

## **Inventory Process**

Taking inventory can be achieved in CARL by changing the status of a collection from “On Shelf” to “Missing,” then by checking in the items on the shelf.

Weeding reports based on Status will be affected by inventory, so it is important to run these reports before doing inventory. When a collection is globally updated, the Last Action Date is what gets updated causing all items in a collection to have a more current date than the last edited or last circulation date.

Steps for Inventory:

1. Staff will run a weeding report based on the collection they want to inventory. Either by using the [‘Items by Status Report’](#) or the ‘Collection List Report’.
2. Once all weeding reports have been run, staff will notify OWLS of starting inventory
  - a. OWLS staff will use the Global Update tool to update the collection(s) to a status of “Missing” - staff should have the Location Code(s) and the Media Code(s) ready if there is a specific part of a collection getting inventoried.
  - b. OWLS staff will notify library staff when this has been completed
3. Library staff will then use Connect to “Return” those items that are on shelf.
  - a. Log in to CARL Connect Staff – Circulation.
  - b. Select Library Services.
  - c. Click “Check In.”
  - d. Scan the barcode of the item on the shelf.
4. Once library staff have finished scanning all items in “Return”, they will then run another report with ‘Items by Status’ to locate those items still with a “Missing” status.