Leap Inventory – Circulation Method

Introduction

Procedure

1. Log into LEAP
   a. Ensure your laptop or device is logged into the Library Staff wireless network and that you use the following web address to access LEAP: https://leap.tracpac.ab.ca/
2. Choose Check In
3. Choose Inventory
4. Begin scanning!

There are various statuses that will prompt a block. If you accidentally miss the notification and keep scanning, you can look back in your list at the Status and Comment field to see if you need to go back and pull a title. Please see examples below of the blocks that may occur.

What you may see

Unexpected Location – Items that need to be shipped back to their owning libraries. Check in the item at a workstation with a receipt printer to generate a transit slip and ship as necessary.

Unexpected Status – Items that may have a status of out, missing, in-transit, withdrawn, bindery, mending etc. – check-in using normal mode and re-shelve as necessary.

Unexpected Record Status - Items that may be deleted. Evaluate if the item should be re-added to the catalog or discarded.

Completing the Inventory

Contact ASK@NLLS.AB.CA to learn how to run reports to identify the missing items that were not scanned during your inventory process. **These items can be marked missing,** and you will have an opportunity to search for the items in your library before they will be withdrawn from Polaris.

After the Inventory

After an inventory is completed, you will generate lists of items that were not counted by the inventory. These items could've been missed during scanning or could be tucked away in an unlikely space (e.g., office, program room, etc.). You will want to look for these items and inventory them. If the items aren't found, you will want to withdraw them so that they no longer show up in TRACpac or in your collection counts.

In SimplyReports, we can generate record sets of items that don't have a recent inventory date. This will create a list of items to search for.

In order to generate reports, you will have to login to SimplyReports. To login to SimplyReports, follow these steps:

1. Go to HTTPS://CATALOGUE.TRACPAC.AB.CA/SIMPLYREPORTS/LOGON.ASPX?OP=DEFAULT.ASPX
2. Login using your Polaris username and password.

3. If you can't get in, we may have to setup your profile to give you access. Contact NLLS for assistance.

Identify your Collection Codes

To run accurate reports, you'll want to know what collection codes your library uses. To find out your collection codes, run the following report

Items > Item Count Reports

Columns selected for output:

- Item assigned collection name Under Item general filters, select:
- Assigned branch: (your branch name)
- Record Status: Final

The click on Submit. The list you see in the Report Preview is all the collection codes you're currently using and a count of how many items are within each collection code.

Running Reports

To generate a list of items that weren't inventoried, you'll have to run reports for each of your collection areas. In SimplyReports, run the following report for each collection code:

Items > Item List Report

Columns selected for output:

- Item barcode
- Item call number
- Item assigned collection name
- MARC author
- MARC title
- Item last inventory date Under Item General Filters, select:
- Assigned branch: Your branch name
- Collection: Whatever collection you're working on first
- Record Status: Final

Under Item relative date filters (prior to a specified date), select:

- Last inventory date more than: 1 month(s) before the report run date (Note: you can choose 1 year if it takes you longer than a month to complete inventory. It just depends on whether you did an inventory already in the past year or not).

Click on "Submit" and look at the next step of this tutorial: Creating Record Sets. Don't close the report yet!

Creating Record Sets

The list you just created is a list of all items that weren't inventoried during your inventory process. Now, we're going to create a record set out of the report you have just generated so that we can work with these titles if we need to remove them in bulk.

1. On the report preview, check off the box that says Create item record set from report results.
2. Name the record set Library Code - Collection Name - Inventory (year)
3. Run the report for the next collection code and create another record set. Repeat until all collections are complete. You should have a record set for each collection by the time you're done.

Search for Missing Items

Now that you've created a record set for each collection of items that were missed during inventory, it's time to search for the items.

1. Open the record set in Polaris, sort the items by call number and print it out. Sorting the list by call number will help searching go quickly.
2. Search your library for the missing items.
3. If you find an item, remove it from the record set by highlighting the item and clicking on the "-" sign (minus sign).
4. All the items left in the record set should be missing items. If there aren't very many, you can change their status individually to "withdrawn". If there are a lot, you may want to do a bulk change. If you aren't comfortable with bulk changes, feel free to contact NLLS for help.