



## WorkFlows Inventory Guide

**Last updated: June 23, 2025**

### Preparing for inventory

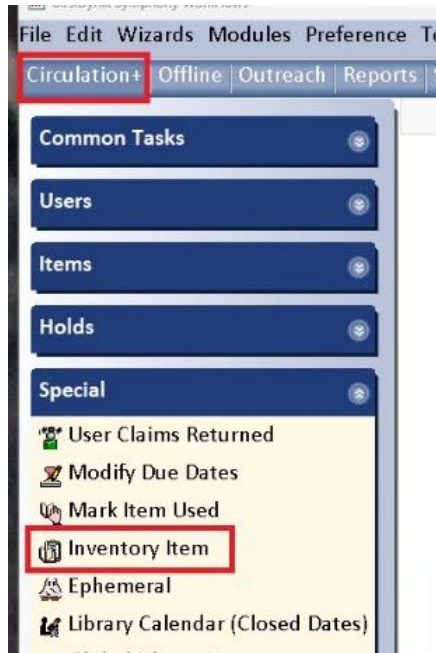
- Complete any weeding projects.
- Decide what you are inventorying. Certain collections or the whole collection?
  - Inventorying by Home Location (shelving location) makes running post-inventory reports easy.
- What is your time frame?
  - The library can be open while scanning.
  - Inventory can be 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 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 [MobileStaff Inventory and Weeding Guide](#).
- 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

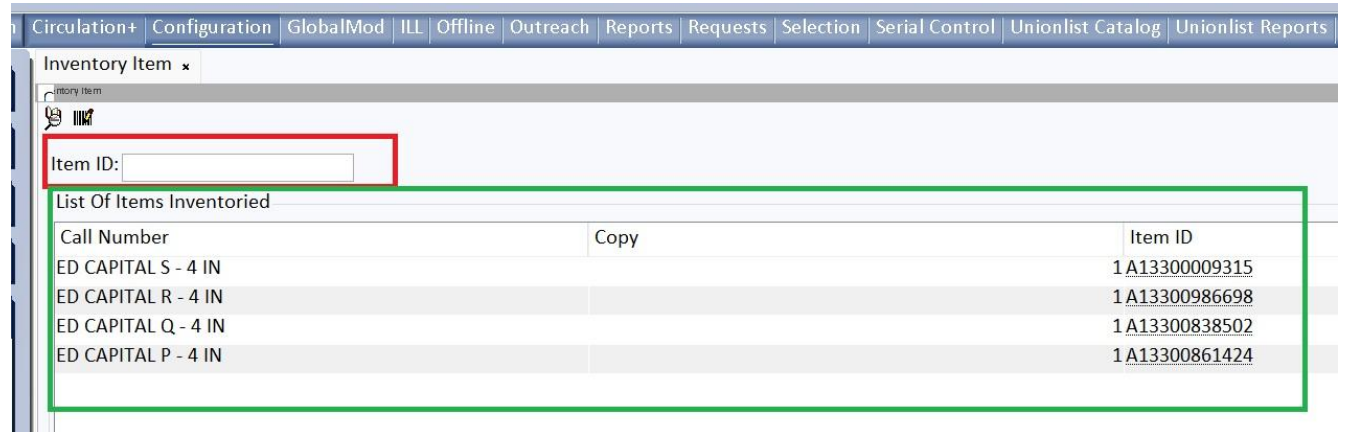
You may use the CIRC login or individual logins.

Go to the Circulation+ module.

Choose the Special group>Inventory Item wizard.



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



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



### 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 [help@rsanfp.org](mailto:help@rsanfp.org) or 866-940-4083.