

Sirsi Inventory Overview
(Please refer to manual for details)

The All Inventory or My Inventory group of reports allows you to inventory items that are currently checked out, load barcode files into the system, create a list of missing items, and finalize your inventory by changing the status of items to MISSING.

Inventory Preparation for a less problematic inventory.

- Before starting, it is recommended you browse your shelves for order.
- ***PreInv 1)*** Run the Missing Copies List report to check your current missing and contact your ITC to delete items that have been missing for a long time *(also use to identify old DISCARD, WEEDDED, LOST status items that need to be removed before inventory starts)*
- ***PreInv 2)*** Run the List Transit report (items you loaned) and/or go to Special Circulation, Pending Transits wizard (items borrowed by you) and review the location and status of any items listed. If you declare transit items as missing in the inventory process, there may be a problem with the record because of the transit status.

Inventory Process

1. **Set Inventory Date** report. This accounts for items *currently* checked out by adding an inventory date to the item record.

WARNING: *If your library remains open, run this report again each day you scan items!*

2. **Options for entering inventory –**

- a. MobileStaff Inventory method – **RECOMMENDED**

Scan selected item group, listen for alerts

Or

- b. Load Scanned Barcodes

Step 2 - Scan barcodes into file, transfer to system using Scanner wizard.

Step 2a – Run Load Scanned Barcode report to inventory items in the file. Report will also indicate items in the file with problems.

Or

- c. Interactive method – Special Circulation – Inventory Item Wizard. **Not Recommended** for scanning entire library. Use this method for found items (Step 3b).

3. **Items NOT in Inventory** report. This is a list of Items that were not on the shelf when scanned. The items may have been missed in scanning, in another location, or possibly truly missing. Rerun this report as needed to reconcile your inventory. Use the Special Circulation – Inventory Item wizard to scan found items.

NOTE: *Continue the above process for the entire library.*

WARNING: *If you enter new items into your database after you start the inventory, be sure to scan them using the Inventory Item wizard before putting them on the shelf. If you don't, they could appear on your missing items list.*

Finalizing the Inventory Process.

4. **Checkout to MISSING** report. Run this report after the entire library has been scanned. Submit this report late in the day or overnight to save process time and interruption of other reports run time.



a. **Update Option: Be sure that the check box remains empty:** This is a list of items not found in your inventory and will be changed to a status of Missing. Check this list carefully. *(Follow documentation carefully when working with this option!)*

b. **Update Option: Update database records. A checkmark in this check box will: Finalize Inventory** - This will change the status of the items on the list to Missing. You will not get a list on this final run of the report. *(Follow documentation carefully when working with this option!)*

5. **Missing Copies List** report - This will give you a final list of items with current status of MISSING, both prior and after inventory.

6. **DISCARD missing items** - OPTIONAL – Contact your ITC for batch discard of MISSING items.

NOTE: *When viewing and/or printing inventory reports in Finished Reports, check View log*

Report to view:
<input checked="" type="checkbox"/> View log
<input checked="" type="checkbox"/> View result
<input checked="" type="checkbox"/> Format report