



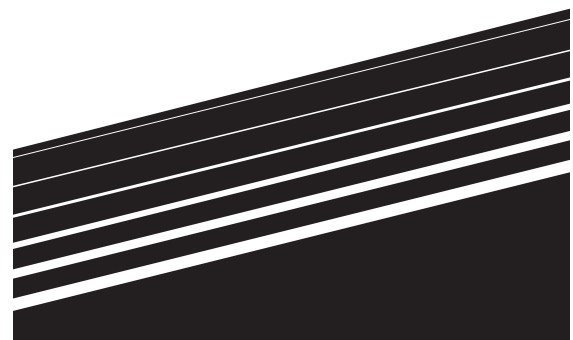
# OASIS

# Library Stocktake

**Revised edition 2000**



Training and Development Directorate



**Office Automation School Information System**

*Second edition* Training and Development Directorate  
NSW Department of Education and  
Training 2000  
Revised Information Technology Bureau

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# Contents

<b>Acknowledgements</b>	<b>3</b>
<b>Introduction to the Training Program</b>	<b>5</b>
<b>Outcomes</b>	<b>11</b>
<b>Session 1</b> Background	<b>13</b>
<b>Session 2</b> Getting Ready to Start	<b>17</b>
<b>Session 3</b> Markers, Stocktake, Processing	<b>25</b>
<b>Session 4</b> Stocktake Procedures	<b>27</b>
<b>Session 5</b> Accept Remote Batch	<b>31</b>
<b>Session 6</b> Entry and Report	<b>35</b>
<b>Session 7</b> Finalise	<b>39</b>



# Acknowledgements

## **OASIS library stocktake**

Developed for Training and Development Directorate by School Technology Support Staff. The document incorporates materials previously published by Regional Information Technology Units and Information Technology Directorate.

Revised in 2000 by Doug Jenkins, Information Technology Bureau.



# Introduction to the Training Program

This program is designed to introduce new users of OASIS to the system and to give new users the skills required to use the system in the school. It is aimed at all staff who are unfamiliar with, or just starting to use OASIS.

## **What is OASIS?**

OASIS is the Office Automation and School Information System used by the NSW Department of School Education.

## **OASIS consists of a number of interrelated modules**

*School Information*

*Student and Staff Information*

*Library Management*

*Financial Management*

*System Maintenance*

*Backup and Recovery*

*Standard Reports*

*School Timetable*

*Report Generator*

OASIS allows the gathering of school management information into a single data base.

# Program Overview

The program has three components, each component having a number of sections.

## **Component One: OASIS Administration and the OASIS System**

This section introduces the use of OASIS for school administration, and basic management of the system.

## **Component Two: OASIS Finance**

OASIS Finance introduces the use of OASIS for the management of school finances.

## **Component Three: OASIS Library**

OASIS Library introduces the use of OASIS in the school library.

# Program Structure

You should start with the OASIS System, thereafter selection of components will be dependent on your learning needs.

You may choose to complete all the sections within a particular component or sections from different components.

This will be dependent on the requirements of your particular workplace.

Where completion of a particular section presupposes material covered elsewhere, this will be stated in the introduction.

# **Program Design**

The program is learner centred and materials are designed to be used flexibly. The learning material is print based and can stand alone. Sections within each component follow the same pattern which includes description of learning outcomes, and specific activities designed to achieve these outcomes.

# **Learning Outcomes**

The learning outcomes are presented as a list in the introduction of each section. Use the list to assess your current level of knowledge and to assist you to decide how much time you will need to spend on each section.

The outcomes are designed for self assessment. Determine which outcomes you need to achieve prior to commencing. This self assessment should be done in consultation with your supervisor in your school.

# **Training Process**

Discuss the process of self paced training with your supervisor.

Each training module should be completed in Palm Tree Central which is the learning section in OASIS. To use Palm Tree Central you will need to gain access through the password 'Learn'. (If this is not available in your school, your supervisor will need to liaise with the school's systems administrator to enable you to gain access).

# **Information and Activities**

Each section of the training program includes information about the particular function of the system being learned, its purpose and function in school administration, finance or library system.

The activities consist of step by step guides to performing the functions of the system.

In order to complete the activities you will need access to a computer loaded with OASIS Version 2.

## **Study Options**

The components are based on the principles of open learning and are designed to be used flexibly. You will need to decide which sections or parts of sections are appropriate for you given your background skills, current knowledge and employment needs.

You may like to form a study group with others in your area and work through the material with other people.

You may decide to study the material on your own, occasionally discussing your progress with a more experienced colleague.

Determine the best method for you in consultation with your supervisor.

## **Time Commitment**

The time taken to work through a section will depend on your level of knowledge and the depth to which you wish to study and practice the material. Times for the completion of activities within a section have not been given as this will depend on your starting skill.



## **OASIS Help**

If you are using OASIS in your workplace and are in any doubt about the correct procedure contact the School Technology Support Unit on:

**Phone: 132348**



# Outcomes

## **On completion of this booklet, participants will be able to**

- ✓ Understand rationale for stocktake
- ✓ Understand issues involved in stocktake workpractices
- ✓ Configure ASP portable Barcode Reader for stocktake mode
- ✓ Run rebuilds and Weekly Housekeeping
- ✓ Set up backup sequence for stocktake
- ✓ Ensure the consistency of Locations, Classifications, and Dewey Suffix in General Resources
- ✓ Ensure the accuracy and consistency of barcode numbers
- ✓ Understand the concept of partial stocktake
- ✓ Initialise a stocktake
- ✓ Use the portable barcode reader to download stocktake scans
- ✓ Run appropriate stocktake reports
- ✓ Finalise the stocktake
- ✓ Write off missing and disposed items



# Session



## Background

Stocktake is an important process in the school library. It meets the audit requirements of the Department of Education and Training by reporting on stock losses and disposals during a given time period.

Stock control is also an important part of library management. Library staff can use the results of stocktake to

- provide information on the necessity to replace vital curriculum materials that have been mislaid
- provide information on weaknesses in the collection that need redressing.
- attempt to retrieve items that borrowers have not returned when they have moved on to another school

As well as the accountability aspect of stocktake, it is a vital component of keeping the library collection relevant to the curriculum and recreation needs of the school borrowers.

# Preparation for Stocktake

## Issues

- Develop an awareness of the issues involved in stocktake.
- Read the manual Volume 1 Section 4, pp. 95-120. Use the resource barcodes from the Palm Tree Central Tutorial Manual to do a “practice” stocktake. This helps you to get an overview and prepare you for the correct sequencing of events in the process.

## Stocktake scheduling

Stocktake does not have to be done as an end of year process. OASIS Library allows partial stocktakes to be completed during the two year period in which a stocktake should be performed. Use this flexibility to ensure that the task is not too onerous.

## Stocktake initialisation

Once a stocktake has been initialised it should be finalised as soon as possible after the process has been completed. Do not leave any part of the library collection as initialised but not finalised for undue lengths of time.

## Loans during stocktake

The **OASIS Library Manual** (p4-95) states:

“During stocktake, normal operations of the library can continue - there is no need to restrict services, sort resources into strict shelf order or limit circulation. Once the group of resources has been nominated for the stocktake, resources scanned in the borrowing process are automatically accounted for in the stocktake”.

While strictly speaking this is true, there are practical limitations in a school library situation. For example, in practice students would not be permitted to borrow from the section being currently scanned. Also another operator would have to be available to do the checking out process. If the school only has one barcode reader the operator would have to remember to download the barcode reader memory before the loan is processed. The reader memory would then have to be cleared before the stocktake continues.

Loans can be processed if a workstation is available and the details entered manually. Before continuing with stocktaking the Dewey range from which the loan was taken **Weekly Housekeeping** would have to be run.

Loans then may well have to be restricted during the stocktake to enable the process to proceed quickly and efficiently. Urgent loan details could be recorded on paper and then processed with any returns at the end of a particular stocktake session.

## **Resources lost or not returned by student/staff leavers**

If these resources are to be flagged as “M” Missing by the stocktake the following steps should be taken

- return by selecting **B2/E2** and manually typing in the resource barcode
- **<E>dit** the record in **B1/D1 General Resources** and change the status to “M” missing, enter date and comment



*Note: If desired a message can be entered on the student/staff record in **B2/A1** regarding the lost resource.*

## **Stocktake documentation**

Create a stocktake record to both outline your stocktake plan and log the steps in the process. This will help avoid problems like forgetting whether or not you initialised a sequence for stocktake, or whether the stocktake has been finalised.

Keeping a record also helps keep track of the dates initialisation and finalisation occurred. These dates will be essential when you run a Stocktake Report.

If you decide to run partial stocktakes over a two year period planning and recording the sequence of events is even more critical.

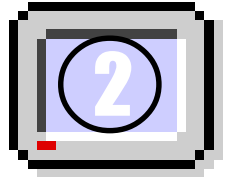
## **Processing new materials**

Fully process any items that have skeleton or partial entries. Make a decision when to stop processing new materials. Do not continue to add new resources to the section(s) that have been initialised for stocktake. Once the stocktake is finalised for that section(s) recommence adding new resources.

## **Returning items to the appropriate shelf location**

Although it is not necessary to have all items in their appropriate place on the shelves, it certainly makes stocktake easier if as many items as possible are in their correct shelf position. Check all those places where items may be temporarily located e.g., the repair shelves, new book display, resource boxes, closed reserve etc. Otherwise the tendency is to forget them until these items are listed in a missing report.

# Session



## Getting Ready to Start

### Check the ASP Portable Barcode Reader

- Make sure the battery is fully charged. Leave it connected to the home base with the power supply on for at least 24 hours. Make sure the switch on the reader itself is set to the “off” position.
- Check to see that the reader can read OASIS barcodes correctly. Function 08 will return the factory default setting by selecting “Yes”.
- Select Function 05 (15 for fairly old readers) Set the Char Delay to 005, the CR delay to 005 and the comma delay to 000. All other settings offered should be set to 000. This will ensure that the output from the barcode reader can be satisfactorily read by the computer and the OASIS software once you are ready to download the barcode read file.
- Before commencing scanning disconnect the barcode reader from the home base. Select Function 19 to clear the reader memory. Then select Function 23 to check on how many barcode reads are still in memory. If it displays that there are 0 scans then the memory is definitely clear.

## **Backup and rebuilds in stocktake mode**

It is essential that a **B4 N4 Weekly Housekeeping**, a **B4 N1 Rebuild**, and a **K1 Data Backup** is completed prior to initialisation of stocktake. If a problem arises phone School Technology Support on **132348**.

It is advisable to backup more frequently during stocktake. A K1 backup should be completed at an appropriate stage, e.g. the completion of scanning of a major section of the library such as non fiction. A K1 backup should still be performed at the end of each operational day.

In schools that have an Adlib system and share a fileserver with Administration, discuss the backup strategy before commencing the stocktake. Avoid doing stocktake while the Administration staff are completing their important end of year procedures such as Finance rollover.

## **Ensuring consistency in the library data prior to initialising stocktake**

Accuracy in stocktake is dependent on consistent and error free data in the shelf list and barcode fields. Initialising a stocktake without checking data is akin to doing a manual stocktake with the shelf list cards misfiled and the library shelves in a state of disarray. To ensure an expeditious stocktake undertake the preliminary steps that follow in place of the preparations you would have done in the past for a manual stocktake.

## **Location, Classification and Dewey Suffix fields**

The initialisation of a stocktake is dependent on these fields. Check library data to ensure the consistency of data entry in these fields. A shelf list report can be produced using the option **B4 G4**. The beginning and end of each Location and Classification sequence can then be checked for inconsistencies.

An alternative to producing a large report is to use the Enquiry module. To do this :

- At the *Enter Searchwords* prompt type in 001 and press **<Enter>**

<F1> Help <F10> Exit	ENQUIRY	Palm Tree Cent.
Enter Search Word(s)		
oo	<input type="text" value="001"/>	
Registered User: Palm Tree Central		

This should access the classification field.



*Note: if it does not then use the **<Page Down>** key until it does.*

Use the **Right Hand Arrow** key to open up the classification window.



In some schools these items could be followed by resources with Dewey Suffixes but no classification number. All items should have a classification and a Dewey Suffix.

- Use the <**Print Screen**> option or note down the details of items that need correction.
- Go into **B1 D1 General Resources** to make necessary corrections
- Use <**F4**> to go back into Enquiry mode. Start then to scan through the location and classification sequences. Check for inconsistencies, blanks and lower case suffixes. Where appropriate print or note the errors.
- Use <**F2**> to return to **General Resources** to make corrections.



*(NOTE: If there are a large number of lower case suffixes or it is difficult to identify them, request a Head Office Floppy from **School Technology Support** that will correct them automatically)*

The inconsistencies in the fields pertaining to the shelf list will generally misfile. This makes them fairly easy to identify when scanning the shelf list via the classification field through Enquiry. That is they will not be in the appropriate place in the sequence. They will generally appear between sequences. For example, the A800's will file at the end of the non-fiction sequence after 999, not in the 800's. In this case the filing sequence is correct. An example of a true misfile might be where an item appears with the call number EF BYA rather than F BYA. This would appear between the number 999 but before the classification F AAA.

<Fl> for Help		ENQUIRY		Palm Tree Cent.	
NAMES/AUTHORS					
Location-Classification					
		F MCN			Taking off
		F POS			The Pied Piper of Hamelin
Ahlberg, Allan		F RAY			Cat in a flap
Alexander, Charle		F STE			Vicki's habit
Aliki		F STE			Orange Wendy
Allen, Pamela		F TIT			Pumpkin pumpkin
Amor, Rick		F UDE			Asterix and son
		F ZIE			A new coat for Anna
	S E R	FF FIN			Finn and the big guy
	(=>	FF GRE			The great escape from the Ci
Australian indust	AV	304.2 KAN			Do the right thing kit produ
Australian resour	AV	363.7 ACI			Acid rain: the silent crisis
Basic concepts in	AV	428 WRI			Writing K-12: better writers
	AV	500 NAD			I can read about all kinds of
	C L A	AV 510.28 FIS			Fish scales Computer softwa
		AV 537 ELE			Plug it in and switch it on
001.64 THO	AV	551.2 VOL			Volcanoes. Yrs 8-10 [Video r
030 MAC	AV	574.5 ATT			The northern forests [Video r
030.2 GUI	AV	574.5 ATT			The baking deserts [Video re
		AV 612 CIR			The human body [video record
<F>ind <PgUp> <PgDn> <> <> <Enter> e<X>pand <Esc>					

Numbers always come first in the filing sequence followed by letters. In effect by identifying and correcting these inconsistencies, the filing sequences are being organised in the same way the shelf list cards would be checked in a manual system.

Once errors are corrected in the shelf list do a **B4 N1 Rebuild**. This would also be a good point to do a full K1 data backup prior to initialising stocktake.

If there are changes to be made globally to the location field refer to the **School Technology Support** page in the issue of **SCAN Vol.16 No.3 August, 1997, pp.41- 42** for details.



**NOTE:** When initialising the whole non fiction section or any part of it which includes Australian Literature, any classification numbers which have an A prefix will not be regarded as part of the range. It is necessary to initialise this section separately e.g. **A800 - A899**.

## Barcode field

It is important to also ensure that there are no errors in the barcode field. To check for errors a **B4 G2 Barcode/ Accession Cross Reference Report** can be produced. Alternatively use the Enquiry module as previously outlined.

- At the *Enter Searchwords* prompt type in the first barcode number e.g., R00001 and press **<Enter>**.

<F1> for Help	ENQUIRY	Palm Tree Cent.
BARCODE NUMBERS		
	Barcode	
0008262520 The R00028 2520 The R00029 2520 The		
A C C - Bulletin 024855 The north 024856 The bakin 024937 The carpe	(=> 000826 2520 The last pirate R00028 2520 The carpenter and joiner R00029 2520 The carpenter and joiner R00030 2520 The carpenter and joiner R00032 2520 Wild places of Australia R00034 2520 All at sea: a geography unit for Australian R00035 2520 All at sea: a geography unit for Australian: R00036 2520 Human geography : east and south east Asia : R00037 2520 The gourmet's guide to French cooking R00038 2520 Introducing art metalwork R00039 2520 Salinger's The catcher in the rye : a critic	
<F>ind <PgUp> <PgDn> <> <> <Enter> <Esc>		

- Use the **Right Hand Arrow** key to open up the barcode file window.
- Use the **<Page Up>** key to get to the top of the file. Any incorrect barcodes will appear here. Note them or use the **<Print Screen>** key to produce a list of numbers that need correction.



*(NOTE: If there are blanks when you go to the top of the barcode file contact **School Technology Support** on 132348)*

Items identified as having an incorrect barcode can be fixed using **B4 P2 Change Barcode Utility**. It is best to actually have the items affected on hand so that the correct barcode number can be scanned using the barcode reader during this process.

# Session

## Markers

Make a set of markers from three pieces of different coloured cardboard. The first marker can be placed at the beginning of the sequence to be scanned for stocktake. Use the second marker to indicate next resource to be scanned. This will help with the inevitable interruptions or allow a break to be taken without forgetting which particular resource was last scanned. The third marker should be set to indicate the end of the stocktake sequence that is to be initialised.

## Partial stocktake

A partial stocktake can be initialised by <S>electing either by location or Dewey Classification. It is advisable to do one section at a time rather than a large one. As a general rule select the shelves that would allow for a scanning session of no greater than 500 items. For example, the first 6 bays of the Fiction collection might cover titles with authors from A to LIN. It would be reasonable to initialise specifically for that area :

<i>Location</i>		<i>Location</i>
<i>Classification F</i>	<i>TO</i>	<i>Classification F</i>
<b>Dewey Suffix A</b>		<b>Dewey Suffix LIN</b>

Another example might be the Teacher Reference collection.

The first six bays might cover the Dewey range 001 to 599. It would be reasonable to initialise specifically for that area:

<i>Location</i>	<i>TR</i>		<i>Location</i>	<i>TR</i>
<i>Classification</i>	<i>001</i>	<i>TO</i>	<i>Classification</i>	<i>599</i>
<b>Dewey Suffix</b>			<b>Dewey Suffix</b>	

## **Processing options**

The two options for scanning resources are:

- using the barcode reader in portable mode and downloading through *H2 Accept Remote Batch*, or
- *H3 Entry* using a fixed barcode reader at the circulation desk. The disadvantage of *H3 Entry* mode is that resources have to be taken to the Circulation Desk to be scanned.

# Session



### Stocktake Procedure

- Check in any returned items, especially those that belong to the section that is going to be scanned for stocktake
- Run *B4 N4 Weekly Housekeeping, B4 N1 Rebuild Files*, and complete a *K1 Data Backup*.
- Ensure that all users are logged out. The only workstation operating should be the one that is used for stocktake.
- Initialise each section **ONCE** only. Never initialise the same section again during the current stocktake. If you shutdown in the afternoon, you can continue working again the next day. There is no need to initialise the same section again.
- Initialisation can take a long time to run. The time varies according to the size of the section that has been initialised. Smaller sections do not take as long.
- Remember if you initialise <A>ll then *OASIS LIBRARY* is expecting that you want to stocktake every item that is catalogued in *General Resources*.

## H1 Initialisation

- Once you select this option you are reminded that “This function should be run immediately after a WEEKLY HOUSEKEEPING has been complete. If you have not run this function select <Esc> and perform the operation. If you have run *Weekly Housekeeping* select <C>ontinue.

<F1> for Help	STOCKTAKE - INITIALISATION	Palm Tree Cent.
This function should be run immediately after a WEEKLY HOUSEKEEPING has been completed.		
<C>ontinue OR <Esc>		

- The option Bar gives you the opportunity to do a stocktake on <A>ll or <S>elect locations. In most circumstances you would not choose <A>ll. It really does mean having to run the stocktake procedure on the entire library collection.
- Choosing <S>elect you can enter the range for the section you intend to scan e.g. Shelf Locations

*From*

*Location*

*Classification F*

*Dewey Suffix A*

*TO*

*Location*

*Classification F*

*Dewey Suffix LIN*

<F1> for Help

STOCKTAKE - INITIALISATION

Palm Tree Cent.

Shelf Locations

From

Location :  
Classification : F  
Suffix : A

To

Location :  
Classification : F  
Suffix A : LIN

<C>onfirm Initialisation OR <Esc>

- The Option Bar now gives the opportunity to **<C>onfirm Initialisation** or **<Esc>**.

Select **<C>onfirm** .

If the initialisation was successful the message appears ***“Initialisation completed successfully”***.

If the initialisation was not successful it will prompt with the message ***“No items in this range”*** In this case either the range was entered incorrectly at the **<S>elect** option or there are errors in the shelf list. Refer back to page 6 to check on how these errors can be identified and corrected.

Shelf Locations

From

Location : S Senior  
Classification : 001  
Suffix :

To

Location : S Senior  
Classification : 299  
Suffix :

No Items in this range ... <Esc>



**NOTE:** *You can initialise more than one range consecutively. However it is important to remember by noting down the ranges that have been initialised.*

# Session



## Accept Remote Batch

### H2 Accept Remote Batch

- Make sure the ASP Portable Barcode reader is ready and the memory is clear



*NOTE: Refer to Session 2 on setting up the barcode reader*

- Disconnect the reader from the homebase and scan the barcodes for the items in the range that has been initialised.
- Once the scanning is complete for that range reconnect the reader to the homebase.
- The Option Bar offers **Shelf Locations** <A>ll <S>elect or <Esc>

<F1> for Help	STOCKTAKE - ACCEPT REMOTE BATCH	Palm Tree Cent.
Shelf Locations - <A>ll <S>elect <Esc>		

- Select <A>ll if the operator has initialised and scanned resources from more than one location. This will allow all shelf sequences on the ranges initialised to be checked when the resource barcodes are downloaded.
- Choose <S>elect if the operator has initialised only one range of shelf sequences and nominate that range again now.

<F1> for Help	STOCKTAKE - ACCEPT REMOTE BATCH	Palm Tree Cent.
Shelf Locations		
From -	Location :	
	Classification :	F
	Suffix :	A
To -	Location :	
	Classification :	F
	Suffix :	LIN
<Esc> when Finished		

- From the option bar select *Input data from <A>SP*
- Select *<C>confirm* to allow the system to check that the ASP Reader is connected.

A blank highlighted field will appear on the screen and the Option Bar will display *<Esc> when finished*.

<F1> for Help	STOCKTAKE - ACCEPT REMOTE BATCH	Palm Tree Cent.
Shelf Locations	:	ALL
<div style="border: 1px solid black; width: 150px; height: 20px; margin: 0 auto;"></div>		
<Esc> when Finished		

- At this point select *Function 11* from the barcode reader. The barcodes that have been scanned will be downloaded from the reader's memory. The operator will see the barcodes scrolling on the monitor.

- Press <Esc> when the download is finished and <C>*onfirm* to accept the stock batch. This will allow the barcodes that have been downloaded to be matched against the shelf list nominated in the initialisation of the stocktake.
- After the download the operator will be given the opportunity to Print reports. The <S>*elect* option for the nominated shelf location range will generate 4 reports as follows:

***Error report for stock batch***

(This will report on invalid barcodes in the stock batch)

01/10/97	Palm Tree Central School	Page 1
ERROR REPORT FOR ACCEPT STOCK BATCH		
Barcode	Error Found	
R00001	Item not on File	
R098761	Item not on File	
2 Errors Found		
Palm Tree Central *** END OF REPORT ***		

***Items marked as previously missing***

(This will report on items that were marked missing at the previous stocktake)

02/10/97	Palm Tree Central School	Page 1
ITEMS ENTERED DURING STOCKTAKE MARKED AS PREVIOUSLY MISSING		
Barcode	Shelf Location	Title
R008112520	F AHL	Woof!
R008122520	F ALL	Simon said
R008132520	F ALL	Who sank the boat?
R009692520	F BAK	Window
Palm Tree Central *** END OF REPORT ***		

### ***Items marked as not initialised***

(This will report on items which were not initialised for inclusion in the stocktake)

02/10/97	Palm Tree Central School	Page 1
ITEMS ENTERED DURING STOCKTAKE MARKED AS NOT INITIALISED		
Barcode	Shelf Location	Title
R009882520	BB F COL	The magic school bus lost in the solar system
R000512520	F BRI	The tinpot foreign general and the old iron wom
R000S52520	F HAN	My poppa loves old movies

### ***Items not in shelf location range***

(This will report on items located in the stock batch that were not in the indicated location range)

02/10/97	Palm Tree Central School	Page 1
ITEMS ENTERED DURING STOCKTAKE OUTSIDE THE NOMINATED RANGE OF LOCATIONS From FA To FLIN		
Barcode	Shelf Location	Title
R001892520	AV 612 CIR	The human body [video recording]
R003252520		Resource box for circulation [Kit]
Palm Tree Central *** END OF REPORT ***		

**ALWAYS** accept the reports that it produces. The information provided is essential to the success and accuracy of the stocktake.



**NOTE:** The **EOF** message simply means “End of File”. Often this will be the only error that is reported. Though it is reported as an error it is really just a message and as such needs no followup action.

# Session



## **H3 Entry**

This option is used primarily by schools using a fixed barcode reader.

If scanning in remote mode and items on shelves are reported as missing because they have not been accepted in remote batch for any reason, eg faulty barcode, scan or type in the barcode using **H3 Entry**.

Any additional resources that are reported as missing in **H4 Reports** but have been found can be scanned or the barcode number typed in at this point. This can continue to happen until the section initialised has been finalised in **H5 Finalise**.

When given the option for <A>**ll** or <S>**elect** proceed as per instructions in **H2 Accept Remote Batch**.

<F1> for Help	STOCKTAKE ENTRY	Palm Tree Cent.
Shelf Locations		
From -	Location :	
	Classification : F	
	Suffix : A	
To -	Location :	
	Classification : F	
	Suffix : LIN	
Barcode	Title	Message
		Invalid Barcode
Enter Barcode or Command		

## H4 Report

When this option is selected it checks to see if ***B4 N4 Weekly Housekeeping*** has been completed. It is especially important to run this option again if the library has been operating ***Circulation*** whilst in stocktake mode.

From the option bar choose <S>***elect*** and nominate the range for the scanning session that has just been completed.

Choose <D>***etailed*** report as it will list bibliographic information about the items that were not accounted for in the scanning session. If these items are found, scan them before selecting to finalise the stocktake for this section. This report may be produced several times before finalisation.

## STOCKTAKE - REPORT OF MISSING ITEMS for Shelf locations from F A to F LIN

Barcode	Shelf location	Title	Author	Publisher Detail	Cost	Number of StockTakes (Missing)
R008182520	F BRO	Willy the wimp	Browne Anthony	Methuen Children's Books Place: London Year: 1986	0.00	1
R010751520	F BRO	The white abacus	Broderisk, Damien		0.00	1
R003422520	F BUR	The Christmas present	Burch, Robert	Scholastic Book Services Place: New York Year: 1973	5.00	1
R000512510	F BYA	The glory girl	Byars, Betsy	Penguin Place: Hamondsworth Year: 1985	2.95	1
R002762520	F CER	The adventures of Don Quixote	Cervantes Saavedra, Miguel de	Methuen Place: London Year: 1980	12.00	1
R010732520	F CLE	Grandad's teeth	Clement, Rod		0.00	1
R008192520	F DAH	Charlie and the great glass elevator	Dahl, Roald	Penguin Place: Hamondsworth Year: 1986	0.00	1

TOTAL ITEMS MISSING : 7

Palm Tree Central  
 \*\*\* END OF REPORT \*\*\*

The summary report can be quite useful to give a statistical report for items that have not been scanned for that session. If it looks particularly inaccurate because of large numbers the operator would be alerted to the need for a more detailed report and follow up.



**NOTE:** The items listed in the report do not yet have the status "M" for missing. They will only change status when the operator finalises the stocktake. It is the ideal time to do the report and check the library for any of the items listed. They can then be scanned in at **H3 Entry** at the Circulation desk. They will not appear in the report if it is run again. Remember not to initialise the section again. Simply indicate the range of shelf locations in **H3 Entry** and start to scan or type in the barcode numbers.



# Session



## H5 Finalise

- Items that were not scanned can now have their status changed to “M” for missing.

- At the option bar you have the opportunity to choose:  
<A>*ll* i.e. all areas initialised for stocktake will be finalised

OR

<S>*elect* i.e. a nominated shelf range initialised will be finalised.

- After making the appropriate choice there are two other options :

(A) Write off items missing before : \_\_/\_\_/\_\_

And

(B) Write off Disposed items also (Y/N):\_

For the first option you must select a date. Normally it would be the date of the previous stocktake two years earlier.

Finalise

<F> for Help

STOCKTAKE - FINALISE

Palm Tree Cent.

Shelf Locations

From

Location :  
Classification : F  
Suffix : A

To

Location :  
Classification : F  
Suffix : LIN

Write Off Items Missing Before : 01/10/95

Write Off Disposed Items Also (Y/N) : Y

NOTE - This process may take a long time to run

<C>onfirm Finalisation OR <Esc>



**NOTE:** Refer to the **School Manual on Financial Management, NSW Department of Education, 1985+** in Part 6 "Stores Accounting and Control" for explanation of the audit requirements for the frequency of stocktake.

- If this is the first automated stocktake for the school there should not be any items to write off so select a date that is completely out of range e.g. 30/12/80.
- For the second option if you select "Y" for yes the system will write off all items that have been given the status "D" for Disposed in ***B1 D1 General Resources***.
- When offered the option to **<C>onfirm Finalisation - *this option may take a long time to run*** select to confirm.
- Select a ***Detailed Report*** when given the **<P>rint** option. This will list the complete bibliographic record for each item that is written off. This should be filed with the stocktake report for audit purposes. It will also

serve as a way of re-entering information should the item re-appear and the school still want to put it back in the collection.

01/10/97	Palm Tree Central School		Page 1	
STOCKTAKE - REPORT OF ITEMS WRITTEN OFF				
Self Location				
F AHL				
Title	: Woof!			
Additional Title	: Allan Ahlberg pictures by Fritz Wegner			
Author Names	: Ahlberg, Allan			
Edition	:			
Addition. Edition	:			
Publisher	: Penguin			
	Place: Hammondsworth	Year	1987	
Physical Descripn	: 154 p., ill			
Series	: Puffin books			
Notes	:			
Subects	: Dogs - Fiction			
GMD	: TE Text			
Barcode	: R008112520	Status	: D	ISBN/ISSN : 0140319964 SCIS No : 412226
Accession No	: 020732	Accessioned	: 11/10/00	Supplier : Cost : 0.00
Loan Category	: F	Missing/Disposal	: 01/10/97	Order No : Dissection :
Comment	: damaged			
F ALL				
Title	: Simon said			
Additional Title	: Pamela Allen			
Author Names	: Allen, Pamela			
Edition	:			
Addition. Edition	:			
Publisher	: Nelson Australia			
	Place: Melbourne	Year	1985	
Physical Descripn	: [24] p., col. ill.			
Series	:			
Notes	:			
Subjects	:			
GMD	: TE Text			
Barcode	: R008122520	Status	: D	ISBN/ISSN : 0170064204 SCIS No : 216301
Accession No	: 020733	Accessioned	: 11/10/00	Supplier : Cost : 0.00
Loan Category	: F	Missing/Disposal	: 01/10/97	Order No : Dissection :
Comment	: damaged			
TOTAL ITEMS WRITTEN OFF : 4				
Palm Tree Central *** END OF REPORT ***				

- Finalising does take a considerable amount of time to run. The report is printed first, then **OASIS** searches for and removes all references to the items being written off. It then changes the status of all items that were identified as missing. The larger the number of resources initialised, the longer the finalisation will take. It may be possible to run this function overnight if there are a large number of items to be finalised.



**NOTE:** *Inexperienced operators may feel that the system is “hung” when it takes a long time, especially as they receive the report quickly. Allowing the function to run overnight can save operational time and reduce the temptation to switch off the workstation prematurely. Be aware that running the finalisation overnight will prevent the server tape backing up the library module for that night.*

## **B2 Q1 Stocktake statement**

The stocktake statement can be run after finalising. It can be done on individual sections using **<S>elect** or after the whole collection has been completed using **<A>ll**. It summarises the acquisitions and losses between stocktakes.

The system prompts for :

■ *Date of previous stocktake:*

and

■ *Date of current stocktake:*

The dates entered are used to select the missing, disposed and new resources which will be included in the calculation of the stocktake statement. If no previous stocktake has taken place using **Oasis Library** leave the field blank or select a date totally out of range.



**NOTE:** *In the actual report itself remember :*

**(a) Additions since previous stocktake**

*This will include all resources that have been added to **General Resources**. The figure could appear to be unusually large if the library is still adding existing resources. In this case the number would not reflect new resources alone, but also include retrospective cataloguing.*

**(b) Items missing for period**

*This number includes all items with an **M** for **Missing** in the status field. If you are not writing off resources which were missing at the previous stocktake, the number will include the resources which were missing at that stocktake as well as the number missing at the present stocktake.*

## Post stocktake questions

- *How do I deal with an item that stocktake has not identified as missing but where the student has actually left the school without returning the item?*

Stocktake will not identify these items that are currently loaned as missing. This will have to be done manually.

Where the borrower has left the school you will get a report as part of the **Refresh Students** procedure. This will list the borrower and give details of the item(s) that have not been returned. While an attempt is made to retrieve the item(s) (e.g. contacting the school to which the student has transferred) the item(s) will have to be returned in **B2 E2 Returns** by manually typing in the barcode number(s).

When it is reasonably definite that the item will not be returned it will need to have its status changed. In the copies area for the item in **General Resources** in edit mode change the status to “M” for missing, complete the date field , and make a notation about the reason the item is missing in the comment field.

This item will be “written off “ after it has been at a “missing” status for two years as part of a future stocktake.

- Why do I get a message during the loan of an item “Note: item marked as missing on \_\_/\_\_/\_\_ <C>ontinue” ?

The item has been identified by the stocktake as missing or has been manually changed to a missing status.

If <C>**ontinue** is selected this will enable the loan to proceed. After you next run **B4 N4 Weekly Housekeeping** the status of the item will change from “M” for missing to “F” for found. It will remain at this found status until after the next stocktake.

This will count towards the total number of items recovered for that stocktake. Once that stocktake is complete the item will revert to the “C” for catalogued status when **B4 N4 Weekly Housekeeping** is run.