# Polaris® Inventory Manager Guide

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*This guide is written for Polaris 4.0 or later. Polaris Inventory Manager is compatible with Polaris 3.3 or later.*
*Rev. 2*

# Contents

# Taking Inventory with Polaris Inventory Manager

Using a wireless tablet PC and Polaris Inventory Manager software, you can go to the shelves to take an inventory of items. As you take the inventory, Polaris Inventory Manager identifies the items that are misshelved, have a status other than In, or satisfy hold requests. At the same time, you can mark items for weeding. You can stop and resume your session at any time. When you have finished, you update the item records in the Polaris database with the latest inventory date. A report is automatically generated, along with a text file that identifies any scanned barcodes not in the call number range of the items you inventoried. Optionally, you can have Polaris Inventory Manager create a record set of any items that were apparently skipped (expected but not processed) during the inventory, and a record set of items marked for weeding. You can also run standard or custom Polaris staff client inventory reports.

## Requirements

Polaris Inventory Manager is designed for convenient use with a Microsoft Windows XP, Windows Vista, or Windows 7-compatible tablet PC, but also runs on conventional workstations and laptop computers with these operating systems. The application requires Microsoft .NET 4.0, which is installed with Polaris Inventory Manager if it is not already present. You need Adobe® Reader® to view the Inventory Statistics update report. You can download this free application from www.adobe.com.

A license key file from Polaris Library Systems is required to run Polaris Inventory Manager. You need a unique license key on each workstation where Polaris Inventory Manager is installed. Place the license key file in the Polaris Inventory Manager program file, typically **C:\Program Files \Polaris\Polaris Inventory Manager** or **C:\Program Files (x86)\Polaris\Polaris Inventory Manager**. Your Polaris Support Engineer works with you to download and install the software and license key. For more information, see *Polaris Inventory Manager Installation* on the Polaris Customer Extranet.

You can take inventory using the stylus that came with your tablet PC, a barcode scanner, or both. You can use a conventional barcode scanner connected to the tablet PC, or a Bluetooth® wireless scanner. Your scanner should be set up before you run Polaris Inventory Manager. For instructions, see "Appendix: Setting Up the Bluetooth® Scanner" on page 23.

A network connection is required when you load data from the Polaris database and when you want to update item records after the inventory, but no connection is required while you take the inventory.

If you plan to weed your collection or otherwise work with the items on the shelves as you take the inventory, a cart is very convenient. If you are using a conventional workstation or laptop computer, a cart is essential.

Polaris Inventory Manager supports all date formats. Set your location on the computer that runs Polaris Inventory Manager. For example, for Canadian date format on a Windows Vista workstation, select **Start, Control Panel, Regional and Language Options**, and select **English (Canada)** from the **Current format** list.

# Before You Begin - Some Considerations

The current state of your catalog and collection can help you decide the most efficient way to take your inventory.

## Are Your Shelves in Good Order?

If you know that the shelves are in very bad order or the collection has not been weeded in a long time, you may want to do some preliminary shelving and weeding before you even start the inventory. Otherwise, the inventory may be very slow as you try to locate and account for all the problem items, while simultaneously inventorying the "good" ones. However, if you think your collection is in fairly good shape, you can plan to do the shelf work simultaneously with the inventory. Polaris Inventory Manager identifies misshelved and out-of-range items as you go, and you can choose to mark items for weeding.

## Are Items Consistently Cataloged?

In Polaris Inventory Manager, item data is sorted in normalized call number order. You may be able to make your inventory more efficient by first assessing how consistently your collection is cataloged. For example, perhaps **J** and **Juv** have been used interchangeably to designate juvenile items. You may want to create Polaris record sets and bulk-change certain item call numbers before you even begin the inventory. The result is a more consistent catalog and a more efficient inventory.

## Should You Use the Stylus or a Barcode Scanner?

If you are using Polaris Inventory Manager on a tablet PC, you can mark items as inventoried by selecting check boxes with the stylus or by scanning barcodes. (You can also key in barcodes, useful when a barcode does not scan properly.) Using the stylus is the quickest method because you leave the items on the shelf, visually scan the spine labels, and mark a list of items taken from Polaris item records. However, because the items are listed in call number order, call numbers in the item records need to be fairly consistent with the spine labels, and the shelves must be in fairly good order for this method to work efficiently.

Scanning barcodes is more efficient when spine labels are not consistent with call numbers in the item records, or when many items have the same call number. The correct item in the inventory list is marked as done, and you can readily identify discrepancies in the spine labels so they can be corrected. If you scan an item that is not listed, you can simply put it aside. Polaris Inventory Manager creates a file for any out-of-range items you scan. Later, you can shelve the items properly and update their records in the Polaris staff client (see "Update the inventory date of out-of-range items" on page 21).

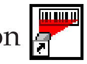
## Using Polaris Record Sets

Polaris record sets can help you resolve problems encountered during your inventory process. For example, you might pull certain problem items without inventorying them, put them aside, and scan them into a Polaris record set in the Polaris staff client. Then, when the issues have been resolved (perhaps by bulk change), you can load the entire record set into Polaris Inventory Manager in one step and mark the items as inventoried.

Any items can be placed in a record set for inventory processing. If you have a back room of items with miscellaneous, discontinuous call numbers, scan these into a Polaris record set. Then you can load the record set in Polaris Inventory Manager for inventory.

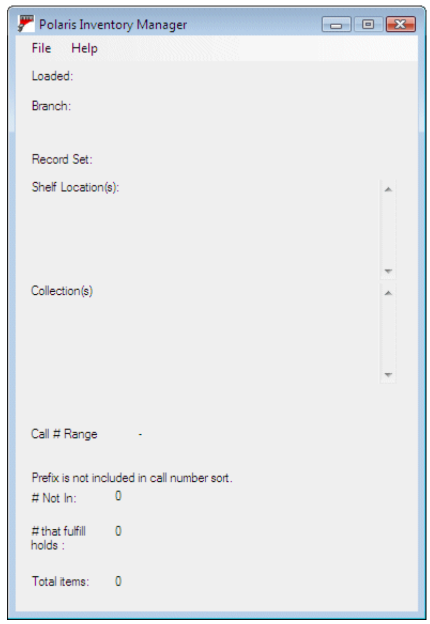
# Configure Polaris Inventory Manager

Before you take an inventory, follow these steps to set up Polaris Inventory Manager to work with your Web server. You do not need to do this procedure again unless your server information changes.

1. On the tablet PC, select **Start, Programs, Polaris, Polaris Inventory Manager**, or click the desktop shortcut icon .

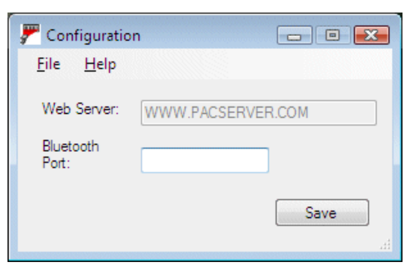
   **Note:**
   Windows Vista requires elevated permissions to allow Polaris Inventory Manager to write data and reports, and set permissions on files. When you open Polaris Inventory Manager, a dialog box asks whether you want to allow the program to run. Click **Allow**.

   The Polaris Inventory Manager main window opens.




2. Select **File, Configure**.

   The Configuration window opens.



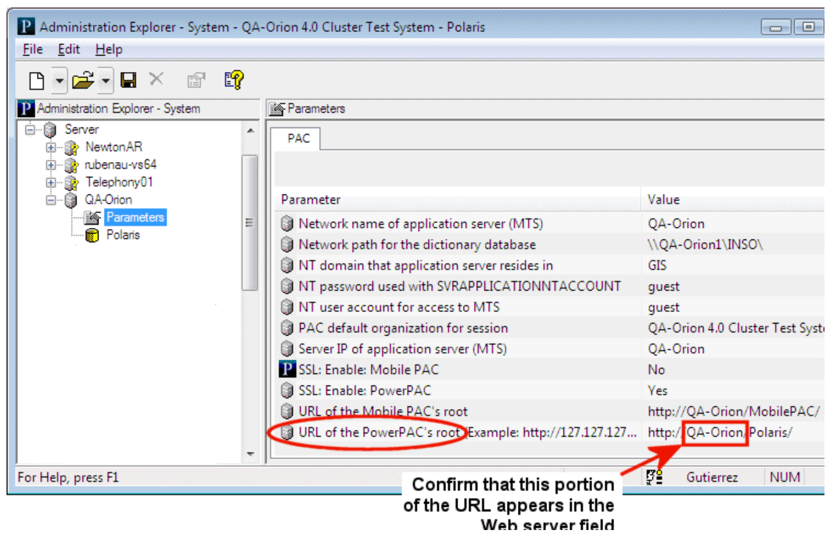

3. Confirm that the exact root portion of the URL for your Polaris Web server (typically the server where Polaris® PowerPAC™ is located) appears in the **Web Server** field.

You should see that portion of the URL that immediately follows **http://**, up to the next forward slash **/**, if any.

**Important:**
If this value is incorrect in the Configuration window, or if the value changes for your system, obtain a new license key from Polaris Library Systems.

The *complete* URL may be displayed if the PIM Web service is installed in a directory other than www.*PACserver.org*/paws, where www.*PACserver.org* is the root portion of the URL for your Web server.

You can obtain this value from Polaris Administration. Open the Administration Explorer at the system level, expand **Servers**, select the Polaris Web server, and select **Parameters**. The PAC parameter **URL of the PowerPAC's root** displays the URL.




4. (Optional) If you are using a Bluetooth wireless scanner, enter the Bluetooth port.

   For more information, see "Appendix: Setting Up the Bluetooth® Scanner" on page 23.

5. If you entered Bluetooth scanner information, select **Save**.

   If there is a problem with your settings, a message appears. Correct the settings and click **Save** again.

6. Select **File**, **Close**, or select **X** in the upper right corner of the Configuration window.

   The Polaris Inventory Manager main window appears. You are ready to load item data for the inventory.

## Load item data for the inventory

When you load item record data from the Polaris database to the tablet PC, you specify a group of items—call number range, shelf locations, collections, or a record set—as the source for data. All the data is loaded, but you can inventory the items in several sessions. Polaris Inventory Manager keeps track of where you left off in the loaded record data. Follow these steps to load data from the Polaris database.

**Important:**

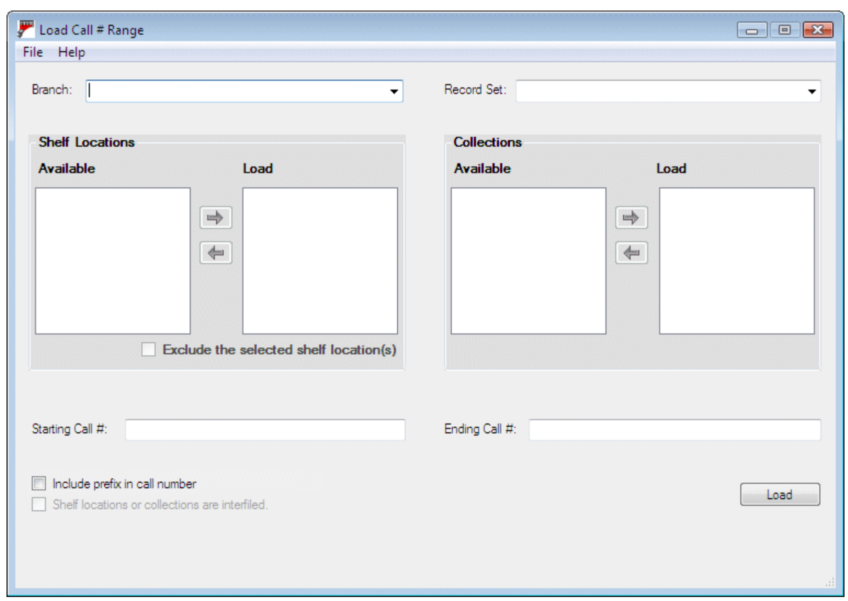
Call number ranges, shelf locations, collections, or record sets that include many items may take some time to load.

Circulation status and hold alert information for the items is valid when you load the item record data, but may become out of date if the inventory for this group of items takes several days. If you need the most current status information as you take the inventory, consider loading the data in smaller sets that can be completed in a shorter period.

1. Establish a network connection for the tablet PC.
2. Select **Start, Programs, Polaris Inventory Manager**, or click the desktop shortcut icon .

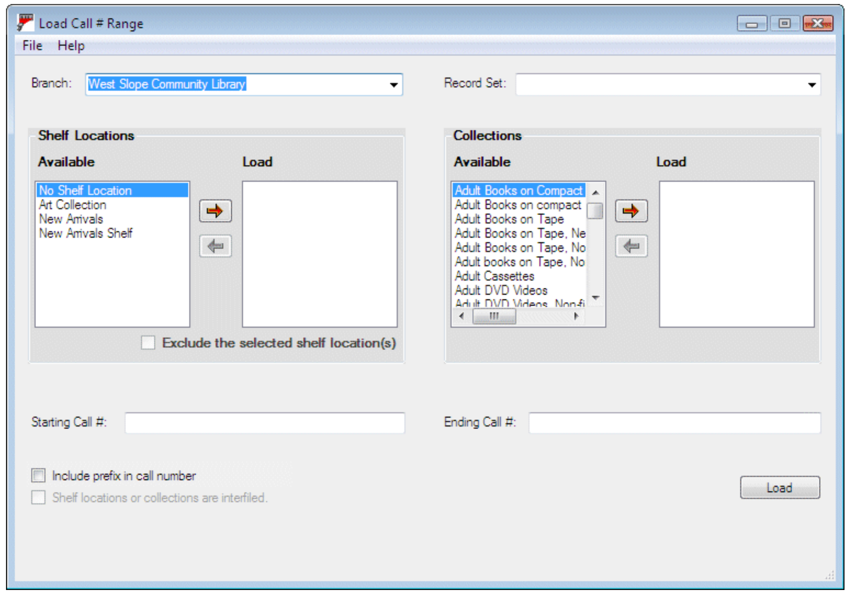
   The Polaris Inventory Manager main window opens.
3. Select **File, Load.**

   The Load Call # Range window opens.



4. Select the branch where you are taking the inventory.

   Shelf location and collection selections become available.




You can load items in a call number range, in one or more collections, in one or more shelf locations, in collections or shelf locations *within* a call number range, or from a record set:

- **Load items in a call number range**:
  - Set the item call number range by specifying **Starting Call #** and **End Call #** values. You can leave either field or both fields blank, with the following results:

    **Starting call number blank, ending call number blank (no record set)**: All items are loaded.

    **Starting call number blank, ending call number specified**: All items from the beginning (including those with no call number) through the end call number are loaded.

    **Starting call number specified, ending call number blank**: All items from the beginning call number through the end of a branch's items are loaded.

- **Include prefix in call number** option - This option controls what items are loaded based on the call number prefix.

  When the option is *checked*, items are loaded under any of these conditions:

| *Prefix* | *Classification Number* | *Cutter Number* | *Call Number Suffix* |
|---|---|---|---|
| Blank | Blank | Blank | In range |
| Blank | Blank | In range | -- |
| Blank | In range | -- | -- |
| In range | -- | -- | -- |

  When the option is *unchecked*, items are loaded under any of these conditions:

| *Prefix* | *Classification Number* | *Cutter Number* | *Call Number Suffix* |
|---|---|---|---|
| Ignored | Blank | Blank | In range |
| Ignored | Blank | In range | -- |
| Ignored | In range | -- | -- |

  **Note:**
  "In range" means that the value of this column followed by any succeeding columns must be within the starting and ending call numbers you specified. For example, if the starting call number is **fed** and the ending call number is **fon**, and the classification number is "in range," then the Classification Number + Call Number + Call Number Suffix of an item must fall within the range **fed** to **fon** for the item to be loaded.

  If items are shelved together regardless of whether the call number begins with a prefix, be sure **Include prefix in call number** is not checked (uncheck the option if it is checked).

  **Note:**
  If your items are intershelved as described, and some items have *only* a prefix, you must make the beginning value of the call number range blank to include these items in the range.

- (Optional) If you want to specify a particular shelf location or locations within the call number range, select the locations in the Shelf Locations **Available** list, and select the right arrow to move them to the Shelf Locations **Load** list.

  **Note:**
  If you put **No Shelf Location** in the **Load** list, you will get items where no shelf location is specified in the item record. You can also exclude items from a particular shelf location. Put the shelf location in the **Load** list, and select (check) **Exclude the selected shelf location**. If you exclude **No Shelf Location**, you will load only those item records that do specify a shelf location.

- (Optional) If you want to specify a particular collection or collections within the call number range, select the collections in the Collections **Available** list, and select the right arrow to move them to the Collections **Load** list.

  **Note:**
  You can select shelf locations or collections, but not both.

- **Load items in a shelf location or locations** - You can load items with a specified shelf location or locations, regardless of call number. Leave the starting and ending call number fields blank. Select the locations in the Shelf Locations **Available** list, and select the right arrow to move them to the Shelf Locations **Load** list. You can select multiple locations.

  **Note:**
  If you load multiple shelf locations, you can select which ones of those loaded are actually displayed in the inventory list, then change your display selections when needed as you take inventory. See "Set inventory preferences" on page 11.

  - If items from several shelf locations are actually interfiled on the library shelves, as they may be in a small library, select (check) **Shelf Locations or collections are interfiled**. When this option is checked, items will be listed for inventory in call number order, regardless of their shelf locations. When this option is not checked, items will be grouped by shelf location for inventory.
  - You can select a shelf location or locations to exclude. Select the locations in the **Available** list and select the right arrow to move them to the **Load** list. Then check **Exclude the selected shelf location(s)**.

- **Load items in a collection or collections** - You can load items with a specified collection or collections, regardless of call number. Leave the starting and ending call number fields blank. Select the locations in the Collections **Available** list, and select the right arrow to move them to the Collections **Load** list. You can select multiple collections. If items from several collections are actually interfiled on the library shelves, as they may be in a small library, select (check) **Shelf Locations or collections are interfiled**. When this option is checked, items will be listed for inventory in call number order, regardless of their collections. When this option is not checked, items will be grouped by collection for inventory.

  **Note:**
  If you load multiple collections, you can select which ones of those loaded are actually displayed in the inventory list, then change your display selections when needed as you take inventory. See "Set inventory preferences" on page 11.

- **Load item records from a Polaris item record set** - Select the record set in the **Record Set** list. The list includes only the record sets owned by the branch you selected for inventory. Within a selected record set, only those items that belong to the selected branch are loaded. See "Using Polaris Record Sets" on page 3.

  **Note:**
  If you want to load a call number range after inventorying a record set, be sure to clear the **Record Set** selection.

5. Select **Load**.

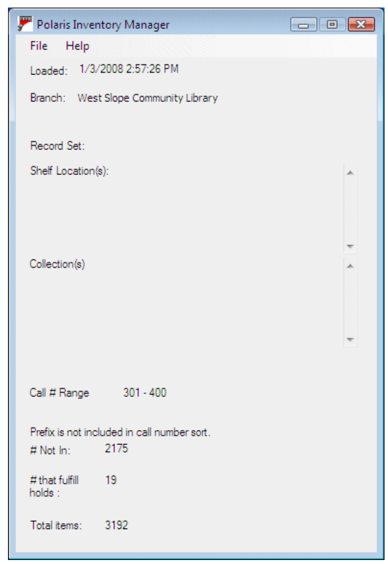
   Item record information for the branch's items is transferred from the Polaris database to the tablet PC. A message tells you when the process is complete.

   **Note:**
   The maximum number of records you can load at once depends on your network and server, but it is possible to load more than 10,000 records. The more records you load at once, the longer the loading process. If you receive an error message, load a smaller call number range, fewer shelf locations, fewer collections, or a record set with fewer records.

   Once the data has been loaded, a network connection is not required until you are ready to send updates to the Polaris database.

6. Select **File, Close**.

   The Polaris Inventory Manager main window appears. The window displays summary information about the item records you specified, and the date and time you loaded the data.



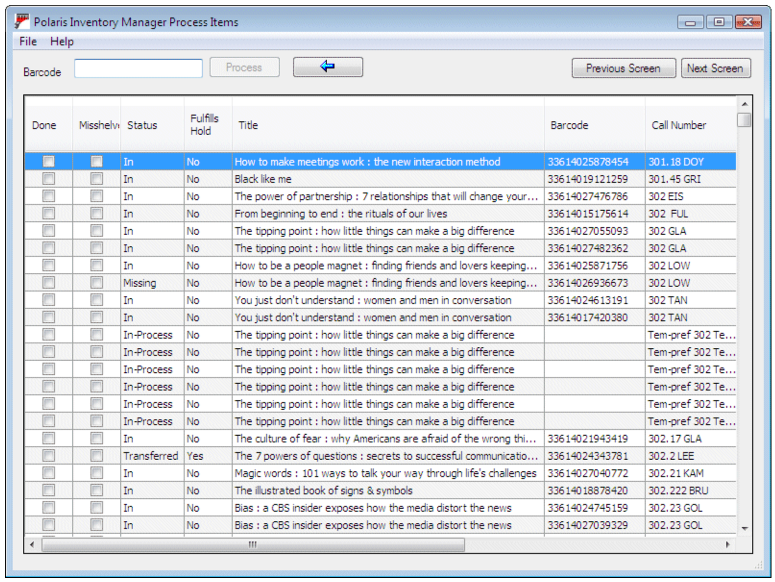

You are ready to set your preferences and take the inventory.

# Set inventory preferences

You take inventory by working from a list of items, simply checking them off as you see them, or by scanning item barcodes. To set your preferences for how the inventory list of items is displayed, follow these steps.

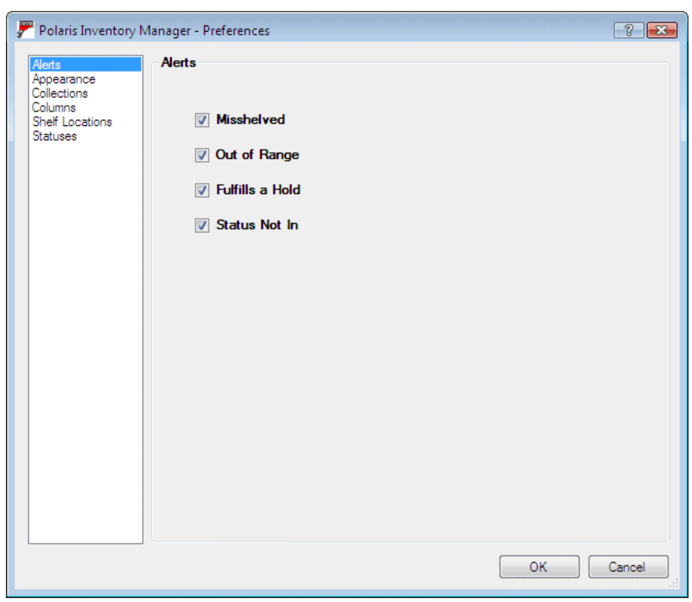
1. Load the item data from the Polaris database. See “Load item data for the inventory” on page 6.
2. Select **File, Scan** on the Polaris Inventory Manager main window.

   The Process Items window opens, displaying the inventory list.




3. Select **File, Preferences**.

   The Preferences window opens to the Alerts list.

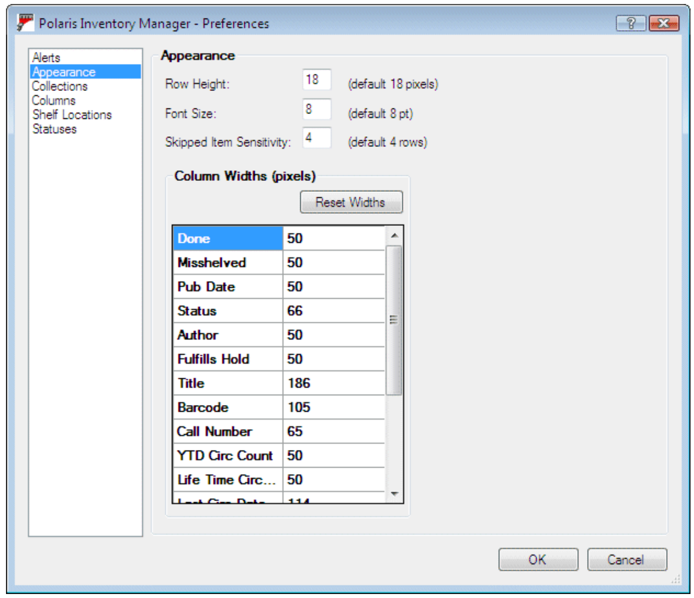


4. Select the alerts messages you want to receive.

   **Note:**
   The **Misshelved** alert is active only when you scan item barcodes.

5. Select **Appearance** in the list on the left side of the Preferences window.

   Appearance options are listed.




**Tip:**
If you are using the stylus to do the inventory, and depending on your screen display, you may want to increase the row height so you can more easily select the check boxes. If you are working a small tablet device and the check boxes do not seem to work, increase the row height to display the check marks.

6. If necessary, adjust the row height in the **Row Height** box.

   A higher number creates more space between the item check boxes in the inventory list. The default value is 18 pixels. Values below 18 are not saved because they may cause display problems in the Process Items list. The maximum value is 30.

7. If necessary, adjust the font size in the **Font Size** box.

   The default value is 8 points. Values below 8 are not saved because they may cause display problems in the Process Items list. The maximum value is 20.

8. If necessary, adjust the **Skipped Item Sensitivity** value.

**Tip:**
If you are taking inventory in a section that is not in call number order, consider increasing the **Skipped Item Sensitivity** value to avoid repeated messages asking if an item is misshelved.

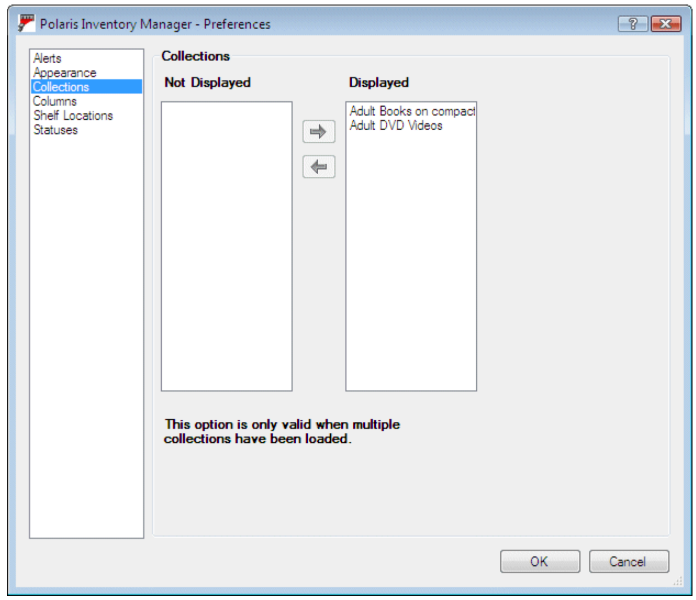
   As you take inventory, you may deliberately scan an item out of order because it is at hand, skipping several items in the list. This value represents the number of records skipped before a message is displayed. The message asks you to indicate whether the scanned item was misshelved. You can enter a value from 4 to 20.

9. If necessary, adjust the column widths of the items list.

   **Note:**
   You can also adjust the column widths on the list itself. Your changes are reflected in the Preferences window, and remain in effect until you change them again or click **Reset Widths**.

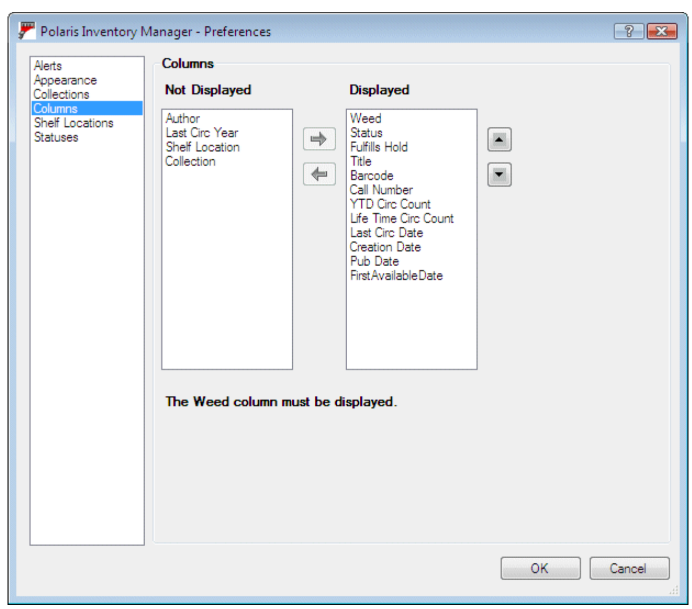
10. If you specified multiple collections to load, select **Collections** in the list on the left side of the Preferences window.

    The collections you loaded are listed. You can select which ones of those loaded are actually displayed in the Process Items inventory list, then change your selections when needed as you take inventory.




11. To move a collection between the **Displayed** and **Not Displayed** lists, select the collection and select the appropriate arrow.
12. Select **Columns** in the list on the left side of the Preferences window.

    Columns options are displayed.



**Tip:**
If you are inventorying with the stylus—visually comparing spine labels to the inventory list—order the columns so that the call number and title are first. If you are scanning barcodes, you may want a different order. Your selections remain in effect until you re-set them.

**13.** Set the data columns you want to display in the inventory list:

- To display a column, select it in the **Not Displayed** list and select the right arrow. To omit a column, select it in the **Displayed** list and select the left arrow.

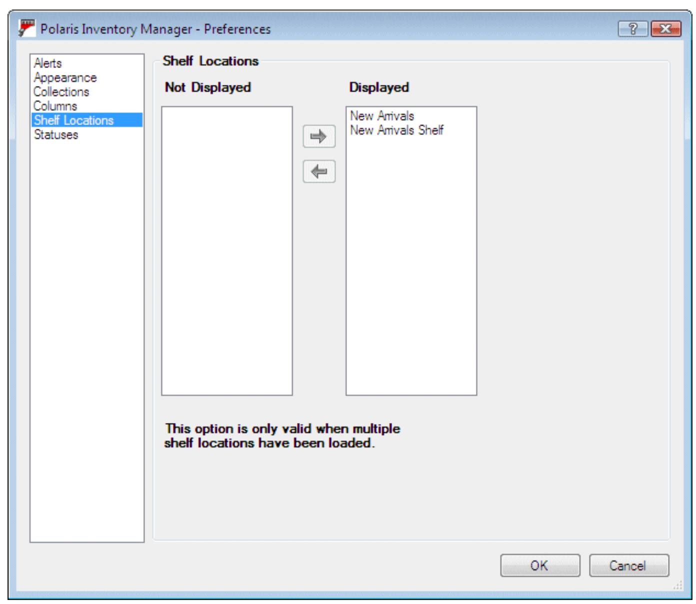
  The top column in the **Displayed** list will be displayed at the far left in the list, the next will be displayed one column to the right, and so forth.

- To re-order the data columns in the inventory list, select a column in the **Displayed** list. Select the up arrow to move the column to the left in the list. Select the down arrow to move the selected column to the right.

  **Note:**
  The Weed column is always displayed, but you can change its position.

**14.** If you specified multiple shelf locations to load, select **Shelf Locations** in the list on the left side of the Preferences window.

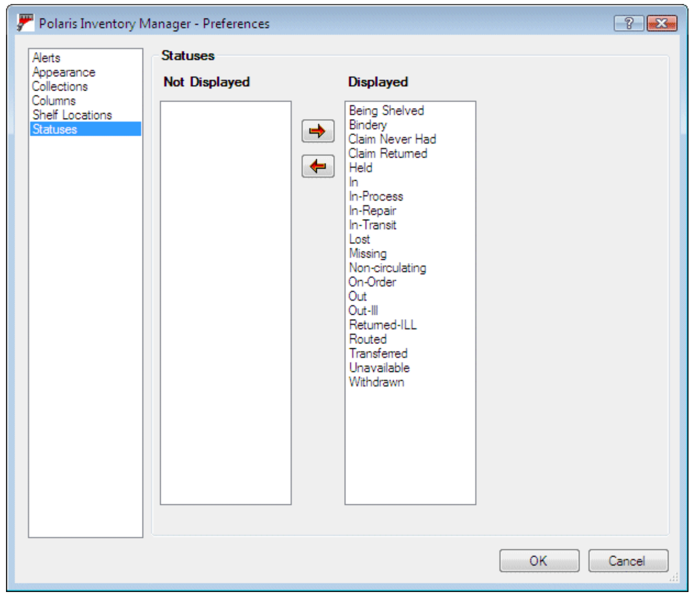
The shelf locations you loaded are listed. You can select which ones of those loaded are actually displayed in the inventory list, then change your selections when needed as you take inventory.




**15.** To move a shelf location between the **Displayed** and **Not Displayed** lists, select the shelf location and select the appropriate arrow.

**16.** Select **Statuses** in the list on the left side of the Preferences window.

The Status options are displayed.




**17.** To suppress items with particular statuses from the inventory list, select the statuses in the **Displayed** list, and select the left arrow to move them to the **Not Displayed** list.

For example, you may choose to suppress On-Order items from the list.

**18.** Select **OK**.

The Preferences window closes. The Process Items window opens, displaying the inventory list according to the preferences you set.

## Take inventory

After you set your preferences and close the Preferences window, the Process Items window displays the inventory list.

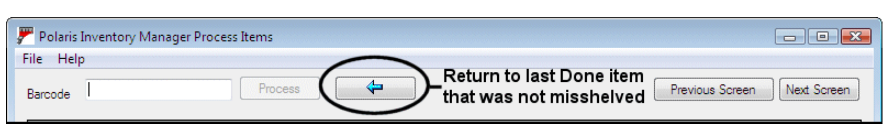
- You may need to scroll to the right to see all the columns.
- To change the width of a column, select the right edge of the column head and drag it.
- The default sort order is normalized call number (Shelf Order). If you checked **Include Prefix In Call Number Sort** when you loaded the data, call numbers with prefixes appear separately from those without them. If you did not check this option, call numbers with prefixes are sorted in with the other call numbers without regard to the prefix. If multiple items have the same call number, these are next sorted by author, then by title, then by volume if applicable. Initial articles are ignored in the title sort.
- If you loaded multiple shelf locations or collections and checked **Shelf locations or collections are interfiled** when you loaded the data, the items are sorted in call number order. If the option was not checked, the items are grouped by shelf location or collection.
- You can use the Weed column to check items that need to be weeded from the collection. When you update the database, a report of the items checked for weeding is generated, and you can choose to create a record set of the marked items. However, you mark items for weeding as part of the inventory process. It is not possible to update the database only with weeded items. You must also mark items as inventoried.

Follow these steps to take the inventory.

**Note:**
You can select a column head to sort the data in a different order, but you must click the **Shelf Order** column head to re-sort the data before you take inventory.

**Tip:**
If the scanner reads only part of the barcode, you hear a bell tone. Scan the barcode again until you hear the normal beep tone.

1. Inventory the items, using one or both of these methods (see "Should You Use the Stylus or a Barcode Scanner?" on page 2):
   - **Stylus** - As you visually inspect the shelf, select the **Done** check box for each item you see.
   - **Scanner** - Scan each item's barcode. If an item is not in order according to the list, the list jumps to the position of the misshelved item, and the **Done** box is checked for the item. You can select the back arrow button near the top of the window to return to the last **Done** item in the list that was not misshelved, or use the **Previous Screen** and **Next Screen** buttons to navigate the list.



**Notes:**
-If a barcode does not scan properly, you can key in the barcode. Then select **Process**. The list jumps to the position of the misshelved item, and the **Done** box is checked for the item, as if you had scanned the item.
-If you scan the same item twice, you are returned to the item in the list but the item's inventory status does not change.

The following messages may appear:

- **Item not found in the current call number range** - Select **OK** on the message box and put the item aside. When you update the Polaris database, a text file that lists the out-of-range barcodes is automatically created. You can view and update these items in the Polaris staff client. See "Update the inventory date of out-of-range items" on page 21.
- **Item's status is not In** - For example, the item may be checked out or it has been reported lost. Select **OK** on the message box and put the item aside. These items should be checked in using circulation functions in the Polaris staff client. See "Checking In Items" in the *Polaris Patron Services Guide*. (The status information was valid when you loaded item record data for the inventory.)
- **The status of this item is [status]** - You chose to filter certain item statuses from display (see "Set inventory preferences" on page 11), and this item has one of those filtered statuses. Select **OK** on the message box and put the item aside for appropriate processing.
- **Item fills a hold request** - Select **OK** on the message box and put the item aside. These items should be processed using holds functions in the Polaris staff client. See "Working with Hold Requests" in the *Polaris Patron Services Guide*. (The request information was valid when you loaded item record data for the inventory.)
- **Item is misshelved** - (Appears for scanned barcodes only.) Select **OK** on the message box and put the item aside for proper shelving.

**Important:**
If you receive a misshelved item error message but the item is *not* misshelved, be sure to clear the **Misshelved** check box for the item.

**Tip:**
You can sort columns for convenience when you mark items for weeding. For example, if your criterion for weeding is the last date an item circulated, you can sort the list of items by Last Circ Date and check the items that last circulated before your cutoff date.

2. If you want to mark items for weeding, select the appropriate check box for each item to be weeded.

   **Note:**
   If an item has already been inventoried, you can select the weeding check box for the item at any time. If the item has not been inventoried, the list must be sorted in shelf order. Then you can select the weeding check box and the item is inventoried at the same time.

   These items can be listed on a report when you upload your inventory data to the Polaris database, and you can create a record set of the items at that time.

3. Select **File, Close**, or select **X** in the upper right corner of the Process Items window.

   The main window appears. You can resume the inventory at any time. When you have finished the set of items, update the database.

1-2-3

## Update the database

When you update the Polaris database with your inventory data, the inventory date for the relevant items is updated and an Inventory Statistics report is automatically generated as a .pdf file. The report includes information such as the update date and time, the date and time the item record information was loaded, branch and call number range or record set, and totals. You can select any or all of the following subreports to include in the Inventory Statistics report: Misshelved Subreport; Out of Range Subreport; Items Not In Subreport; Expected items Not Processed Subreport; Weeding Subreport.

The report is placed in the following location, depending on your operating system:

- **Windows XP** – **C:\Documents and Settings\All Users\Application Data\Polaris\Polaris Inventory Manager*YYYYMMDD Time***
- **Windows Vista** – **C:\ProgramData\Polaris\Polaris Inventory Manager*YYYYMMDD Time***

where *YYYYMMDD Time* is the date and time of the update. You can also choose to create Polaris record sets of items that were expected but not processed and items marked for weeding, which you may find convenient for processing the items later.

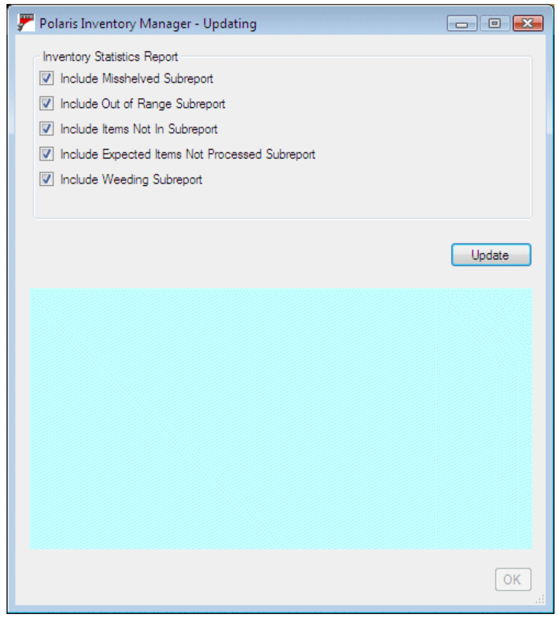
> **Note:**
> The optional record set of items that were expected but not processed is named **PIM_*branch abbreviation_date_time***. The optional record set of items marked for weeding is **PIM_WEEDING_*branch abbreviation_date_time***. The record set owner is the branch specified when the item data was loaded, and the default record set note is the call number range of the inventoried items.

In addition, if you scanned any barcodes that were not in the call number range, these are recorded in a text file named **OutOfRange.txt**. You can process this file in the Polaris staff client to update the inventory date for the out-of-range items. See "Update the inventory date of out-of-range items" on page 21.

When you have finished the inventory for the items you loaded, follow these steps to upload the data to the Polaris database.

1. Establish a network connection for the tablet PC.
2. On the main window of the Polaris Inventory Manager, select **File, Update**.

   The Updating window opens.




3. Select (check) or deselect the subreports to include in the Inventory Statistics report.

   **Note:**
   If you loaded multiple shelf locations or collections and chose to interfile them on the inventory list, the Updating window offers an option to group them on the weeding subreport.

4. Click **Update**.

   Messages are displayed as the OutofRange.txt file and Inventory Statistics report are generated.

   - If an OutofRange.txt file is being created, you see a dialog box where you can create another copy and place it in a location of your choice. A copy is always placed in **C:\Documents and Settings\All Users\Application Data\Polaris\Polaris Inventory Manager*YYYYMMDD Time*** (Windows XP) or **C:\ProgramData\Polaris\Polaris Inventory Manager*YYYYMMDD Time*** (Windows Vista) on the tablet PC or inventory workstation. This default copy is deleted if you load a new call number range or record set in Polaris Inventory Manager without updating the database.

   - If items were expected but not processed between the first and last item you checked, you see a message that offers the option to create a Polaris record set of the items. Click **Yes** to create the record set. A message appears that allows you to change the default record set note, which is the call number range of the inventoried items. You can type up to 255 characters.

     **Note:**
     Items that were expected but not processed are also summarized and listed in the Inventory Statistics report, and the report includes the name of the record set if you choose to create one. The maximum number of these items that can be shown on the Inventory Statistics report is 5,000.

**Tip:**
You can use the record set of items expected but not processed to help you track down and account for the items later. Then you can load the record set into Polaris Inventory Manager, process the records, and update the database again.

- If you marked items for weeding, you see a message that offers the option to create a Polaris record set of the items. Click **Yes** to create the record set. A message appears that allows you to change the default record set note, which is the call number range of the inventoried items. You can type up to 255 characters.

  **Note:**
  Items marked for weeding are also summarized and listed in the Inventory Statistics report, and the report includes the name of the record set if you choose to create one.

- Finally, a message indicates that the update was successful and the Inventory Statistics report opens as a .pdf file in Adobe Reader. It includes any subreports you selected. You can review the report and print it, if you have a printer connection, or copy it to another workstation for later review.

  **Note:**
  If you have previously updated the database, you can view the earlier reports. Select **File, Report** on the main window of the Polaris Inventory Manager, and select the report from the report window. You can click **Explore** to browse to other file locations. Select the report you want to view, and click **Display**.

5. Click **OK**.

   The Updating window closes, and the Polaris Inventory Manager main window opens.

6. Select **File, Exit** to quit Polaris Inventory Manager.

   If the loaded items were not completely inventoried, the next time you open the Process Items window in Polaris Inventory Manager (select **File, Scan**), the list is positioned at the next item to process.

   In the Polaris staff client, the inventory date is displayed in the **Last inventory date** field in the Item Record workform - Statistics view for each item that was successfully inventoried.

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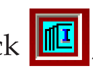
## Update the inventory date of out-of-range items

When you update the Polaris database, Polaris Inventory Manager creates **OutOfRange.txt**, a text file that contains the out-of-range barcodes. Follow these steps to update the inventory date of these items in the Polaris staff client.

1. If the Polaris staff client is not installed on the tablet PC with Polaris Inventory Manager, copy **OutOfRange.txt** from the folder **C:\Documents and Settings\All Users\Application Data\Polaris\Polaris Inventory Manager*YYYYMMDD Time*** (Windows XP) or **C:\ProgramData\Polaris\Polaris Inventory Manager*YYYYMMDD Time*** (Windows Vista) on the tablet PC to any location on a network workstation where the Polaris staff client can access it.

   **Note:**
   If you created a copy of the file in a network location where the Polaris staff client can access it (see "Update the database" on page 18), you do not need to do this step.

2. Log in to the Polaris staff client.
3. Select **Circulation, Check In** from the Polaris Shortcut Bar to display the Check In workform.
4. Select **View, Update Inventory Date,** or click , to display the Update Inventory Date view.
5. Press **CTRL+ALT+I**.

   An explorer window opens.

6. Browse to and select **OutOfRange.txt.**

   The items are listed on the workform. For each item, the Comments column lists whether the inventory date was successfully updated, and information about any problems.

# Inventory Reports in the Staff Client

After you update the database, you can run standard Polaris inventory reports from the Polaris staff client. These reports do not distinguish between data received from Polaris Inventory Manager and the Polaris staff client. That is, if you also took inventory using the Polaris staff client, and this data falls within the specified item sets and date ranges for the reports, it is included in the reports.

To access the standard reports, select **Utilities, Reports and Notices** on the Polaris Shortcut Bar. The following reports are available under **Cataloging, Item**:

- **Inventory Exception Incorrect Status** - Lists items that had a status other than In during inventory. You specify a call number range and a cut-off date. Set the cut-off date to the day before the inventory date. You can filter the report by organization.
- **Inventory Exception Misshelved** - Lists items with a status of In that should have been in the inventory sequence but were not. You specify a call number range and a cut-off date. Set the cut-off date to the date you started the inventory. You can filter the report by organization.
- **Inventory Shelf List** - Lists inventoried items in a specified call number and date range. You can filter the report by organization.

For more information on generating reports, see your Polaris staff client documentation.

# Appendix: Setting Up the Bluetooth® Scanner

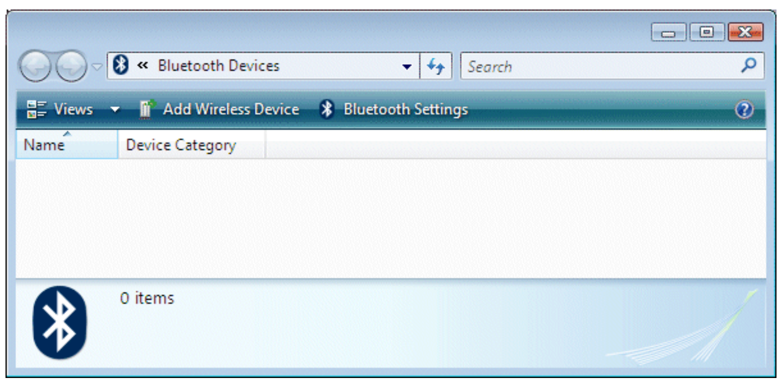
This section explains how to set up your optional PSC® QuickScan® Bluetooth scanner to work with Polaris Inventory Manager. Before you begin, install the Polaris Inventory Manager software on the tablet or laptop computer you plan to use for inventory. For installation details, see the *Polaris Inventory Manager Installation Guide*, available on the Polaris Customer Extranet.

## Set up the scanner

Follow these steps to set up your Bluetooth scanner.

1. On the tablet or laptop computer, select **Start, Control Panel, Bluetooth Devices.**

   The Bluetooth devices window opens.



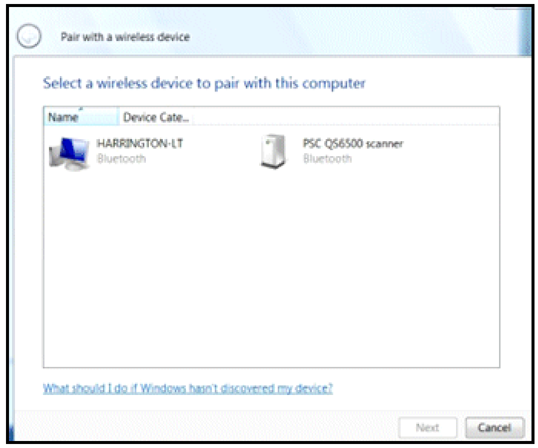

2. Using the scanner, scan barcodes 1 - 15 (see “Scanner Programming Barcodes” on page 28).

   These barcodes put the scanner in Bluetooth mode. If they are scanned correctly, the scanner base flashes yellow, pauses, and emits three beeps.

3. In the Bluetooth devices window, select **Add Wireless Device**.

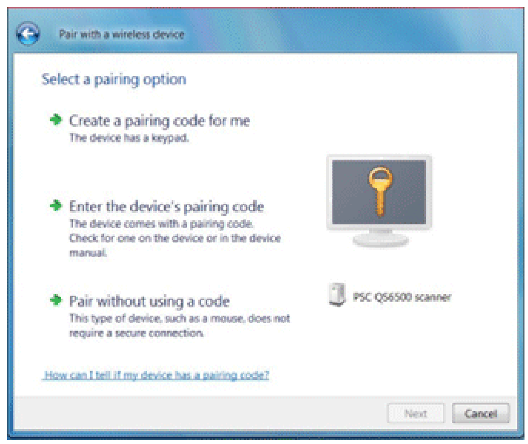
   The tablet or laptop scans for available Bluetooth devices.

   **Note:**
   Your tablet or laptop may find extra devices such as phones and other laptop computers.



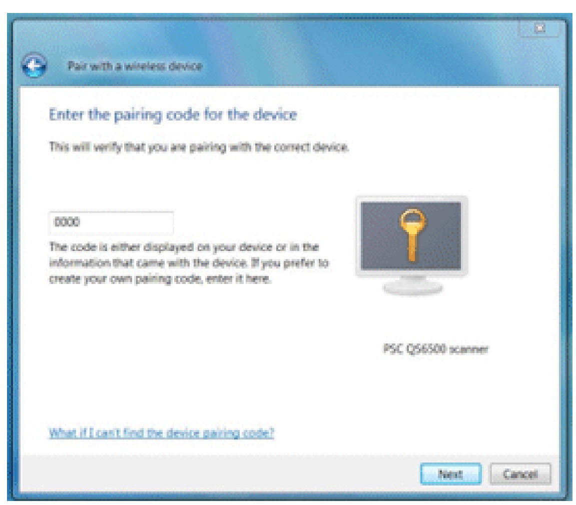

4. Select **PSC QS6500 scanner**, and select **Next**.

   The pairing option window opens.



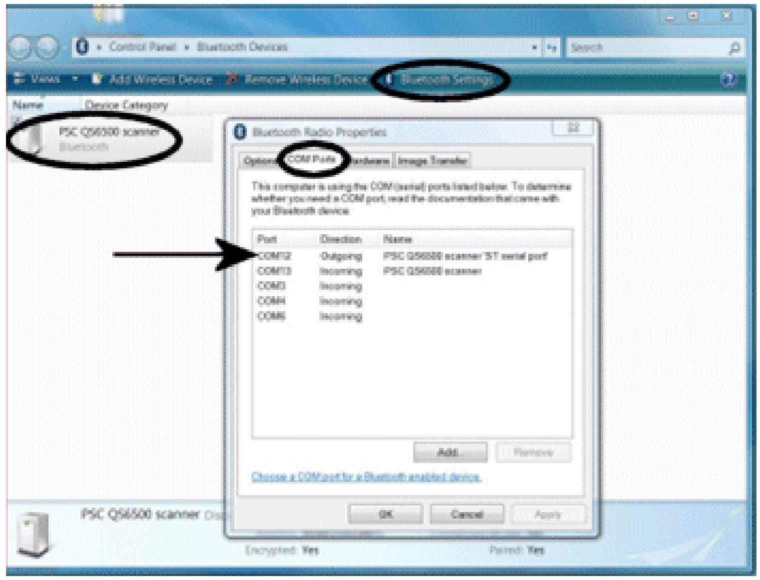

5. Select **Enter the device's pairing code**.

   The pairing code window opens.



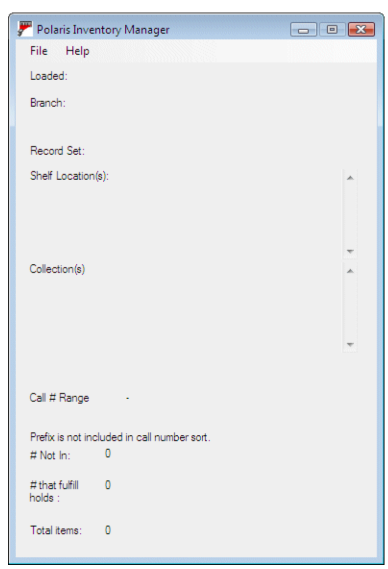
6. Type **0000** in the box.
7. Select **Next**, then select **X** to close the window.
8. In the Bluetooth Devices window, select **PSC QS65000 scanner**, then select **Bluetooth Settings**.

   The Bluetooth Radio Properties dialog box opens.
9. Select the **COM Ports** tab and note the port associated with the PSC QS65000 Scanner 'ST serial port'.



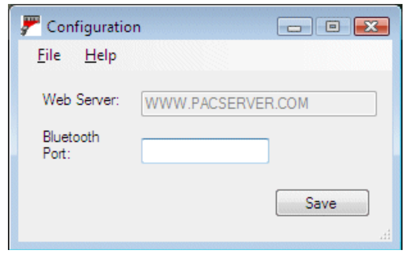

10. Close the properties dialog box and the Bluetooth Devices window.
11. Select **Start, Programs, Polaris, Polaris Inventory Manager**, or click the desktop shortcut icon .

    The Polaris Inventory Manager main window opens.



12. Select **File, Configure**.

    The Configuration window opens.




13. In the **Bluetooth Port** box, type the COM port information that you found in step 9.

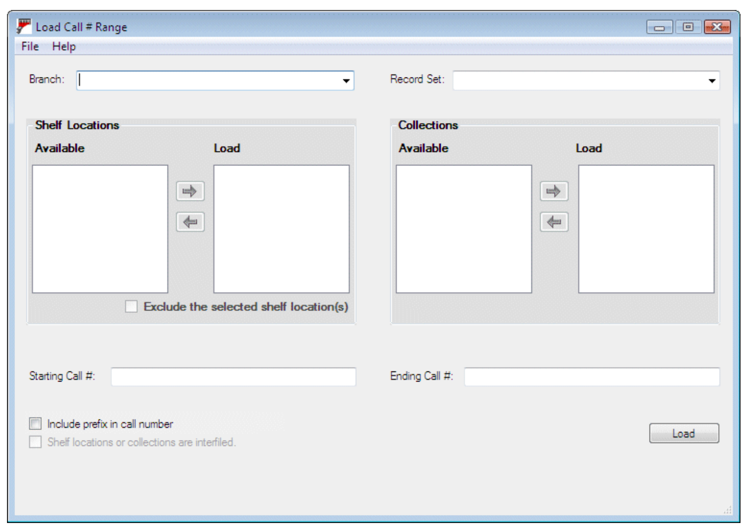
14. Select **Save** and close the Configuration window.

    The Polaris Inventory Manager main window appears. The application is ready to load item data for the inventory.

15. Select **File, Load**.

    **Important:**
    Follow the next steps each time you load item data in preparation for inventory.

    The Load Call # Range window opens.




16. Select the branch, and enter the call number range and the other pertinent information for the items that you intend to inventory. For details, see the *Polaris Inventory Manager Guide*.

17. Select **Load**.

18. Select **File, Close**.

    The Polaris Inventory Manager main window appears. The window displays summary information about the item records you specified, and the date and time you loaded the data.

19. Select **File, Preferences**, and set your inventory preferences. See the *Polaris Inventory Manager Guide.*

    The Process Items window displays the inventory list.

20. Select **File, Scan**.

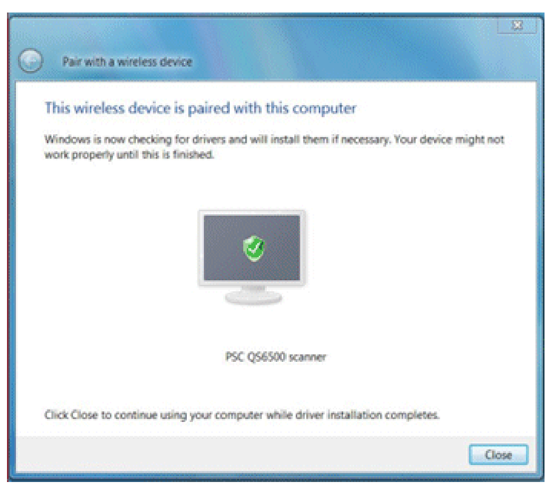
    A Bluetooth device message appears.


21. Click the message.

    The pairing code window appears.


22. Type **0000** in the box, and select **Next**.

    A confirmation window appears.



23. Select **Close**.

    The PIM Process Items window appears, and you can now scan items for inventory.

### Related Information

For detailed information on taking inventory, see "Taking Inventory with Polaris Inventory Manager" on page 1.

## Scanner Programming Barcodes

Scan these barcodes in order, as described in step 2 of these instructions.

> **Note:**
> These barcodes are reproduced from the PSC QuickScan *Product Reference Guide*.

1. Return handheld to factory defaults

2. Bluetooth Connectivity Mode - Start

3. Bluetooth Connectivity Mode - Connect to a BT device

4. Bluetooth Connectivity Mode - End

**5.** PIN = 0000 (Scan barcode or enter **0000** on laptop or tablet PC)

PIN = 0000

³ P I N : 0 0 0 0 . % %

**6.** Codabar - Start

**7.** Codabar - Enable Codabar

**8.** Interface Selection - USB keyboard

**9.** Interface Selection - End

**10.** Symbology, I.D. and Code Length - Start

**11.** Symbology, I.D. and Code Length - Code I.D. Transmission: Disable

**12.** Symbology, I.D. and Code Length - End

**13.** Codabar Start/End Transmission - Start

**14.** Codabar Start/End Transmission - Disable Start/End Transmission

**15.** Codabar Start/End Transmission - End

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