Inventory Management
“Battles and Triumphs with Online and Batch Inventory”
Aleph ver. 17 and higher
Presented to MnPALS User Group
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What is Inventory Management? Inventory management lets you analyze inventory status with regard to missing or misshelved items. The analysis can be done by reading a 1) Shelf Range of Items (item-04) which generates 2 reports, 2) Shelf List (item-05) creates a report of all items that should be in shelf range, 3) Online Manual Inventory process, or 4) Batch Inventory process.

How is inventory determined? By data from the item record. Item data is stored in the z30 Oracle table. Each circulating (barcoded item) must have a z30 record. The z30 table contains information on the copy’s call no., call no. type, sublibrary, collection, material type, open date, close date, description, OPAC note, Circulation note, Internal --- anything you would find on the Item Record.

What z30 information is used by inventory management? Inventory management only uses the sublibrary, collection, material type, and most importantly the call no. and call no. type.
Can local numbers on specific collections be successfully inventoried? The problem with locally defined call numbers is that their order is also locally defined. Once they are locally-defined, the system no longer knows any rules about how they should be sorted, so it just sorts them in ASCII order or something equally wrong. The system then looks at them and thinks that huge numbers of them are ‘misshelved’. There is no good solution to this. ExLibris says there are 3 possibilities: 1) define a sorting algorithm for local call numbers, 2) stop using local call numbers, or 3) only use local call numbers that sort properly with a default computer sort. None of these is really realistic, so we just have to suffer with the consequences, such as not being able to use Aleph to do a good inventory of them.

What defines which items will appear on the “Missing Items List”? Items that are truly missing from the shelves and items that are still on loan. Additionally, if the items were not checked back in properly, but put back out on the shelves, the report would include them in the Missing List. The Aleph system has them still out on loan, even though physically they are on the shelf.

What does “Not in scope” mean on a report? When item barcodes are scanned into a range, but no call number can be found for them. This often happens if the call no. type is wrong on the item record, which comes from the Holding Record. The Holding Record is the master record for location information; e.g. sublibrary, collection, call number, and call no. type (852 1st indicator 0=Library of Congress, 1=Dewey Decimal, 2=National Library of Medicine classification, 3=Supt. Of Documents classification, 4=Shelving Control Number, 5=Title, 8=Local).

1. **Shelf Reading Report (item-04).** This was used before ver. 17 and ver. 18. It can still be used.
   a. Barcode Shelf Input File needed. Knowledge Base #3043
   b. This service performs an inventory check. The inventory check is based on a shelf range of items. It compares an input file of barcode numbers to the same range of items in the system, and generates two reports.
      i. The first report includes all items which are missing or loaned,
ii. The second report includes all items which are misshelved.
c. The service's parameters are: Call No. From/To, Call No. Type, Call No./Second Call No., Sublibrary, Collection, Item Status and Item Process Status.

Note: This service uses the z30_call_no_key field to sort the list. If this field is left blank, the item will not be included in the report. The z30_call_no_key field is updated when an item record is updated, or it can be built using p-item-06.

If the user marks Yes in the Update Database field, then each item checked by this service is updated by the field Z30-LAST-SHELF-REPORT-DATE (the run date).
2. **Shelf List (item-05)**. This was used before ver. 17 and 18. It can still be used.

   a. This is a procedure for performing a shelf list inventory check. The shelf list is based on a shelf range of items. The procedure checks the library's holdings and circulation files and **creates a report of all items which should be in the shelf range**.

   b. The Call Number which is printed is taken from the item's (Z30) Call Number field. The z30_call_no_key field is used for sorting the list. If this field is left blank, the item is not included in the report.

   c. You can limit the check so that it only checks the holdings of a specific sublibrary, collection or loan status.
d. **Note!** The report cannot be created for more than 5000 items.

Since ver. 17, the inventory marking feature has been used. This is where a file of records is defined as belonging to an inventory, according to various criteria in the Inventory Definition (item-01) job. This is done by:

- Defining a range of items on the shelf
- Run the service ‘Inventory Definition’ (item-01) on the range of items
- Take note of the ‘Shelf Report Number’ given in the results of item-01
- Use the ‘Shelf Report Number’ to check the inventory in either of 2 ways:
  - Run manual ‘online’ inventory management
Run batch inventory management.

3. **Inventory Definition (item-01)**. To start the process, use the Cataloging module/Services/Items/Inventory definition (item-01). This will define your range of items.

- **Inventory Definition (item-01)**. Follow the HELP to fill out the parameters. NOTE: Collection is a MANDATORY field. If you don’t fill in this field, the job won’t run.
• **Shelf Report Number** - The items are identified as belonging to an inventory by their Z30-SHELF-REPORT-NUMBER field. Enter the shelf report number that has been assigned to the inventory shelf by the Inventory Definition (item-01) batch job.

4. **Online Manual Inventory.** (Knowledge Base #3199) **Inventory Marking.** Cataloging module/Items/Inventory Marking. This dialog box enables defining various parameters for the Inventory Marking session.
Print Report at End of Session - Checking this check box will enable the receiving of a report at the end of the marking session. The report will include all of the items for which one of the errors that have been selected in the ‘Error Types To Include’ section exists.

Known problem is that an extra period appears in the filename extension (..prn). Copy the error file from the print directory on the server and putting the file directly in the print directory on your computer ... then you can print as usual.

Retrieval of error file from the server

- Open this page:
  http://aleph.mnpals.net/tables/u18_1/xxx50/print/ (you will be asked for a username and password). It is best to use Firefox.
- Look for the filename in the lists of files. The naming convention is /tstxxx..prn (tst will be your 3-digit library symbol, xxx is the date of the file plus some other system assigned numbers, the wrong extension of ..prn)
- Click on the file and you will see its contents in the browser window
  - Do file/save as (Ctrl+S)
• Remove the extra period from the filename
extension (.prn)
• Change the “Save as type:” field to “all files”
• Change the “Save in:” field at the top to
C:\AL500_18\circ\files\XXX50\print

Now you will be able to find and print the file in the Circulation Task Manager.

5. **Batch Inventory.** (Knowledge Base #3225).
   a. Run Inventory Definition (item-01) to get the Shelf Report Number (SRN)
   b. **Inventory Marking (item-08).** This service marks items that belong to
a previously defined inventory as found.
   c. The **input file** requires an input file of item barcodes. This requires
the ADM library to FTP the file to a special region on the PALS server.
BE SURE to follow the instructions in the ‘Batch Inventory’ document.

6. Other Inventory Services to use can be found in the Cataloging Module/Services/Items.
   a. **Inventory List (item-07).** This is a procedure for creating an
inventory list to document all items which have arrived within a
defined period, usually one year. Order information, invoice
information and inventory information is brought together in one place. The list contains, at minimum, the inventory number, inventory date, short bibliographic information, location, order number, method of acquisition, invoice number, invoice date and internal note from the item record.

b. **Inventory Summary (item-09).** This service creates a summary report of the inventory status, and allows updating inventory items according to the inventory check results.

c. **Inventory Report (item-10).** This service creates a report of the inventory items.