Welcome to G4 Inventory

Tips for a simpler way to work

More Help Guides at www.lrms.com

Inventory made simpler

Inventorying your collection materials is quite simple; G4's Inventory starts with an understanding of how it works.

Materials listed within your collections have a code known as a STATUS code. Materials that are not checked out and are considered available for Checkout have a Status code of "A".

Those that are lost should have a Status code of "L"; collection items can also have additional codes assigned, during inventory these items that are marked with a Status code other tan "A" are not affected by these next steps. These items will not be inventoried unless that item is actually scanned during the inventory process. G4 works on the premise if an item is scanned it must be recognized as valid and existing and will account for this during the inventory process within a Exceptions List.

So How does this work? All Status codes of "A' are Globally changed to an "M" Status code and as each item is scanned and recognized it has this Status code changed back to an "A" making it available and accounting for the item to be present.

Catalog Menu

Basic Functions

Search/Edit Catalog

Import/Export

Easy ISBN Cataloging
Instantly Search & Catalog MARC records
Using LRMS and numerous
Z39.50 data bases by ISBN number

Inventory

Labels & Cards

Pick and Pull
Alternate MARC Record Search & Cataloging
by Title, Author, Subject, Keyword & Number
Limited Data Base Search

Advanced Functions

Manage Collections

Define Call Number Categories

Design Form Templates

Design MARC Templates

Define Catalog Indexes

Mass Update

Maintain Authority Tables

Maintain Holding Codes

Edit MARC Tag Definitions

Vendor Book Order

How Inventory Works!

Understanding how it works:

1 Determine what and how inventory is to be conducted, will Weeding (Removal) of materials take place during the inventory process, how many collections are to be inventoried

2 Automatic Check-in, G4 by design is Defaulted to automatically check-in any item scanned that was missed through the normal circulation return process. (NOTE: items can be accidentally shelved before properly being checked-in) This option can be unchecked and turned off. (No.1 & 2- Reference Video Available)

3 Items in the library or other locations when its barcode number (Book label Not the ISBN number) is scanned will be accounted for and placed into the Success list and log, Items not recognize during the scanning process will be listed within the Exceptions Log. Each item scanned is sequentially numbered in the order of scanning to assist with locating any item scanned. No. 3- Reference Video Available

4 When Inventory is accomplished by using a Bar Code Scanner that collects/stores the scanned in barcodes, Use the "Process Scanned File" option located Top Center of the inventory screen for adding this file. Review these video's after studying this document, they all have audio explanation (me ☺). Let's move on to the reviewing the rest of this document. No. 4 – Reference Video Available
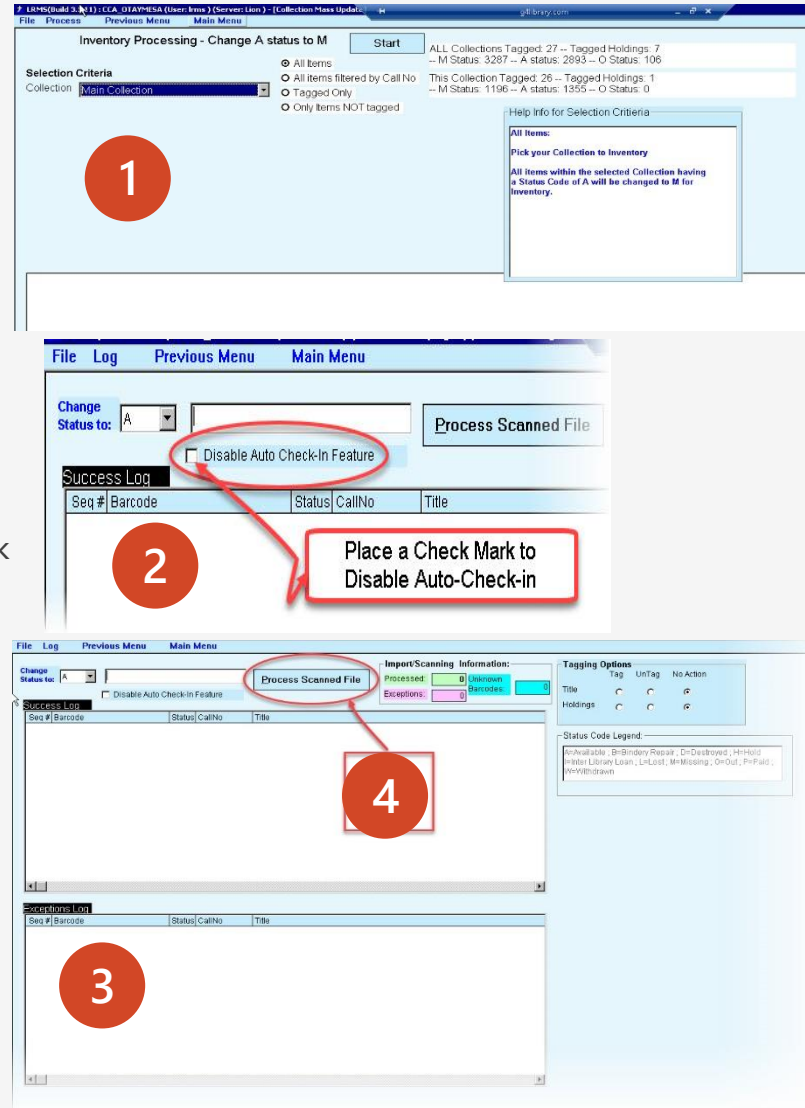
Plan what to inventory

✓ What is the best method that should be used for doing this Inventory? The best if possible is to have you library Closed during the time of inventory. Is this a practical request, not always can you close a library during inventory. When this is a factor select inventory using Call Number ranges and proceed scanning by sections of the library.

✓ Can Circulation be active during Inventory?

- Yes you can Circulate during Inventory.,

- What happens if I have already begun inventory and someone needs a book that has not yet been scanned for inventory?

- No Worries; G4 will checkout the book(s) as it is designed to recognize a physical scan of any item through Circulation with a different Status Code other than "A" to be Valid when scanned into the Circulation Barcode field and will circulate the Item. (Note: if an item was on the library shelf that contains a Status Code of O (Out) G4 will create a statement before continuing Checkout.

✓ How do I determine what Items are Missing after I have completed my Physical Inventory?

- Select from the Main Menu - Reports Management then Catalog Reporting where you can select the Missing Inventory report. Search your Collection looking for any item that will have the Status Code of **M**; investigate these reported items to be sure they were not overlooked (look for sequential patterns) during inventory.

- **Main Menu/Back Office**

Circulation Management
Circulate, Manage Circulation Periods & Calendars

Borrower Management
Add/Edit/Delete, Import & Manage Patron Groups

Catalog Management
Import records from book vendors
Manage Collections and templates
Quickly add Catalog and Holding Records with Easy Cataloging
Quickly create records with your templates
Add images from: Amazon, Google, Open Library, World Cat
Inventory your holdings

Reports Management
Utilize existing or create custom Circulation, Catalog, Borrower, & Analysis Reports

Create Labels
Print Barcode, Spine Labels & ID Cards

Advanced Settings
Manage Master settings, Printers, & Program Users

Contact Customer Support
Send Real-time support ideas and requests

? Help
Redirect to Web based help documentation

Click the above image to see the Missing Item Report.

Use the Catalog Menu to view and print Missing Items

Search the Catalog Menu
How this works:

1

✓ Click the Main Menu/Back Office, Catalog Management menu

2

✓ Select from the Catalog Menu where you can select the Search/Edit.

3

✓ Setup Catalog Search by picking the collection to be reported on.

✓ Change the Find For description to Status Code, add to the description field the **M** for Missing, Click Search.

✓ Displayed records on these pages can be printed by selecting **Print this page** or **Print all pages**. See how - Chick the Video Link on this page.

Click Here for Video