Inventory Management
“Online Manual Inventory”
Aleph ver. 17 and ver. 18

Inventory Management lets you analyze inventory status with regard to missing or misshelved items. The analysis can be done either as an online process or as a batch process. The procedure in this document explains how to run Online Manual Inventory. First, by initiating the inventory and then by conducting the inventory.

Initiating the Inventory
The first stage in analyzing an inventory is to define a physical range of items as an inventory. At this stage, the boundaries of the inventory range being checked are defined by parameters such as call number range, sublibrary, collection, item status and process status and material type. The inventory being checked receives an identifier that is used later for executing the Inventory Period. This is achieved by running the Inventory Definition (item-01) batch service.

- Fill out item-01. (Cataloging module/Aleph dropdown/Connect to … XXX50/Services/Items/Inventory definition (item-01).

- Output File: Give it a filename. Use the first 3 letters of your library to begin the name; e.g. tst_inventory_mg2
• From Call Number: In the GUI client, find your first item record in the range. From this item, Tab2, **copy** the call number intact with the delimiter and subfield; e.g. $$hML420.D65$$iC65 2007. **Paste** this call number into the item-01 From Call Number field.

• To Call Number: In the GUI client, find the last item record in the range. From this item, Tab2, **copy** the call number intact with the delimiter and subfield; e.g. $$hML1711.8.N3$$iM77 2000. **Paste** this call number into the item-01 To Call Number field.
• Back on the item-01 (inventory definition) workform, be sure to choose the Call Number Type: No Call No. Type, Library Of Congress, Dewey Decimal, etc. (NOTE: if the Call Number Type is *not* filled in, the report will not run)
• The rest of the parameters may be filled in as you desire. Choose the correct Sublibrary, Collection is not mandatory, Item status may include or exclude item statuses, etc. See the HELP for complete instructions.
The results of item-01 give you the Shelflist Report Number.
- Stay connected to XXX50, go to the Task Manager.
- In the Batch Log tab, find that your report has completed when it has ‘end’. If you don’t see your report, hit REFRESH.
- Click the File List tab to find the filename (example above: tst_inventory_mg2). If you don’t see the filename appear, hit REFRESH.

Open the filename for the ‘Inventory Definition Report’. Notice the Shelflist Report Number (SRN- )

```
12/10/2007
shelf-report-definition-00
```

```
Inventory Definition Report

Form Date: 12/10/2007

Inventory Definition parameters:

Shelf Report Number: SRN-1

From Call Number: $ShML420.185
To Call Number: $ShML1711.8.N3

Call Number Type: 0
First / Second Call Number: First
Sublibrary: Metropolitan State/St. Paul
The following item statuses: Included
Item Statuses: ALL
The following item process statuses: Included
Item Process Statuses: Not in process
The following material types: Included
Material Types: ALL
```

Conducting the Manual Online Inventory
At this stage, the inventory is checked and its current status is compared with the database status. The physical shelf is checked and the ALEPH client is updated online with each item that is scanned. This stage is called Marking.

To conduct an online inventory (Marking):
1. From the Cataloging module, Connect to … SYS01 (you must be in SYS01 to open this feature) click the **Items** dropdown menu, then **Inventory Marking**:

   ![Inventory Marking menu](image)

   The **Inventory Marking** command opens the form that defines various parameters to be used for the Marking session. Type in the Shelf Report Number from item-01. Checkmark the parameters according to how you want inventory marking to work.

   ![Inventory Marking form](image)

2. When you have finished filling in this form, click **OK**. The window marking boxes will come-up and you are ready to scan the books. The marking of the found items is done by scanning or entering the item’s barcode:

   ![Inventory Marking window](image)
3. Click **Submit**. This marks the item as found. Clicking **Submit** also displays reports of any errors that have been configured at the beginning of the session as requested for reporting. NOTE: You can only scan the section specified with the barcodes provided in the Item-01 report - beginning and ending barcode numbers of that certain section.

The errors will be reported by either a popup message or a printed report, also depending on what has been configured at the beginning of the session. NOTE: St. John’s/St. Ben’s was the test library for this procedure. They stated that they chose the popup message. They say to watch the screen for error messages and make the corrections. Here are some of the error messages:

- ‘Item is misshelved’ - the message tells you where it goes, before #### and can be corrected immediately.
- ‘Item is on loan’ - book is pulled and returned in the Aleph Circ module and reshelved.
- ‘Item does not belong to the collection’ - we pull the book and place a note inside and bring book to Tech Services for corrections needed in the database.
- ‘Item is in Lost or Missing’ - we made the item process status correction - changing the item process status and inter-filed the book back into the collection.
- ‘Item is not in the database’, in which case Tech Services needed to correct the error.

4. Click **Close**. This ends the Marking session, triggering a printout of the error report, if such a report was requested at the beginning of the session.

**Summary Reports**

Two Summary Reports are used to report the inventory status. They are normally run when the inventory period is over, although they can be run at any stage. The following reports are available:

**Inventory Summary (item-09)**

This service creates a summary report of the inventory status, and allows updating of inventory items process statuses according to the inventory check results. Use the HELP to fill out the form.
Inventory Report (item-10)
This service produces a report of the inventory items, consisting of each item's details and whether the item was marked as found or accounted for (on loan, on hold shelf, process status missing, and so on).