Inventory @ UEL

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Access Services Librarian
Session Overview

• Why?
• Other projects
• UE’s projects
• Inventory future @ UE
Why Inventory?
Inventory @ Eastern IL U

- Why? Showcase Library Stacks Management System
- Why? Inventory more cost effective than replacing missing titles
- LSMS delivered & statistical analysis is compelling
- COST: Inventory 2.2¢ v. Replacement $30

Inventory @ U Mississippi

• Last inventory in 1980s
• Why? Negative LibQual comments about library collection
• Used Millennium’s inventory feature + Library Stacks Management System
• Science Library = full scan & Main Library = PR-PT
• Discovered misshelving pattern – PR1369, PE1417, PR1417

Inventory @ Notre Dame University

• Why? Established practice
• 2 decades of printed shelf list inventories
• Smart & cheap solution – Excel and Visual Basic
  • Signal for status problem, misshelved, not on list
  • Comment fields for condition issues
• Significant decrease in labor = 12 weeks → 3 weeks

Project Overview

• Goal: Align OPAC with books on shelf
• Started 2012
• Finished 2016
• Used 2 different techniques
• Total Admin Buy-In
UE

- Private, liberal arts & sciences university with some professional degrees
- 2500 FTE students
- 500 faculty, staff & administrators
- 5 librarians – tenured w/ faculty rank
- 6 paraprofessionals
- 1 library director
Access Services Dept

• 4 Paraprofessionals
  • 1.33 = Interlibrary Loan
  • All oversee Information Desk
  • Tuesdays from 3:15-4:30 pm – only time everyone is in office

• 5-44 student workers
  • 107 hours/week in summers
  • 308 hours/week during semesters = 44 students
Collection Info

• UE Library = Bower Suhrheinrich & Clifford Buildings
  • C = built in 1955; renovated in 1986; 9,000 sq. ft.
  • BS = built in 1986; renovated in 2015-16; 56,000 sq. ft.
• 232,000+ items spread across 2 floors in 2 buildings
• Inventory has never been done
• May 2015 – Feb 2016 library was renovated
  • All BS books were boxed up and stored offsite
Phase 1 – Old School

• 2012-2013
• 2012 – did LC classes cataloger wanted
• 2013 – determined most popular LC classes
• Used shelf list
• Lots of errors in shelf list
Major Space Issue

- Within a range, call numbers were displayed in two ways:
  - with a space before the DOT or
  - without a space
- This effected how the list is sorted:
  - all spaces are sorted in one group and
  - no spaces sorted next
- Required diligent shelf reading
# 2012-2013 Inventory Results

<table>
<thead>
<tr>
<th>Call #</th>
<th>#</th>
<th>NOS</th>
<th>% NOS</th>
<th>To TS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2012</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ND</td>
<td>1449</td>
<td>38</td>
<td>3%</td>
<td>3</td>
</tr>
<tr>
<td>BS</td>
<td>2112</td>
<td>34</td>
<td>2%</td>
<td>1</td>
</tr>
<tr>
<td>M</td>
<td>4173</td>
<td>310</td>
<td>7%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2013</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PS</td>
<td>11845</td>
<td>262</td>
<td>2%</td>
<td>112</td>
</tr>
<tr>
<td>PR</td>
<td>11091</td>
<td>232</td>
<td>2%</td>
<td>96</td>
</tr>
<tr>
<td>ML</td>
<td>5688</td>
<td>70</td>
<td>1%</td>
<td>54</td>
</tr>
<tr>
<td>PN</td>
<td>7952</td>
<td>106</td>
<td>1%</td>
<td>59</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>36576</strong></td>
<td><strong>1052</strong></td>
<td><strong>3%</strong></td>
<td><strong>325</strong></td>
</tr>
</tbody>
</table>
Incomplete Data

• Cost – no data
• Shelf lists showed all items, including charged items
• To TS – can only guess at issues: no barcode, spine label/call number mismatch, etc
• Shelving errors – no data
  • Minor misshelves = correct shelf or shelf immediately before or after
  • Major misshelves = beyond this zone
• Conditions Problems – no data
Inventory @ Franklin Pierce

Introduction:

- Franklin Pierce College is a small liberal arts college in southwest New Hampshire. We have about 1700 undergraduate students. The library has a staff of 8.5FTE, plus student employees. Our collection is approx. 140,000 volumes.
- The last inventory had been done 6 years ago, prior to our move to Voyager. We needed to update our database.
- With no built-in inventory method in Voyager, we began to look at how other Voyager libraries had performed inventory.
- An Enduser presentation introduced Paul Johnson’s (Bryan College) program: [http://library.bryan.edu/inventory/](http://library.bryan.edu/inventory/). This method is based on Access, easy to run, easy to make changes to, and we already had most of the equipment needed. We could also use our wireless network which meant real time updates.
Phase 2 – Getting Smarter

• Used STATISTICAL CATEGORY feature in Voyager
• Gave all items in a class INVENTORY MISSING status
• Recorded total number of items
• Went to stacks with laptop & barcode scanner
• Scanned barcodes into Voyager’s Circulation Module’s PICK AND SCAN
• Change status to INVENTORY YYYY ON SHELF
Inventory Missing Reports

• INVENTORY MISSING + INVENTORY ON SHELF
  • Systems/cataloguer removed duplicate statuses

• Checked report against shelf (matching barcodes)
  • Found all those skipped shelves

• Other ITEM statuses: overdue, lost, charged, etc.
  • Items on shelf and with other statuses were updated to ON SHELF

• Report generated 5 times before all remaining items were declared missing
Post Phase 2 Process

• All items marked WITHDRAWN and suppressed from OPAC
• List given to Acquisitions Librarian for action
  • Circulation counts for each item on Inventory Missing Report
<table>
<thead>
<tr>
<th></th>
<th>Before</th>
<th>After</th>
<th>% on Shelf</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>1,083</td>
<td>1,074</td>
<td>99.2%</td>
</tr>
<tr>
<td>B</td>
<td>21,244</td>
<td>21,080</td>
<td>99.2%</td>
</tr>
<tr>
<td>C</td>
<td>1,477</td>
<td>1,466</td>
<td>99.3%</td>
</tr>
<tr>
<td>D</td>
<td>15,453</td>
<td>15,363</td>
<td>99.4%</td>
</tr>
<tr>
<td>E</td>
<td>10,206</td>
<td>10,128</td>
<td>99.2%</td>
</tr>
<tr>
<td>F</td>
<td>3,966</td>
<td>3,946</td>
<td>99.5%</td>
</tr>
<tr>
<td>G</td>
<td>5,497</td>
<td>5,440</td>
<td>99.0%</td>
</tr>
<tr>
<td>H</td>
<td>35,612</td>
<td>35,352</td>
<td>99.3%</td>
</tr>
<tr>
<td>J</td>
<td>6,712</td>
<td>6,450</td>
<td>96.1%</td>
</tr>
<tr>
<td>K</td>
<td>2,218</td>
<td>2,218</td>
<td>100.0%</td>
</tr>
<tr>
<td>L</td>
<td>6,901</td>
<td>6,527</td>
<td>95%</td>
</tr>
<tr>
<td></td>
<td><strong>Total</strong></td>
<td></td>
<td><strong>98.9%</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Before</th>
<th>After</th>
<th>% on Shelf</th>
</tr>
</thead>
<tbody>
<tr>
<td>M</td>
<td>13,152</td>
<td>13,067</td>
<td>99.4%</td>
</tr>
<tr>
<td>N</td>
<td>6,789</td>
<td>6,708</td>
<td>98.8%</td>
</tr>
<tr>
<td>P</td>
<td>43,499</td>
<td>43,287</td>
<td>99.5%</td>
</tr>
<tr>
<td>Q</td>
<td>27,304</td>
<td>26,624</td>
<td>97.5%</td>
</tr>
<tr>
<td>R</td>
<td>9,996</td>
<td>9,871</td>
<td>98.7%</td>
</tr>
<tr>
<td>S</td>
<td>1,532</td>
<td>1,531</td>
<td>99.9%</td>
</tr>
<tr>
<td>T</td>
<td>11,688</td>
<td>11,148</td>
<td>95.4%</td>
</tr>
<tr>
<td>U</td>
<td>1,179</td>
<td>1,153</td>
<td>97.8%</td>
</tr>
<tr>
<td>V</td>
<td>157</td>
<td>152</td>
<td>96.8%</td>
</tr>
<tr>
<td>Z</td>
<td>4,590</td>
<td>4,450</td>
<td>96.9%</td>
</tr>
<tr>
<td></td>
<td><strong>OVER</strong></td>
<td></td>
<td><strong>99.1%</strong></td>
</tr>
</tbody>
</table>

**Total** 230,718 227,494 **98.9%**
Incomplete Data

• Cost – no data
• Problem barcodes, spine label/call number mismatch – no data
• Shelving errors – no data
  • Minor misshelves = correct shelf or shelf immediately before or after
  • Major misshelves = beyond this zone
• Conditions Problems – no data
Inventoried Missing Books
Missing Procedure

• NOT ON SHELF = MISSING
• 4 WEEKS OVERDUE = LOST
• Reported items – search almost daily for 3 months
• Withdrawn and suppressed
• How others do it:
  • Chen & Ma – 4 or 5 x in 8 months
  • Niland & Kurth – 3 x in 12 months; last time 1 year after 1st
Phase 3 – Using RFID

• Inventory performed by RFID Digital Library Assistant
• 3M software
• All tagging done by student workers – Fall 2015 – 2016
• Tag placement & wanding books = did we do good?
Complete Data?

• Cost – analyze daily schedules
• Minor & major misshelved items – DLA report
• Other ITEM statuses – DLA report
• Inconsistent call numbers/spine labels?
• Condition problems
Bibliography


Bibliography


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