Using an Interactive Excel Workbook and Alma Analytics for Inventory

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Limitations/Qualifications for this Inventory Tool

- Not a one-size-fits-all product
- Not real-time data retrieval
- Scalability not tested
- Single library, Institution Zone implementation
- Physical inventory, barcoded items

Motivation for Physical Material Inventory

- Move to new building (with interim, temporary location)
- Weeding before some items put in temporary storage
- Migration 2019 to Alma (from Voyager)
- Review OCLC holdings, bibliographic record match
- Ensure accurate status of available items

Inspiration

Alma Inventory Tool

Anna Striker   (Team Leaders)   Terry Brady

(Project Manager)   (Developer)

Washington Research Library Consortium (WRLC) GitHub

https://github.com/WRLC/AlmaInventory

- Real-time API access to Alma data
- Flagged problem alerts
- Check item call number, title information
- Record of inventoried items, including problems

Conceptual Approach to Inventory Process

- Excel-based interface, intended for use with a laptop

- Uses Analytics report as basis for collection item information: avoid security implications for networked drive & API access

- Excel workbooks for the interface, standard Analytics report and inventoried item spreadsheet: flexibility of design

- Physical flags to identify problems, placed in materials brought to TS: combination color coding and text caption

- Use the inventoried list workbook to update item record 'Inventory date' as an Alma manual job and as record of problems (estimate investment of effort for corrections)

Design Parameters for Interface

- Display Alma data associated with scanned barcode
- Use of visual indications for problems based on Analytics report data
- Ability to input select problems from physical item inspection
- Error message displays
- Add inventoried items to a list; manually batch process Alma item record inventory date

Interface – Opening Screen

Clear ⇨ [   ]

Stop Inventory

Enter Barcode *(Number begins 31745)*

Inventory Project
Reference

Barcode	Check the Item					Problems to Flag				
	☐ Call Number	☐ Title Page		☐ Pieces		Wrong Location	Not on Shelf/ on Loan	Sup-pressed	Process Error	Temp Loc Error

Barcode   Call Number   Title Page

Find Last Inventoried

Inventory Date

Interface – Last Inventoried

Clear ⇨ _____

Stop Inventory

Enter Barcode *(Number begins 31745)*

Inventory Project
<u>Reference</u>

	Check the Item				Problems to Flag				
	☐	☐	☐						
					Wrong Location	Not on Shelf/ on Loan	Sup-pressed	Process Error	Temp Loc Error
Barcode	Call Number	Title Page	Pieces						

745000531502   Z5064.C7 S54 1986 v. 1   The airline bibliography : the Salem College guide to sources on commercial aviation / Myron J. Smith, Jr. ; foreword by James P. Woolsey ; preface by R.E.G. Davies.

Find Last Inventoried

Barcode   **Call Number**   **Title Page**

2/13/2023
Inventory Date

Interface – Localization

Stop Inventory

Clear ⇨

Enter Barcode *(Number begins 31745)*

Streepjescode niet gevonden. ● Rode puntvlag en zoek volgend item.
[Google Translation 😊]

Inventory Project
Reference

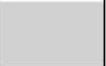| Barcode	Check the Item				Problems to Flag				
	☐ Call Number	☐ Title Page		☐ Pieces	Wrong Location	Not on Shelf/ on Loan	Sup-pressed	Process Error	Temp Loc Error

Barcode   *Call Number*   *Title Page*

Inventory Date

Find Last Inventoried

Interface – Scanned Item

Stop Inventory

Enter Barcode (Number begins 31745)
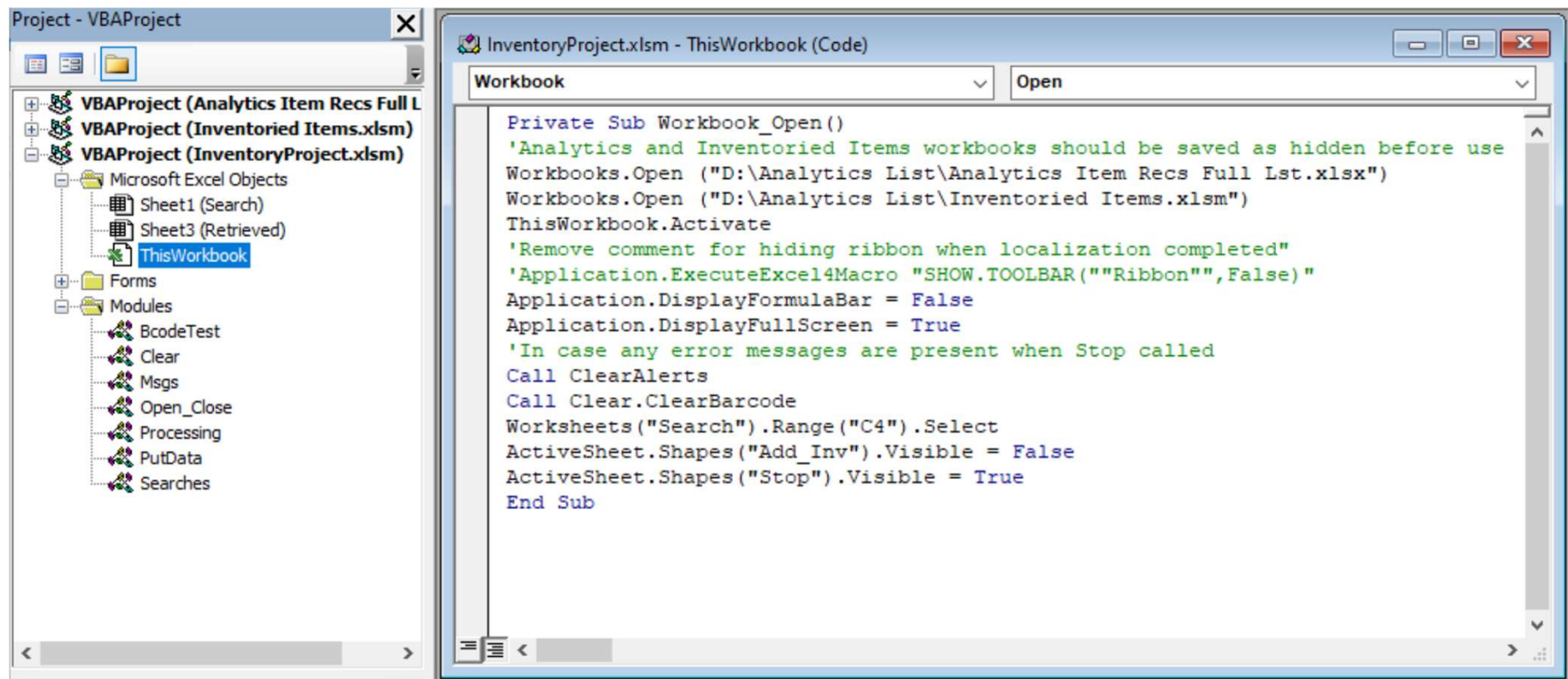
Inventory Project
Reference

Clear ⇨ 31745002405531

	Check the Item				Problems to Flag				
31745002405531 ☑ QD65 .C72	☐ CRC handbook of chemistry and physics.		☐						
Barcode	Call Number	Title Page	Pieces	Wrong Location	Not on Shelf/on Loan	Sup-pressed	Process Error		Temp Loc Error

Add Record to Inventoried

Find Last Inventoried

Barcode   Call Number   Title Page
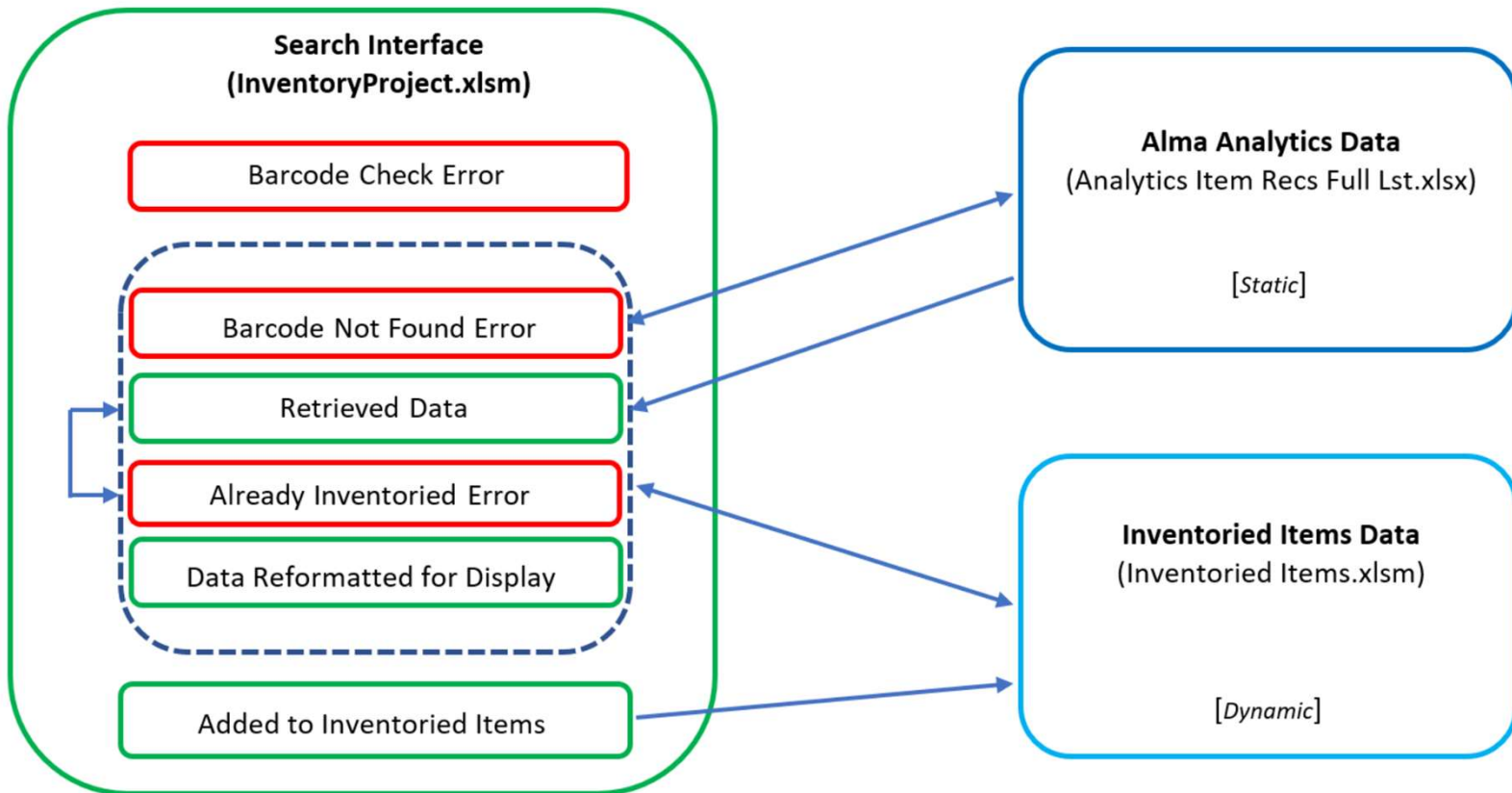
Inventory Date

Organization of VBA Macros

Project - VBAProject

- VBAProject (Analytics Item Recs Full L
- VBAProject (Inventoried Items.xlsm)
- VBAProject (InventoryProject.xlsm)
  - Microsoft Excel Objects
    - Sheet1 (Search)
    - Sheet3 (Retrieved)
    - ThisWorkbook
  - Forms
  - Modules
    - BcodeTest
    - Clear
    - Msgs
    - Open_Close
    - Processing
    - PutData
    - Searches

InventoryProject.xlsm - ThisWorkbook (Code)

Workbook — Open

```
Private Sub Workbook_Open()
'Analytics and Inventoried Items workbooks should be saved as hidden before use
Workbooks.Open ("D:\Analytics List\Analytics Item Recs Full Lst.xlsx")
Workbooks.Open ("D:\Analytics List\Inventoried Items.xlsm")
ThisWorkbook.Activate
'Remove comment for hiding ribbon when localization completed"
'Application.ExecuteExcel4Macro "SHOW.TOOLBAR(""Ribbon"",False)"
Application.DisplayFormulaBar = False
Application.DisplayFullScreen = True
'In case any error messages are present when Stop called
Call ClearAlerts
Call Clear.ClearBarcode
Worksheets("Search").Range("C4").Select
ActiveSheet.Shapes("Add_Inv").Visible = False
ActiveSheet.Shapes("Stop").Visible = True
End Sub
```

Alma Analytics Report and Inventoried Workbooks

'Analytics Item Recs Full Lst' – Report used for item data searching/retrieval

Physical Item Details								Location	Holding Details					Bibliographic Details		
Barcode	Base Status	Process Type	Inventory Date	Description	Pieces	Physical Item Id	Temporary Physical Location In Use	Location Name	Permanent Call Number	Normalized Call Number	Suppressed from Discovery	Suppressed from Discovery by Suppressed Location		MMS Id	Suppressed From Discovery	Title - 245

'Inventoried Data' – Replicates textual data transferred from 'Search' interface

Processing Schematic

Search Interface
(InventoryProject.xlsm)

- Barcode Check Error
- Barcode Not Found Error
- Retrieved Data
- Already Inventoried Error
- Data Reformatted for Display
- Added to Inventoried Items

Alma Analytics Data
(Analytics Item Recs Full Lst.xlsx)

[Static]

Inventoried Items Data
(Inventoried Items.xlsm)

[Dynamic]

Inventory Equipment & Accessories

Follow-up Processing of Problems

- Red Dot Flags – 'No barcode found'
  - Cataloger reviewed
  - Acquisitions consulted for possible replacement or confirmed withdrawal
- Recorded call number/title problem flagged
  - Cataloger reviewed
  - Technician follow up
- Automatically generated problem flags
  - Technician correcting process problems
  - Cataloger involved with more technical problems
- For items on Loan, batch process item 'Fulfillment note' to pass materials to Technical Services when returned
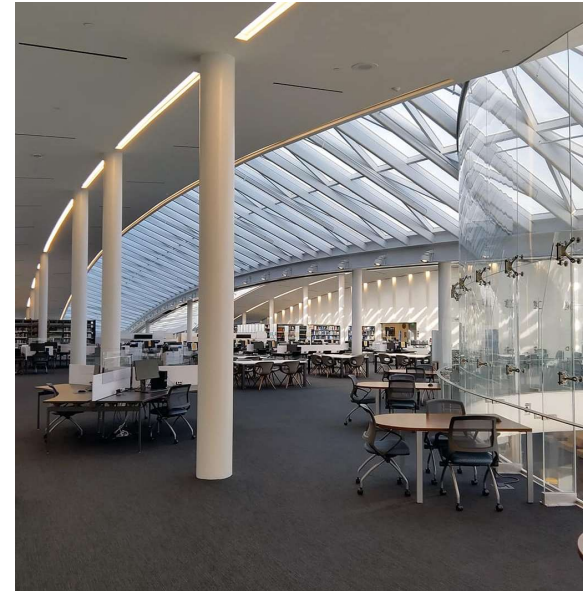
Questions

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Thank You