

WorkFlows Inventory Guide

Last updated: June 23, 2025

Preparing for inventory

- Complete any weeding projects.
- Decide what you are inventorying. Certain collections or the whole collection?
 - Inventorying by Home Location (shelving location) makes running postinventory 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 scan items for 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. See this guide for more information <u>MobileStaff Inventory and</u> <u>Weeding Guide</u>.
- Other considerations:
 - Have a way to mark each shelf as completed. Have a way to mark a stopping point on each shelf to account for interruptions.
 - Have a place to set aside items that need attention: Needs mending, are marked as lost or in transit, or are out of order.
- RSA can mark checked out items as inventoried. Contact us during the inventory process to let us know what locations you are inventorying.

Inventorying Items using WorkFlows

You may use the CIRC login or individual logins.

Go to the Circulation+ module.

Choose the Special group>Inventory Item wizard.

⊥ File Edit Wizards Modules Pref	ference To
Circulation+ Offline Outreach	Reports S
Common Tasks	
Users	۲
ltems	۲
Holds	۲
Special	۲
 User Claims Returned Modify Due Dates Mark Item Used Inventory Item Ephemeral Library Calendar (Closed Dat 	es)

Start scanning in the Item ID box. A list of scanned items will appear. Scanning an item more than once doesn't hurt anything.

n (irculation+	Configuration	GlobalMod	ILL Offline	Outreach	Reports	Requests	Selection	Serial Cont	ol Unionlist	: Catalog	Unionlist	Reports
	Inventory It	em 🗴											
	C ^{intory Item}	ull.											
	y in												
	Item ID:												
	List Of Iter	ns Inventoried											
	Call Num	ber				Сору					ltem	n ID	
	ED CAPITA	L S - 4 IN									1A133	300009315	
	ED CAPITA	L R - 4 IN									1 A133	300986698	
	ED CAPITA	L Q - 4 IN									1 A133	300838502	
	ED CAPITA	L P - 4 IN									1A133	300861424	

A list of items that have been scanned will appear. <u>Watch the screen for popup alerts!</u> Items that are in transit, lost in transit, checked out, lost, will return an alert that must be addressed. <u>Scanning an item in inventory does NOT change its status. It will remain</u> <u>checked out, lost in transit, lost, etc.</u> Anything with an alert must be addressed. Set items aside to be discharged and/or investigated later.

Sample alert, Lost in Transit:

A9600041	15345		
Сору		Item ID	
rt Message Running out of time / Haddix, M	argaret Peterson. 0415345		
Alert	Item checked out		
Alert Name: ABINGDN-HS LOST T Date due: NEVER	Item checked out TRANS USER User ID: Checked out	ABINGDN-HS-LOSTTRANS	
Alert Name: ABINGDN-HS LOST T Date due: NEVER Renewals:	Item checked out IRANS USER User ID: Checked out NONE Claims ret:	ABINGDN-HS-LOSTTRANS :6/10/2025,7:45 NEVER	
Alert Name: ABINGDN-HS LOST T Date due: NEVER Renewals: Dates-	Item checked out <u>RANS USER</u> User ID: Checked out NONE Claims ret: Last notice:	ABINGDN-HS-LOSTTRANS 6/10/2025,7:45 NEVER	Recalled:
	et Message Running out of time / Haddix, M	et Message Running out of time / Haddix, Margaret Peterson.	et Message Running out of time / Haddix, Margaret Peterson.

After scanning for inventory, the last inventory date is updated but the item remains lost-intransit status.

- 🔣 A96000415345 - 1 - BOOK - LOST-TRANS - Can't Circ	Item Info Circ Info Bills	Item Info Circ Info Bills Checkouts Holds						
BB-BRD-SD (BB_ / BB2_)	Call number informati	Call number information						
- 細A90500044717 - 1 - BOOK - FICTION ●曲FHAD - BB2 BRD-ES	Call number:	FIC HAD	Class scheme:	DEWEY				
	Call library:	ABINGDN-HS						
- ## A90550015970 - 1 - BOOK - FICTION - fla C5-CAMB-SD (C5_ / C6_)	Shadow call number	N						
□ 曲 F HAD - C6_CAMB-GS ■■ A86410144001 - 1 - BOOK - STACKS	Item information							
and a book shick a book shick a book	Item ID:	A96000415345	Copy number:	1				
ate created: 4/6/2011 ate last charged: 6/10/2025	Туре:	BOOK	Item library:	ABINGDN-HS				
ate due: Never	Home location:	FICTION	Current location:	LOST-TRANS				
Jate inventoried: 6/23/2025 Immes inventoried: 14 revious user ID: D359013833 Last activity: 6/10/2025	Item cat1:	FICTION	Item cat2:	JUVENILE				
	Item cat3:	BOOK	Item cat4:	UNDEFINED				
1-house uses: 0	Item cat5:	UNDEFINED	Item cat6:	UNDEFINED				
	Item cat7:	UNDEFINED	Item cat8:	UNDEFINED				
	Item cat9:	UNDEFINED	Item cat10:	UNDEFINED				
	Media desk:		Number of pieces:	1				
	Total charges:	1	Price:	\$10.00				
	Permanent	Y	Circulate	N				
	Shadow item	Ν						
	Extended information							
	Tag Con	tents						
	CIRCNOTE							
	PUBLIC STAFF LOSTTRANS - Transited 202504161404 from CENTRAL-HS to							

Discharge the item to tell WorkFlows it is back on the shelf.

After Scanning

After you've finished, let RSA know which sections you completed, and we will send you a list of items that were not inventoried.

Look for the items that have not being inventoried. Scan them in inventory if found. If they cannot be found, you can mark them as missing or check them out to the DISCARD user to remove them from WorkFlows.

If you have any questions, contact the RSA Help Desk at <u>help@rsanfp.org</u> or 866-940-4083.