Searching for Missing Items

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Introduction

It's useful to take some time on a regular basis to check the shelves for items that have been marked missing, in case they can be found with a more extensive search. These instructions provide step-by-step guidance on how to use Alma to create a list of items from your departmental library that have been marked "Missing" and what to do if an item marked missing is found.

Generating a List of Missing Items

Basic Steps:
- Check that the persistent search box has the first parameter set to "Physical Items" and that there's an icon of a house for the Search Zone.
- Click the "Advanced Search" icon to the left of the persistent search box.
- Use the following options for the first rule:
  - Holdings: Permanent physical location
  - Equals
  - [The location within your departmental library that you want to search]
- Click the plus sign in a circle to add another rule.
- Leave the toggle on "AND". Use the following options for the second rule:
  - Physical Item: Process type
  - Equals
  - Missing
- Click "Search".
- On the search results page, check the "Library" section in the Facets sidebar. If it has more than one facet, click the name of your library.
- Click the "Export list" icon and select "Excel (current view)".
- Open the file in Excel. Enable editing if necessary.
  - Sort the spreadsheet by newest to oldest modification date.
  - Delete anything with a modification date of more than six months ago.
  - Sort the spreadsheet by call number.
  - Hide any columns you don't need.
- Repeat the process until you've gone through all of the locations in your departmental library.
- Search for the items on your shelves.

Detailed Workflow:

1. In Alma, go to the persistent search box at the top of the page. Make sure the first parameter is set to "Physical items" and the Search Zone is set to "Institution" (indicated by an icon of a house).
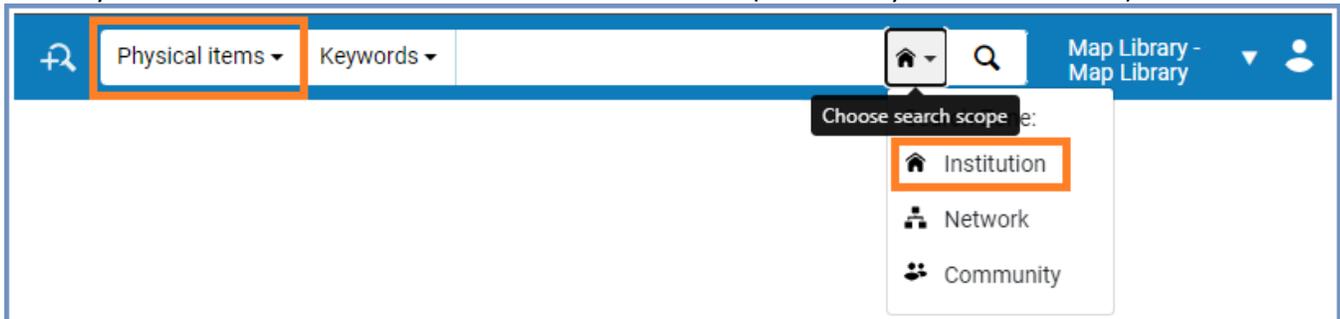
2. Click the "Advanced Search" icon to the left of the persistent search box.
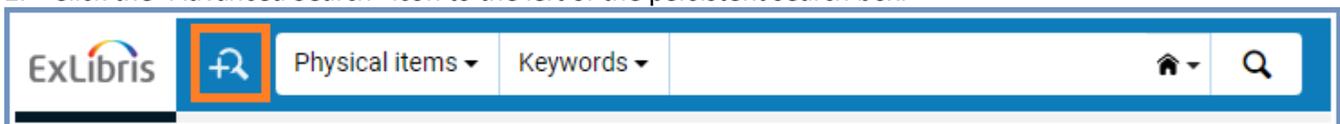
3. At the top of the expanded search box, it should say "Search in: Physical Items", and the radio button for Institution Zone should be selected.

4. On the line below that, click the first drop-down menu on the left to open it. Then expand the "Holdings" section of the menu and select "Permanent physical location".

5. The next drop-down menu to the right should automatically change to "Equals". Open the next drop-down menu to the right of that. Click on the name of your library to expand that section, and then select a location.
Note: Once you're done with this location, you'll need to repeat the process until all your locations have been searched.
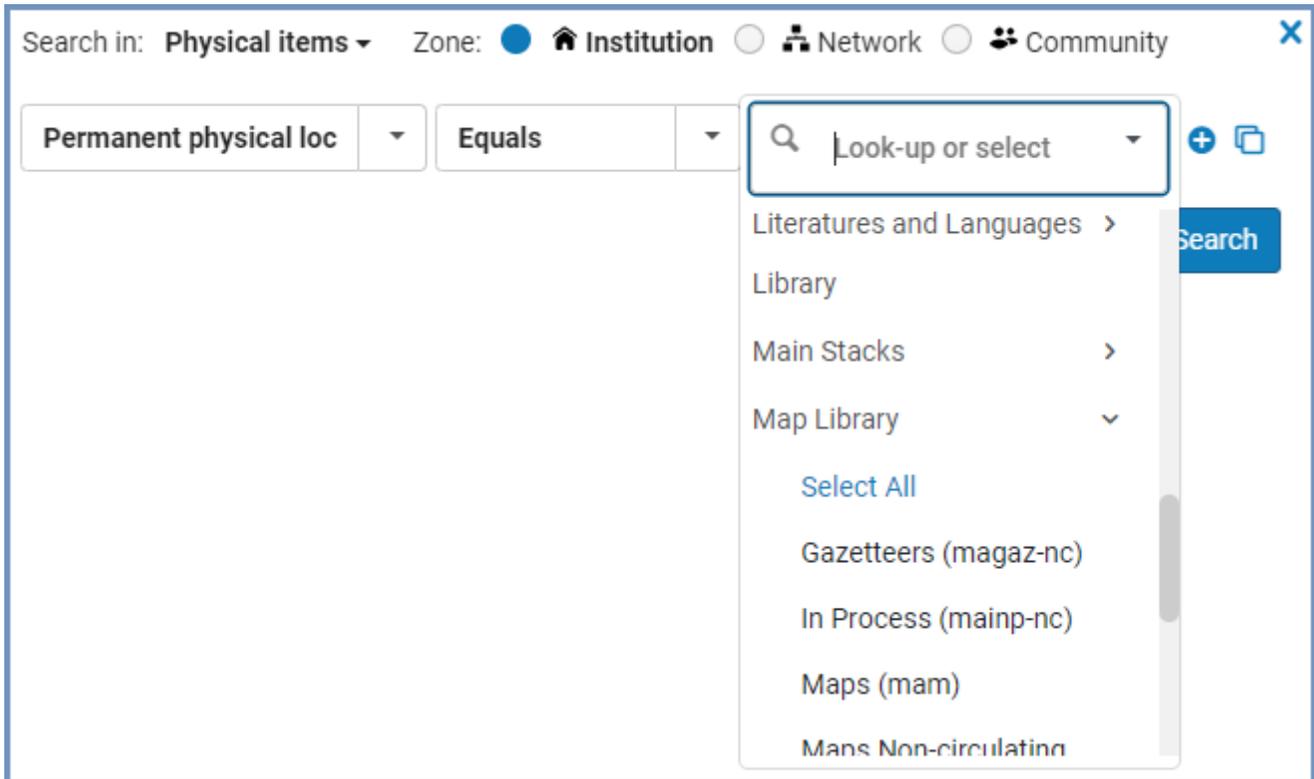
6. Click the plus sign in a circle to the right of that menu to add a rule to the search.
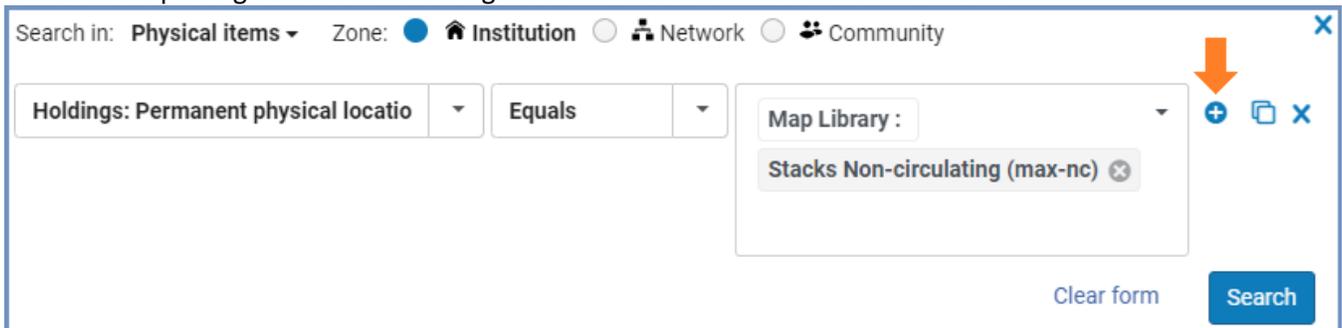
7. The toggle switch should be left on "AND". Open the first drop-down menu to the right of that. Expand the "Physical item" section and select "Process type".
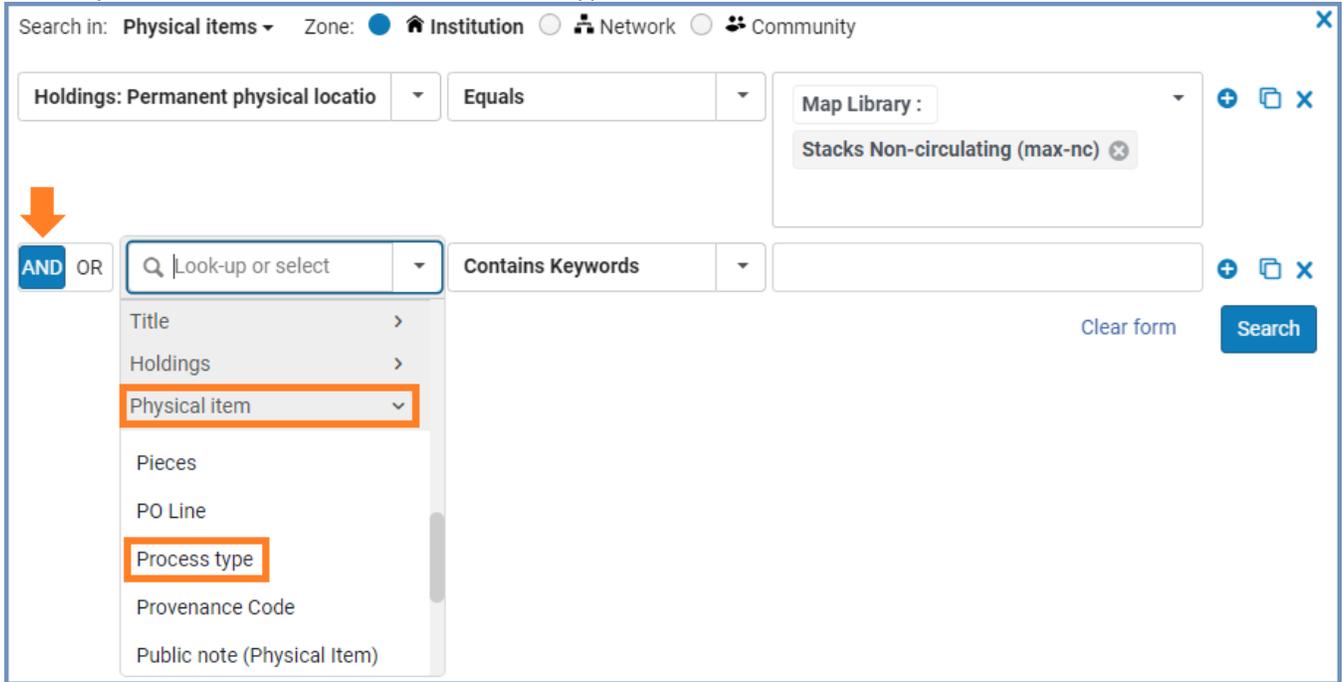
Note: An alternative to selecting the parameter from the longer drop-down menu is to type the parameter into the field and then click on it in the shorter menu that appears. Some parameters have similar names, so be sure to select the correct one. For example, in this procedure, typing "process type" will bring up both "In Process Type" and "Process type" and you would want to make sure to select "Process Type".
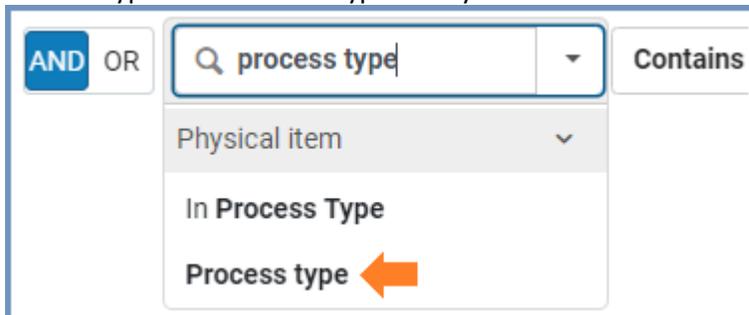
8. The next drop-down menu to the right should automatically change to "Equals". Open the next drop-down menu to the right of that and select "Missing".
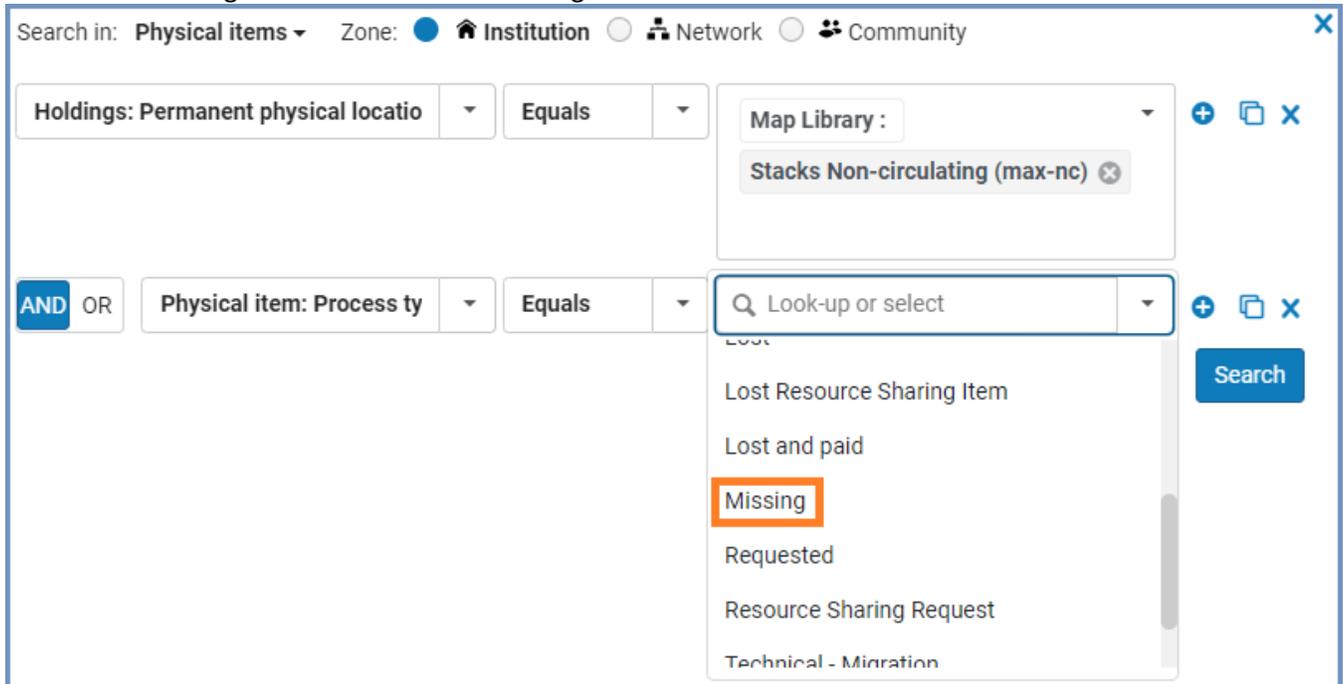
9. Click the "Search" button.

10. Make sure the list only includes items from your departmental library. On the page of search results, look at the "Library" category in the Facets sidebar on the left. If it has more than one facet in that section, click the name of your library to exclude any other facets.

11. Click the "Export list" icon near the top right of the page. In the drop-down menu that appears, select "Excel (current view)".
    Note: Depending on how large the list is, the export process may take a little while.

12. Once the file has been downloaded, open it in Excel. If it has a yellow "Protected view" ribbon at the top, click the "Enable Editing" button.

13. Sort the spreadsheet from newest to oldest date in the "Modification Date" column.
    a. To do that, click on one cell in that column, and then go to the "Data" tab in the toolbar at the top. In the "Sort and Filter" section of that tab, click the "Sort newest to oldest" icon.
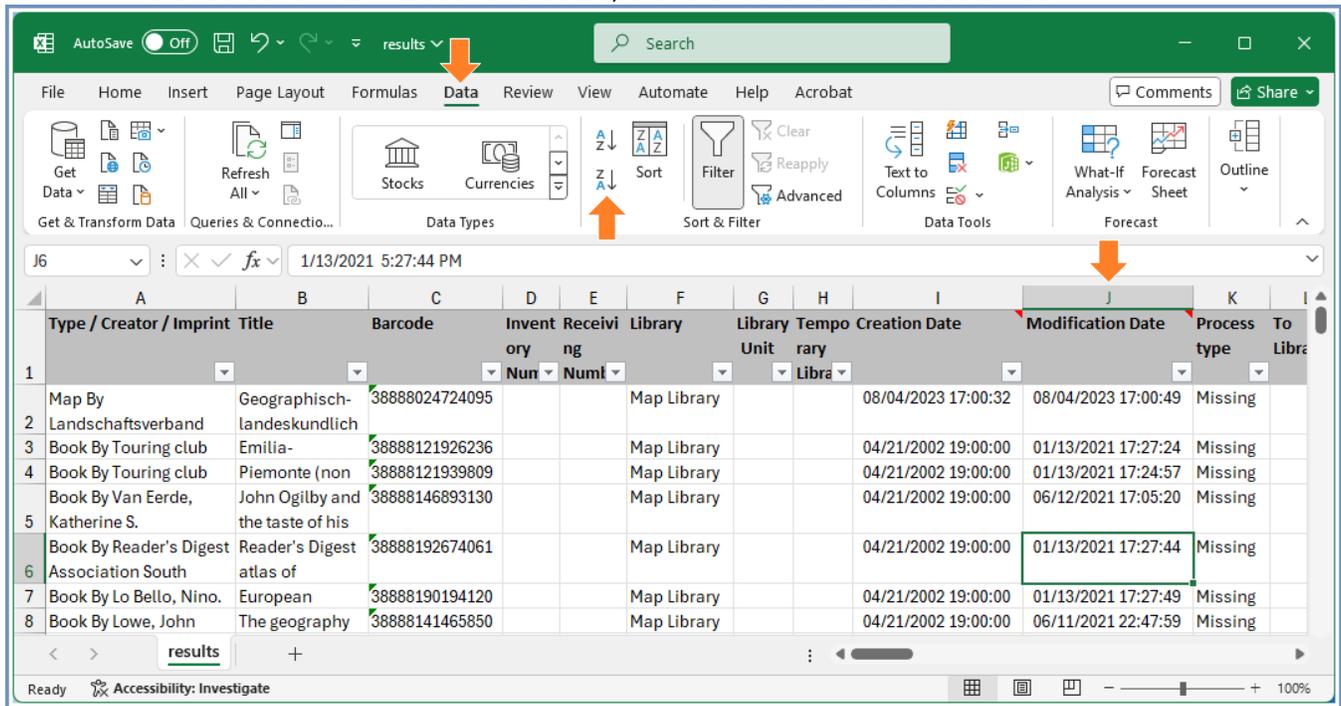
14. Find the ones with a modification date within the last six months. These are the items that you will search your shelves for. Delete anything older than that from the spreadsheet.
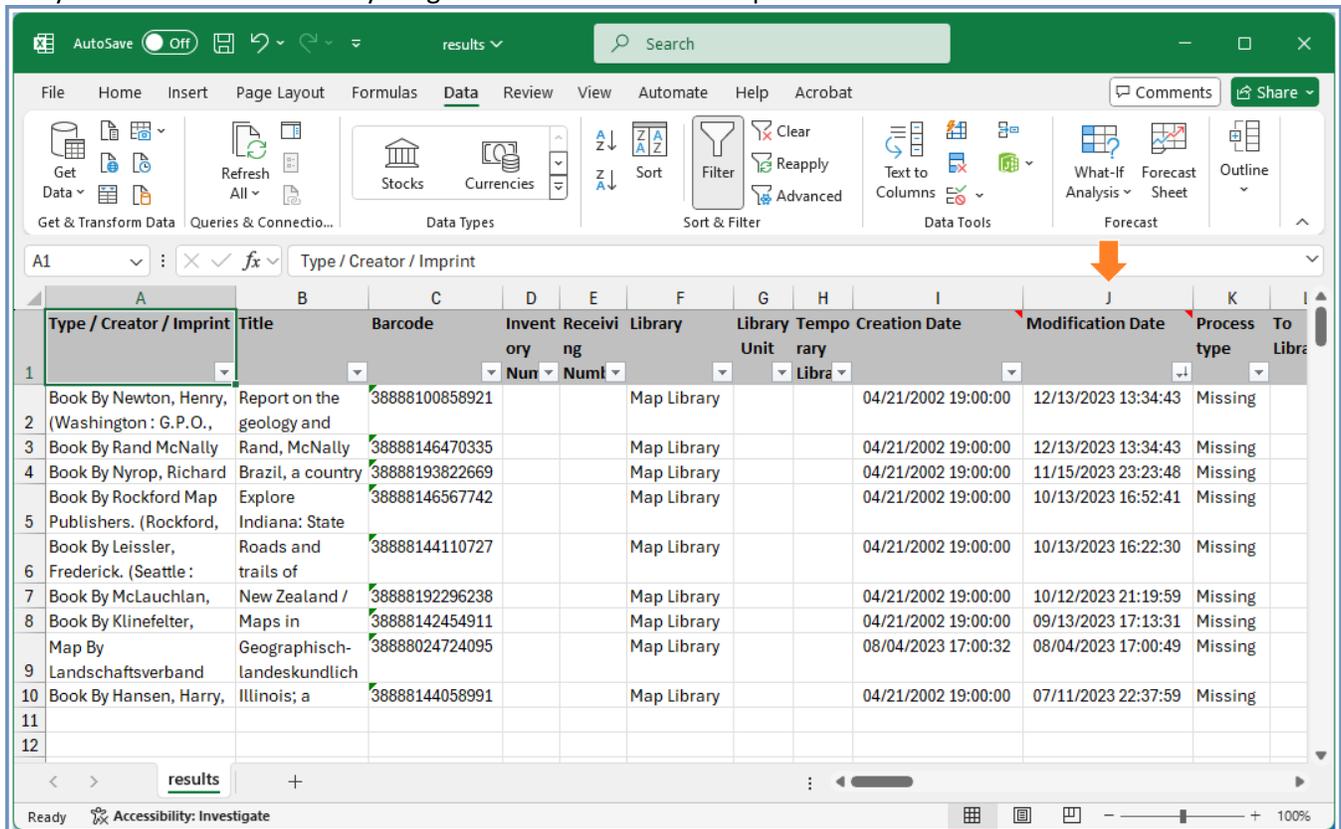
15. To make the items easier to search for, use the "Call Number" column to sort the rows by lowest to highest call number. You can also hide any columns you don't need by right-clicking the letter at the top of the column and selecting "Hide" from the drop-down menu.

    Note: Once these are done, repeat the process until you've completed the list of locations under your library name in the "Permanent physical location" section of the Advanced Search (see step 5).

After the Shelves Have Been Searched

Basic Steps:
- Any items that were not located should keep the Process Type of "Missing".
- Items that were located should be scanned into Alma on the "Scan In Items" screen.
  - The "Missing" status will be removed automatically.
  - Route the item according to the information in the "Destination" column.

Detailed Workflow:

1. Any items that were not located should keep the Process Type of "Missing".
2. Items that were located should be scanned into Alma:
   a. From the "Fulfillment" menu, select "Scan In Items".
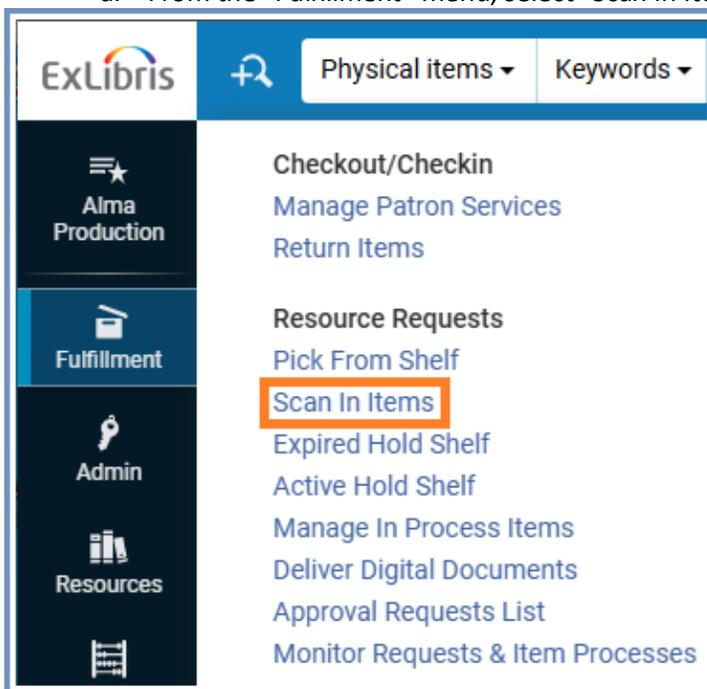
b. Scan in the item.

Scan In Items ⟨Manage In Process Items⟩ ⟨Exit⟩

| Scan in Items | Change Item Information |

Automatically print slip ● Yes ○ No

Register in-house use ☑

Work Order Type [   ] ▾

Scan item barcode * [🔍 Look-up or select] [☰] [OK] **Create Item**

Scan request ID [   ] [OK]

⟨☰⟩

No records were found.

c. A notification will pop up to say that the "Missing" status has been removed from the item.

Please note the following:

ⓘ Item's missing status was removed, barcode 30112065314772.

[OK]

d. Route it according to the information under "Destination". In most cases, this will mean reshelving the item.