

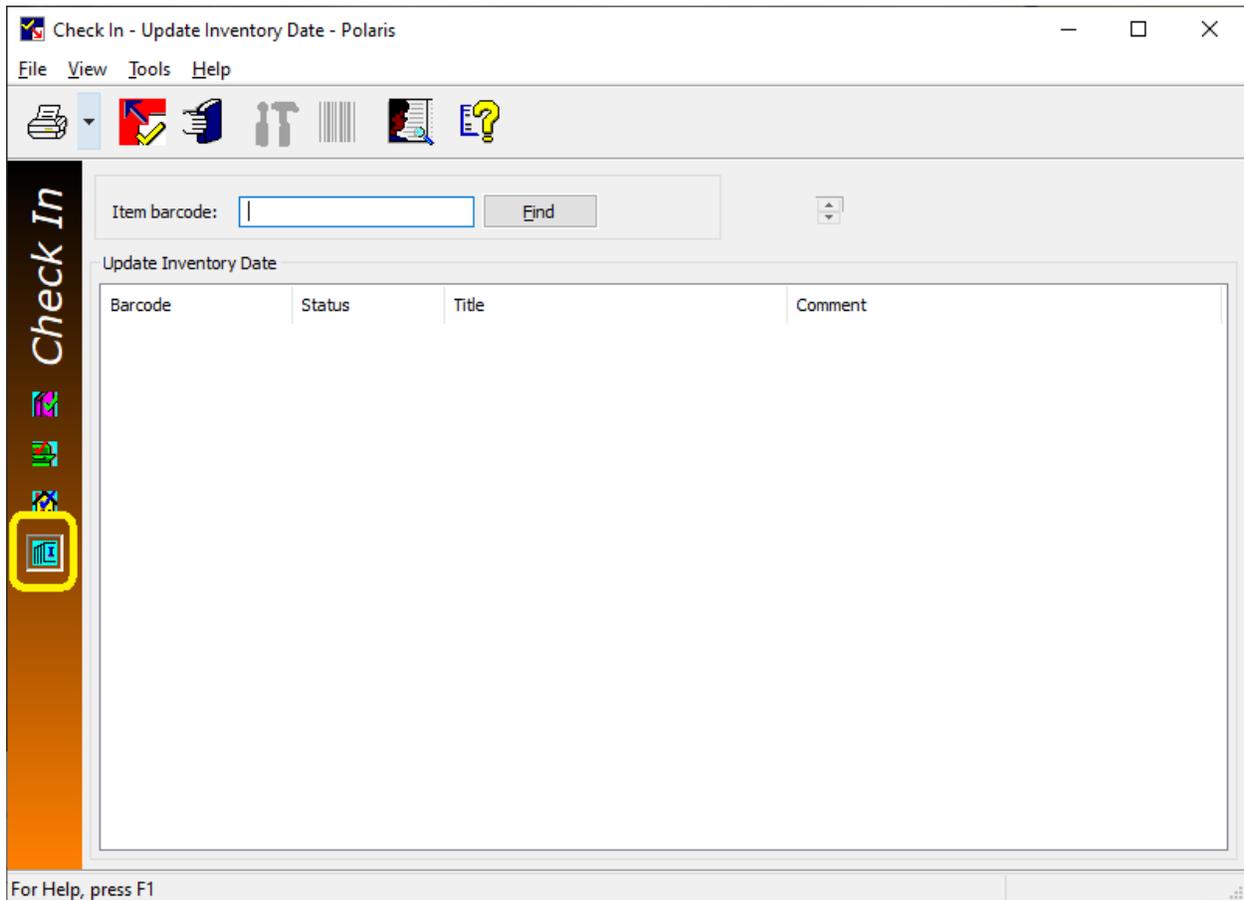
# How to Inventory Your Collection Manually

## What to do in Polaris

Open up a Polaris Check In Screen (press F2 on the keyboard, click Circulation > Check In on the Polaris toolbar).

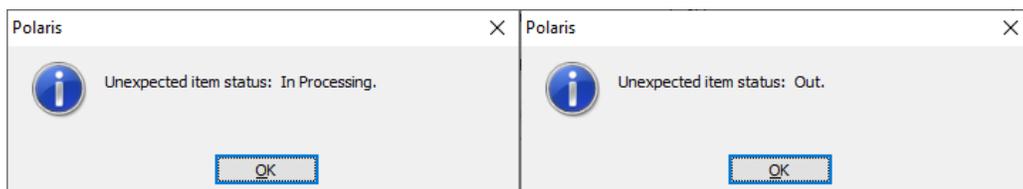
A Polaris Check In screen has four different modes: Normal Mode, Bulk Mode, In House Mode, and Update Inventory Date

Click on Update Inventory Date



Then scan your collection. Every item. One at a time until you are done. Order does not matter as long as you get everything.

As you are scanning, you may get some pop-ups. These will let you know when an item has an unexpected status (e.g. In Processing, Claim Returned, Lost, Unavailable, Withdrawn, Out, etc).



When this happens, set these items aside. Once you're done scanning everything else, check in these items using Normal mode. If you have them in hand, they clearly aren't lost, missing, checked out to a patron, or something along those lines.

If you've forgotten to set those items aside, you can review the Update Inventory Date screen for a list of what you've scanned.

Barcode	Status	Title	Comment
30100000256372	Out	The very hungry caterpillar	Unexpected item status: Out. Inventory update suc...
30100000172843	Unavailable	The nonesuch	Unexpected item status: Unavailable. Inventory upd...
30100000287054	Withdrawn	No wind of blame	Unexpected item status: Withdrawn. Inventory upda...
30100000172876	Lost	Pistols for two, and other stories.	Unexpected item status: Lost. Inventory update suc...
30100001000753	Claim Returned	Powder & patch (the transformation of Phi..	Unexpected item status: Claim Returned. Inventory...
30100000172835	In	My lord John	Inventory update successful.
30100000234262	In Transit	The masqueraders	Unexpected item status: In Transit. Inventory updat...
30100001000100	In Processing	An infamous army	Unexpected item status: In Processing. Inventory u...

### **What to do in Simply Reports**

As you scanned your items, you found items that shouldn't be on the shelves. Now with Simply Reports, you're going to find the items that should be on the shelves but aren't.

Create an Item List Report. The following output columns are recommended (but feel free to add others if you would prefer):

- Item barcode
- Item call number
- Item assigned collection name
- Item shelf location
- MARC author
- MARC title

<p>Report output columns</p> <ul style="list-style-type: none"> <li>MARC sort ISSN</li> <li>MARC sort OCLC number</li> <li>MARC sort publisher number</li> <li>MARC sort title</li> <li>MARC sort UPC</li> <li>MARC UPC</li> <li>Patron barcode</li> </ul>	<p>Columns selected for output</p> <ul style="list-style-type: none"> <li>Item barcode</li> <li>Item call number</li> <li>Item assigned collection name</li> <li>Item shelf location</li> <li>MARC author</li> <li>MARC title</li> </ul>	<p>Columns selected for sort</p> <ul style="list-style-type: none"> <li> </li> </ul>
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Next go down to the Item general filters.

Set the assigned branch to your library.

**Item general filters**

Item record set  

**Assigned branch:**

Library quick pick Marigold  
MeLibrary  
Northern Lights  
Peace Library System

Branch Pat Hardy Elementary School Library  
Paul Rowe Jr.-Sr. High School  
**Peace Library System (Branch)**  
Peace Regional Outreach

Set your record status to final. You are only concerned with items that currently exist in your collection and have not been deleted.

Record status Final  
Provisional  
Deleted

Under Circ status, select In.

Circ status In  
Out  
Out-ILL  
Being Held

Under Item date filters, put a check beside Last inventory date and then again over by Not present. Since you updated the inventory date for all the items in your library, you're looking to see what should be there, but wasn't scanned.

**Item date filters**

<input type="checkbox"/> PO release date	<input type="text"/>		<input type="text"/>	
<input type="checkbox"/> Creation date	<input type="text"/>		<input type="text"/>	
<input type="checkbox"/> Due date	<input type="text"/>		<input type="text"/>	
<input type="checkbox"/> First available date	<input type="text"/>		<input type="text"/>	
<input type="checkbox"/> Item record history transaction date *	<input type="text"/>		<input type="text"/>	
<input type="checkbox"/> Imported date	<input type="text"/>		<input type="text"/>	
<input type="checkbox"/> In-transit received date	<input type="text"/>		<input type="text"/>	<input type="checkbox"/> Not present
<input type="checkbox"/> In-transit sent date	<input type="text"/>		<input type="text"/>	<input type="checkbox"/> Not present
<input type="checkbox"/> Last check in date	<input type="text"/>		<input type="text"/>	
<input type="checkbox"/> Last check out or renewal date	<input type="text"/>		<input type="text"/>	<input type="checkbox"/> Not present
<input type="checkbox"/> Last activity date	<input type="text"/>		<input type="text"/>	<input type="checkbox"/> Not present
<input type="checkbox"/> Last circ status change date	<input type="text"/>		<input type="text"/>	
<input checked="" type="checkbox"/> Last inventory date	<input type="text"/>		<input type="text"/>	<input checked="" type="checkbox"/> Not present
<input type="checkbox"/> Last overdue notice date	<input type="text"/>		<input type="text"/>	
<input type="checkbox"/> Modification date	<input type="text"/>		<input type="text"/>	
<input type="checkbox"/> Record status date	<input type="text"/>		<input type="text"/>	

Then scroll down and click Submit.

In an ideal world, there would be zero results because that would mean that everything that is supposed to be there, is there. Unfortunately, it rarely works that way.

You are most likely going to get some results. You can export those results to Excel, where you can sort, print, and save them. You can create a record set that you can refer to as you work your way through the list. It's up to you.

- Download report output
- Save report parameters for later use
- Create item record set from report results

There were 617 results, to download the report use the checkbox (above).

The important thing is to go look for those items. Search around the library. Look in nooks and crannies. It's amazing where things can be hidden. As you find items, update the inventory date and shelf.

If you have searched everywhere and cannot find the items, update the item record. Change the circ status from In to Missing.

Congratulations. You have completed an inventory of your collection!