

## CARL Conversations: August 5, 2021

### Topic: Inventory

#### Question and Answer Session

1. What is the current method for running inventory?

Currently, OWLS has come up with a procedure similar to that of Sierra for inventory. Staff will run a weeding report for the collection they want to inventory, then OWLS staff will globally update that collection from a status of 'Available' to a status of 'Missing.' Staff will then use Connect to "check-in" those items on shelf. Once staff are done "checking-in" the items, they will run another Items by Status report to locate those items still with a 'Missing' status.

2. Why do staff need to run a weeding report before inventory?

Because CARL's Inventory Utility isn't working as TLC expected, they are doing more development on it,; therefore, OWLS had to come up with another solution. When collections are globally updated, this changes the Last Circulation Date in item records. To make sure library staff have the most current Last Circ Dates for their weeding reports, OWLS highly recommends staff running a weeding report prior to inventory. That way staff will have an idea of the last circ date of a collection once it has been inventoried.

3. What should staff do when letting OWLS know they want to inventory?

Staff should run a weeding report for the collection. Then, they can contact OWLS to let them know they want to inventory and what location/media code(s) they would like to inventory. If there is more than one collection, please start with one, and then OWLS staff will notify staff when each collection has been updated.

4. When a global update is done, how does that effect items that have a status of "checked out", "in-transit", etc.?

When OWLS staff update a collection to 'Missing' they will only be looking for items in the collection that have a status of 'On Shelf' (Available). Items with any other status will not be changed to 'Missing.'

5. Is there any recommendation as to how often libraries should be doing inventory?

No. This is up to the libraries to how they want to do this. There are resources online that could help guide libraries in their inventory procedures but in terms of the system recommending this, there are none. This would be based on many factors, including your library, budgets, collection, and community needs. And this differs from library to library.

6. Would it be the same as inventory if staff were doing weeding and marked items they didn't find on shelf as 'Missing?'

Essentially, yes. Weeding is only pulling a specific collection, though. Such as, items that haven't circ'd in X years. Whereas inventory is pulling a list of all items on shelf in a collection. But if staff use weeding as inventory, then that is up to them.

7. Is there a CARL Conversation on the Holds Purchase Alert report? Can the ratios be explained again?

Yes. Those reports were discussed in the Reports Conversation in March. The Q&A for it is [here](#). But to recap, the ratios for this report are to locate those titles that that meet the ratio you put in the parameters. If a ratio of 3:1 is put in, then that is saying: any title that has 3 holds to one copy. If you run the report for the system, this will show system information. If you run it for your branch only, then it will show titles that your branch has one copy of with 3 or more holds on it. If you were to put in a ratio of 3:0 for your branch then this means titles that your branch does not own, but you have 3 or more patrons with a hold on it. These reports are great for deciding if you want to purchase titles or not based on the holds. This is similar to the High Demand Holds report in Sierra.