

Inventory

Inventory consists of scanning barcodes, running those barcode files into two different systems, processing the output, searching for missing items, and marking items as missing.

[Scanner Processing](#)

[Shelf List \(Web App\)](#)

[Shelf Report \(Alma\)](#)

More to Come

Scanner Processing

Pulling Data From a Scanner

1. Open Opn200x
2. Check off any fields at bottom that you want in addition to barcode
3. Click the ... next to "Save to file" checkbox ([\\caesar\circserv\Truck Audits\New Inventory\Ranges](#))
4. Type in a new filename or select a file to add data to the end, click save
5. Check "Save to file" (uncheck/skip this step to only preview in box)
6. Click "Get barcodes"

Clear data

Click "Delete barcodes" and it can't hurt to click "Set time"

Finished

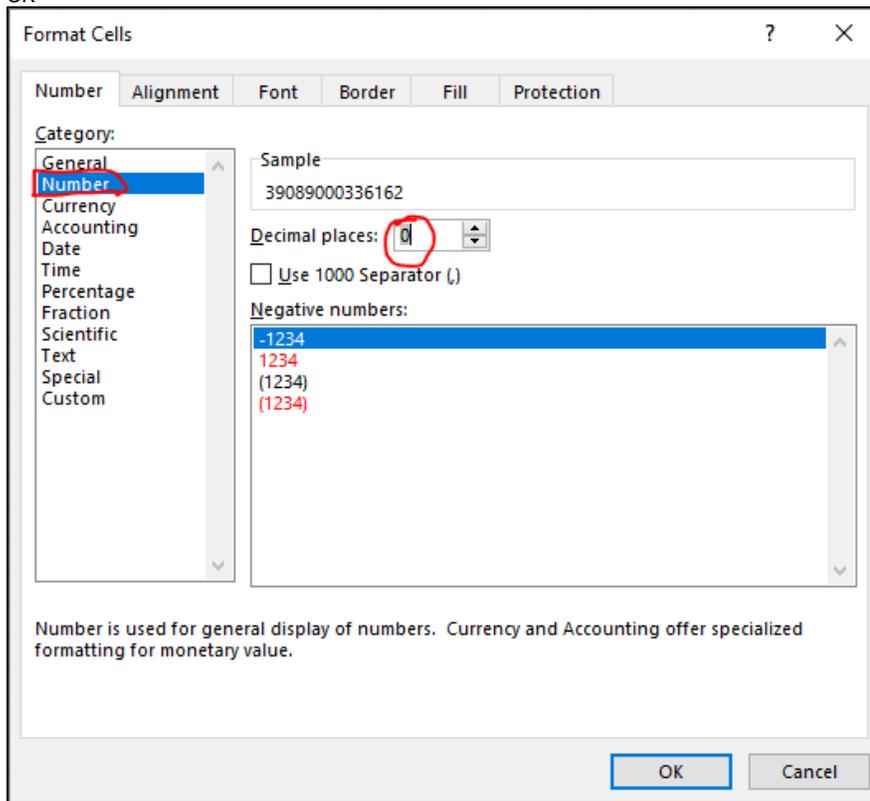
Click Close

Shelf List (Web App)

Using an API hosted by SUNY, we feed in a barcode list and get a list of everything out of order, things that don't belong, and barcodes without corresponding items.

1. Open barcode list, add the word "barcodes" to top of list, select all, copy
2. Open excel and paste barcodes below
3. Change the formatting if barcodes showing as scientific
 - a. Highlight cells, Ctrl + 1
 - b. Select Number on the left
 - c. Set decimal places to 0

d. OK



4. Save file and close (\\caesar\circserv\Truck Audits\New Inventory\Ranges)
5. Navigate to <https://www.sunyconnect.suny.edu/shelflist/ALB/> (RIGHT CLICK TO OPEN IN NEW TAB)
 - a. Select file to upload
 - b. Choose Library
 - c. Choose Scan Location
 - d. Choose Primary Item Type
 - e. Submit
6. Download Excel File
7. Delete Col A, C, E
8. Filter Col C to show all non-blanks
9. Open Out of Order Template (\\caesar\circserv\Truck Audits\New Inventory\Inventory\Out of Order Template.xlsx)
10. Copy data in Col A-D from line 2 to the bottom (excluding header)
11. Paste into A2 of template
12. Open or create appropriate range Out of Order file (ex "24 Out of Order.xlsx"), create new tab named section numbers
13. Copy whole worksheet, paste into final destination
14. Update Inventory Master file (\\caesar\circserv\Truck Audits\New Inventory\Inventory\Inventory Master.xlsx)
 - a. Shelf List Run (Web) to Yes
 - b. Pull/Order List (Web) to Added/Printed
 - c. # Barcodes (look at top of output report or the line number at the end of the barcode file)
 - d. # Out of Order (Web)
 - e. # Pulls (Web)
15. Save and close Out of Order file, discard other open files.

Printing:

- Switch orientation to Landscape
- Fit all columns in 1 page
- Narrow margins

Shelf Report (Alma)

We tell Alma a call number range, and it tells us both what's missing and what's there that shouldn't be

1. Within Alma go to Resources Shelf Report
2. Fill in fields
 - a. Library
 - b. Location
 - c. Call Number Type

- d. Call Number Start
- e. Call Number End
- f. Select the scanned barcodes file
- 3. Click submit
- 4. Review Output
 - a. Admin Monitor Jobs
 - b. Find job in history tab, can use filters
 - i. Job Category Repository
 - ii. Select Date/Range
 - iii. Search "Shelf Report"
 - iv. Sort by Operator
 - c. Click on name or ... "Report"
 - d. Analysis section
 - i. 1) Items in place - Items Alma says should be ARE on shelf and ARE on shelf (Do nothing)
 - ii. 2) Missing items but marked in place - Items Alma says should be ARE on shelf and are on NOT physically on shelf
 - **Action Item:** Preview items, select all, Manage Selected --> Review for reasonableness: If number of items is very large, or all close to each other, this may be an unscanned pocket. It may also be an error in the call number range established in the Shelf Report. If all reasonable, add to Itemized Set (or Create if 1st)
 - iii. 3) Items on shelf but marked not in place - Items Alma says should NOT be on shelf and ARE physically on shelf
 - **Clarify Action Item:** Review for reasonableness, add to excel/set for pulling
 - iv. 4) Known items not in place - Items Alma says should be are NOT on shelf and are NOT on shelf (Do nothing)
 - v. 5) Items on shelf but out of range/set - Items that have call numbers that fall outside the given parameters
 - **Clarify Action Item:** Pull/Do nothing? Is this covered by the other job?
 - vi. 6) Barcodes with no matched item - There's no corresponding record in Alma for a given barcode (Do nothing, handled by other job)
- 5. Update Inventory Master file
 - a. Shelf Report Run (Alma)
 - b. # 3s (and 5s?) to Alma Pull tab
 - c. Added Missings to Range Set

What To Do With Papers

Inventory Tracking Sheets

When you are finished taking data off of a scanner, and have made sure all relevant information is inputted into the proper Excel sheets, you can discard the Inventory Tracking paper. If starting a new scanning section, refer to the Inventory Master file to see what needs to be scanned next, and write down on a new Inventory Tracking sheet.

Note: Highlight the START and FINISH call numbers at the top and bottom of the sheet to make it easier to see where to scan.

Out Of Order/Pulls Worksheet

When an Out of Order worksheet is completed, refer to the digital copy in the corresponding Excel sheet to make sure all items have been addressed. (Some may have been added after the worksheet was printed, so it's good to double-check.) If all highlighted items have been pulled, and all out of order items have been marked as finished, the sheet can be discarded. Any NOS items should be searched for a second time if possible, and if still missing should be added to the Alma Pulls tab in the Out of Order excel file.

Range Tracking Tab

Overall snapshot of where we're at with the individual chunks: Scanning, pulling/fixing, searching for missings X 2, marking things missing in Alma