>
<td>(info)</td>
</tr>
<tr>
<td>Report Name</td>
<td>Source</td>
<td></td>
</tr>
<tr>
<td>-----------------------------</td>
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<td></td>
</tr>
<tr>
<td>Step 1) Set Inventory Date</td>
<td>startinv</td>
<td></td>
</tr>
<tr>
<td>Step 2) Load Scanned Barcodes</td>
<td>loadbarcodes</td>
<td></td>
</tr>
<tr>
<td>Step 3a) Inventory Date BEFORE</td>
<td>invbefore</td>
<td></td>
</tr>
<tr>
<td>Step 3b) Inventory Date NEVER</td>
<td>invnever</td>
<td></td>
</tr>
<tr>
<td>Step 4) Missing Copies List</td>
<td>invmisslist</td>
<td></td>
</tr>
<tr>
<td>Step 5) Checkout to MISSING</td>
<td>setmissing</td>
<td></td>
</tr>
<tr>
<td>Step 6) Set Copies to DISCARD</td>
<td>setdiscards</td>
<td></td>
</tr>
<tr>
<td>Step 7) Convert Copies to DISCARD</td>
<td>cvtdiscard</td>
<td></td>
</tr>
<tr>
<td>Step 8) Remove DISCARD Copies</td>
<td>deldiscard</td>
<td></td>
</tr>
</tbody>
</table>

**Source** column contains links to more information.
Steps

1. Run the set inventory date report - All Inventory.
2. Scan barcodes to the barcode.bin file.
3. Upload scanner transactions to PC. Can scan more barcodes after this step.
4. Transfer scanner transactions from PC to server with Scanner Transfer wizard.
PC filename and path:

```
c:\Program Files\SIRSI\Workflows\bar.sav
```

[Download]

[Run program]

[Convert .EXE]

[Upload]

TRAKKER Antares filename:

```
c:\bar.sav
```

[Delete Terminal File]

[After Upload]

[Delete Now]

Use C: for flash drive, E: for RAM drive, and G: for extended storage drive. For example, C:example.bin.

[Exit]

[Help]
Transfer: Transfer file

**Transfer From**
- directory and filename: C:\Program Files\SIRS\Workflows\bar.sav

**Transfer To**
- upath entry: scanner
- library: BPCC
- filename: scanner.dat

[OK]  [Close]
• 5) Run Load Scanner Transactions or the Load Scanned Barcodes report.
• 6) Run List Items Missing—may want to do this at the beginning.
• 7) Run List reports 1) identify items never inventoried—Inventory Date NEVER 2) items inventoried in the past but not in the current inventory—Inventory Date BEFORE.
• You can also use the List Inventory by Item Number report for step 7.
Count of Transactions Loaded

- Check misordered: □ Yes □ No
- Check unknown: □ Yes □ No
- Use short form: □ Yes □ No

Transaction type: Inventory

Buttons:
- Schedule 1
- Save As Template 2
- Cancel 3
Steps

• 8) Use lists to check shelf again
• 9) Run Charge to Missing report-BPCC stops here
• 10) Run Set Items to Discard report
• 11) Run List Inventory report to get a list of items to be discarded.
• 12) Run Remove Discard Report
Schedule New Reports: Create set

Library: EPC
Home location: ATLAS, AVSHELVES, BIOGRAPHY
Current location: ATLAS, AVSHELVES, BIOGRAPHY
Item type:
Item category 1:
Item category 2:
Permanent: Yes  No
Circulate: Yes  No
Comments:
In the shadow catalog: Yes  No  Both
Accountable: Yes  No
Number of pieces:
Date created:
Last activity date:
Date last charged:
Date last discharged:
Date inventoried: NEVER
Number of times inventoried:
Number of charges:
Number of total charges:
Number of inhouse charges:
Number of copy holds:
Available on hold: Yes  No
Number of bills:

Schedule 1  Save As Template 2  Cancel 3
Inventory at BPCC

- Inventory is conducted annually.
- Keep records for missing items 3 years and then discard.
- Multiple missing users & locations: MISS9900, MISS0001, MISS0102, etc.
- Charge to missing report-run then checkin and then checkout to current missing user i.e. MISS0203