RSA NFP
715 Sabrina Drive, East Peoria, IL 61611
Resource Sharing Alliance NFP
866-940-4083

Using a Shelf List versus the WorkFlows Inventory Item Wizard to Reconcile Cataloging Discrepancies Between WorkFlows and the Physical Collection

Revised March 6, 2018

Instructions for the Shelf List Method:

1. Submit an RSA report request (http://goo.gl/forms/Z1WG86RWO8) to ask Doug King, the RSA System Coordinator, to run an updated shelf list of your collection that is printable on 8 ½ by 11 inch paper.
2. After Doug shares it with you, print the entire shelf list or a portion of it (e.g., the juvenile easy reader collection).
3. Use the shelf list to compare the items on the list to the items in your library's physical collection.
4. For those items that are on the shelf and not in WorkFlows (i.e., not on the shelf list), but the items should be entered into WorkFlows, you might find it helpful to mark these items on the shelf, using colored adhesive labels or turning the items on their spines, to easily distinguish those items that need to be cataloged in WorkFlows.
    a. As you finish a shelf or a section, you can pull the marked or turned items from the shelves to catalog them in WorkFlows.
    b. Once an item is cataloged, its colored label should be removed, or it should be shelved upright.
5. You should indicate those items, either on a paper or electronic copy of the shelf list, which should be deleted from WorkFlows because they will be weeded from your collection.
6. After reviewing your notes on the shelf list, create a list of item IDs to be deleted from WorkFlows. Be sure to exclude any checked out items from the list.
7. The list of item IDs to be deleted should be submitted to James Campbell, the RSA System Supervisor, at james.campbell@railslibraries.info. James will batch delete the item IDs from WorkFlows.
8. James will share with you any item IDs that were unable to be removed during the WorkFlows batch deletion. You should review the report, and if necessary delete items manually in the Delete Titles, Call Numbers, or Items wizard.
9. After you finish shelf listing a collection sub-section or the entire collection, RSA recommends scanning each item that will remain in the collection into the Call Number and Item Maintenance wizard. From this wizard, check the call number, price, and cataloging parameters (home location, item type, item categories 1-5) to ensure they are correct.

Over

Instructions for the Inventory Method:

1. Contact Doug King, the RSA System Coordinator, to let him know your library is ready to begin inventory and also indicate the specific home location(s), item type(s), or call number range(s) you plan to inventory if you will not inventory the entire collection. Doug can be reached at doug.king@railslibraries.info or 1-866-940-4083.
2. Doug will confirm once WorkFlows is ready for you to begin the inventory.
3. You will go to the shelves and scan items to be inventoried into the Inventory Item wizard. To access this wizard:
    a. Log into WorkFlows using your individual cataloging login or the TECH login if you have not been issued a cataloging login.
    b. Go to the circulation module.
    c. Open the special group on the left.
    d. Click on “Inventory Item.”
    e. Slowly scan each item into the wizard, watching for any pop-up messages upon scanning.
4. For those items that you scan into the inventory wizard, and you see an ”item not found in catalog” error, but the item should be cataloged in WorkFlows, you might find it helpful to mark these items on the shelf, using colored adhesive labels or turning the items on their spines, to easily distinguish those items that need to be cataloged in WorkFlows.
    a. As you finish a shelf or a section, you can pull the marked or turned items from the shelves to catalog them in WorkFlows.
    b. Once an item is cataloged, its colored label should be removed, or it should be shelved upright.
5. Notify Doug once you are finished scanning items into the inventory wizard.
6. Doug will run a report to show items that lack an inventory date (i.e., were not scanned during your inventory), mostly likely due to the items being checked out, lost, missing, etc. You should review this report to try to locate the items in your collection.
7. After reviewing the report of items that lack an inventory date, create a separate list of the item IDs that should be deleted from WorkFlows. Be sure to exclude any checked out items from the list.
8. The list of item IDs to be deleted should be submitted to James Campbell, the RSA System Supervisor, at james.campbell@railslibraries.info. James will batch delete the item IDs from WorkFlows.
9. James will share with you any item IDs that were unable to be removed during the WorkFlows batch deletion. You should review the report and if necessary delete items manually in the Delete Titles, Call Numbers, or Items wizard.
10. After you finish inventorying a collection sub-section or the entire collection, RSA recommends scanning each item that will remain in the collection into the Call Number and Item Maintenance wizard. From this wizard, check the call number, price, and cataloging parameters (home location, item type, item categories 1-5) to ensure they are correct.