

INVENTORY MANAGER

Inventories are an essential part of managing collections. The Inventory Manager Upgrade provides easy-to-use tools to get you started on the road to successful inventory projects. This add-on product makes it simple to generate inventory lists, electronically track items, and ensure accurate catalog records.

In this chapter we will review how to install the Inventory Manager Upgrade, generate inventory lists, print inventory worksheets, and update catalog records with inventory information.

INSTALL INVENTORY MANAGER

If you are on a network, please be sure all users have exited the program. Open the PastPerfect program and insert the upgrade disc in your computer's CD drive. From the Main Menu, click **Setup**, then click **System Parameters**. Click the **Unlock Upgrade Options** button and follow the on-screen prompts. When the process is complete, close PastPerfect. The next time you open PastPerfect, the Inventory Manager functions will be available under the **Inventory Manager** button on the Main Menu.

CREATE INVENTORY LISTS

For many organizations, one of the keys to successful inventories is a printed worksheet that can be distributed to staff and volunteers. The first step in creating these worksheets is to define the collections to be checked. Inventory

Manager enables you to build randomly sampled or complete lists from your PastPerfect catalogs.

CREATE INVENTORY SAMPLING LISTS

You can easily build an inventory list based on a number of criteria. To build a list, click **Inventory Manager** from the Main Menu. Click **Create Inventory List** to see the screen in Figure 30-1.

Figure 30-1
Create Inventory
Sampling List
screen

The screenshot shows the 'Create Inventory Sampling List' dialog box. The title bar reads 'Inventory Manager' and the window title is 'Create Inventory Sampling List'. The dialog is organized into three distinct sections:

- Select items to Include on list:** This section features four checked checkboxes: 'Objects', 'Photos', 'Archives', and 'Library'. Below these are two text input fields labeled 'Only Status' and 'Only Collection'. At the bottom of this section are two radio buttons: 'Items in all locations' (which is selected) and 'Items in selected location', accompanied by a 'Select Location' button.
- Select items to Exclude from list:** This section contains three checked checkboxes: 'Items out on loan', 'Items that are part of an incoming loan', and 'Items currently on exhibit'. Below these is a text input field labeled 'Items with status' containing the text 'Deaccessioned'.
- Select sampling criteria:** This section has four radio buttons: 'All Items', 'A percentage of all items - Enter percentage here' (selected), 'Fixed number of items - Enter number here', and 'All items that haven't been inventoried since'. To the right of the selected radio button is a spin box set to '10'. The other two radio buttons have corresponding spin boxes set to '1000' and '12/29/2010'.

At the bottom of the dialog are two buttons: 'Create List Now' and 'Cancel'.

The first section of the **Create Inventory Sampling List** screen allows you to choose which catalogs your inventory list is based on. Removing the checkmarks will exclude those catalog items from your inventory. You can further narrow the scope of your inventory by selecting a single location, collection, or status.

The second section allows you to exclude items that are currently part of an outgoing loan, incoming loan, or are on exhibit. For this section of the screen,

removing the checkmarks will allow these items to be part of your inventory. By filling out the **Items with status** field, users can exclude items from their inventory. For example, an organization who uses Status to record deaccessioned records may want to exclude those records from the inventory, as shown in Figure 30-1.

The **Select sampling criteria** section allows you to determine the number of records that will be included on your inventory list. If you have narrowed the list down to a single location in the first section, you may want to select **All Items** in this section. The other options in this section allow you to reduce the number of items that are selected for your inventory.

The settings shown in Figure 30-1 will randomly select ten percent of the records across all four catalogs, but will not include items on loan, items on exhibit, or items with the status of "Deaccessioned." Clicking the **Create List Now** button will add items to a list and open the screen to Figure 30-2.

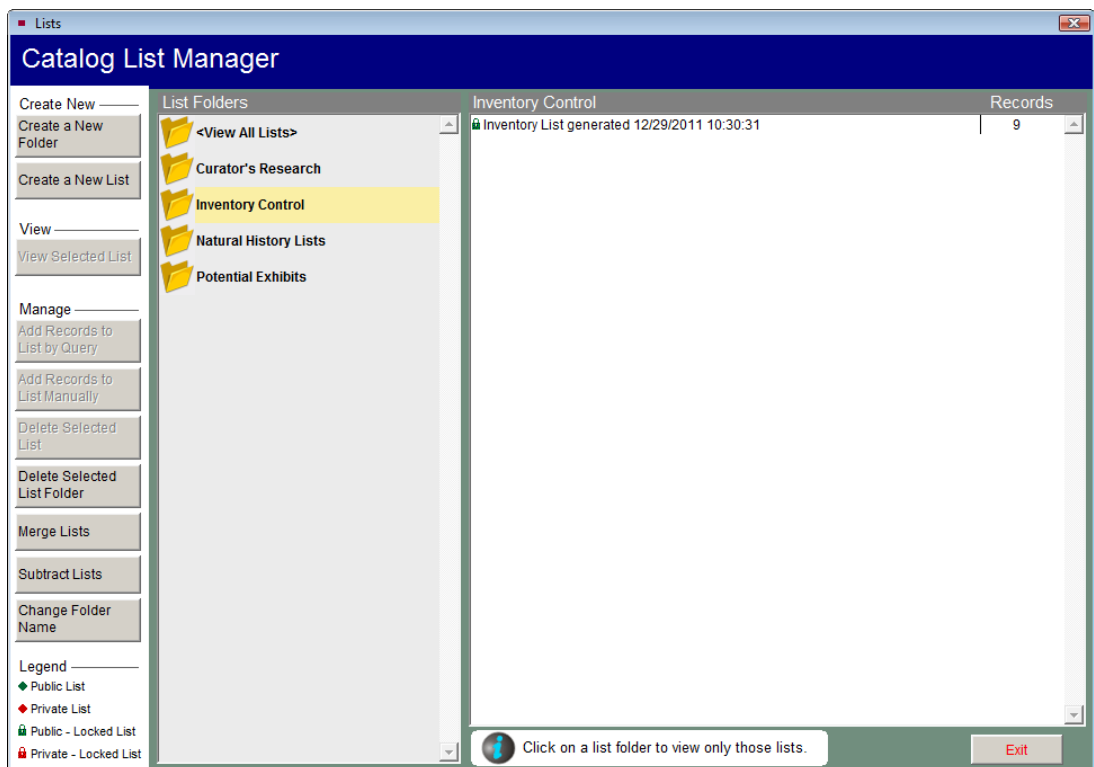


Figure 30-2 Catalog List Manager screen with Inventory Control folder

PRINT INVENTORY WORKSHEETS

Once you have created an inventory list, it is automatically added to the Inventory Control folder in Catalog Lists. To print an inventory worksheet, on the **Catalog List** screen select the list from the column on the right, then click **View Selected List**. At the bottom of the Sidebar, click **Print Inventory Worksheet**. You have a choice of worksheets to use. The **Inventory Check List** is the most basic report and displays about 32 records per page. It contains the fields Object ID and Object Name. The **Inventory Check List with Images** adds a few fields including Status and Location, as well as a thumbnail image of each item. The **Inventory Full Worksheet** contains more fields and may only show a record or two per page. As with all reports in PastPerfect, these worksheets may be modified to meet your needs. Please see *Chapter 19 - Advanced Report Modifications* for detailed instructions on modifying reports.

IMPORT INVENTORY LIST FROM EXTERNAL FILE

Some organizations perform an inventory by creating a list of found items in a specific storage location and reconciling that list against their PastPerfect database. Once these items are placed on PastPerfect catalog lists, users can globally update inventory information, including location and status changes.

ADD RECORDS TO A LIST MANUALLY

This is the simplest way to create a catalog list of inventoried items without using external files or devices. To begin, open **Catalog Lists** from the Main Menu and create a new list. Then click the **Add Records to List Manually** button from the Sidebar. As seen in Figure 30-3, enter your Object ID number by typing or by using your barcode scanner. Once your list is complete, you will have the options for updating the list items that are explained later in this chapter.

IMPORTING EXTERNAL LISTS

Inventory Manager enables you to import a basic text document that contains the Object IDs of your inventoried items. To create this document, as you check

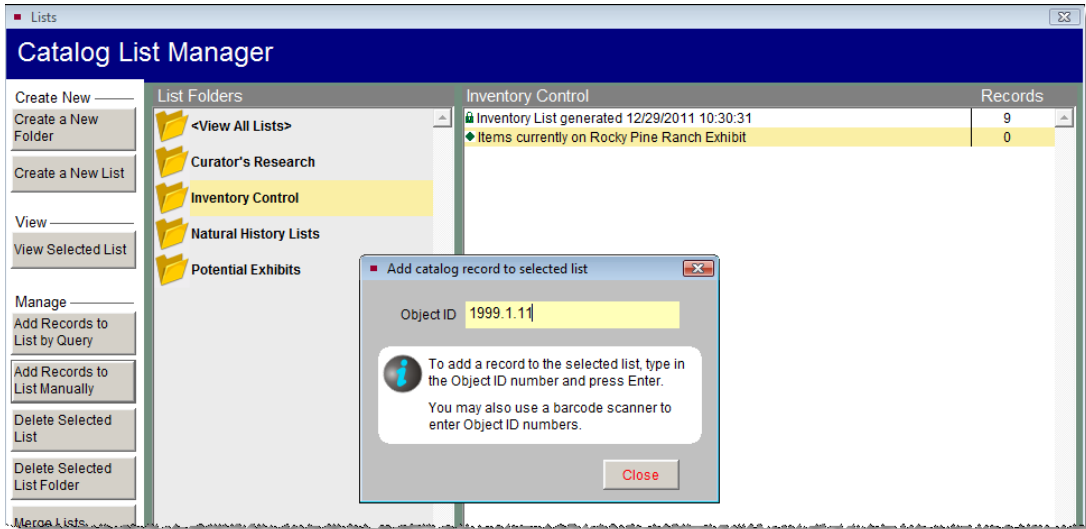
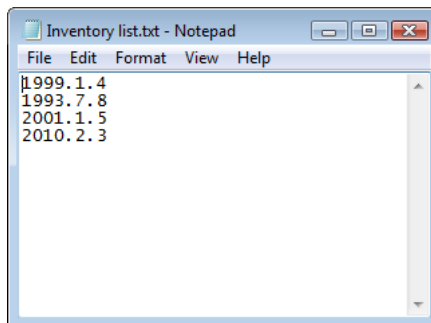


Figure 30-3 Add catalog record to selected list manually

each item, type its Object ID number followed by a carriage return as shown in Figure 30-4. Or you can enter the numbers in the document by scanning each item's barcode (Object ID). Scanning the barcode instead of typing the Object ID number speeds up the process and reduces the chance of typing errors.

Figure 30-4
Inventory list
in Notepad



TIP

Microsoft Notepad is recommended for creating this basic text document for importing. Name the file appropriate to the content of the list. Example: "Vault Inventory 2012"

To import the document, select **Inventory Manager** from the Main Menu, then click **Import List**. Click **Import List Now**. Browse to the location of your text file, select it, then click **OK**. The list will be saved to the Inventory Control folder in Catalog Lists, with the name of your text file as the name of the list. Once the list is created in Catalog Lists, you can use the standard list tools to print the list and update the records.

If an Object ID number in your text file is not found in the Objects, Photos, Archives, or Library catalogs, that number will appear in a new text file that you can save and print for later inventory reconciliation.

IMPORTING USING OTHER DIGITAL DEVICES

The principles for importing are the same whether the list is compiled by manually typing Object ID numbers into a Notepad document or scanning items from a device like a tablet or a barcode scanning/storage device. You must have a simple text file with one item per line separated by <enter> or a carriage return. Once this file is created, you can import it using the steps described above.

TIP

When using a device that is incapable of creating a simple text file, try emailing yourself the list and copying the email's contents into a text file.

UPDATING INVENTORY INFORMATION IN CATALOG RECORDS

Now that you have created inventory lists, you can perform global updates to the items' catalog records using the **Change Location**, **Mark Inventoried**, and **Global Change** buttons. *Warning: Global changes cannot be reversed and can have unintended consequences. Be certain to back up your data before making any mass changes to your data.*

CHANGE LOCATION

This feature is useful when dealing with items that are being relocated during a collections move. Before you begin, make a backup of your data. Next, open **Catalog Lists** from the Main Menu, select your inventory list from the Inventory Control folder, click **View Selected List**, then click **Change Location** from the Sidebar. Place checkmarks next to the fields that you want to change, then type in the new values that you want all records to have. Only the checked fields will be affected. Click the **Change Locations** button to complete the process. You will be asked if you want to record the old location in the Location History section of the catalog records.

MARK INVENTORIED

This feature will not change an item's location, but it does allow you to place existing inventory information into the inventory history table and update the Inventory Date and Inventoried By fields.

GLOBAL CHANGE

This feature allows you to update many of the common fields across all four catalogs. Be careful when making global changes as they are NOT reversible.

For the latest information about using Inventory Manager, please refer to the Quick Start Guide that came with the upgrade installation disc and review our online Knowledge Base at www.museumsoftware.com.

