Inventory

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SOMMAIRE

1 - Introduction

In conformity with ISO 15489 Records Management Standard, Damaris RM provides Inventory function.

2 – Inventory Function Description

Damaris RM manages physical archives.

In a normal management, each Archives Unit has to verify if physical archives and records in Damaris RM are synchronized.

To do so, Inventory will verify if all declared archives are at right place, or your archiving records have some differences with physical files or boxes.

The following workflow describes several steps to achieve your inventory:
- Capture current localization information from your storage sites
  - You can use barcode reader
  - You also can create a CSV (Excel) file containing localization data
- Upload data to Damaris RM
- Choose the storage from file read
- Manage cases

3 – Capture Current Localization File

Incoming file format should follow this format:
- ANSI text CSV file

- First column: Barcode Value or function key

- Second column: Barcode reading time stamp

You should have a reading sequence with first of all, the inventory function, followed by storage address and all file or box codes localized on that address.

To change to a new storage address, you will repeat the same sequence.
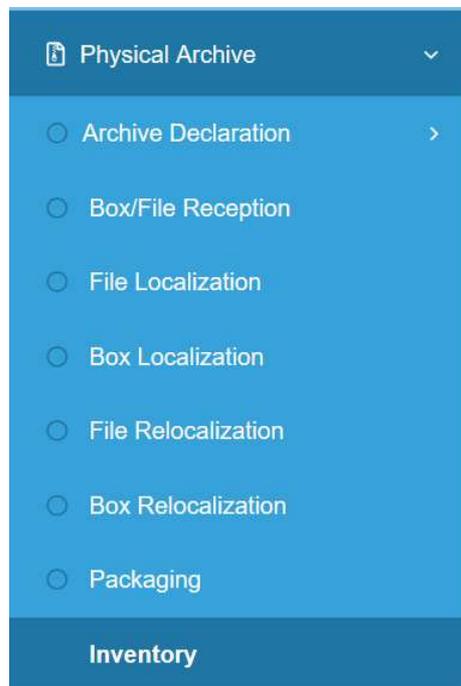
Here is a sample Inventory file:

```
--- FONCTION – <Inventaire>
Fl1-A101; 9:52:46 AM3/9/13
616263; 9:52:46 AM3/9/13
TBox222; 9:52:46 AM3/9/13
TFile13222; 9:52:46 AM3/9/13
--- FONCTION – <Inventaire>
Fl1-A102; 9:52:46 AM3/9/13
616263; 9:52:46 AM3/9/13
```
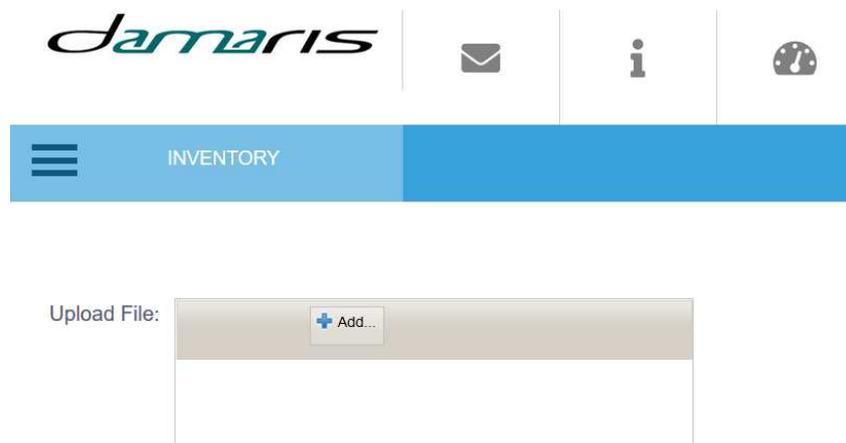
```
TBox2; 9:52:46 AM3/9/13
TFile14; 9:52:46 AM3/9/13
--- FONCTION - <Receive Box>
BOX_CODE; 9:52:46 AM3/9/13
BOX_CODE; 9:52:46 AM3/9/13
```

4 – Upload data to Damaris RM

After reading the current localization information, please open Damaris RM session and go to "Physical Archives / Inventory" menu.
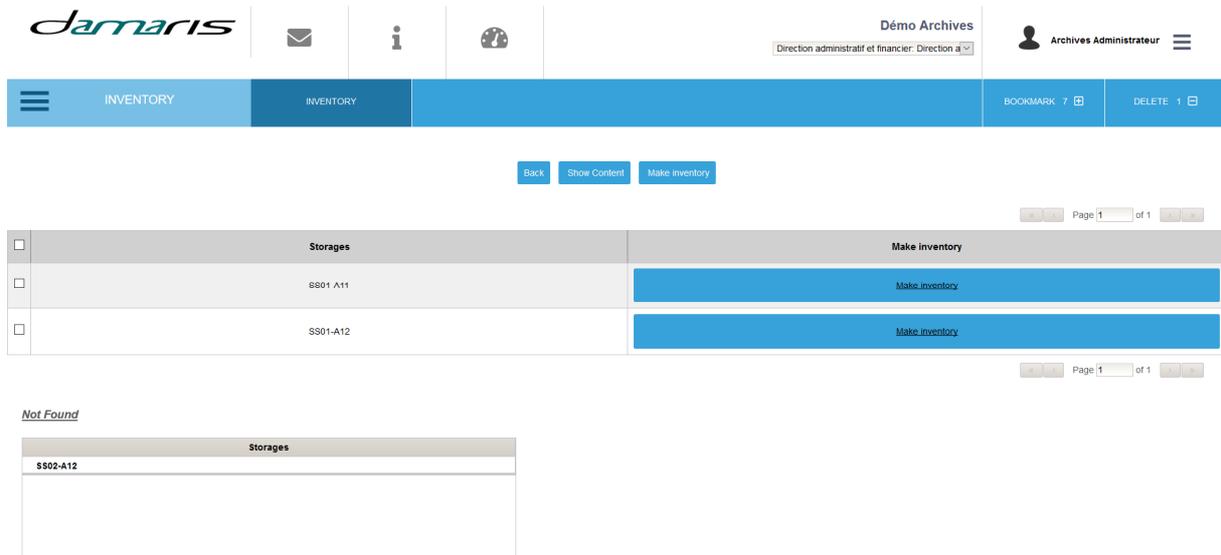

A similar page appears:

Please click on "+ Add" button and upload the inventory file.
Then use "Upload" button.

You will get a similar page:

The first part lists all storage addresses found in storage sites.
The second part indicates all sites absent from Damaris RM database.

5 – Make Inventory

At this level, you can use "Make inventory" button to compare electronic and physical information.

If you select a line, you can view the address's content by using "Show Content" function.

You also can select multiple lines and make global inventory by clicking on "Make inventory" button on top of the page.

After launching this function, you will get the following information:

Summary

Type	Count
Correct located box/file codes	0
Incorrect located box/file codes	0
Missing box/file codes	3

Incorrect located box/file codes

☐	Box/File code	Current address	Correct address
			Show Log Relocalize

Missing box/file codes

☐	Box/File code	Address
☐	616263	SS01-A11
☐	TBox222	SS01-A11

The first table indicates number of files / boxes on each case.
Cases are:

- Correct located box/file codes

- Incorrect located box/file codes

- Missing box/file codes

- Not found Storage addresses

5.1 – Correct located box/file codes

This list needs no action. All present box/files are correctly located and exist in database.

The "Show content" button

5.2 – Incorrect located box/file codes

All files or boxes found in a site at an incorrect storage address, are listed here.
You can select one or more items and relocate them.

Relocate function automatically modifies the storage address aligned to effective place instead of wrong information in database.

5.3 – Missing box/file codes

To fix items in this category, you have to declare missing boxes or files in database which are physically in archives site.

You can export CSV file for these items.

5.4 – Not found storage addresses

You will find all non-recognized addresses in this list.
It cannot be processed until you create these storage facilities.

You can use "Storage management" menu to create missing addresses and restart inventory process.