

Inventory in LEAP

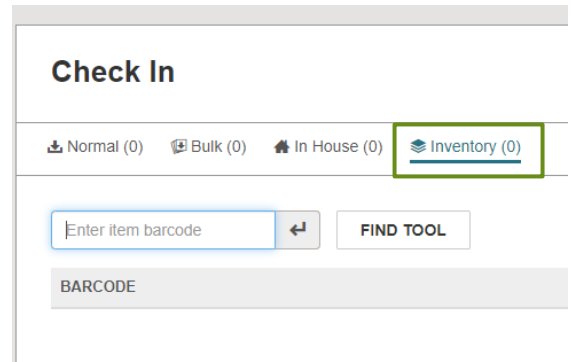
Please Note: If you do not have the necessary equipment onsite to conduct your collections inventory without taking everything off of the shelves, please contact your PRLS Consultant to request additional equipment (ie., laptops, scanners) loan.

Step 1: Scanning Materials

In Polaris LEAP set the check in mode to INVENTORY.

Note: If your computer restarts or loses battery power during the inventory, you do not need to start over again. It has recorded items previously scanned.

Begin scanning items into the blue highlighted box. It is recommended to scan items from the shelf in order (Dewey or Alphabetical).



Check In

Normal (0) Bulk (0) In House (0) **Inventory (0)**

Enter item barcode FIND TOOL

BARCODE

If you receive a notification that the item is **unavailable, missing, or in-process**, hit okay and continue scanning. These item records will need to be fixed later using the *Inventoried with Status Exceptions Polaris Report*.

You should inventory any collection appropriate items that are returned during the inventory time period.

Any items that fulfill a hold should be pulled after inventorying and sent out in the next van run.

Step 2: Running Inventory Reports

All Items Not Inventoried

[Home](#) > [Polaris](#) > [Public Libraries](#) > [Inventory](#) > **All Items Not Inventoried**

1. Fill in the requested information
 - a. Library Code
 - b. Start and end date of the inventory (choose the day before the actual start date and the day after the actual end date to ensure everything is captured)
 - c. Select the specific collections that were inventoried
 - d. Item Status: AVAILABLE

- The report will pull a list of all items, in the selected collection, that were not inventoried, but whose status says they should have been on the shelf. These items should be uploaded to a record set and made MISSING (*see below record set instructions*). Staff

SQL Server Reporting Services

Home > Polaris > Public Libraries > Inventory > All Items Not Inventoried

Library: aol Inventory Start Date: 1/1/2021 Inventory End Date: 2/28/2021 Collections to Include: e View Report

Item Statuses: Available

1 of 2? Find | Next

All Items Not Inventoried

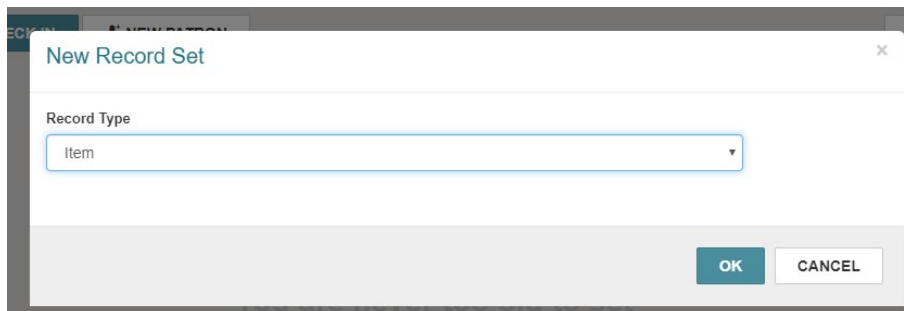
This reports lists all items that have not been inventoried between 1/1/2021 12:00:00 AM and 2/28/2021 12:00:00 AM these items belong to the e collections and have an item status of Available

Barcode	Call Number	Browse Title	Item Status Date	Last Inventory Date	Item Status	Collection
31000045010303	LUK	A storytelling of ravens			Available	e
31000040042866	MAC	Flo			Available	e
31000044764085	MCC	The five forms			Available	e
31000008185319	MAC	Shortcut	Friday, January 8, 2021	Monday, September 6, 2014	Available	e
31000005491389	MCC	My friend chicken	Saturday, January 9, 2021	Monday, September 6, 2014	Available	e
31000007612800	BRO	Changes	Friday, February 26,	Monday, September 6,	Available	e

should then look for the missing titles, check them in if found, and if not found within 6 months of being made missing, they will automatically update to an item status of WITHDRAWN.

Upload and Change a Record Set

- Save the report as a .CSV file.
- In LEAP create a new record set by opening the NEW tab and clicking RECORD SET.
- Create a new ITEM record set.



- Select ACTIONS (midscreen), click ADD FROM FILE, and upload the inventory Excel file.
- Name the record set with the library code and reason. For example, ALAP – All Items Not Inventoried May 2023.
- Save the record set.
- Contact your Consultant Librarian and they will make the necessary Bulk Changes.

Inventoried with Status Exceptions

Home > Polaris > Public Libraries > Inventory > **Inventoried with Status Exceptions**

- Fill in the requested information

- a. Library Code
 - b. Start and end date of the inventory (choose the day before the actual start date and the day after the actual end date to ensure everything is captured)
 - c. Select the specific collections that were inventoried
 - d. Statuses Excluded: Leave as default.
2. This report will pull all inventoried items that have an odd status (In Transit, Transfer for Hold, In Process, etc.). These items will need to have their Item Statuses updated to AVAILABLE.

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★ Favorites Browse

Home > Polaris > Public Libraries > Inventory > Inventoried with Status Exceptions

Library: Inventory Start Date: Inventory End Date:

Included Collections: Statuses Excluded:

1 of 2 ?

Inventoried with Status Exceptions

This report identifies acl items that have an inventory date between 1/1/2021 12:00:00 AM and 2/28/2021 12:00:00 AM. Belong to the collections e and do not have the statuses of Available,Checked Out,On Hold,Withdrawn,On-Order,In-Repair

Barcode	Browse Title	Call Number	Browse Author	Abbreviation	Last Inventory Date	Item Status	Item Status Date
31000045319335	Pip & Pup	YEL	Yelchin, Eugene, illustrator.	e	2/22/2021 12:31:37 PM	Transferred for Hold	4/12/2021 1:09:40 PM
31000044652371	What do you do with a chance?	YAM	Yamada, Kobi, author.	e	2/22/2021 12:31:05 PM	In-Transit	4/12/2021 11:03:34 AM
31000039944695	Blue on blue	WHI	White, Dianne, author.	e	2/22/2021 11:31:20 AM	Transferred for Hold	4/8/2021 4:32:16 PM
31000045930396	How to catch the Easter Bunny	WAL	Wallace, Adam, author.	e	2/22/2021 11:26:18 AM	In-Transit	4/8/2021 11:39:23 AM
31000037813436	Emma's question	URD	Urdahl, Catherine.	e	2/22/2021 10:36:31 AM	Transferred for Hold	4/6/2021 9:22:20 AM
31000016072046	There was an old lady who swallowed	THE		e	2/22/2021 10:27:26 AM	In-Transit	4/12/2021 11:18:53 AM




Upload and Change Record Set

- Follow the same above steps
- Name the record set with the library code and reason. For example, ALAP – Inventoried with Status Exceptions May 2023

Inventory Item List

Home > Polaris > Public Libraries > Inventory > Inventory Item List

1. Fill in the requested information
 - a. Library Code
 - b. Start and end date of the inventory (choose the day before the actual start date and the day after the actual end date to ensure everything is captured)
 - c. Select the specific collections that were inventoried
 - d. Statuses Excluded: Leave as default.
2. This report pulls a full list of all items within the selected collections that were inventoried. This report can be sorted and used as a shelf-reading tool if desired.

SQL Server Reporting Services



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★ Favorites Browse

Home > Polaris > Public Libraries > Inventory > Inventory item list

Library: ItemStatuses: Last Inventory Start Date: Last Inventory End Date:

Included Collections:

1 of 2 ? 100% Find | Next

All Items with Inventory Date

Barcode	Item Status	Call Number	Browse Title	Browse Author	Material Type	Collection	Last Inventory Date
31000042762123	In	636.086 HEO 2014	Be a pet sitter	Heos, Bridget.	Book	Early	2/25/2021 9:42:02 AM
31000010652721	In	AAR	Bringing the rain to Kapihi Plain : a Nandi tale	Aardema, Verna, adaptor.	Book	Early	2/22/2021 1:28:58 PM
31000042479249	In	ABB	Who's on first?	Abbott, Bud, 1895-1974.	Book	Early	2/9/2021 9:45:43 AM
31000009979231	In	ABL	Onest cat	Abley, Mark.	Book	Early	2/9/2021 9:45:50 AM
31000040975651	Out	ABR	Ready or not, here comes Scout!	Abramson, Jill, 1954-	Book	Early	2/9/2021 9:45:59 AM
31000043226011	In	ACT	Poppy Cat	Acton, Sara, author, illustrator.	Book	Early	2/9/2021 9:46:09 AM
31000010071952	In	ADA	The three little witches storybook	Adams, Georgie.	Book	Early	2/9/2021 9:47:03 AM
31000004834597	In	ADA	Yours truly, Goldilocks	Ada, Alma Flor.	Book	Early	2/9/2021 9:48:33 AM
31000043761819	In	ADA	Douglas, you need glasses!	Adamson, Ged, author, illustrator.	Book	Early	2/9/2021 9:47:02 AM
31000036671074	In	ADA	Mrs. Honey's hat	Adams, Pam.	Book	Early	2/9/2021 9:46:16 AM

Note: Please let your PRLS Consultant know once your collections inventory is complete, so we can keep our records updated.