

Inventory Basics

- Decide which types of items will be listed as exceptions and how you will resolve those exceptions. (items such as misshelved items, duplicate items, etc.).
- Resolve all problems for one collection before starting inventory for another collection.
- Item statuses currently not reported: Damaged, Checked-in, Missing Inventory, Shelving Cart, Withdrawn.
- Choose whether to report items as misshelved; this is set in the collection parameters.
- Systems Admin will make appropriate changes to collections and item statuses.

Scanning Barcodes

- Barcodes should be scanned Collection by Collection. It is recommended to complete each collection before moving to the next.
- Scan barcodes in call# order. Do not scan more than 500 barcodes before downloading into Horizon. Make sure to download a file the very first day as this sets the inventory date.
- On the scanner, press F3 to select Inventory from the Main Menu.
- Press F1 to start the inventory.
- Scan the item barcodes. Press F1 after each scan to go to the next.

Downloading Barcodes

- Create a folder (on the desktop or on a drive) to store the download files.
- Using the PSC XFER32 program (System Admins will install), select the Receive Files button.
- At the Select File to Receive window, browse to the folder you created
- Type the name of the file.
Name the file to indicate the collection and call# range if needed (i.e. gena-b, refa-l).
- Click the Open button.
- When the File Transfer Utility window appears, press F2 on the scanner to get the Send Menu.
- Press F3 to send.
- After the file has downloaded, press F4 to exit the Send screen.
- Go to your download folder and open (with Notepad) to confirm the download worked and barcodes are listed.
- If the download was successful, press F3 to enter the Erase Options screen.
- Press F3 twice more to erase the file.
- Press F4 to return to the main menu.

Starting the Inventory Process in Horizon

- In Horizon, select Inventory/Percon Inventory.
- Enter location and collection, call# should auto-fill, and then select whether to override call# checks.
- Click the Files button and locate the barcode file being imported (from the download folder previously created).
Click Open.
- At the Inventory window, click OK.
- If there are exceptions, make note of the session ID number in case you need to print the Inventory Exceptions report just for this session.

Running the Inventory Exceptions Report

- Select Inventory/Report Inventory Exceptions.
- Enter location, collection, call# type, and Session ID#.
- Horizon displays the exceptions in a window; you can print or save the file from the file menu.
- Once the exceptions have been resolved, click Clear to delete the exceptions from the tables.

Running the Missing Inventory Report

- Do not run this report. Contact System Admins for assistance.