



AUTOMATING SHELF INVENTORY

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What is Inventory?



- **Inventory**
 - What does the system say is on the shelf?
 - What is actually on the shelf?
 - What is on the shelf, but in the wrong place?
 - When was the item last on the shelf?
 - What items are on the shelf, but not in the system?
 - What items are marked as missing or checked out, but actually on the shelf?

To Automate or Not To Automate

- Wireless Barcode Scanner – OPN 2001
- @ \$120 on Amazon



Barcode Files

Name	Date modified	Type
2015-08-03 inv AY 30 W927 2007-CT 104 M357m 2001.txt	1/25/2016 10:50 AM	Text Docu
2015-08-03 inv CT 104 M357m 2002-HA 203 C855 2007.txt	7/8/2015 2:23 PM	Text Docu
2015-08-03 inv HA 203 v836 1907-HA 203 v836 v.2 1947.txt	7/14/2015 2:39 PM	Text Docu
2015-08-03 inv HA 203 V836 v.1 1948-HA 203 V836 v.2 pt.B 1968.txt	7/15/2015 2:47 PM	Text Docu
2015-08-03 inv HA 203 V836 v.3 1968-HA 581 U54a 2005.txt	7/27/2015 2:36 PM	Text Docu
2015-10-14 inv HB 881 S383 1985-PE 1595 N548e19.txt	8/6/2015 3:17 PM	Text Docu
2015-10-14 inv PE 1625 C736 1971 v.1-QH 302.5 E56 v.9 1997.txt	8/25/2015 9:14 AM	Text Docu
2015-10-14 inv QH 307 F293b 1956 cop.2-QV 38 D79313 2015.txt	9/14/2015 5:00 PM	Text Docu
2015-10-14 inv QV 38 M613s vol.1 2006-QW 4 B496 v.4 1989.txt	9/21/2015 3:36 PM	Text Docu
2015-10-14 inv QW 4 B832m 1925-QZ 266 F686s 2007.txt	9/23/2015 3:43 PM	Text Docu
2015-10-14 inv SF 609 B655s 2007-W 19 A849d 2013.txt	9/30/2015 2:58 PM	Text Docu
2015-10-14 inv W 19 S711 1945-W 613 E56 v.3 2000.txt	10/13/2015 3:39 PM	Text Docu
2015-10-14 inv WA 5 A512p 1999-WM 100 H859 v.2 1984.txt	10/22/2015 3:38 PM	Text Docu
2016-01-11 inv WM 105 C737 v.1 1998-Z 7405.P7 P965 1994.txt	1/11/2016 10:05 AM	Text Docu

2 Ways to do Inventory

Alm's Way (Shelf Report)

- ❑ Must use an excel file
- ❑ Call # ranges as defined by Alma
- ❑ Does not address the issue of items listed in other locations
- ❑ Easily lists all issues in one place

My Way

- ❑ Uses a text file
- ❑ No need to worry about Call #'s
- ❑ Need to create/access different files/lists for each issue

Shelf Report

➤ Resource Management > Manage Inventory > Shelf Report

Inventory definition Range Set

Library * Location *

Call number type *

From call number *

To call number *

File

Scheduled Running **History**

Submit Date from to [Apply Filter](#)

Job Category Filter Status filter

[Refresh](#)

	Name	Job ID	Job Category	Creator
1	Shelf Report_A - CT 104 M357m 2001 (National Library of Medicine clas...	1134439180002043	Repository	EJONES7
2	Schedule of Analytics reports and dashboards - Daily	1134437460002043	Analytics	System
3	PO Line - Claiming	1134437060002043	Acquisition	System
4	Users - Remove Blocks	1134434180002043	Fulfillment	System
5	Shelf Report_A - CT 104 M357m 2001 (National Library of Medicine clas...	1134434180002043	Analytics	System

Shelf Report Results, NLM Call



Completed
Successfully

Process ID 1134439180002043

Started on 04/29/2016 08:23:36 CDT

Total run time 7 Seconds

Status Completed Successfully

Records processed 1

Counters

Library Robert M Bird Library
Location REFERENCE
Call number type National Library of Medicine classification
From call number A
To call number CT 104 M357m 2001
Set name -

Analysis

		Count
1	Items in place	82
2	Missing items but marked in place	696
3	Items on shelf but marked not in place	0
4	Known items not in place	166
5	Items on shelf but out of range/set	1
6	Barcodes with no matched item	0

Shelf Report Results, LOC Call

Counters

Library Robert M Bird Library
Location REFERENCE
Call number type Library of Congress classification
From call number A
To call number CT 104 M357m 2001
Set name -

Analysis

		Count
1	Items in place	1
2	Missing items but marked in place	21
3	Items on shelf but marked not in place	0
4	Known items not in place	25
5	Items on shelf but out of range/set	82
6	Barcodes with no matched item	0

Missing Items Marked in Place

- These are items that the system says are on the shelf, but were not scanned (missing).
- KFO is outside the A – CT call range (NLM 696).
- W is outside the A – CT call range (LOC 21)

1 [Oklahoma session laws.](#)

Journal By Oklahoma. (St. Paul, Minn. [etc.] West Pub Co West Group etc 1936/
Update Date: 10/27/2015
Library: Robert M Bird Library Permanent Location: 3rd FI, Reference
Call Number: KFO 1225.2 O41s Call Number Type: National Library of Medicin
Alternative Call Number: KFO 1225.2 O41s v.1 1999 Alternative Call Number
Status: Item in place Item Policy: Reference book Barcode: [360201009741](#)
Description: v. 1 (1999)
[Edit](#) | [Holdings](#) | [Items](#) | [Request](#) | [Work Order](#) | [Withdraw](#) | [More info](#)

2 [Oklahoma session laws.](#)

Journal By Oklahoma. (St. Paul, Minn. [etc.] West Pub Co West Group etc 1936/
Update Date: 10/27/2015
Library: Robert M Bird Library Permanent Location: 3rd FI, Reference
Call Number: KFO 1225.2 O41s Call Number Type: National Library of Medicin
Alternative Call Number: KFO 1225.2 O41s v.2 1999 Alternative Call Number
Status: Item in place Item Policy: Reference book Barcode: [360201009744](#)
Description: v. 2 (1999)
[Edit](#) | [Holdings](#) | [Items](#) | [Request](#) | [Work Order](#) | [Withdraw](#) | [More info](#)

1 [Medical device register.](#)

Journal By Directory Systems, Inc. (Greenwich, CT ; Montvale, N
Library: Robert M Bird Library Permanent Location: 3rd FI, R
Call Number: W 26 M489 Call Number Type: Library of Congr
Alternative Call Number: W 26 M489 v.2 2007 Alternative Ca
Status: Item in place Item Policy: Book Barcode: [3602010](#)
Description: v.2
[Edit](#) | [Holdings](#) | [Items](#) | [Request](#) | [Work Order](#) | [Withdra](#)

2 [Medical device register.](#)

Journal By Directory Systems, Inc. (Greenwich, CT ; Montvale, N
Library: Robert M Bird Library Permanent Location: 3rd FI, R
Call Number: W 26 M489 Call Number Type: Library of Congr
Alternative Call Number: W 26 M489 v.1 2007 Alternative Ca
Status: Item in place Item Policy: Book Barcode: [3602010](#)
Description: v.1
[Edit](#) | [Holdings](#) | [Items](#) | [Request](#) | [Work Order](#) | [Withdra](#)

3 [Directory of pathology training programs.](#)

Journal By Intersociety Committee on Pathology Information. (B

Known Items Not in Place, 166

- These are items that are both in the range and were scanned, but the system has a status for them of “not in place” (checked-out/Missing).
- Again items JK are outside the A – CT call range (NLM 166).
- W are also outside the A – CT call range (LOC 25).

1 [Official congressional directory.](#)

Journal By United States. Congress. (Washington, DC : GPO : 1999) : 1999
Library: Robert M Bird Library Process type: Missing
Call Number: JK 1011 U58o 1963 Call Number Type: Library of Congress classification
Alternative Call Number: JK 1011 U58o Alternative Call Number Type: National Library of Medicine
Status: Item not in place Barcode: [AAF7364-iss-1](#)
Description: 1999 (1999)
[Edit](#) | [Holdings](#) | [Items](#) | [Request](#) | [Work Order](#)

2 [Occupational outlook handbook / U.S. Department of Labor.](#)

Journal By United States. Bureau of Labor Statistics. (Washington, DC : GPO : 1999) : 1999
Update Date: 07/31/1990
Library: Robert M Bird Library Process type: Missing
Call Number: HD 8051 O15 1992-93 Call Number Type: Library of Congress classification
Alternative Call Number: HD 8051 O15 1998-99 Alternative Call Number Type: National Library of Medicine
Status: Item not in place Item Policy: Reference
[Edit](#) | [Holdings](#) | [Items](#) | [Request](#) | [Work Order](#)

3 [Occupational outlook handbook / U.S. Department of Labor.](#)

Journal By United States. Bureau of Labor Statistics. (Washington, DC : GPO : 1999) : 1999

1 [Medical device register.](#)

Journal By Directory Systems, Inc. (Greenwich, CT ; Montvale, NJ, etc. : DSI Medical Economics Group : 2000) : 2000
Library: Robert M Bird Library Process type: Missing Permanent Location: 3rd Fl, Reference
Call Number: W 26 M489 Call Number Type: Library of Congress classification
Alternative Call Number: W 26 M489 Alternative Call Number Type: National Library of Medicine
Status: Item not in place Barcode: [AAC9792-iss-1](#) Material Type: Issue
Description: ED. 20 (2000)
[Edit](#) | [Holdings](#) | [Items](#) | [Request](#) | [Work Order](#) | [Withdraw](#) | [More info](#)

2 [Medical device register.](#)

Journal By Directory Systems, Inc. (Greenwich, CT ; Montvale, NJ, etc. : DSI Medical Economics Group : 2001) : 2001
Library: Robert M Bird Library Process type: Missing Permanent Location: 3rd Fl, Reference
Call Number: W 26 M489 Call Number Type: Library of Congress classification
Alternative Call Number: W 26 M489 Alternative Call Number Type: National Library of Medicine
Status: Item not in place Barcode: [AAC9792-iss-2](#) Material Type: Issue
Description: ED. 21 (2001)
[Edit](#) | [Holdings](#) | [Items](#) | [Request](#) | [Work Order](#) | [Withdraw](#) | [More info](#)

3 [Hoover's handbook of world business.](#)

Items on Shelf, Out of Range, 1

- These are items that were scanned and exist in the system, but are outside the range specified (mis-shelved).
- AY 30 W927 1992 should not have been outside the call range A – CT (NLM 1).
- CT 104 M357m 1994 should not have been outside the call range A – CT (LOC 82).

1 [The World almanac and book of facts.](#)

Journal (New York, Mahwah, N.J. : The New York world-telegram Newspaper Enterprise Association World Almanac Books St Martin's Press etc 1868-)

Library: Robert M Bird Library **Permanent Location:** 3rd Fl, Reference

Call Number: AY 30 W927 1992 **Call Number Type:** Library of Congress classification

Alternative Call Number: AY 30 W927 2007 **Alternative Call Number Type:** Library of Congress classification

Status: Item in place **Item Policy:** Book **Barcode:** [36020101202246](#) **Material Type:** Issue

[Edit](#) | [Holdings](#) | [Items](#) | [Request](#) | [Work Order](#) | [Withdraw](#) | [More info](#)

2 [Index to Marquis Who'sWho publications.](#)

Journal By Marquis Who's Who, Inc. (New Providence, NJ : Marquis Who's Who 1994-)

Update Date: 07/31/1990

Library: Robert M Bird Library **Permanent Location:** 3rd Fl, Reference

Call Number: CT 104 M357m 1994 **Call Number Type:** National Library of Medicine classification

Alternative Call Number: CT 104 M357m 1994 **Alternative Call Number Type:** National Library of Medicine classification

Status: Item in place **Item Policy:** Reference book **Barcode:** [36020100497870](#) **Material Type:** Issue

[Edit](#) | [Holdings](#) | [Items](#) | [Request](#) | [Work Order](#) | [Withdraw](#) | [More info](#)

Shelf Report Summary



- Help files say that you can use an excel or text file, but I've only been able to make an excel file work.
- Video on knowledgebase shows excel file.
- There are issues with the call # ranges
- Can use sets, but that same issue exists with getting the call # range searches to work correctly

Beth's Way

- You will need permission to:
 - ▣ Run and monitor jobs
 - ▣ Create and work with sets





Beth's Way Overview

- Create a logical set for the inventory location where the inventory date is null.
- Upload the Scanned Barcodes into a 2nd itemized set for physical items
 - The errors from this barcode are items scanned, but do not exist in Alma.
- Run the change physical items job on the 2nd set making the inventory date = current date
- Download the scanned barcodes set to Excel in order find items to update location information in Alma
- Download the logical set to Excel to identify items that were not on the shelf.


Create a Logical Set for Location

- Set the library and location of the inventory
- Set the inventory date to “Is Empty”
- Once you have inventoried this location you will make this setting “After” and set the date of the last inventory.

Holding

	Find	Permanent physical location	Equals	REFERENCE
	And	Library	Equals	Robert M Bird Library

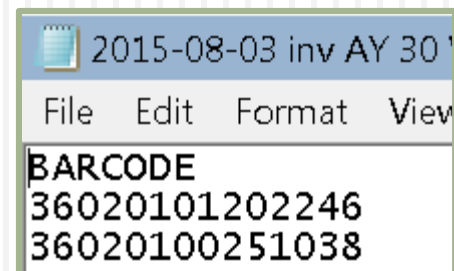
Physical items

	Find	Inventory date	Is Empty	06	01	2015
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[Clear conditions](#)

Upload Scanned Barcodes

- First you will need to open your text file of barcodes and add a heading line - BARCODE
- Add a new itemized set
 - Resource Management > Search and Sets > Manage Sets
 - Add Set > Logical
- If you are doing the inventory in parts make sure to include a call number range
- Choose your file to upload
- Click Save



Upload Scanned Barcodes Cont...

Set name * Reference Inventory AY thru CT

Description Scanned barcodes from reference in the AY-CT call # range

Note

Set content type * Physical items

Status Active Inactive


Created by Ex Libris

Content Origin Institution only


Private Yes No

Status date 04/29/2016 15:07:45 CDT

Updated by Ex Libris


File 2015-08-03 inv AY 30 W927 2007-CT 104 M357m 2001.bt  The maximum file size is 10 MB.

- You get a message saying a job was run to add the members
- View the job and download any error files. These barcodes are ones that do not exist in Alma.

 Completed with Errors

Process ID 1134507780002043
Started on 04/29/2016 15:23:06 CDT
Total run time 0.305 Seconds
Status Completed with Errors
Records processed 5

Alerts

 Of the 5 records processed, 5 records failed. For more information view the report details (or contact

Counters

Set name:	test
Total added to set:	0
Total invalid:	5
Total failed for technical reasons:	0
Download error file:	sets-1134507780002043.csv

Run the Change Physical Item Job

- Set the inventory date to the current date
- Administration > Manage Jobs > Run a Job
- Choose the Change Physical Items Job
- Select your itemized barcode set
- Set the inventory date

location fields		Change Type * Permanent	Due Back
<input type="checkbox"/>		New library	New location
<input type="checkbox"/>	Remove temporary item indication		
change other fields		Item policy No Item Policy	Condition Unconditionally
<input type="checkbox"/>		Material type	Condition Unconditionally
<input checked="" type="checkbox"/>	Inventory date 05/04/2016	Provenance Default provenance code for both campuses	Condition Unconditionally
<input type="checkbox"/>		Is Magnetic	Condition Unconditionally
<input type="checkbox"/>	Receiving date		Condition Unconditionally
<input type="checkbox"/>	Storage Location ID		Condition Unconditionally
<input type="checkbox"/>	PO line		Condition Unconditionally

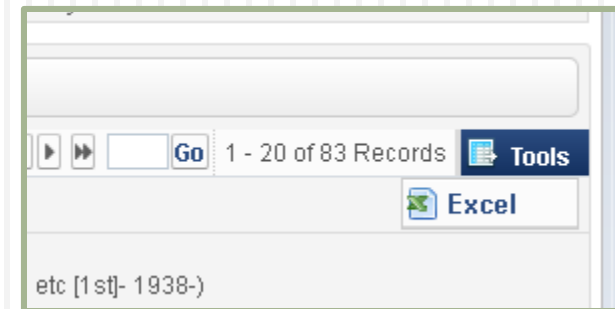
Why Inventory Date?



- We are not currently using the inventory date.
- If we did use the inventory date, it would be the date the item was added to our collection. Currently we use the receiving date.
- Having the inventory date set allows us to locate items with no inventory date, indicating they were not scanned.

Download Itemized Barcodes Set

- Navigate to manage sets and locate the itemized barcode set in the list.
- From the actions menu on the right, choose “members.”
- From the tools button click “Excel.”



D	P	R	Y	AA	
Library	Permanent Location	Call Number	Status	Item Policy	Barcode
Robert M Bird Library	3rd Fl, Reference	BF 176 T345 2003	Item in place	Book	360201011
Robert M Bird Library	3rd Fl, Reference	BF 11 A51m 1992	Item in place	Reference book	360201009
Robert M Bird Library	3rd Fl, Reference	BF 176 T342	Item in place	Reference book	360201007
Robert M Bird Library	3rd Fl, Reference	BF 176 T342	Item in place	Reference book	360201007
Robert M Bird Library	3rd Fl, Reference	BF 176 T342	Item in place	Reference book	360201007
Robert M Bird Library	3rd Fl, Reference	BF 176 T342	Item in place	Reference book	360201006
Robert M Bird Library	3rd Fl, Reference	BF 176 T342	Item in place	Reference book	360201006

What does the Excel Sheet Tell Us?

- Shows items scanned that have a different library setting in Alma.
- Shows items scanned that have a different location than the one being scanned.
- Shows items scanned with a different item type or item policy than the one being scanned.
- Shows items scanned with status other than “item in place.”

Download Logical Set

- Follow the same steps for downloading the logical set.
- Exception is that you will be viewing “results” and not “members.”
- Set should contain all items for a particular location that do not have an inventory date set.
- If this is the 2nd or 3rd time you are running the inventory then the search setting for inventory date should be set to “after” with the latest date of the last inventory.

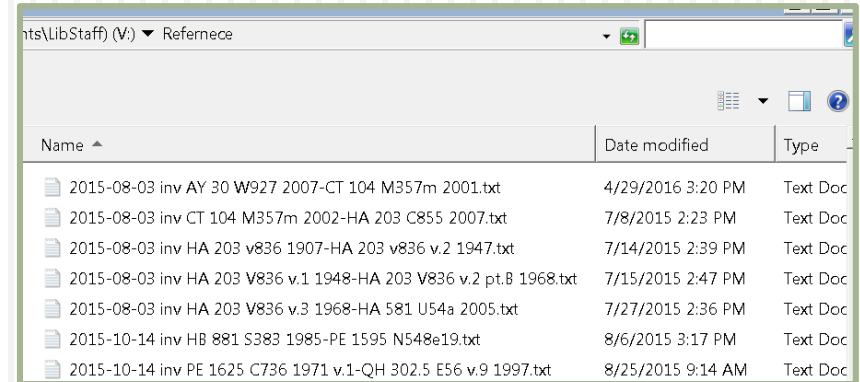
What Good is the Logical Set?

- This is a list of items that Alma says are in the location being inventories, but we not scanned.
- Items that should be marked as missing, withdrawn, or suppressed.
- The Excel sheet will need to be filtered to look at only items with a status of “item in place.”
- You could also filter for “item not in place” and look at the process type to easily generate a missing list in which to search the library.

Added Benefit to Scanned Inventory

Locate Missing/Mis-Shelved Items

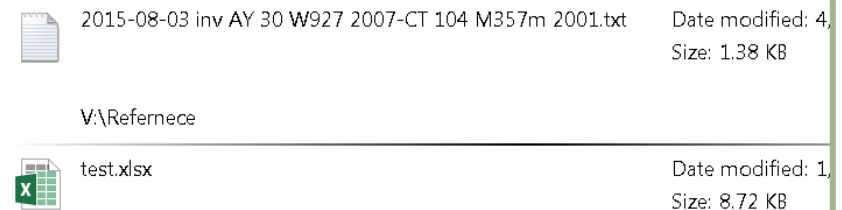
- Search inventory folder for a barcode
- Within the file search Alma for the barcodes scanned immediately before and after your barcode.
- Once you have the call numbers you know the exact shelf location





Name	Date modified	Type
2015-08-03 inv AY 30 W927 2007-CT 104 M357m 2001.txt	4/29/2016 3:20 PM	Text Doc
2015-08-03 inv CT 104 M357m 2002-HA 203 C855 2007.txt	7/8/2015 2:23 PM	Text Doc
2015-08-03 inv HA 203 v836 1907-HA 203 v836 v.2 1947.txt	7/14/2015 2:39 PM	Text Doc
2015-08-03 inv HA 203 V836 v.1 1948-HA 203 V836 v.2 pt.B 1968.txt	7/15/2015 2:47 PM	Text Doc
2015-08-03 inv HA 203 V836 v.3 1968-HA 581 U54a 2005.txt	7/27/2015 2:36 PM	Text Doc
2015-10-14 inv HB 881 S383 1985-PE 1595 N548e19.txt	8/6/2015 3:17 PM	Text Doc
2015-10-14 inv PE 1625 C736 1971 v.1-QH 302.5 E56 v.9 1997.txt	8/25/2015 9:14 AM	Text Doc

Search again in:

 Libraries  Computer  Custom...  Internet  File Contents



 2015-08-03 inv AY 30 W927 2007-CT 104 M357m 2001.txt	Date modified: 4/29/2016 3:20 PM Size: 1.38 KB
V:\Referenece	
 test.xlsx	Date modified: 10/14/2015 3:17 PM Size: 8.72 KB

Challenges

- What if you are using inventory date already?
 - Depending on how you use the inventory date file, you may still be able to do this.
 - You could use an internal item note field instead. The statistical notes cannot currently be searched.
- You will need to keep track of time periods in which you are doing inventory.
 - Decide what date you are going to use for inventory date or note field: the date scanned or the date you run the change physical items job.

QUESTIONS?????

