Workflows Inventory Guide

**Last updated: July 10, 2024**

<u>Preparing for inventory</u>

- Complete any weeding projects.
- Decide what you are inventorying. Certain collections or the whole collection?
  - Inventorying by Home Location sections makes running post-inventory reports easy.
- What is your time frame?
  - The library can be open while scanning.
  - Inventory can be done over time, although you will have to keep track of where you are in a section.
  - RSA can mark checked-out items as inventoried, so you don't have to monitor discharges for items from completed locations. This can be done throughout the process.
- Do you have the equipment and staff available? Multiple staff can inventory at the same time.
  - Items can be loaded onto carts and scanned at a workstation.
  - A laptop on a cart, using a wired or wireless scanner, can be taken into the stacks.
  - A tablet with MobileStaff installed can be used with a bluetooth scanner in the stacks. RSA has 2 bluetooth barcode readers available for checkout. Please contact RSA for more information about MobileStaff.

<u>Inventorying Your Items using Workflows</u>

1) Open Workflows. You may use CIRC, TECH, or individual logins. Go to the Circulation+ module.
2) Choose the Special group.
3) Select the Inventory Item wizard.
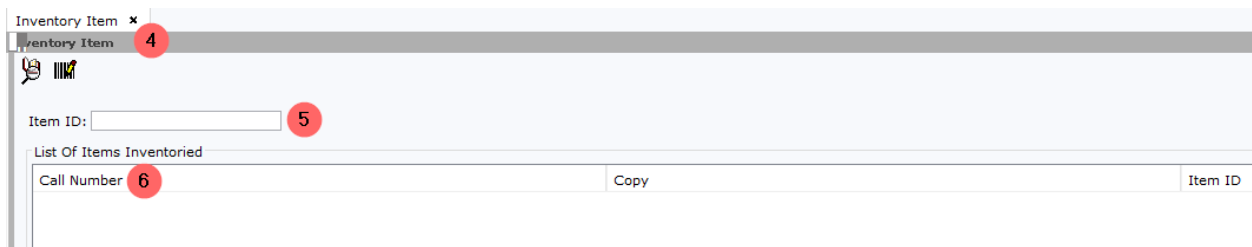
4) You are ready to scan your items.

5) Scan the items you want to inventory. Accidentally scanning an item more than once doesn't hurt anything.

6) A list of items you've scanned will appear. You can close the wizard when you are done. If you accidentally close it before finishing, that is ok. You can simply open it up again and resume scanning.

<u>After Scanning</u>

1) After you've finished, let RSA know which sections you completed, and we will send you a list of items that were not inventoried. You may do this location by location or wait until you've completed all the areas you plan to inventory. It is up to you, and there are no real negatives to doing it either way.

2) Report in hand, you can then check to make sure the items are really gone or simply missed in the inventory. If you find any missed items, scan them into the Inventory Item wizard as above.

3) Celebrate! You've completed your inventory!