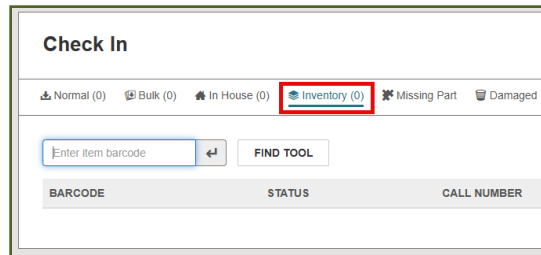


## Inventory in LEAP

**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 (i.e., laptops, scanners) loan.

### Scanning Materials

1. In Polaris LEAP set the check in mode to **Inventory**.



The screenshot shows the 'Check In' interface in Polaris LEAP. At the top, there are several mode options: 'Normal (0)', 'Bulk (0)', 'In House (0)', 'Inventory (0)', 'Missing Part', and 'Damaged'. The 'Inventory (0)' option is highlighted with a red rectangular box. Below the mode selection, there is a text input field labeled 'Enter item barcode' with a search icon to its right, and a 'FIND TOOL' button. At the bottom of the interface, there is a table header with three columns: 'BARCODE', 'STATUS', and 'CALL NUMBER'.

**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.

2. Begin scanning items into the 'Enter Item Barcode' field. It is recommended to scan items directly from the shelf in order (Dewey or Alphabetical).
3. If you receive a notification that the item is **Unavailable, Missing, Lost, or In-Process**, hit **Ok**, and continue scanning. Set the items aside as they will need to be fixed later using the "Inventoried with Status Exceptions Polaris Report".
4. Any items that fulfill patron holds should be pulled after the inventory and sent out in the next van run.

### Running Inventory Reports

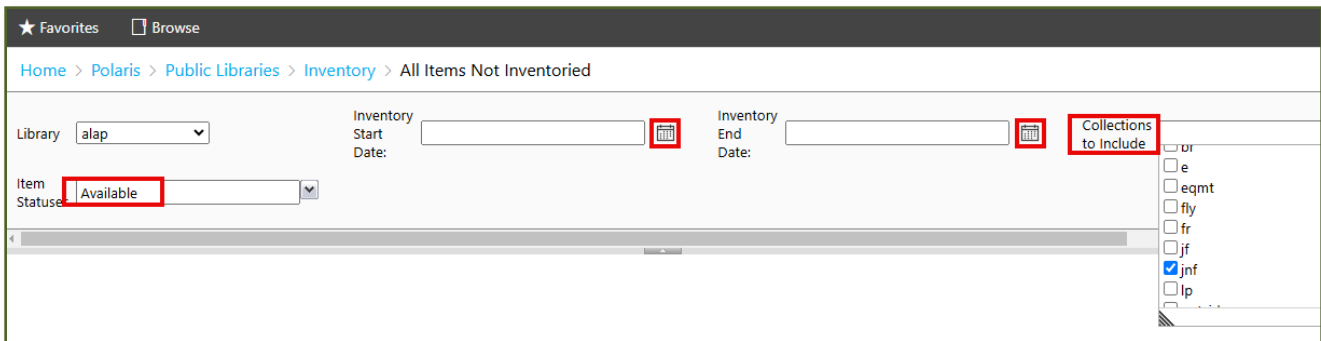
This is done through the **SQL Server Reporting Services**.

#### All Items Not Inventoried Report

This report shows all items that were not scanned during inventory but have an item status of "Available". It is recommended that you run this report the day **Before** you start the Inventory and **After** you've completed the Inventory.

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

1. Fill in the requested information:
  - a. Choose your **Library**
  - b. Select an Inventory **Start** and **End Date** (choose the day before the actual start date and the day after the actual end date to ensure everything is captured)
  - c. Select the collections that were inventoried under **Collections to Include**
  - d. Under **Item Statuses**, choose "Available"



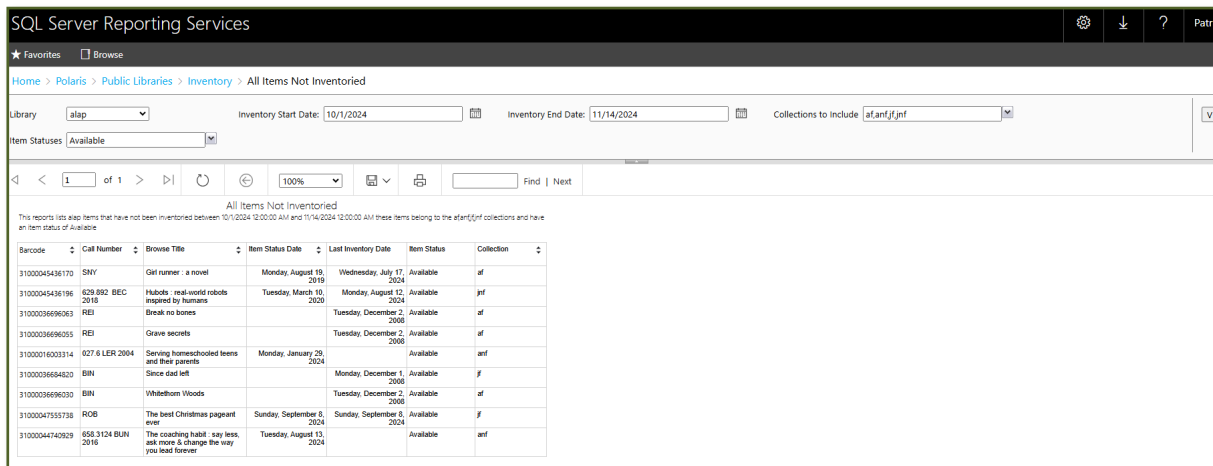
Home > Polaris > Public Libraries > Inventory > All Items Not Inventoried

Library:  Inventory Start Date:  Inventory End Date:  Collections to Include:  or  e  eqmt  fly  fr  jf  jnf  lp

Item Statuses:

- e. Click **View Report**

2. The report will pull a list of all items, in the selected collection(s) that were not inventoried, but whose item status says they should have been on the shelf. These items should be uploaded to an item Record Set and have their item statuses updated to **Missing**.



SQL Server Reporting Services

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

Library:  Inventory Start Date:  Inventory End Date:  Collections to include:  Item Statuses:

All Items Not Inventoried

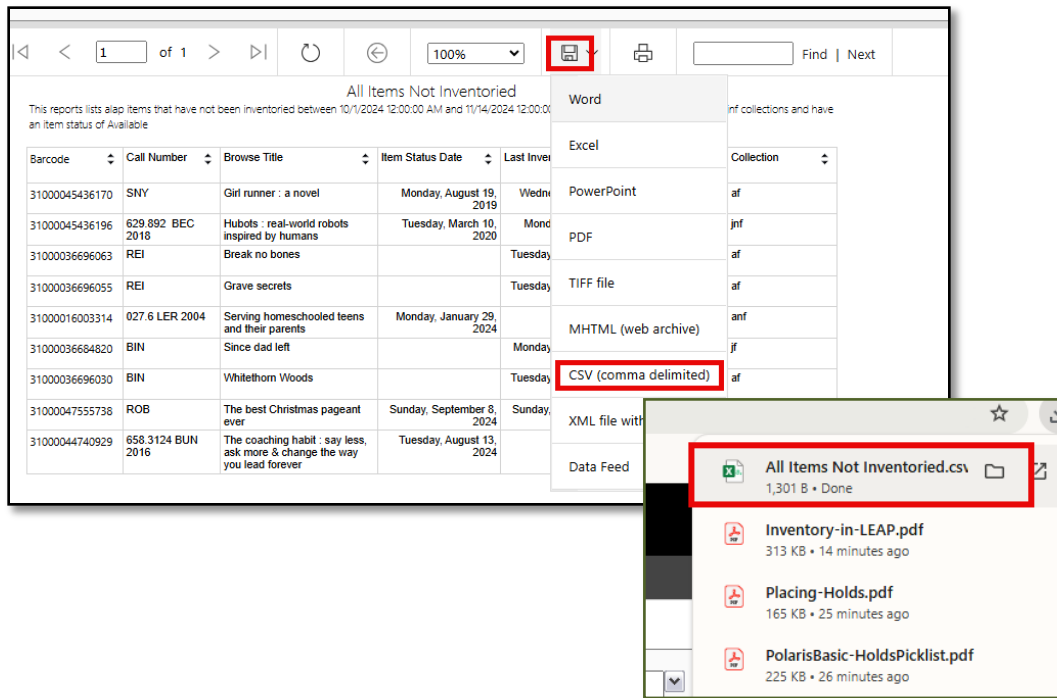
This report lists also items that have not been inventoried between 10/1/2024 12:00:00 AM and 11/14/2024 12:00:00 AM these items belong to the af,anf,jf collections and have an item status of Available

Barcode	Call Number	Browse Title	Item Status Date	Last Inventory Date	Item Status	Collection
31000045436170	SNY	Get runner : a novel	Monday, August 19, 2019	Wednesday, July 17, 2024	Available	af
31000045436196	629 B92 BEC 2018	Hubots - real-world robots inspired by humans	Tuesday, March 10, 2020	Monday, August 12, 2024	Available	jnf
31000036696063	RES	Break no bones		Tuesday, December 2, 2008	Available	af
31000036696055	RES	Grave secrets		Tuesday, December 2, 2008	Available	af
31000016003314	027 6 LER 2004	Serving homeschooled teens and their parents	Monday, January 29, 2024		Available	anf
31000036684820	BIN	Since dad left		Monday, December 1, 2008	Available	f
31000036696030	BIN	Whitehorn Woods		Tuesday, December 2, 2008	Available	af
31000047555738	ROB	The best Christmas pageant ever	Sunday, September 8, 2024	Sunday, September 8, 2024	Available	f
31000044742029	656 3124 BUN 2018	The coaching habit - say less, ask more & change the way you lead forever	Tuesday, August 13, 2024		Available	anf

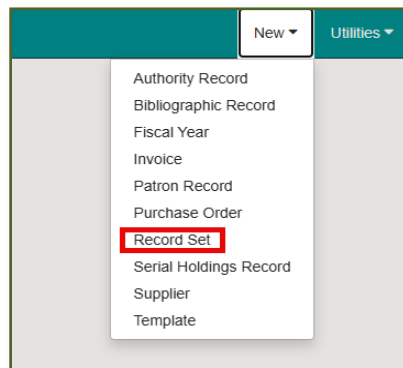
3. Staff should then look for the missing titles, and check them in if found. Items not found within 6 months of being marked **Missing** in Polaris, will automatically update to an item status of **Withdrawn**.

### Create a Record Set from a Report

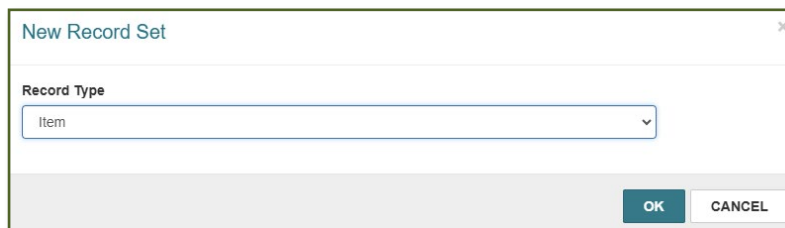
1. Save your report as a **CSV** file. It will automatically save in Excel.



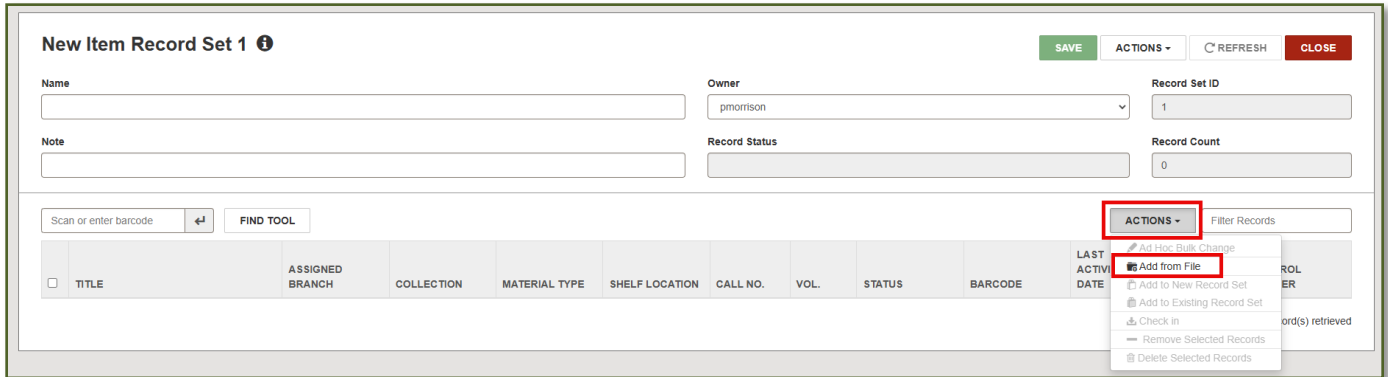
2. In LEAP create a new **Record Set** by opening the **New** tab and by clicking "Record Set".



3. Create a new **Item Record Set**.

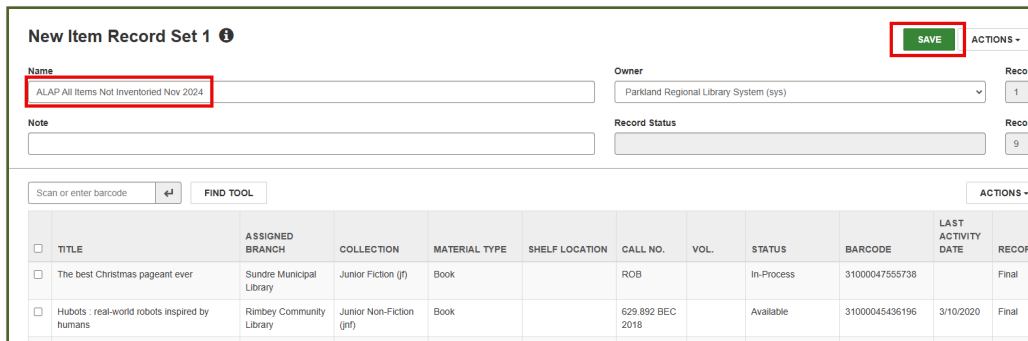


4. Select **Actions**. Click **Add From File** and upload the inventory Excel file.



The screenshot shows the 'New Item Record Set 1' form. The 'Name' field is empty. The 'Owner' dropdown is set to 'p Morrison'. The 'Record Set ID' is '1'. The 'Record Count' is '0'. The 'ACTIONS' dropdown menu is open, showing options: 'Filter Records', 'Ad Hoc Bulk Change', 'Add from File' (highlighted with a red box), 'Add to New Record Set', 'Add to Existing Record Set', 'Check in', 'Remove Selected Records', and 'Delete Selected Records'.

5. Include your **Library Code** in the name of the Record Set. (i.e., ALAP – All Items Not Inventoried May 2025) and click “Save”.



The screenshot shows the 'New Item Record Set 1' form. The 'Name' field is now filled with 'ALAP All Items Not Inventoried Nov 2024'. The 'Owner' dropdown is set to 'Parkland Regional Library System (sys)'. The 'Record Set ID' is '1'. The 'Record Count' is '9'. The 'SAVE' button is highlighted with a red box. Below the form is a table with the following data:

TITLE	ASSIGNED BRANCH	COLLECTION	MATERIAL TYPE	SHELF LOCATION	CALL NO.	VOL.	STATUS	BARCODE	LAST ACTIVITY DATE	RECORD
The best Christmas pageant ever	Sundre Municipal Library	Junior Fiction (jf)	Book		ROB		In-Process	31000047555738		Final
Hubots : real-world robots inspired by humans	Rimbey Community Library	Junior Non-Fiction (jnf)	Book		629.892 BEC 2018		Available	31000045436196	3/10/2020	Final

6. Contact your Consultant Librarian and they will make the necessary **Bulk Changes**.

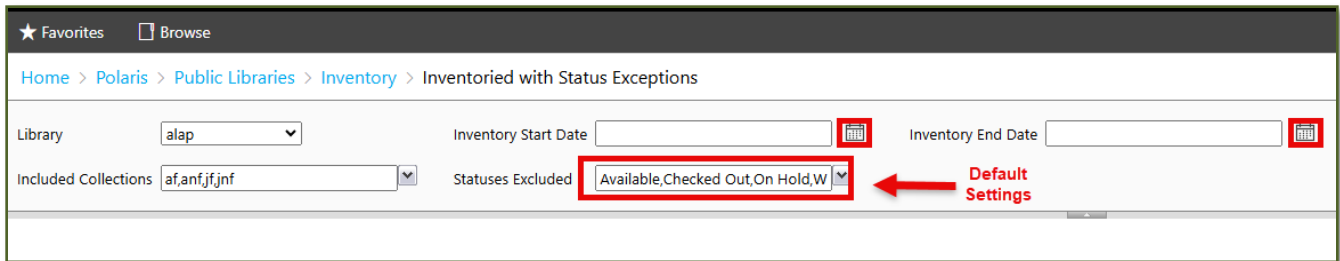
### Inventoried with Status Exceptions Report

This report shows all items inventoried during the selected time and shows items with an **Odd Status**. It is recommended that you run this report **Before** you start the Inventory and **After** you've completed the Inventory.

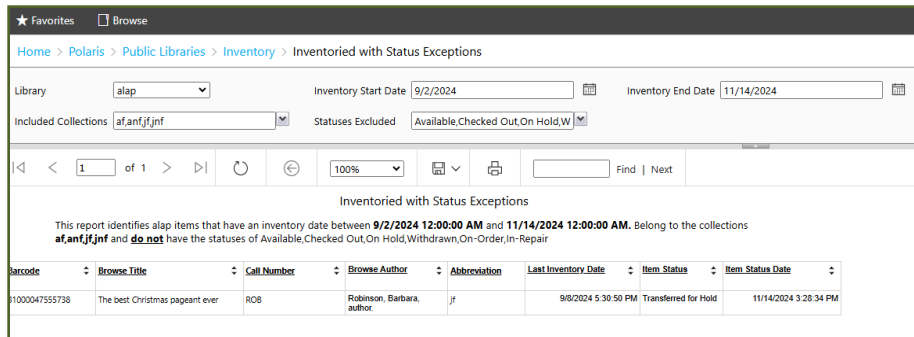
Home > Polaris > Public Libraries > Inventory > **Inventoried with Status Exceptions**

1. Fill in the requested information:

- a. Choose your **Library**
- b. Select an Inventory **Start** and **End Date** (choose the day before the actual start date and the day after the actual end date to ensure everything is captured)
- c. Select the **Included Collections** that were inventoried
- d. Leave the default settings under **Statuses Excluded**



2. This report will pull all inventoried items that have an odd status (i.e., Unavailable, In Process, etc.). These items will need to have their item statuses updated to **Available**.



Barcode	Browse Title	Call Number	Browse Author	Abbreviation	Last Inventory Date	Item Status	Item Status Date
#1000047555738	The best Christmas pageant ever	RO8	Robinson, Barbara, author	jf	9/8/2024 5:30:50 PM	Transferred for Hold	11/14/2024 3:28:34 PM

3. Create an **Item Record Set**, following the same steps mentioned above. Remember to include your **Library Code** in the name of the Record Set. (i.e., ALAP – Inventoried with Status Exceptions May 2025).

## Inventory Item List Report

This report displays all items inventoried within the selected date range. It is recommended you run this report **Before** you start the inventory and **After** you've completed the inventory.

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

1. Fill in the requested information:
  - a. Choose your **Library**
  - b. Select an Inventory **Start** and **End Date** (choose the day before the actual start date and the day after the actual end date to ensure everything is captured)
  - c. Select the **Included Collections** that were inventoried
  - d. Leave the default settings under **Statuses Excluded**

SQL Server Reporting Services

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

Library:  Item Status:  Last Inventory Start Date:  Last Inventory End Date:

Included Collections:  Default Settings

1 of 27

All Items with Inventory Date

Barcode	Item Status	Call Number	Browse Title	Browse Author	Material Type	Collection	Last Inventory Date
31000047818482	In	BHO	To cover a countless	Bhog, Sapna, author.	Book	Adult Fiction	9/9/2024 9:58:57 AM
31000047027919	In	BIS	Queen of the darkness	Bishop, Anne, author.	Book	Adult Fiction	10/6/2024 11:17:56 AM
31000047037950	In	BIS	Heir to the shadows	Bishop, Anne, author.	Book	Adult Fiction	10/6/2024 11:17:04 AM
31000047341865	In	BRO	Building her Amish dream	Brown, Jo Ann, author.	Book	Adult Fiction	9/9/2024 10:07:47 AM
31000046089480	In	BUR	Above the sea	Burton, Laura (Fantasy writer) author.	Book	Adult Fiction	9/9/2024 10:09:06 AM
31000046098589	In	BUR	Heart of glass	Burton, Laura (Fantasy writer) author.	Book	Adult Fiction	9/9/2024 10:09:11 AM
31000046098597	In	BUR	Beastly secrets	Burton, Laura (Fantasy writer) author.	Book	Adult Fiction	9/9/2024 10:09:09 AM
31000047991453	In	BUR	Pure as snow	Burton, Laura (Fantasy writer) author.	Book	Adult Fiction	9/9/2024 10:09:12 AM

- 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.

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