



Inventory Using Alma's Shelf Report at Two Libraries

Nancy Dryden
University of Connecticut, Stamford



Rebecca McCallum
Wesleyan University



Alma's Shelf Report



- Ex Libris created Shelf Report to work with Alma in December 2015.

Shelf Report can:

- Report missing items
- Report found items
- Report out of range (grossly misshelved items or location problems)
- Report items not in Alma

Reports generated do not retain context for where troubled items reside (more on this later).



UConn Stamford's Collection

- Regional campus with 2,300 students (@32,000 at UConn)
- Library has a staff of 3 and student hours of 3 FTE; centralized with main campus
- 50,000 volumes, down from 90,000
- Steady weeding called for an inventory
- Used Shelflister for Voyager in 2014/15; cleaned up errors in records



Process – Scan Barcodes

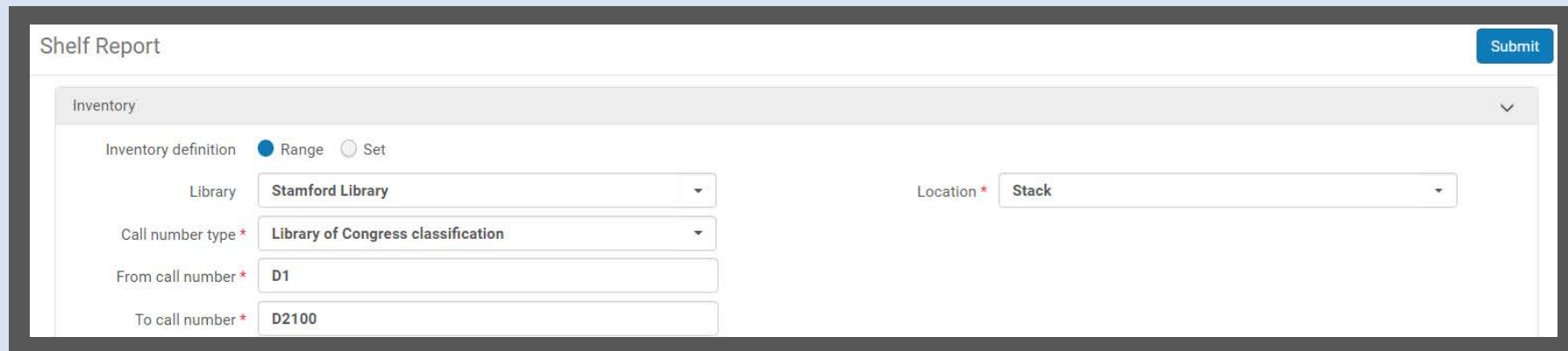
Prepare an Excel or .txt file of a range of barcodes. Create a blank file for each call number range in One Drive of Office 365 and share it with the student workers. (Tip: format column as “text.”) Students take a laptop and a scanner and go into the stacks to scan a section.

	A
1	BF barcodes
2	34012022502095
3	39153019748534
4	34012022502111
5	39153019092289
6	39153019730037
7	39153019730045
8	39153019730052

When they have finished a call number section, I save the file into my files as Scanned barcodes and the LC class.

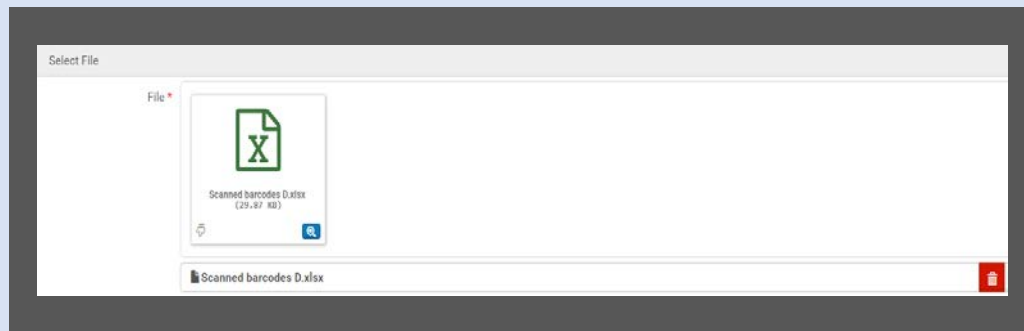


Creating your report

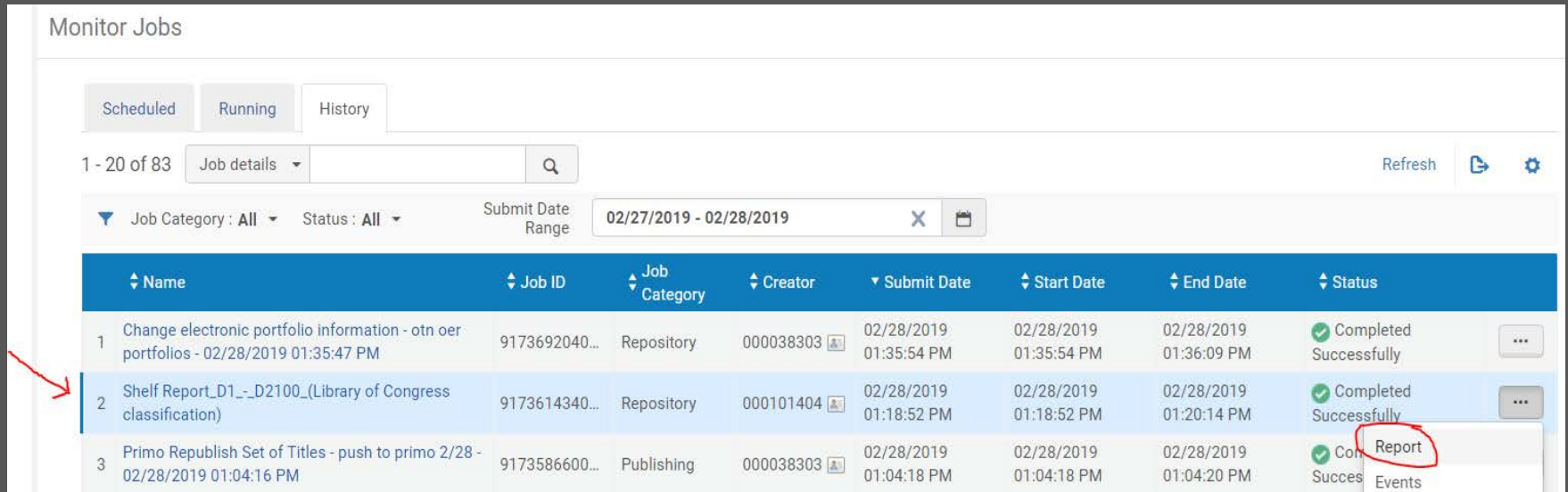


The screenshot shows the 'Shelf Report' form. At the top right is a blue 'Submit' button. Below the title is a section titled 'Inventory' with a dropdown arrow. Inside this section, there are two radio buttons for 'Inventory definition': 'Range' (selected) and 'Set'. Below these are several input fields: 'Library' (Stamford Library), 'Location *' (Stack), 'Call number type *' (Library of Congress classification), 'From call number *' (D1), and 'To call number *' (D2100).

- Navigate to Shelf Report:
Resources > Manage Inventory > Shelf Report
- Fill out fields; upload barcode file
- Click Submit



Accessing Results



Monitor Jobs

Scheduled Running History

1 - 20 of 83 Job details Q Refresh

Job Category: All Status: All Submit Date Range: 02/27/2019 - 02/28/2019

Name	Job ID	Job Category	Creator	Submit Date	Start Date	End Date	Status	
1 Change electronic portfolio information - otn oer portfolios - 02/28/2019 01:35:47 PM	9173692040...	Repository	000038303	02/28/2019 01:35:54 PM	02/28/2019 01:35:54 PM	02/28/2019 01:36:09 PM	Completed Successfully	
2 Shelf Report_D1_-_D2100_(Library of Congress classification)	9173614340...	Repository	000101404	02/28/2019 01:18:52 PM	02/28/2019 01:18:52 PM	02/28/2019 01:20:14 PM	Completed Successfully	
3 Primo Republish Set of Titles - push to primo 2/28 - 02/28/2019 01:04:16 PM	9173586600...	Publishing	000038303	02/28/2019 01:04:18 PM	02/28/2019 01:04:18 PM	02/28/2019 01:04:20 PM	Completed Successfully	Report Events

- Receive email when job is completed
- In Alma, click on History or Monitor Jobs to access report.
- Click on the ellipsis on the far right to select Report

Interpreting Results

Job Report

Shelf Report_D5.E94 1988_-_D2009.S54 2000_(Library of Congress classification)

Completed Successfully

Process ID	7963477380002432	Started on	05/02/2018 01:13:37 PM
Finished on	05/02/2018 01:14:25 PM	Total run time	47 Seconds
Status	Completed Successfully	Status date	05/02/2018 01:14:25 PM
Records processed	1599	Records with exceptions	0

Counters

Library: **Stamford Library**

Location: **stack**

Call number type: **Library of Congress classification**

From call number: **D5.E94 1988**

To call number: **D2009.S54 2000**

Set name: -

Analysis

	Count	
1 Items in place	1559	...
2 Missing items but marked in place	33	...
3 Items on shelf but marked not in place	8	
4 Known items not in place	7	

Preview Items
Create Itemized Set

- Click on Analysis of 1,599 items
- For each category, see a list of the items by clicking on the ... button on the right– Preview Items
- Create itemized set if you need to send the items to Database Maintenance for withdrawal



Results categories

1. Items in Place – all is good here!



2. Missing items but marked in place

Check these!

- On the shelf (Shelf Report errors)
- Physically withdrawn items not removed from Alma. Create set to be WD, send to DB maintenance.

		Count
1	Items in place	1559
2	Missing items but marked in place	33
3	Items on shelf but marked not in place	8
4	Known items not in place	7

Preview Items
Create Itemized Set

Results categories (cont.)

3. Found items - on shelf but marked not in place – books charged out between scanning and analysis, or were shelved without being discharged.

4. Known items not in place – items in circulation, missing or lost (no need for action)

The screenshot displays a library catalog interface with a dark grey background. At the top, a white bar shows '3 Items on shelf but marked not in place' and a count of '6' on the right. Below this, two search results are visible. The first result, numbered '5', is for the book 'The myth of self-esteem : finding happiness and solving problems in America / John P. Hewitt.' The 'Process type' is 'Loan', which is circled in red. The second result, numbered '6', is for 'Mothers and others : the evolutionary origins of mutual understanding / Sarah Blaffer Hrdy.' At the bottom, another white bar shows '4 Known items not in place' and a count of '11' on the right. The interface includes buttons for 'Edit Item' and 'Request' next to each result, and a blue circular button with an upward arrow at the bottom right.

Item ID	Title	Author	Process Type	Status
5	The myth of self-esteem : finding happiness and solving problems in America	John P. Hewitt.	Loan	Item not in place
6	Mothers and others : the evolutionary origins of mutual understanding	Sarah Blaffer Hrdy.		Item not in place



Results categories (cont.)

5. Out of range - Items on shelf but out of range/set – Misshelved (grossly) items, which means that they are out of order, belong in the reference or oversized stacks, or belong to another campus library. Also, mislabeled books were found here.

5 Items on shelf but out of range/set		9
5	Stones, bones, and ancient cities : the greatest archaeological discoveries of all time / Lawrence H. Robbins. Book By Robbins, Lawrence H. (New York : St Martin's Press c1990.) Barcode: 34012019687198 Update Date: - Library: Stamford Library Expected Arrival Time: - On Hold Expiration Date: - Due Date: - Needed By: - Until: - Permanent Location: Stack	Call Number: CC165 .R62 1990 Call Number Type: Library of Congress classification Status: Item in place Due back: - Item Policy: Book Material Type: Book

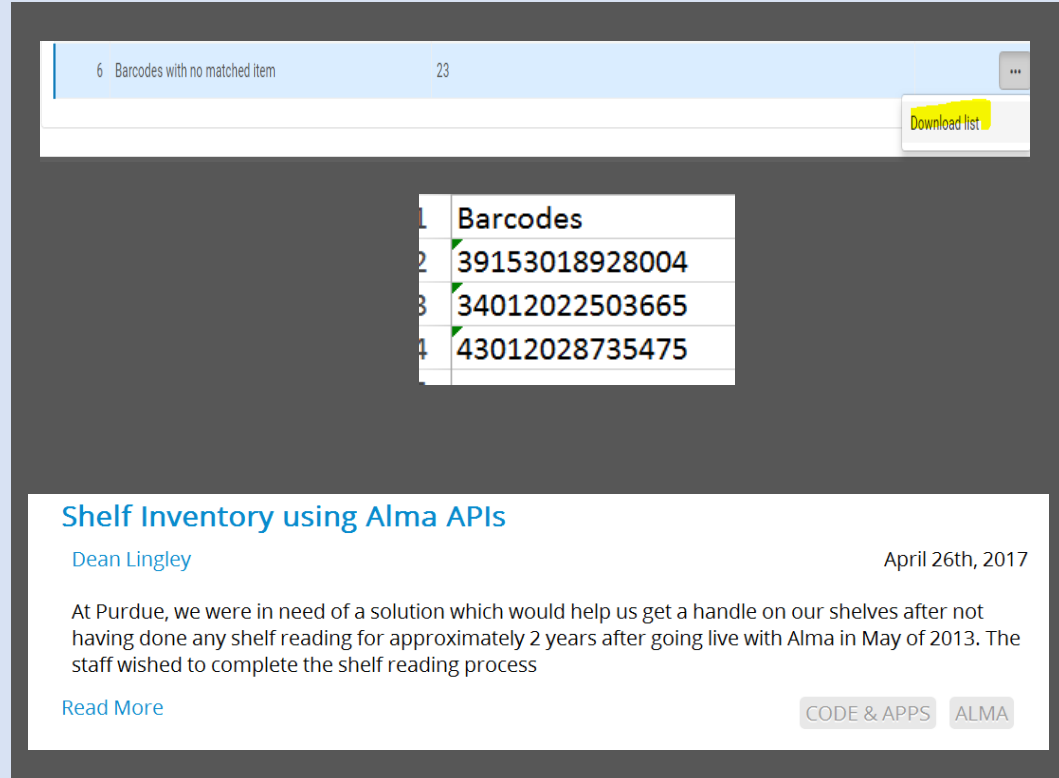
Results categories (cont.)

6. Not in Alma - Barcodes with no matched item –

Books on the shelf with no records in Alma. Download the list and open in Excel. (Usually meant to WD and book wasn't removed from shelf).

But where are these books on the shelf?? Detective work to find call numbers of books before or after. Send to cataloging if want to keep.

Looking to add on an Alma API web app developed at Purdue. Or maybe Ex Libris will further develop Shelf Report! (See Ex Libris Tech blog →)



6 Barcodes with no matched item 23

Download list

	Barcodes
1	
2	39153018928004
3	34012022503665
4	43012028735475

Shelf Inventory using Alma APIs

Dean Lingley April 26th, 2017

At Purdue, we were in need of a solution which would help us get a handle on our shelves after not having done any shelf reading for approximately 2 years after going live with Alma in May of 2013. The staff wished to complete the shelf reading process

[Read More](#) [CODE & APPS](#) [ALMA](#)

<https://developers.exlibrisgroup.com/blog/Shelf-Inventory-using-Alma-APIs>

Wesleyan's Collection

- Small liberal arts campus with 3,000 students, both undergraduate and graduate students
- Library has a combined staff of 40 librarians and paraprofessionals, plus the equivalent of 20 FTE student workers
- Over 1.25 million volumes, in two separate libraries
- Catalog problems called for an inventory
- Wesleyan went live with Alma in July 2017



Inventory Pilot Project: Problems to address

- Unbarcoded materials, but with records in the catalog
- Materials not in the catalog at all
- Materials missing from the shelf
- Wrong location codes or call numbers
- Incremental weeding of materials that have not circulated in over 30 years.



Unbarcoded materials in the catalog

- Barcode field is populated with an old Sirsi number
- Since there is no barcode sticker, the book will have been pulled by student workers.
- These titles show up on the **“Missing but marked in place”** (Result Category 2)
- Remove these from the missing list before any bulk jobs.

title	Barcode
Essays on self-reference /	31841000276790
Hierarchy and society : anti	31841002695039
From tribe to empire, socia	001ABZ2209
Man: an indictment, by An	31841000726018

No record in the catalog

- Book has been pulled, but there is no record -- send to Selectors for possible weeding.

Missing from the shelf

(“Missing but marked in place”)
(Result category 2)

- Toggle to missing in Alma (using a bulk job)
- Access Services searches all missing items

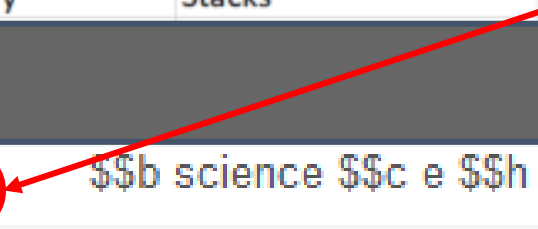
The screenshot displays the Alma system interface. At the top, there are two tabs: "Change physical items" and "Update item information for a set of physical items". Below the tabs is a header for "Run a Job - Enter Task Parameters". Underneath, there is a field for "Task Parameters: Update Item". A checkbox labeled "Missing status" is checked, and the value "Missing" is entered in the adjacent text field. At the bottom of the interface, a confirmation dialog is shown with the text: "You are about to run a job which will affect 8 members of the set. This cannot be reversed. Do you want to continue?". The dialog has "Cancel" and "Confirm" buttons.

Wrong location codes or call numbers

“On shelf but out of range/set”
(Result Category 5)

- Incorrect library and/or location code
- Incorrectly formatted call number
- Incorrect indicators in the Holdings record 852 field
- Simply misshelved

Library	Permanent Location	Call Number
Van Vleck Observatory	Van Vleck Collection	QB3 .P7
Science Library	Periodicals	QB1 .W4
Science Library	Stacks	QB 3 S5
Science Library	Stacks	QB3 .B35

852 8  \$\$b science \$\$c e \$\$h QB3 .B35
866 4 1 \$\$8 0 \$\$a v.1 (1955)-v.22 (1978)

Incremental weeding

- Student workers pulled any book with no barcode
- Since there is no barcode, we know these have not circulated in over 30 years
- Selector decides to weed -- physically mark the book and discard.
- Selector decides we should keep -- catalog and barcode.



Finding misshelved items and Barcodes with no matched items

- Shelf Report cannot tell you exactly where a misshelved item is.
- Search for the **misshelved barcode** in your original .txt file
- Copy the **barcode *immediately after*** that barcode number.
- Search for this new barcode in Alma and note its call number.
- The missing book will be on the shelf immediately before this book.

Barcode	Call Number
31841007001910	G465 .T36 1997
	R154 .C319 K37
31841009387721	2002
31841000907337	RC465 .U4

Find

Find what: 31841009387721

Direction: Up Down

Match case

Find Next

Cancel

31841009387721	
31841000079863	

Science Library	31841008849903	Stacks	RG137.45 .R53 1997
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One last problem: Circ-on-the-fly

- If there was an unbarcoded, good record already in the catalog...
- AND a poor circ-on-the-fly record was created...
- That book may show up in multiple places in your reports:
 - **“Missing marked in place”** (“good” record)
 - **“Items in place”** report, or the **“On shelf but out of range/set”** report (circ-on-the-fly record)

The screenshot displays two overlapping record cards for the same book. The top card is a complete record with the following fields:

100	1_ a Hall, Radclyffe.
245	10 a Twixt earth and stars : b poems / c by Marguerite Radclyffe-Hall.
260	__ a London : b J. and E. Bumpus, c 1906.
300	__ a 115 pages ; c 18 cm
336	__ a text b txt 2 rdacontent
337	__ a unmediated b n 2 rdamedia

To the right of this card is a blue 'Barcode' button with the value 001ACG2619 below it.

The bottom card is a partial record with the following fields:

100	1_ a Hall, Radclyffe.
245	10 a TWIXT EARTH AND STARS

To the right of this card is another blue 'Barcode' button with the value 31841007159866 below it.

Red arrows point from the text in the list to the top record (labeled 'Missing marked in place') and the bottom record (labeled 'Items in place' report).



Lessons learned from Wesleyan's pilot project:

- This process helped find many items that need fixing, but did not identify incorrect or poor quality records.
- Working at our current pace, with the large number of unbarcoded and uncataloged materials, it would take us about 12 years to finish an inventory of our entire collection.
- In order to continue, we must simplify the process, or hire additional staff on a short term basis. We are also exploring outsourcing a full inventory.

This can be long-term project, but worth it if you have student workers and staff time to devote to an inventory project.

- Shelf Report allowed us to identify missing, misshelved, and incorrectly coded items.
- The process allowed us to identify unbarcoded items, uncataloged materials, and items that were physically withdrawn but not out of the catalog.
- The process can incorporate collection maintenance, correcting mistakes, and deciding what to retain and what to withdraw.





Questions?
Comments?

nancy.dryden@uconn.edu

University of Connecticut

rmccallum@wesleyan.edu

Wesleyan University