Overview

This document will show you how to perform a Stocktake of the Library Collection which should take place every two years. Depending on your school’s circumstances you will either Stocktake the entire Library or perform a Rolling Stocktake.

Before commencing a Stocktake, there are a number of procedures which are advisable. All documentations should be saved in Google Drive.

1. In Google Drive create a Folder called Library and then another Folder inside called Stocktake. At this top level create a ‘Running Record’ of all Stocktakes. (examples at end of this document).

2. Create a Document for this Stocktake and provide appropriate headings such as Stocktake of Junior Fiction | July 2014. This should be saved in your new Folder.

3. Cull in advance – weed any items already Missing or Disposed.

4. Check Copy information by navigating to Cataloguing > Copies, and selecting your Collection. Sort your result by clicking the Sort button and select the sortableClassification field by clicking the left arrow. Checking the first page and the last page will help you to identify any resources which have had problems being catalogued.

5. Spine labels should be correct and easily read and items in good repair.

6. Decide on the Collection to Stocktake and encourage users to return as much as possible. This is not essential as items on loan are counted in the Stocktake.

7. Print a Statistical Report of each Collection in order to ascertain the exact number of resources within each Collection and to assist in the identification of any Classifications which may need to be corrected. This helps to ensure the consistency of data within Oliver. This can be done in Statistics:
   1. Go to Management > Statistics.
   2. Select Copies > Total record count.
   3. Select Branch > Library, click Next.
   4. In First Grouping, select Collection, click next.
   5. This provides a list of Collections with the number of resources in each.

7. It is also a good idea to take note of your current situation by going to Cataloguing > Copies and performing searches such as:
   1. Number of items Available, on Loan, Missing, marked for Disposal.

Note: The above statistics should now be entered into your Stocktake Document.

Jeanette Davies
**Commencing the Stocktake**

1. Identify the Collection which will be covered in the Stocktake and refer to the Statistics report.

2. **Cataloguing > Stocktake:** Create a New Stocktake, the Descriptor should be the year the Stocktake is being performed e.g. 2014 – Fiction  
   2014 – Non-Fiction etc.
   
   This will depend on previous Stocktakes. When you create a new Stocktake, ideally you want to compare with previous, so e.g. if you had a stocktake in 2012 and the Collections done were Fiction and Non-Fiction then your 2014 one should be the same so your current Stocktake can compare with the 2012 one. Please contact me if you are unsure of your own situation.

3. Click on **Add Section** > select Branch and Collection. **Note:** Under normal circumstances you would leave Classification From and To blank. This will ensure the entire Collection is initialised. Click Save.

4. Click Scan Barcodes and you are ready to Stocktake.

**Note:**

1. A good idea is to have crates or boxes labeled ready to place problem resources in as you Stocktake. Some examples might be ‘damaged’ or ‘incorrect classification’ etc.

These resources can then be dealt with after the Stocktake. You should not make any cataloguing changes during Stocktake process of that particular Collection.
Scan Barcodes

1. Now you are ready to input barcodes either by direct scanning or import.
2. Once all barcodes are scanned click on Process. Always click ‘NO’ when asked if scanned in correct Shelf Order.
3. Process button can be used to update the number of copies. Processing does not alter Cataloguing records but does produce Error reports.
4. It is advisable to Process only after the majority of barcodes have been scanned. Reports can be created for items not yet scanned.
5. When you start scanning again, those items scanned will display a message ‘Found copy: This copy was missing from the stocktake but has since been scanned’.
6. If you need to pause during the Stocktake, click Finish. You can then click Process to determine which titles have not yet been scanned. Click on Error Copies > List. To print a Report go to Function Menu > Reports > Stocktake Catalogue.
7. When ready to start again, open Stocktake, click on the number to the left of the descriptor of the Stocktake you wish to continue.
8. Continue to find resources, process until you can no longer find anymore resources.
9. It is fine to continue normal Circulation after having started a Stocktake, however you should always scan the barcode into its assigned Stocktake Section after it has been returned in CircDesk.
10. A nice search to do after a process is: From the Function Menu choose Search.
   1. Tick the ‘Any’ button.
   2. You can now view copies which contain any error flag.
Finalise Stocktake

1. Click on Finalise to complete the Stocktake for that section.

2. You will see **Submitted** appear in the Finalisation Result column. This means that during Housekeeping that night the Finalisation will occur. The next day you will see the word **Completed** appear.

3. Cataloguing records for Missing items will now have the status changed from Available to Missing.

4. If desired it is possible to Finalise All when all sections are completed.

5. To locate all items which now have the status changed to Missing, go to **Copies > Search > Select Collection > Status and select Missing**. Print report and select **Barcode List** report. Use Excel to edit and add title of Disposed Report and date, delete any columns not required.

6. To dispose items which need to be culled from the Collection after the Stocktake, go to **Copies > Multi-Barcode search**. Scan barcodes > Search > Print Report. Go to **Exchange > select Status to be changed to Disposed**.

7. Weed all.
Create Reports

Note: Your Stocktake Reports can now be run from the Function Menu.

Run the following Stocktake Reports from Stocktake > Select Current Stocktake > Summary Reports (from Function Menu/Tabs):

1. Stocktake Summary (Choose PDF)
2. Stocktake Summary with Cost (Choose PDF)
3. The following Statistical Reports are useful as well

Cataloguing > Copies

1. Select Collection <Enter> – will display total number of resources.
2. Select Collection and Disposed <Enter> – will display total number of resources marked for Disposal.
3. Select Collection and Missing <Enter> – will display total number of resources marked as Missing.
4. Select Collection and On Loan <Enter> – will display total number of resources on Loan.

Note: The statistics should match the figures from your Stocktake after Finalisation. Enter these figures into your Stocktake Document.

Important:

1. Please save this document, give it an appropriate name and upload to Google Drive.
2. You also need to print the Stocktake Summary Reports and have them signed by your Principal. This needs to be shown to the Auditor.

It is recommended that each Library maintains a Stocktake Overview, which lists each Collection and/or Section covered with dates of the Stocktake. This will indicate when the entire Library has been done over a period of two years, as required by the Auditor.
Example of Tracking Individual Stocktake Collection

Collection: Fiction

Date of Previous Stocktake:

<table>
<thead>
<tr>
<th>Date</th>
<th>Missing</th>
<th>Disposed</th>
<th>On Loan</th>
<th>Available</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prior to Initialisation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>After Finalisation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Weeded on</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Final Stats</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Notes</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Example of Running Record of Stocktakes

<table>
<thead>
<tr>
<th>Stocktake History</th>
<th>Big Books</th>
<th>Fiction</th>
<th>Non Fiction</th>
<th>Teacher Resources</th>
<th>Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>July</td>
<td></td>
<td>August</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2013</td>
<td></td>
<td>May</td>
<td></td>
<td>May</td>
<td>June</td>
</tr>
<tr>
<td>2014</td>
<td>August</td>
<td></td>
<td>November</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2015</td>
<td></td>
<td>June</td>
<td></td>
<td></td>
<td>July</td>
</tr>
<tr>
<td>2016</td>
<td></td>
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</tr>
</tbody>
</table>
Flow Chart

Step 1
Add Stocktake

Step 2
Add Sections to Stocktake

Step 3
Import/Scan Barcodes into Section

Step 4
Process Section

Step 5
Run Error Reports and locate items ‘Not Scanned Yet’

Step 6
Process Section again

Step 7
Finalise