



# EVERGREEN PLUS: COLLECTION INVENTORY

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Learn about Evergreen's built-in tools and process to inventory your library's collection, the best workflows, and how to complete an inventory smoothly.



# Today's Objectives

## **At the end of the session, you'll know**

- The essentials of the Evergreen inventory process
- The best workflow for an inventory
- Which reports will help most
- Tips and hints

# Inventory Overview

**The essentials of the Evergreen  
inventory process**

# Planning Essentials

Work in one Shelving Location at a time

Have laptops or Chromebooks with Evergreen access and barcode scanners for use at the shelves

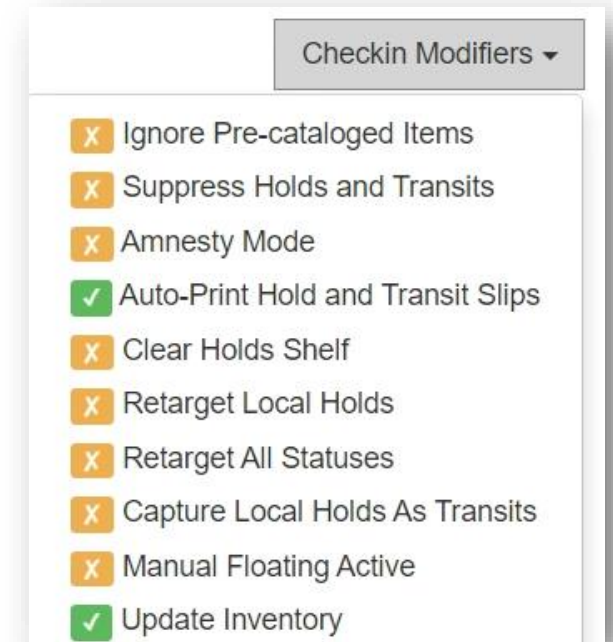
(Optional) Before the shelving location is inventoried, run the *Detailed Inventory List v.2* report

# Essential Process

Working in one Shelving Location at a time,

1. take a laptop to the shelf
2. go to Checkin
3. set the *Checkin Modifier Update Inventory*
4. add the Call Number and Inventory Date to the grid display
5. scan each item. Each item record will have added/updated inventory date and workstation information.

**\*\*Only use the *Update Inventory Checkin Modifier* at the shelf while inventorying. If used during regular checkin, items from other shelving locations will be inventoried which may lead to reporting inconsistencies\*\***



# Checkin Screen

Auto-Print Hold and Transit Slips

Update Inventory

Barcode

Barcode

Submit

Effective Date

08/23/2021

Items Checked In

⏮

⏪

⏩

Actions ▾

Rows 25 ▾

Page 1 ▾

▾

#	<input type="checkbox"/>	Barcode	Call Number	Title	Route To	Status	Alert Message	Inventory Date
No Items To Display								

Print Receipt

☐ Trim List (20 Rows)

☐ Strict Barcode

Checkin Modifiers ▾

- Review the list that displays on the screen, either continuously or after a certain number of items (25, 50, or 100).
- Since items display in the order scanned, the call numbers will display anything that's out of shelving order. The list can be downloaded as a CSV if needed.

# Item Summary With Inventory Information

## Record Summary (MARC)

Title:	Seashore life : a guide to animals and plants along the beach	Edition:		TCN:	3988551	Created By:	equinox
Author:	Zim, Herbert S. (Herbert Spencer) 1909-1994	Pub Date:	1989	Database ID:	3988551	Last Edited By:	equinox
Bib Call #:	574.92			Record Owner:		Last Edited On:	3/3/2019 2:12 AM

Quick Summary Recent Circ History Circ History List Holds / Transit Cataloging Info Triggered Events

Barcode	31015152131869	Circ Library	MAM	Call # Prefix		Status	Available
Price	6.95	Owning Library	MAM	Call #	J 577.78 ZIM	Due Date	10/19/2020
Acquisition Cost		Shelving Location	Juvenile Nonfiction	Call # Suffix		Checkout Date	9/26/2020 10:19 AM
ISBN	{9781582381497,1582381496}	Loan Duration	Normal	Renewal Type		Checkout Workstation	MAM-MAM-samoyedny
Date Created	1/31/2016 7:00 PM	Fine Level	Normal	Total Circs	3	Duration Rule	21_days_1_renew_0_autorenew
Date Active	3/5/2019 10:31 AM	Reference	false	Total Circs - Current Year	0	Recurring Fine Rule	no_fine
Status Changed	1/29/2021 9:43 AM	OPAC Visible	true	Total Circs - Prev Year	1	Max Fine Rule	no_fine
Item ID	1430347	Holdable	true	In-House Uses	0	Checkin Time	10/1/2020 11:55 AM
Circulate	true	Renewal Workstation		Remaining Renewals	1	Checkin Scan Time	10/1/2020 11:55 AM
Floating		Circ Modifier	Book	Age-based Hold Protection		Checkin Workstation	MAM-MAM-dibenedetto
Inventory Date	1/29/2021 9:43 AM	Inventory Workstation	MAM-MAM-mcnally				

# Inventory Reports

**Before, During, and After**



# Inventory Report Templates

- BEFORE (optional)
  - **Detailed Inventory List v3**  
Lists titles and items with bibliographic, ISBN, and item information, item status, creation date, last checkout date, and last inventory date. Includes call number filter.
  - **List Items Before Inventory Date**  
Filters on owning library, shelving location, and latest inventory date. Includes items that have and have not been inventoried. Includes item information, creation, last checkout, and last inventory date; notes, alerts, and total circ count.
- AFTER
  - **List Items By Inventory Date v2.1**  
Use date range to create a list of items that have been inventoried during that time.
  - **List Items NOT Inventoried by Date**  
Shows what wasn't inventoried – what you expect to be in a shelving location. May be used to create a missing list
  - **Count Items Inventoried by Shelving Location**

# Help and Links

- [Evergreen Inventory Essentials](#)
  - [Evergreen Reports Essentials on the IT Wiki](#)
  - [Staff Remote Access \(Installing the Horizon VMWare client\)](#)
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