

# APPENDIX I: THE AUTOMATED INVENTORY PROGRAM

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# APPENDIX I: THE AUTOMATED INVENTORY PROGRAM

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## A. Overview

### 1. *What is the Automated Inventory Program?*

The Automated Inventory Program (AIP) generates the data and reports necessary to complete the annual inventory of:

- controlled museum property
- randomly selected cataloged museum property (including controlled property)
- randomly selected accessioned but uncataloged museum property (you don't have to do an accession inventory if the only uncataloged objects are from accessions you received within the last year)

During the inventory, you'll check the physical location, condition, and documentation for objects in the collection. The annual inventory allows you to identify accountability and collections management problems.

***Refer to the NPS Museum Handbook, Volume II, Chapter 4: Special Instructions and the DOI Museum Property Handbook, Volume II, Chapter 4: Inventory and Other Special Instructions for guidelines on completing the annual museum property inventory.***

### 2. *Must I complete my annual museum property inventory using ICMS?*

Yes. You must complete the inventory using the AIP in ICMS. The program will:

- determine the appropriate sample size and generate a random sample of catalog and accession numbers and extract associated catalog data for inventory
- pull all controlled property for the controlled property inventory and allow you to enter non-electronic controlled property
- allow you to edit selected AIP fields on line
- print the inventory on Form 10-349 or DOI Inventory with the extracted information listed by location
- total the inventory entries and print the summary sheet

### 3. *Will running the AIP change any of my catalog or accession data?*

No. Running the AIP doesn't change ICMS catalog or accession data. The AIP extracts information from existing records, but doesn't modify them. You cannot change your records from the AIP. You must go to the appropriate database to make changes to your data.

### 4. *Do I need special security rights to run the AIP?*

Yes. You need Administrator security rights to run the AIP or specific rights to the inventory under Advanced Module Permissions for your user id.

### 5. *Can I run the AIP for more than one unit?*

Yes. The AIP allows you to pull data from different directories. You can run individual reports for each unit collection that you manage. If the collections for each unit are in separate directories, you should access the inventory Control Screen from that unit's directories to avoid overwriting inventories for the other units you manage. Refer to Section IV of Chapter 9 for information on creating directories.

However, if all unit collections that you manage are in one directory, you will have to generate and complete one at a time. Each time you generate a new inventory within a directory, the previous inventory is overwritten.

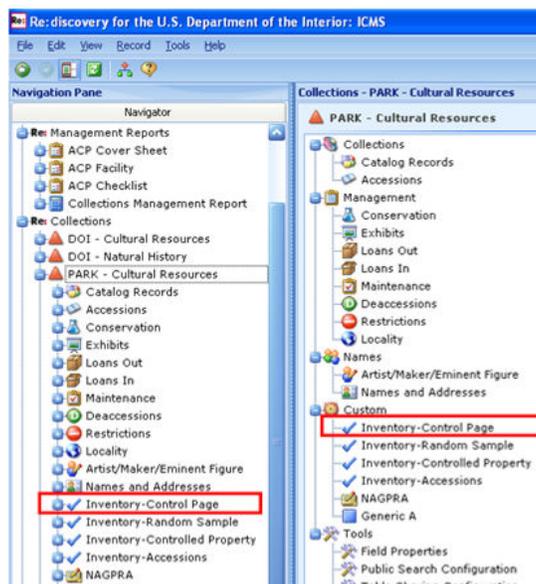
**Note:** There are special procedures for center inventories within the AIP to generate the necessary inventories. These are noted in the field-by-field instructions in Section C below.

## B. Running the AIP

### 1. How do I access the AIP?

The AIP is available within each Collections directory. To access the AIP:

- On the Home Page or in the Navigation Pane, double-click or expand the Collections module.
- Within the Collections module, double-click or expand the CR or NH directory for the collection you want to inventory. You may choose either CR or NH, but you must consistently access the AIP from this directory. Otherwise you might have two copies of the inventory.
- Within the directory, select the Inventory-Control Page. In the Navigation Pane (on the left), you need only single-click this option to open it. Or from the Directory Page (on the right), expand the Custom node (if necessary) and double-click the Inventory-Control Page.



**Note:** All 4 screens of the AIP are listed as separate nodes under the directory. You will start with the Inventory-Control Page to run the AIP.

### 2. What do I need to know to run the AIP?

To run the AIP, you must know:

- the highest catalog number used in your unit's collection
- the highest accession number used in your unit's collection (if you must complete an accessions inventory)
- the **ICMS** cultural resources and natural history directories for the collection you want to inventory

**Note:** For DOI style directories, the highest catalog number and highest accession number are not needed – these fields are grayed out.

3. *How many screens does the AIP have?* The AIP consists of five screens:
- Control Screen
  - Multimedia (for Control Page)
  - Random Sample Inventory
  - Controlled Property Inventory
  - Accessions Inventory
4. *What steps do I follow to complete the AIP?* To complete the AIP:
- Enter the unit, year, and directories for the collection you want to inventory.
  - (NPS Only) Enter the highest catalog number and accession number for the collection.
  - Generate the numbers and data for the inventory using the links on the Control Screen.
  - Go to the appropriate screen, and print the inventory form.
  - Complete the inventory by finding the objects and records, answering the questions on the inventory form, and completing the summary sheet.
  - *Optional:* Enter the inventory responses in the AIP in **ICMS** and reprint the inventory forms and print the summary sheet.
  - Give the inventory forms to the superintendent or unit manager for review and signature.
5. *Which part of the inventory should I complete first?* Once you generate the numbers for the inventory on the Control Screen, you can complete the inventory in any order you choose.
6. *How do I add an inventory in the AIP?* To add an inventory:
- from the Control Screen, click the Add button  on the button bar, *or*
  - go to Edit on the menu bar and choose Add New Record from the pull-down menu, *or*
  - press the F9 key

A new window will open. You will see “Add Mode” on the status bar in the lower right corner. You can then add and save data. You can only use the Add Mode on the Control Screen and the Controlled Property Inventory screen.

***Add Mode is inactive on the Random Sample Inventory and Accessions Inventory screens. The AIP randomly generates the catalog and accession numbers and data for these screens. If you could add records, the selection would not be random.***

7. *How do I modify inventory records in the AIP?*

To modify AIP data that you have previously saved:

- click on the modify button  on the button bar, *or*
- go to edit on the menu bar and choose Modify This Record, *or*
- press the F10 key

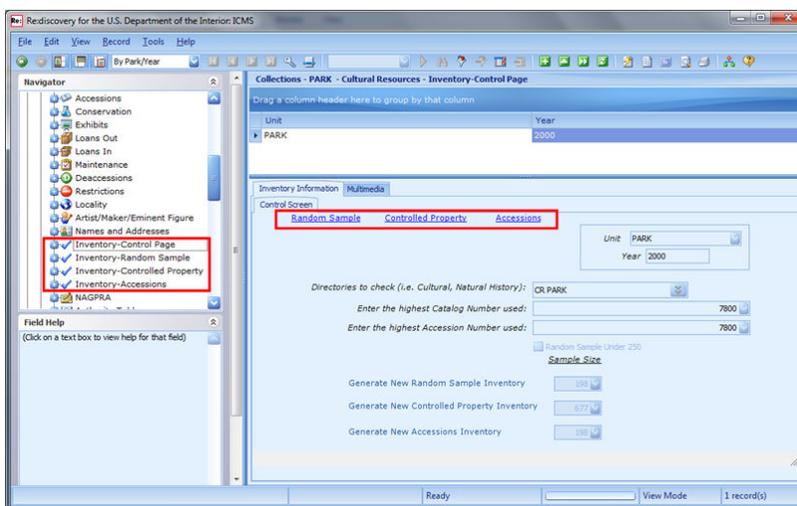
You will see “Modify Mode” on the status bar in the lower right corner. You can then make changes to the data.

***Do not make modifications to the Control Screen data after you have saved the record. You must certify that you have only generated the numbers one time for each part of the inventory.***

8. *How do I select the different screens of the AIP?*

To access the different screens of the AIP:

- From any of the AIP screens, click on the screen links at the top of the screen to be directed to that screen, *or*
- In the Navigation Pane, click the desired screen listed under the directory.



The screen links are not active in Modify or Add Mode from the separate record window that opens, but you can toggle to the main window to select and view one of the other screens if desired.

***To move between the records within each screen, use the previous and next arrows   on the button bar, or select the record in the List Pane.***

C. **Frequent Questions About the AIP**

1. *What is the structure of the AIP?*

The AIP consists of three inventory screens and a control screen. The screens represent separate databases that are linked by the unit acronym and year of report. Each of the three inventory screens is one part of the overall inventory of the collection.

2. *Do I have to complete the item-specific inventory information on the computer?*

No. You are not required to complete item-specific inventory information on the computer. You must generate the numbers and data, and print the forms using the AIP. You may complete the information manually. You then have the option of:

- submitting the inventory forms without entering the data in the computer, *or*
- entering the data in the computer, reprinting the forms, and submitting the reprinted inventory

***If you...***

enter the inventory data on the computer,

only record the data manually on the worksheet,

***Then...***

the AIP will total the answers and complete the summary sheet

you will have to print a blank summary sheet and total the answers manually

3. *Do I have to complete all the fields on the inventory?*

No. You may not always have information to enter in the Remarks/Condition field. In some cases, the instructions say to leave a field blank. For example, if a catalog number is not in use, leave the fields blank.

4. *Must I inventory objects that are on outgoing loan?*

Yes. You must provide item-specific inventory information for objects on outgoing loan, including objects on loan to non-Bureau repositories. You can verify the presence and condition of objects on loan either in person, by telephone, or in writing. Enter information in the Remarks/Condition field on how you verified the objects.

**Note:** You don't need to inventory objects on loan if you have checked the objects within the last year.

***You don't need to inventory objects on outgoing loan to a Bureau repository. Note the acronym or name of the Bureau repository in the Remarks/Condition field. The repository will complete an annual inventory for unit collections at the repository.***

5. *Can I use the button bar and menu bar functions with the AIP?*

Yes. Most of the button bar and menu bar functions work with the AIP. The following functions are not available with the AIP:

- imaging
- word search
- delete (except the Control Screen and manually entered records on the Controlled Property Inventory Screen)

You cannot use Add and Copy functions with the Random Sample Inventory and Accessions Inventory screens. The AIP doesn't contain supplemental records or use the associated modules. Refer to Chapter 1, System Basics, for information on the button bar and menu bar functions.

6. *How do I delete an inventory?*

The delete function is only available on the Control Screen and for manually entered records on the Controlled Property Inventory screen. To delete an inventory:

- Select the Control Screen entry in the List Pane for the unit inventory you want to delete. If you want to delete more than one record at a time, you can select multiple records in the List Pane by using shift-click or ctrl-click.
- Go to Edit on the menu bar and choose Delete Record(s).
- Then choose Delete This Record or Delete Multiple Records (if more than one is selected in the List Pane).
- The program will ask if you are sure you want to delete the selected record(s). Click Yes to permanently delete the record. Click No to return to the screen without deleting.

**Note:** Be extremely careful when using this option. Don't delete an inventory and run it again for the same year. The staff conducting the inventory must certify that only one set of numbers was generated for the inventory.

7. *What do I do if I am interrupted before I complete the AIP?*

Once you generate the numbers and data, you can save the inventory by clicking the Save and Close or Save links. You can then complete the inventory at a later date.

To find your inventory, go to the Control Screen and highlight your current inventory in the List Pane. The entry will load in the Record Pane at the bottom.

8. *What data sorts are available in the AIP?*

The Control Screen is sorted by unit and year.

The predefined sorts in the Random Sample Inventory and Controlled Property Inventory are:

- By Location: object location and catalog number
- By Catalog Number: catalog number and object location

The predefined sorts in the Accessions Inventory are:

- By Location: object location and accession number
- By Accession Number: accession number and object location

Alternatively, you can apply a quick sort using fields in the List Pane. To change the fields in the List Pane, use Update My List View on the View menu. For additional information on sorting, refer to Section V of Chapter 7.

9. *Are the inventories from previous years saved?*

No. Only the Control Screen from each year is saved in the AIP. When you generate a new inventory each year, the previous inventories for Random Sample, Controlled Property and Accessions are overwritten with the new records.

## D. Control Screen

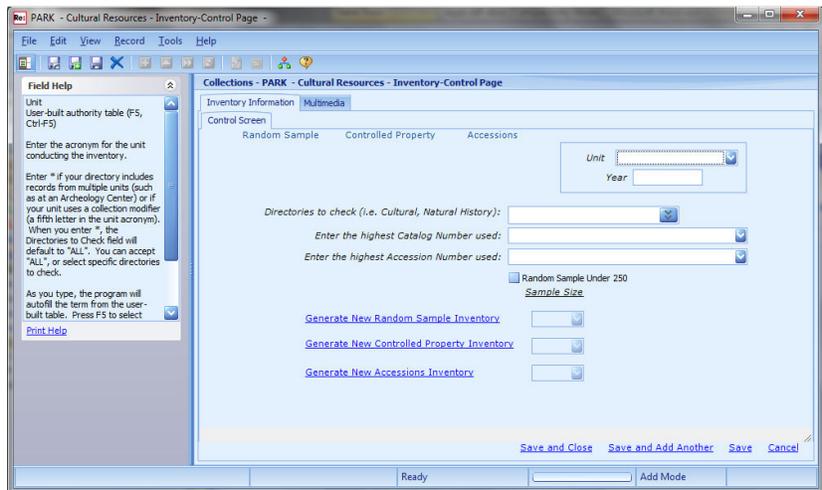
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1. *What is the Control Screen?*

The Control Screen contains the basic information the program needs to generate the numbers and data for the inventory. You must complete the Control Screen first in order to run the inventory.

2. *How do I complete the fields on the Control Screen?*

Follow the field-by-field instructions for completing the fields on the screen. On-line field help is available in the Navigation Pane for each field.



*Unit*

Single entry authority table (F5, Ctrl-F5).

Enter the acronym for your unit. As you type, the acronym will complete from the authority table. To view and select the acronym from the list, click the down arrow or press F5.

If there is a collection designation (for units with separate collections under one acronym), select the appropriate entry in the authority table.

Example: JELAB for the Barataria Preserve unit collection at JELA  
COLOJ for the Jamestown collection at COLO

To add a collection designation to the authority table, press Ctrl-F5 or right click and choose Browse Authority Table. Then click Add Term. Once you have added the new entry, click Save Change. NPS collection designations must be approved by the Chief Curator, WASO.

***NPS CENTERS and other DOI bureaus: For NPS center inventories and other DOI bureaus, select the asterisk (\*) option in the authority table.***

*Year*

Straight entry field.

Enter the fiscal year in which you conducted the inventory. Enter the complete 4-digit year.

*Directories to check*

Stacked authority table of directories that are available in your system. (F5, F12 to expand)

Select the directories that contain the records for your unit. To obtain a complete inventory, you must select both the CR and NH directories for your unit.

As you type, the directory name will complete from the list of directories. To select the directory from the table, click the down arrows next to the field or press F5.

Press F12 to add the second directory to the field. In the expanded window, you will have a second entry line to enter the second directory. Select the second directory from the pull down menu.

If you have more than 2 directories for your collection, press the down arrow on your keyboard or click Add for a new entry line and enter the next directory. Press Ctrl-Delete on the keyboard to remove unwanted directories. Click Save after adding your collection directories. The directory names will be separated with a double dash (--) on the main screen.

**Note:** The directories that you enter tell the system where to go to pull the data. If you don't specify directories, the system will generate the inventory report(s) as if there were no catalog or accession data in **ICMS**.

**CENTERS:** For center inventories, if you select the asterisk (\*) for the Unit acronym, the directory field will autofill with 'All'. This means that all directories in your system will be used for the inventory. If you do not want all directories used, select the individual directories as instructed above.

*Highest Catalog Number Used*

(NPS Only) Straight entry numeric field. This field is used only for directories that use the 3-part NPS-style catalog number format.

Enter the highest catalog number (without acronym) assigned to your museum collection. The program will use this entry to select the appropriate sample size for the random sample inventory.

***If the highest catalog number is...***

***Then the program...***

less than 250

lists all the catalog numbers.

250 or greater

randomly selects catalog numbers. The larger the collection, the larger the sample size. The sample size won't be less than 112 or more than 203.

**Note:** For centers that select the asterisk (\*) in the Unit acronym field, this field will be inactive since you have multiple units with multiple highest catalog numbers. This field is also inactive in DOI directories.

*Highest Accession Number Used*

(NPS Only) Straight entry field. This field is used only for directories that use the 3-part NPS-style accession number format.

Enter the highest accession number (without acronym) assigned to your museum collection. The program will use this entry to select the appropriate sample size for the accession inventory.

***If the highest accession number is...***

***Then the program...***

less than 250

lists all the accession numbers.

250 or greater

randomly selects accession numbers. The larger the number of accessions, the larger the sample size. The sample size won't be less than 112 or more than 203.

**Note:** For centers that select the asterisk (\*) in the Unit acronym field, this field will be inactive since you have multiple units with multiple highest accession numbers. This field is also inactive in DOI directories.

### *Random Sample Under 250*

If you have less than 250 records in your collection, checking this box before generating the Random Sample Inventory or the Accessions Inventory, in that case, will get a random sample rather than all records. Without the box checked, if you have less than 250, the Random Sample (or Accessions) inventory will list all of the records.

### 3. *What do the inventory links do?*

Use the three inventory links on the Control Screen to generate the numbers and data for the inventory.

#### ***If you select...***

#### ***Then the program will...***

##### Generate New Random Sample Inventory,

use the highest catalog number entered to generate the sample size and number of records in the sample. **Note:** For DOI style directories or when the asterisk is used in the Unit field, the sample size will be determined from the size of the collection.

generate the catalog numbers that you will use in the inventory.

pull data from the selected catalog records for the Catalog Number, Object Location, Controlled Property, and Object/Specimen Name fields on the inventory record.

create Inventory History supplemental records for each catalog record selected. Refer to Chapter 3, Section XXV for information about this supplemental.

##### Generate New Controlled Property Inventory,

generate the catalog number for all the controlled property.

pull data from all the controlled property records for the Catalog Number, Object Location, Controlled Property, and Object/Specimen Name fields on the inventory record.

create Inventory History supplemental records for each catalog record selected. Refer to Chapter 3, Section XXV for information about this supplemental.

##### Generate New Accessions Inventory,

use the highest accession number to generate the sample size and number of records in the sample. **Note:** For DOI style directories or when the asterisk is used in the Unit field, the sample size will be determined from the size of the collection.

generate the accession numbers that you will use in the inventory.

pull data from the selected accession records for the Accession Number and Object Location fields on the inventory.

**Note:** When you click any one of these links, you will see a message at the bottom that the system is getting the requested inventory and to please wait. Once the inventory is generated, a message box appears indicating how many records were added for the selected inventory. Click OK.

4. *How do I save the information on the Control Screen?*

Once you have entered all the information on the Control Screen and clicked the three inventory links, click Save and Close at the bottom. The window will close and you can then go to one of the inventory screens to continue with the inventory.

The program won't allow you to save duplicate inventories. If you receive a message that this is a duplicate entry, check the date you entered in the Year field. If the date is correct, you have already entered a Control Screen record for this year. Cancel the current record and select the current inventory in the List Pane. Modify the current inventory only if all information has not been completed.

5. *How do I complete the Control Screen if I manage collections for more than one unit?*

If you manage collections from more than one unit, you will have to complete a separate Control Screen for each unit.

***You must complete all inventory reports for a unit before you can generate inventories for the next unit. Each time you generate the inventories, the previous inventory is overwritten. If each unit is in a separate directory, you might want to run the AIP from the separate directory for each unit to avoid overwriting the inventories for the other units. Make sure that you select the CR and NH directories for that unit only.***

6. *What is the Multimedia tab?*

The Multimedia tab allows you to save the signed and scanned inventory reports to the record. Refer to Appendix G in this manual for information on Multimedia.

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**E. Random Sample Inventory Screen**

1. *What is the Random Sample Inventory Screen?*

The Random Sample Inventory screen contains the fields you will use to conduct the random sample inventory of cataloged objects. There is one screen for each catalog number in the inventory. The records appear in order by location. The records for each location appear by ascending catalog number.

2. *Why does controlled property appear in the random sample?*

Controlled property appears in the random sample inventory because the program needs all your catalog numbers to run a statistically valid sample. If you removed the catalog numbers for controlled property from the inventory, you wouldn't have a true random set of numbers.

**Note:** You don't need to inventory controlled property twice. Copy the data for the controlled property that appears in the random sample inventory into the controlled property inventory or vice versa.

3. *What catalog data does the program pull for the random sample inventory?*

The AIP pulls the location, catalog number, controlled property status, and object/specimen name for all records it pulls from **ICMS**. It enters this information on the screen and prints it on the Form 10-349 or DOI Inventory report.

4. *How do I conduct the random sample inventory?*

Most people will print a copy of the random sample inventory and complete the inventory fields on paper. If you have a laptop computer, you may want to take the computer to the objects and complete the inventory fields on the screen.

5. *How do I print the random sample inventory form?*

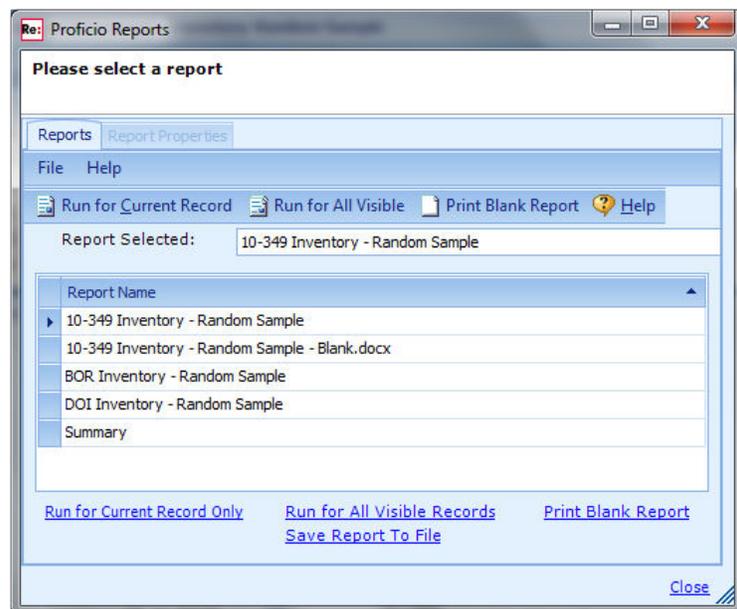
To print the random sample inventory form:

- From the Random Sample Inventory screen, click the Proficio reports button on the button bar, or select Reports on the Record menu and choose Proficio Reports → Proficio Reports.
- In the list of reports, to print the Inventory of Museum Property, Random Sample, select the form appropriate for your unit:

10-349 Inventory - Random Sample, *or*  
BOR Inventory - Random Sample, *or*  
DOI Inventory - Random Sample

Select Summary to print the summary sheet for the inventory.

**Note:** There is also a blank form that you can print. Choose 10-349 Inventory – Random Sample – Blank.docx. This is a Word document that prints from Microsoft Word. You can also print a blank document of any report by clicking Print Blank Report. These blank forms will not include any catalog records on the form.



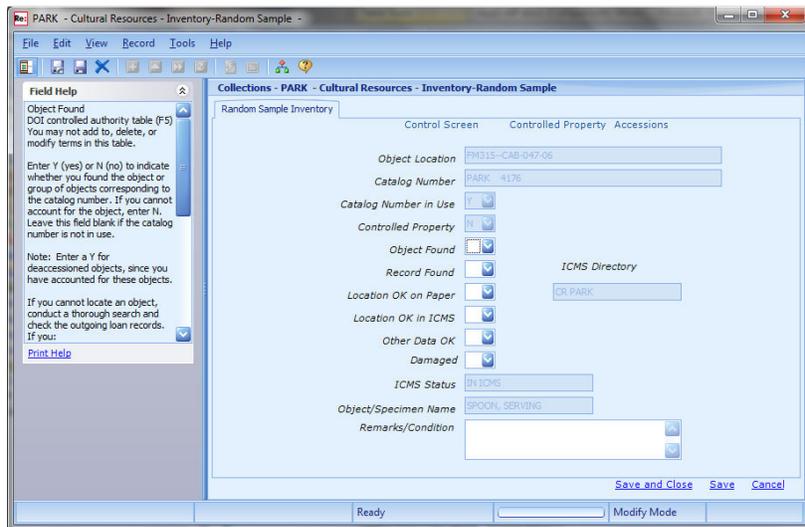
- Click Run for All Visible Records on the toolbar or at the bottom.
- In the Preview window, click the Print button or Quick Print button on the button bar.
- Follow the Windows print screens to print the form.

**Note:** The first page of the form tells you the number of pages in the report, the highest catalog number used, the sample size, and the date the report was printed. This is the signature cover sheet for the random sample inventory. You can scroll through the pages, or use the Next Page and Previous Page buttons to see the other pages of the report. There are also options to export or email the report in other file formats – use the Export or Email document buttons.

6. *How do I complete the fields on the Random Sample Inventory screen?*

Follow these field-by-field instructions for entering the data on the random sample inventory report or on the Random Sample Inventory screen.

If you are entering the data on the screen, field help is available for each field on the right in the Navigation Pane.



***You can modify certain fields on the screen, but you can't add new records. You must be in Modify Mode to add or change data for the current record on the screen.***

**Note:** All Bureau controlled table fields contain 2 entries: a Y (yes) and a N (no). You may not add to, delete, or modify the terms in the table. Click the down arrow, or press F5 to view and select an entry from the table. You can also type the Y or N to enter it in the field.

Press Ctrl-Delete to remove an entry from the field.

*Object Location*

Straight entry field.

This field contains the data from the Location field on the catalog record. The AIP extracts this information from the catalog record. You cannot edit the location entries that the program provides.

Enter the physical location for records that are not in the database. Obtain the location from the paper catalog records or some other unit-based location file system.

*Catalog Number*

Program generated.

The program generates this number when creating the random sample for the inventory. You cannot change this number.

## *Catalog Number in Use*

Bureau controlled table (F5)

The AIP enters a Y for records in the database. You cannot change the entries that the program provides. If for some reason the number is not in use, enter an explanation in the Remarks/Condition field.

The number is in use if you have a catalog record for the object or an object with the catalog number marked on it.

If the number is not in the database, the program leaves this field blank.  
Enter a Y in the field if you have a manual record for the catalog number.  
Enter a N if the number is not in use.

***If the catalog number is not in use, leave the other fields blank.***

## *Controlled Property*

Bureau controlled table (F5).

This field contains the data from the Controlled Property field on the catalog record. The AIP extracts this information from the catalog record. You cannot edit the controlled property entries that the program provides.

Enter the controlled property status for records that are not in the database. Obtain the status from the blue working copies of the catalog records.

**Note:** If a controlled property status is incorrect, make a note in the Remarks/Condition field. After you complete the inventory, make the change in ICMS and on the paper record, if the unit keeps paper records.

## *Object Found*

Bureau controlled table (F5).

Enter Y or N to indicate whether you found the object or group of objects corresponding to the catalog number. If you cannot account for the object, enter N.

**Note:** Enter a Y for deaccessioned objects, since you have accounted for these objects.

Enter a Y for lot cataloged objects only if the lot is complete. If you can't easily verify large lots or archival collections, assess the risk of loss or damage. Then decide at what level you need to review the items. You should determine within reason, if the lot or archival collection is complete.

If you cannot locate an object, conduct a thorough search and check the outgoing loan records. If you:

- reported the loss on an incident report, enter the name and date of the report in the Remarks/Condition field.
- submitted a Report of Survey (Form DI-103), enter "Survey DI-103" and the date of the report in the Remarks/Condition field. When the Report of Survey has been signed and the object is deaccessioned, you have accounted for the object.

If you discover the loss of a museum object during the inventory process, follow the procedures in the DOI Museum Property Handbook, Volume II, Chapter 4 or the NPS Museum Handbook, Part II, Chapter 4, Section III.

## ICMS Directory

Program generated.

The program provides the name of the directory that contains the catalog record. You cannot edit this field. If the number is not in **ICMS**, the directory is blank.

## Record Found

Bureau controlled table (F5).

Enter Y if you find a copy of the catalog record. Enter N if you cannot find a copy of the catalog record. A copy of the catalog record can be either:

- the paper copy, *or*
- an electronic record in the collection records databases (**Note:** If the AIP has entered data in the Location and Object/Specimen Name fields, an electronic record exists.)

***If you have an electronic record, you must use the data from this record to complete the inventory fields.***

## Location OK on Paper

Bureau controlled table (F5).

Enter Y if the object location is correct on the paper catalog record. Enter N if the location is incorrect. If there is only an electronic record for this catalog number or the catalog number is not in use, leave this field blank.

**Note:** If you enter N, then note the correct location in the Remarks/Condition field and make the change on the paper catalog record and in the electronic catalog record after you complete the inventory.

Leave this field blank if the unit does not keep paper records.

## Location OK in ICMS

Bureau controlled table (F5).

Enter Y if the object location is correct on the electronic catalog record. Enter N if the location is incorrect. If you do not have an electronic record or the catalog number is not in use, leave this field blank.

**Note:** If you enter N, then note the correct location in the Remarks/Condition field and make the change in the electronic catalog record after you complete the inventory.

## Other Data OK

Bureau controlled table (F5).

Check the information on the paper and/or electronic record. If both exist, check both. Enter a Y in this field if the information on the museum catalog record(s) is complete and accurate. If any information on the catalog record needs to be added or changed, enter N in this field. Enter a brief note in the Remarks/Condition field about the corrections you need to make to the record. Leave this field blank if the catalog number is not in use.

Make the change on the paper and/or electronic catalog record after you complete the inventory.

**NPS Note:** If you make significant changes, submit the record as a recataloged record to the National Catalog in Harpers Ferry, WV. Do not submit records that have only minor modifications, such as location changes.

*Damaged*

Bureau controlled table (F5).

Enter N if you don't observe any damage or deterioration to the object. Enter Y if you notice the object has been damaged or has deteriorated. Check the current condition against the condition on the catalog record or the previous inventory. Make a note of any damage or condition changes in the Remarks/Condition field.

If there is a change in condition, update the catalog record. If the object was damaged through vandalism, complete an incident report at the time of discovery. Enter the name and date of the report in the Remarks/Condition field.

Leave this field blank if the catalog number is not in use.

*ICMS Status*

Program generated.

The program indicates whether or not the record is in *ICMS*. You cannot edit this field.

*Object/Specimen Name*

Straight entry field.

The AIP automatically enters the object/specimen name for catalog records in the program. You cannot edit the entry that the program provides.

**Note:** For natural history records, the name includes all the subfields, such as species and subspecies, that appear in the catalog record.

Enter the object/specimen name for records that are not in the database. Obtain the name from the paper catalog records. List the collection title for archival and manuscript collections.

Enter the object/specimen name even if you cannot find the object. If the missing object is part of a lot, indicate the number or quantity missing in the Remarks/Condition field.

*Remarks/Condition*

Memo field (F12 to expand).

If you enter "No" in any field except the Damaged field, enter an explanation in this field. You may also use this field to enter notes on the object's condition.

7. *How do I save the information on the Random Sample Inventory screen?*

Once you have entered all the information on the Random Sample Inventory screen for a record, click Save and Close or press F2. Select the next record in the List Pane or use the Next arrow button on the button bar to go to the next record. Complete the fields on the next record, save it, and go on to the next. Continue this process until you reach the last record in the inventory. You can then go to the Controlled Property Inventory or Accessions Inventory screen, if needed, to complete these inventories.

8. *Can I use any of the mass modification functions to enter common data in multiple records?*

Yes. You can use Modify All and Quick Entry to quickly enter data into multiple records. You must create a subset of your data using Tag Sets, filters or selecting multiple records in the List Pane. Refer to Chapter 6 for information on how to use Modify All and Quick Entry.

## F. Controlled Property Inventory Screen

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### 1. *What is the Controlled Property Inventory Screen?*

The Controlled Property Inventory screen contains the fields you will use to conduct the inventory of controlled property. There is one screen for each catalog number in the inventory. The records appear in order by location. The records for each location appear by ascending catalog number.

***You must do a 100% inventory of controlled property. The AIP pulls all catalog records with a "Y" entry in the Controlled Property field. You can't make changes to the Controlled Property field from within the AIP. Make any changes to the Controlled Property field on the catalog record before running the AIP.***

### 2. *What is controlled property?*

Controlled museum property includes all:

- objects valued at \$1,000 or more
- firearms
- incoming loans, with the exception of incoming loans from units to Bureau repositories
- objects that are especially vulnerable to theft, loss, or damage (the unit must assess the risk)
- natural history specimens with high scientific value, such as type or voucher specimens

### 3. *Must I inventory controlled property that is not in ICMS?*

Yes. If possible, enter all your controlled property records into **ICMS** before running the AIP. The AIP only generates the catalog numbers for **ICMS** controlled property. You must enter the catalog numbers for all non-**ICMS** controlled property. Check previous annual inventories for lists of controlled property. To add records to the controlled property inventory:

- Go to the Controlled Property Inventory screen.
- Click the Add button or select Add New Record from the Edit menu to get a blank screen.
- Complete the fields on the screen and save the record.

The program will carry the record(s) you add from year to year. The next time you conduct the inventory, you won't have to re-enter the controlled property record(s). However, the records are not part of the catalog record database. They appear only in the AIP.

The fields that carry over are Catalog Number, Object Location, Controlled Property, Object/Specimen Name, and Catalog Number in Use.

### 4. *If I enter the same record twice, can I delete one of these records?*

Yes. You must delete a record when two records exist with the same catalog number in the controlled property inventory. Duplicate records occur when you add a controlled property record to the inventory and then add a record with the same catalog number to the database. The program will not allow you to delete records that it generates. You can only delete records that you add to the AIP. To delete the record you added:

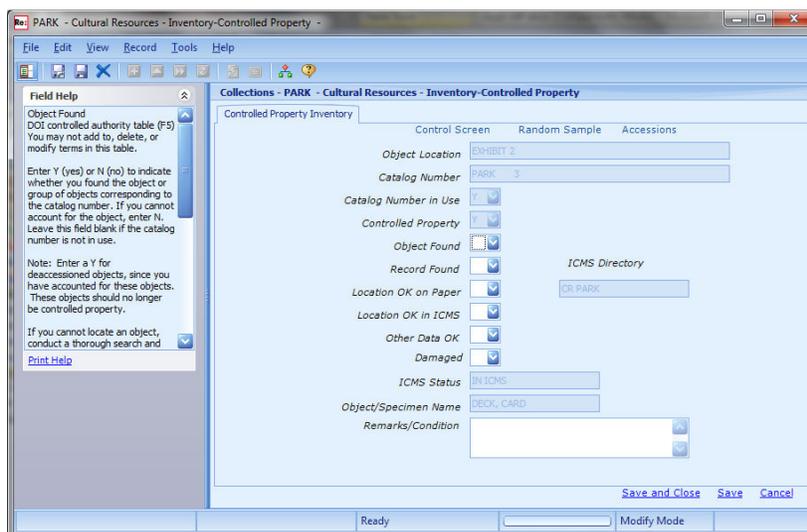
- Go to the record you want to delete on the Controlled Property Inventory screen.
  - Go to Edit on the menu bar and choose Delete Record(s) from the pull-down menu.
  - Choose "Delete This Record"
  - The program will ask if you want to delete the record. Select Yes to delete the record. Select No to return to the screen.
5. *What if some of the controlled property also appeared in the random sample inventory?* You don't need to inventory controlled property twice. Copy the data for the controlled property that appears in the random sample inventory into the controlled property inventory.
6. *What catalog data does the program pull for the controlled property inventory?* The AIP pulls the location, catalog number, controlled property status, and object/specimen name for all records in **ICMS**. It enters this information on the screen and prints it on the controlled property inventory form.
7. *How do I conduct the controlled property inventory?* Most people will print a copy of the controlled property inventory and complete the inventory fields on paper. If you have a laptop computer, you may want to take the computer to the objects and complete the inventory fields on the screen.
8. *How do I print the controlled property inventory form?* To print the controlled property inventory form:
- From the Controlled Property Inventory screen, click the Proficio reports button on the button bar, or select Reports on the Record menu and choose Proficio Reports → Proficio Reports.
  - In the list of reports, to print the Inventory of Museum Property, Controlled Property, select the form appropriate for your unit:
    - 10-349 Inventory - Controlled Property, *or*
    - BOR Inventory – Controlled Property, *or*
    - DOI Inventory - Controlled Property
- Select Summary to print the summary sheet for the inventory.
- Note:** There is also a blank form that you can print. Choose 10-349 Inventory – Controlled Property – Blank.docx. This is a Word document that prints from Microsoft Word. You can also print a blank form of any report by clicking Print Blank Report. These blank forms will not include any catalog records on the form.
- Click Run for All Visible Records on the toolbar or at the bottom.
  - In the Preview window, click the Print button or Quick Print button on the button bar.
  - Follow the Windows print screens to print the form.
- Note:** The first page of the form tells you the number of pages in the report. This is the signature cover sheet for the controlled property inventory. You

can scroll through the pages, or use the Next Page and Previous Page buttons to see the other pages of the report. There are also options to export or email the report in other file formats – use the Export or Email document buttons.

9. *How do I complete the data fields on the Controlled Property Inventory screen?*

Follow these field-by-field instructions for entering the data on the controlled property inventory form or on the Controlled Property Inventory screen.

If you are entering the data on the screen, field help is available for each field on the right in the Navigation Pane.



***You must be in Modify Mode to add or change data for the current record on the screen. You must be in Add Mode to enter a non-ICMS record on the screen.***

**Note:** All Bureau controlled table fields contain 2 entries: a Y (yes) and a N (no). You may not add to, delete, or modify the terms in this table. Click the down arrow, or press F5 to view and select an entry from the table. You can also type the Y or N to enter it in the field.

Press Ctrl-Delete to remove an entry from the field.

*Object Location*

Straight entry field.

This field contains the data from the Location field on the catalog record. The AIP extracts this information from the catalog record. You cannot edit the location entries that the program provides.

Enter the physical location for records that are not in the database. Obtain the location from the paper catalog records or some other unit-based location file system.

*Catalog Number*

Program generated.

The program enters the catalog numbers for all controlled property in the database. You cannot change this number.

*Catalog Number in Use*

Bureau controlled table (F5)

The AIP enters a Y for records in the database. You cannot change the entries that the program provides. If for some reason the number is not in use, enter an explanation in the Remarks/Condition field.

The number is in use if you have a catalog record for the object or an object with the catalog number marked on it.

### *Controlled Property*

Bureau controlled table (F5).

This field contains a Y from the Controlled Property field on the catalog record. The AIP extracts this information from the catalog record. You cannot edit the controlled property entries that the program provides. The AIP automatically enters a Y in this field when you add a record.

**Note:** If a controlled property status is incorrect, make a note in the Remarks/Condition field. After you complete the inventory, make the change in **ICMS** and on the paper record, if the unit keeps paper records.

### *Object Found*

Bureau controlled table (F5).

Enter Y or N to indicate whether you found the object or group of objects corresponding to the catalog number. If you cannot account for the object, enter N.

**Note:** Enter a Y for deaccessioned objects, since you have accounted for these objects.

Enter a Y for lot cataloged objects only if the lot is complete. If you can't easily verify large lots or archival collections, assess the risk of loss or damage. Then decide at what level you need to review the items. You should determine within reason, if the lot or archival collection is complete.

If you cannot locate an object, conduct a thorough search and check the outgoing loan records. If you:

- reported the loss on an incident report, enter the name and date of the report in the Remarks/Condition field.
- submitted a Report of Survey (Form DI-103), enter "Survey DI-103" and the date of the report in the Remarks/Condition field. When the Report of Survey has been signed and the object is deaccessioned, you have accounted for the object.

If you discover the loss of a museum object during the inventory process, follow the procedures in the DOI Museum Property Handbook, Volume II, Chapter 4 or the NPS Museum Handbook, Part II, Chapter 4, Section III.

### *ICMS Directory*

Program generated.

The program provides the name of the directory that contains the catalog record. You cannot edit this field. If the number is not in **ICMS**, the directory is blank.

### *Record Found*

Bureau controlled table (F5).

Enter Y if you find a copy of the catalog record. Enter N if you cannot find a copy of the catalog record. A copy of the catalog record can be either:

- the paper copy, *or*
- an electronic record in the collection records databases (**Note:** If the AIP has entered data in the Location and Object/Specimen Name fields, an electronic record exists.)

***If you have an electronic record, you must use the data from this record to complete the inventory fields.***

### *Location OK on Paper*

Bureau controlled table (F5).

Enter Y if the object location is correct on the paper catalog record. Enter N if the location is incorrect. Leave this field blank if you are using the electronic record in place of the paper catalog record.

**Note:** If a location is incorrect, make a note in the Remarks/Condition field. After you complete the inventory, make the change on the paper record.

### *Location OK in ICMS*

Bureau controlled table (F5).

Enter Y if the object location is correct on the electronic catalog record. Enter N if the location is incorrect. Leave this field blank if you are using the paper catalog record in place of the electronic record.

**Note:** If a location is incorrect, make a note in the Remarks/Condition field. After you complete the inventory, make the change on the electronic record.

### *Other Data OK*

Bureau controlled table (F5).

Check the information on the paper and/or electronic record. If both exist, check both. Enter a Y in this field if the information on the checked museum catalog record(s) is complete and accurate. If any information on the catalog record needs to be added or changed, enter N in this field. Enter a brief note in the Remarks/Condition field about the corrections you need to make to the record. Leave this field blank if the catalog number is not in use.

Make the change on the paper and/or electronic catalog record after you complete the inventory.

**NPS Note:** If you make significant changes, submit the record as a recataloged record to the National Catalog in Harpers Ferry, WV. Do not submit records that have only minor modifications, such as location changes.

### *Damaged*

Bureau controlled table (F5).

Enter N if you don't observe any damage or deterioration to the object. Enter Y if you notice the object has been damaged or has deteriorated. Check the current condition against the condition on the catalog record or the previous inventory. Make a note of any damage or condition changes in the Remarks/Condition field. Leave this field blank if the catalog number is not in use.

If there is a change in condition, update the catalog record. If the object was damaged through vandalism, complete an incident report at the time of discovery. Enter the name and date of the report in the Remarks/Condition field.

*ICMS Status*

Program generated.

The program indicates whether or not the record is in **ICMS**. You cannot edit this field.

*Object/Specimen Name*

Straight entry field.

The AIP automatically enters the object/specimen name for catalog records in the program. You cannot edit the entry that the program provides.

**Note:** For natural history records, the name includes all the subfields, such as species and subspecies, that appear in the catalog record.

Enter the object/specimen name for records that are not in the database. Obtain the name from the paper copies of the catalog records. List the collection title for archival and manuscript collections.

Enter the object/specimen name even if you cannot find the object. If the missing object is part of a lot, indicate the number or quantity missing in the Remarks/Condition field.

*Remarks/Condition*

Memo field (F12 to expand).

If you enter "No" in any field except the Damaged field, enter an explanation in this field. You may also use this field to enter notes on the object's condition.

10. *How do I save the information on the Controlled Property Inventory screen?*

Once you have entered all the information on the Controlled Property Inventory screen for a record, click Save and Close or press F2. Select the next record in the List Pane or use the Next arrow button on the button bar to go to the next record. Complete the fields on the next record, save it, and go on to the next. Continue this process until you reach the last record in the inventory. You can then go to the Random Sample Inventory or Accessions Inventory screen, if needed, to complete these inventories.

11. *Can I use any of the mass modification functions to enter common data in multiple records?*

Yes. You can use Modify All and Quick Entry to quickly enter data into multiple records. You must create a subset of your data using Tag Sets, filters or selecting multiple records in the List Pane. Refer to Chapter 6 for information on how to use Modify All and Quick Entry.

**G. Accessions Inventory Screen**

1. *What is the Accessions Inventory screen?*

The Accessions Inventory screen contains the fields you will use to conduct the accessions inventory of uncataloged objects. There is one screen for each accession number in the inventory. The records appear in order by accession number.

***You must accession all museum collections before running the AIP.***

2. *When do I need to conduct an accessions inventory?*

<i>If...</i>	<i>Then...</i>
the entire collection is cataloged,	don't complete an accessions inventory.

the only uncataloged objects in the collection are from accessions that you received within the last year, don't complete an accessions inventory.

you have uncataloged collections from accessions you received before the last inventory, you must complete an accessions inventory.

3. *Is the accessions inventory a random sample inventory?* Yes. The AIP generates random accession numbers from the highest accession number in use that you entered on the Control Screen for NPS directories. If the AIP generates an accession number that is in **ICMS**, it will pull the accession number from the Accessions associated module. For DOI directories or if you used an \* in the Unit field, it pulls accession records from the existing records in the Accessions associated module. If you have fewer than 250 accessions, the AIP will list all the accession numbers.
4. *What accession data does the program pull for the accessions inventory?* The AIP pulls the accession number and the data in the Location field from the Accessions associated module.
5. *What if an accession on the inventory is fully cataloged?* Fully cataloged accessions appear in the random sample accessions inventory because the program needs all your accession numbers to run a statistically valid sample. You must verify the accession documentation for fully cataloged accessions, but you don't need to check the objects.
6. *What if an accession contains both cataloged and uncataloged objects?* Inventory the uncataloged objects. Don't inventory the cataloged objects as part of the accessions inventory.
7. *How do I conduct the accessions inventory?* Most people will print a copy of the accessions inventory and complete the inventory fields on paper. If you have a laptop computer, you may want to take the computer to the objects and complete the inventory fields on the screen.
8. *How do I print the accessions inventory form?* To print the accessions inventory form:
- From the Accessions Inventory screen, click the Proficio reports button on the button bar, or select Reports on the Record menu and choose Proficio Reports → Proficio Reports.
  - In the list of reports, to print the Inventory of Museum Property, Accessions, select the form appropriate for your unit:  
  
10-349 Inventory - Accessions, *or*  
BOR Inventory - Accessions, *or*  
DOI Inventory - Accessions
- Select Summary to print the summary sheet for the inventory.
- Note:** There is also a blank form that you can print. Choose 10-349 Inventory – Accessions – Blank.docx. This is a Word document that prints from Microsoft Word. You can also print a blank form of any report by clicking Print Blank Report. These blank forms will not include any catalog records on the form.

- Click Run for All Visible Records on the toolbar or at the bottom.
- In the Preview window, click the Print button or Quick Print button on the button bar.
- Follow the Windows print screens to print the form.

**Note:** The first page of the form tells you the number of pages in the report, the highest accession number used, the sample size, and the date the report was printed. This is the signature cover sheet for the accessions inventory. You can scroll through the pages, or use the Next Page and Previous Page buttons to see the other pages of the report. There are also options to export or email the report in other file formats – use the Export or Email document buttons.

9. *How do I conduct an inventory if the accession information is not specific?*

You can only conduct the accessions inventory to the level of detail provided in the accession record. If the accession information doesn't include a list with the number and type of objects, make a list at the time of inventory. Date the list and file it in the accession folder. It will allow future inventories to be more precise.

***If the accession record indicates...***

***Then you would check for...***

2 dinner forks

2 dinner forks

5 boxes of archeological material

5 boxes containing an unspecified amount of archeological material

types of objects, such as military gear or household goods

an unspecified amount of military gear or household goods

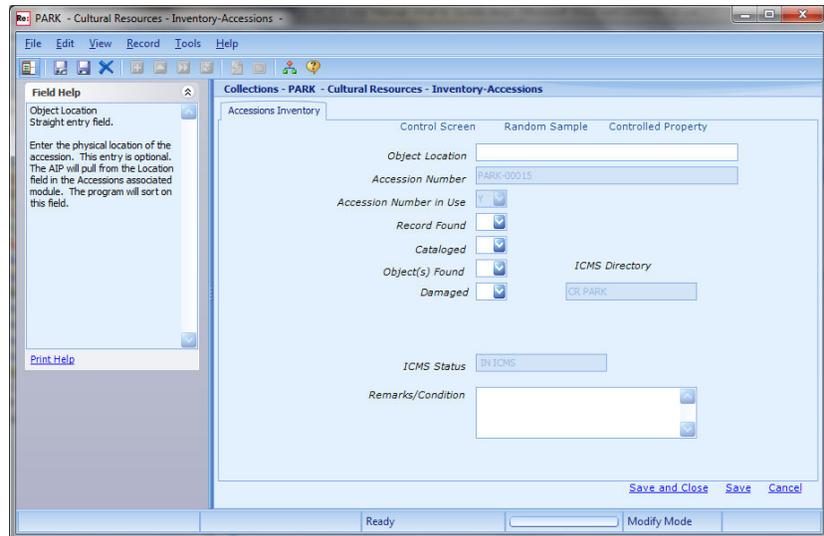
10. *How do I conduct an inventory of extremely large accessions?*

Do a spot-check of the objects in the accession to determine if the objects match the accession information. Use the most detailed object list available. You can spot-check a large accession by doing a random sample of the objects in the accession.

11. *How do I complete the fields on the Accessions Inventory screen?*

Follow these field-by-field instructions for entering the data on the Form 10-349 or on the Accessions Inventory screen.

If you are entering the data on the screen, field help is available for each field on the right in the Navigation Pane.



***You can modify certain fields on the screen, but you can't add new records. You must be in Modify Mode to add or change data for the current record on the screen.***

**Note:** All Bureau controlled table fields contain 2 entries: a Y (yes) and a N (no). You may not add to, delete, or modify the terms in this table. Click the down arrow, or press F5 to view and select an entry from the table. You can also type the Y or N to enter it in the field.

Press Ctrl-Delete to remove an entry from the field.

***Object Location***

Straight entry field.

Enter the physical location of the accession. This entry is optional. The AIP will pull from the Location field in the Accessions associated module. The program will sort on this field.

***Accession Number***

Program generated.

The program generates this number when creating the random sample for the inventory. You cannot change this number.

***Accession Number in Use***

Bureau controlled table (F5).

The AIP enters a Y for accession records in the database. You cannot change the entries that the program provides. If for some reason the number is not in use, enter an explanation in the Remarks/Condition field.

If the accession number is not in the database, the program leaves this field blank. Enter a Y if you have an accession with this number. Enter a N if the number is not in use.

***If the accession number is not in use, leave the other fields blank.***

***Record Found***

Bureau controlled table (F5).

Enter a Y if:

- the entry in the accession book is complete, *and*

- the accession folder contains documents as outlined in the DOI *Museum Property Handbook*, Volume II, Chapter 2, or the NPS *Museum Handbook*, Part II, Chapter 2, Accessioning.

Enter N if:

- the accession book entry is incomplete, *or*
- the required documents in the accession folder are missing, *or*
- there is no electronic accession record.

Note which documentation is missing in the Remarks/Condition field.

Leave this field blank if the accession number is not in use.

**NPS Note:** Accessions dated prior to 1985 should contain a legal custody document, such as a Deed of Gift, **or** an Accession Receiving Report. Accessions dated 1985 or later should contain a legal custody document **and** an Accession Receiving Report.

### *Cataloged*

Bureau controlled table (F5).

You may not add to, delete, or modify terms in this table. As you type, the entry will autofill from the table. Press F5 or click the down arrow to access the table. Choose:

- N if the accession is not cataloged
- P if the accession is partially cataloged
- F if the accession is fully cataloged
- D if the accession is deaccessioned

Leave this field blank if the accession number is not in use.

***If the accession is fully cataloged, do not complete the remaining fields.***

**Note:** The program will pull this information from the Catalog Status field in the Accessions associated module. To have the AIP pull the information from this field, you must complete the field in the associated module.

### *Object Found*

Bureau controlled table (F5).

Enter a Y if the spot-check produces no missing objects. Refer to questions 9 and 10 above for information on checking accessions. Do not list deaccessioned objects as missing.

Enter an N if there are objects missing from the accession. If the spot-check produces missing objects, do a complete inventory of the accession. If you don't have time to do a complete inventory, note in the Remarks/Condition field that this will be done at a later date.

Report all missing objects in the Remarks/Condition field. The object description should match the level of specificity in the accession

documentation. If you need additional space, attach a separate sheet with the heading Remarks/Condition. Continue to list the missing objects by accession number. Report the loss of a museum object in accordance with the DOI *Museum Property Handbook*, Volume II, Chapter 4, or the NPS *Museum Handbook*, Part II, Chapter 4.

If you have completed the following reports for missing objects at the time of inventory, note the name/form number and date in the Remarks/Condition column.

Incident Report  
Report of Survey (Form DI-103)

*Damaged*

Bureau controlled table (F5).

Check the current condition against the condition noted in the accession folder or the previous inventory. Make a note of any damage or condition changes in the Remarks/Condition field. If you need additional space, attach a separate sheet with the heading Remarks/Condition. Continue to list the damaged or deteriorated objects by accession number.

Enter an N if you do not notice any damage or deterioration.

Enter a Y if a quick inspection shows that objects in the accession have been damaged or have deteriorated.

If there is a change in condition, update the accession records. If the objects were damaged through vandalism, complete an incident report at the time of discovery. Enter the name and date of the report in the Remarks/Condition field.

*ICMS Directory*

Program generated.

The program provides the name of the directory that contains the accession record. You cannot edit this field. If the accession number is not in **ICMS**, the directory is blank.

*ICMS Status*

Program generated.

The program indicates whether or not the record is in **ICMS**. You cannot edit this entry.

*Remarks/Condition*

Memo field (F12 to expand).

If you enter "No" in any field except the Damaged field, enter an explanation in this field. You may also use this field to enter notes on the object's condition.

12. *How do I save the information on the Accessions Inventory screen?*

Once you have entered all the information on the Accessions Inventory screen for a record, click Save and Close or press F2. Select the next record in the List Pane or use the Next arrow button on the button bar to go to the next record. Complete the fields on the next record, save it, and go on to the next. Continue this process until you reach the last record in the inventory. You can then go to the Controlled Property Inventory or Random Sample Inventory screen, if needed, to complete these inventories.

13. *Can I use any of the mass modification functions to enter common data in multiple records?*
- Yes. You can use Modify All and Quick Entry to quickly enter data into multiple records. You must create a subset of your data using Tag Sets, filters or selecting multiple records in the List Pane. Refer to Chapter 6 for information on how to use Modify All and Quick Entry.

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## H. Submitting the Inventory

1. *Do I have to print an inventory?*
- Yes. You must print the inventory in order to sign it and submit it. You must print the Inventory of Museum Property for the:

- random sample inventory of cataloged objects
- controlled property inventory
- random sample inventory of accessions (if you need to complete one)

A different version of the inventory report prints from each of the three inventory screens. You must access the form from the appropriate screen. Refer to Sections E-G above for instructions on printing the inventory forms.

2. *Who signs the inventory reports?*
- The staff who conducted the inventory sign and date the inventory after reviewing and verifying it.

***The superintendent or accountable officer and the custodial officer must sign and date the certification statements on the cover sheet of the Inventory of Museum Property form.***

3. *Do I have to submit the inventory electronically?*
- No. The inventory is only required in hard copy. You can use the Transfer Records to/from disk options on the File menu to transfer or load inventory files to and from other sources, but you must submit a paper copy.

4. *What happens to the inventory after signature?*
- For NPS, the superintendent must send a signed full copy of the inventory to the Regional Director. The park should send an informational copy of the signed, first page of the inventory to the Regional Curator. Refer to *MH-II*, Chapter 4, Section I, for information on submitting the inventory and inventory deficiencies.

For other bureaus, contact your museum collections management contact for inventory submission information.

5. *When must I complete the inventory for submission?*
- You must complete the inventory annually before the end of the fiscal year. For the NPS, the Region may call for the inventory at a certain date. If you don't receive a regional call to do the inventory, the superintendent can establish the date for conducting the inventory.

For other bureaus, contact your museum collections management contact for inventory submission information.