

# User Manual

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## 1. Introduction

Finding EnvironmentT for Collected Holdings (**FETCH**) is a new Inventory Management System (IMS) that will replace the Library Archival System (LAS) currently used as a library collection management system at Library high-density storage facilities. This new system optimizes collections management, storage, and security processes, and allows the Library to manage the inventory of its collections and improve service to users. FETCH's key functionalities include accession and verification of new collections, shelving, retrieval and refile, and operational reporting on desktop and mobile devices.

## 1.1 Tools and Technologies

1. FETCH Application
  2. Zebra TC2X Series Mobile Computer
- 

## 2. Installation

The Installation section provides instructions on setting up the FETCH software on desktop and mobile devices.

### 2.1 Desktop and Mobile Device Installation

1. Download the FETCH installer file at [fetch.loc.gov](http://fetch.loc.gov) and follow the on-screen instructions to complete the installation.
- 

## 3. Getting Started

The Getting Started section provides instructions on launching the FETCH software and user registration.

### 3.1 Software Launch

1. Double-click the application icon on desktop or mobile to start.

### 3.2 User Registration

1. Contact FETCH's system administrator to register and gain access to the application.
- 

## 4. Main Dashboard

The main dashboard section provides instructions on navigating the FETCH dashboard, single sign-on (SSO) login, exact and advanced searching, and barcode scanning.

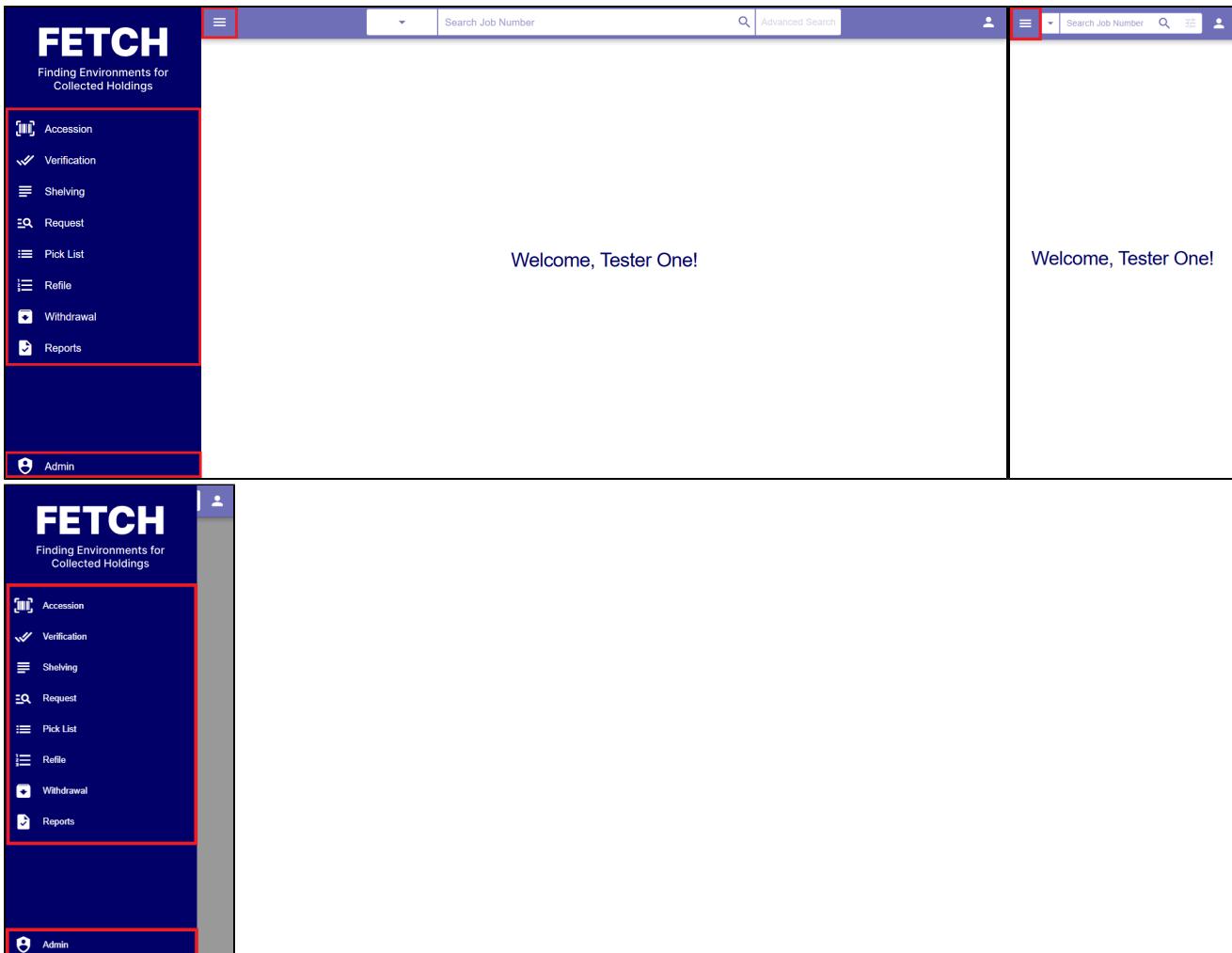
### 4.1 Single Sign-On (SSO) Login

1. Click the "Login" button and enter LIB network credentials when prompted to authenticate access on desktop or mobile. If the user is inactive for 15 minutes, they will be logged out and will need to reauthenticate.



### 4.2 Navigation Menu

1. Use the tabbed menu bar to move between different features of the FETCH software on desktop or mobile.

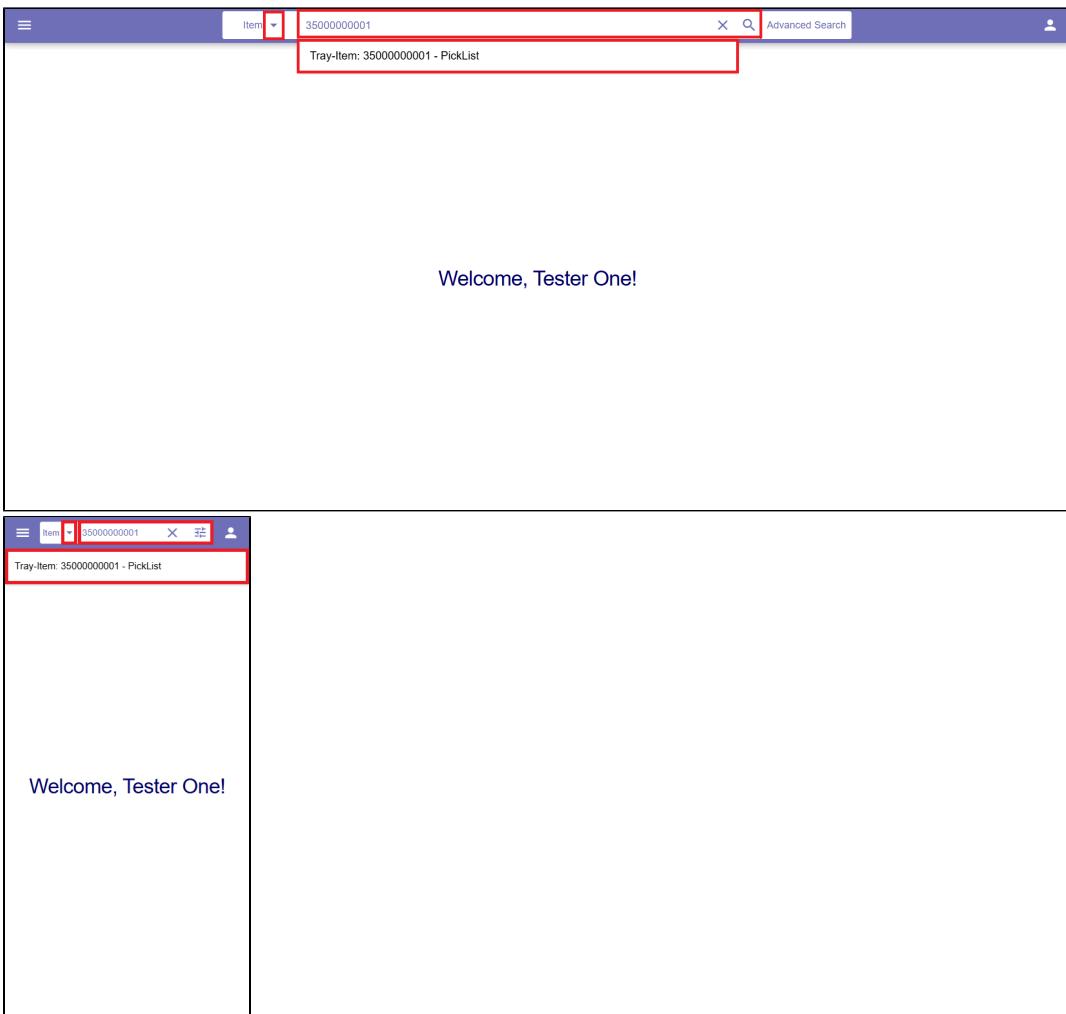


## 4.3 Exact Search

The Exact Search section provides instructions on quickly looking up a specific option using exact match criteria.

### 4.3.1 Non-Trayed/Trayed Item Exact Search

1. In the exact lookup bar on desktop or mobile, select the "Item" drop down arrow and enter the specific non-trayed or trayed item barcode. Click the search icon to find the status of the non-trayed or trayed item matching the entered barcode. Click the overlay to display the non-trayed or trayed item detail information.



2. Click the "Show Item Request History" button to view its detailed information.

Item ▾ 35000000001

Welcome, Tester One!

35000000001

Tray Barcode: BH35353  
Media Type: Microfilm  
Size Class: BH FORT MEADE BOXES - BH  
Status: [PickList](#)  
Owner: LC

**Dates**

Accession Date: 3/10/2025  
Shelved Date: 3/10/2025  
Last Requested Date: 3/10/2025  
Last Refile Date:  
Withdrawal Date:

**Location**

Fort Meade 1-1-L-20-12-14

[SHOW ITEM REQUEST HISTORY](#)

35000000001

Tray Barcode: BH35353  
Media Type: Microfilm  
Size Class: BH FORT MEADE BOXES - BH  
Status: [PickList](#)  
Owner: LC

**Dates**

Accession Date: 3/10/2025  
Shelved Date: 3/10/2025  
Last Requested Date: 3/10/2025  
Last Refile Date:  
Withdrawal Date:

**Location**

Fort Meade 1-1-L-20-12-14

[SHOW ITEM REQUEST HISTORY](#)

**CLOSE**

3. Click the tray barcode, shelf barcode, or request entry to view the corresponding results.

Item ▾ Search Item Barcode Advanced Search

Home > Record Management - Tray/Non-Tray Item: 35000000001

### Tray Item Details

Tray Barcode BH353535	Media Type Microfilm	Last Requested Date: 3/10/2025
Shelf Barcode 007233	Size Class BH FORT MEADE BOXES - BH	Last Refile Date:
Owner LC	Accession Date 3/10/2025	Withdrawal Date
Status PickList	Shelved Date: 3/10/2025	Location Fort Meade   1-1-L-20-12-14

**Request History**

Request ID	External Request ID	Request Date
24	1	3/10/2025

Rearrange ▾

Records per page: 50 ▾ 1-1 of 1

Item ▾ Search Item Barcode Advanced Search

Home >  
Record Management - Tray/Non-Tray Item:  
35000000001

Tray Barcode: BH353535

Shelf Barcode: 007233

Media Type: Microfilm

Size Class: BH FORT MEADE BOXES - BH

Status: PickList

Owner: LC

**Dates**

Accession Date: 3/10/2025  
Shelved Date: 3/10/2025  
Last Requested Date: 3/10/2025  
Last Refile Date:  
Withdrawal Date:

**Item Location**

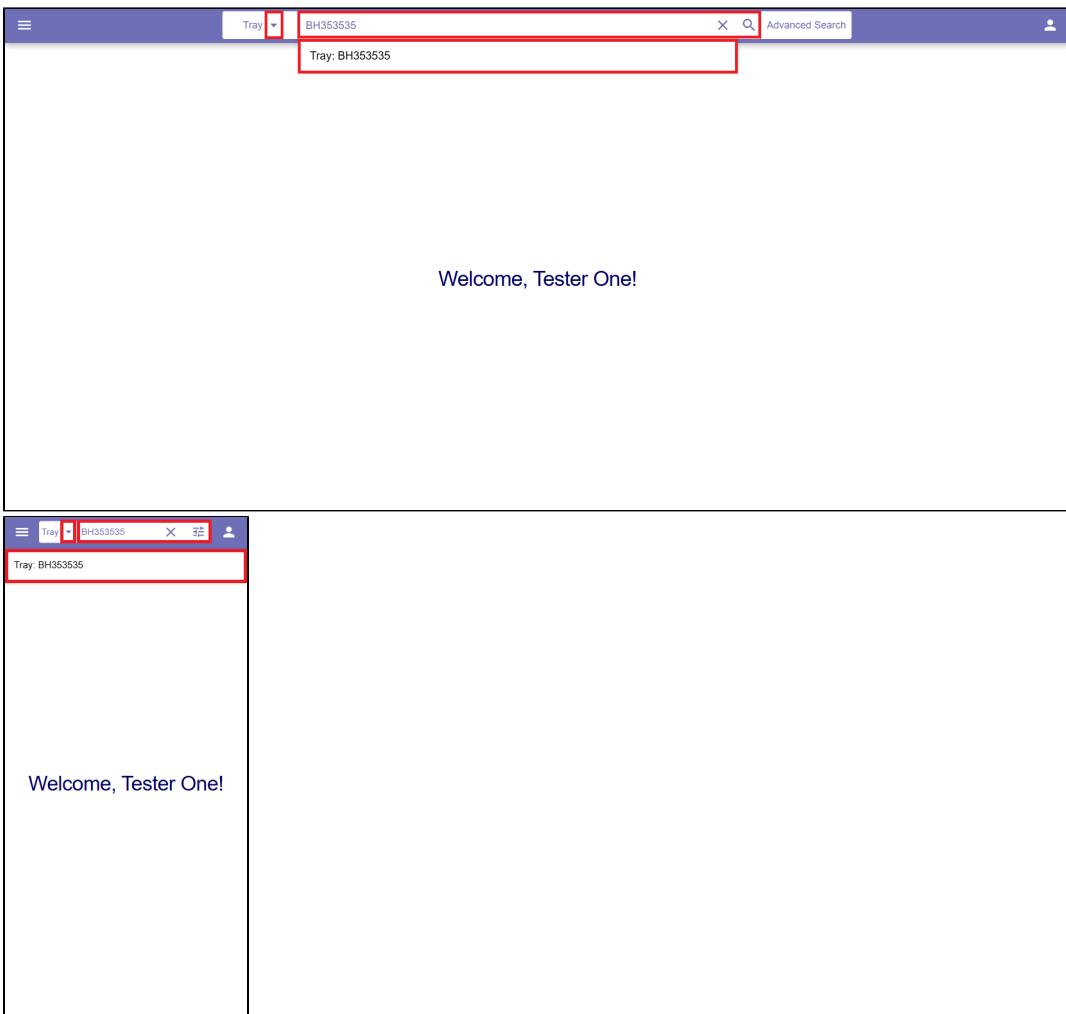
Fort Meade | 1-1-L-20-12-14

**Request History** Rearrange ▾

Request ID	External Request ID	Request Date
24	1	3/10/2025

#### 4.3.2 Tray Exact Search

1. In the exact lookup bar on desktop or mobile, select the "Tray" drop down arrow and enter the specific tray barcode. Click the search icon to find the status of the tray matching the entered barcode. Click the overlay to display the tray detail information.



2. Click the shelf barcode or trayed item entry to view the corresponding results.

The screenshot shows two views of the same record management interface for tray BH353535.

**Top View (Record Management - Tray: BH353535):**

- Tray Details:**
  - Shelf Barcode: 007233
  - Accession Date: 3/10/2025
  - Owner: LC
  - Shelved Date: 3/10/2025
  - Media Type: Microfilm
  - Location: Fort Meade, 1-1-L-20-12-14
  - Size Class: BH FORT MEADE BOXES - BH
- Items in Tray:**

Barcode	Status
35000000001	PickList
35000000002	Out

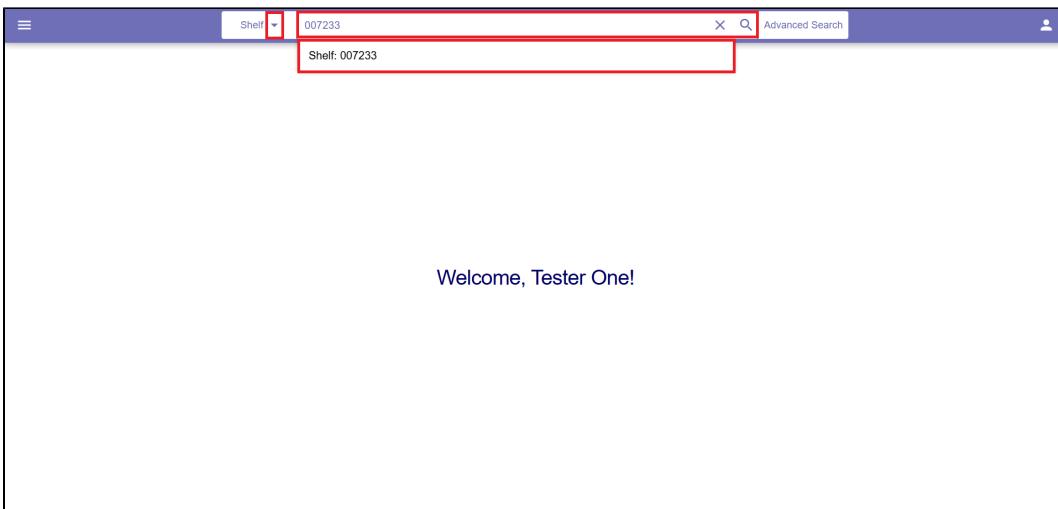
**Bottom View (Record Management - Tray: BH353535):**

- Tray Details:**
  - Shelf Barcode: 007233
  - Accession Date: 3/10/2025
  - Owner: LC
  - Shelved Date: 3/10/2025
  - Media Type: Microfilm
  - Location: Fort Meade, 1-1-L-20-12-14
  - Size Class: BH FORT MEADE BOXES - BH
- Items in Tray:**

Barcode	Status
35000000001	PickList
35000000002	Out
35000000003	PickList

#### 4.3.3 Shelf Exact Search

1. In the exact lookup bar on desktop or mobile, select the "Shelf" drop down arrow and enter the specific shelf barcode. Click the search icon to find the shelf matching the entered barcode. Click the overlay to display the shelf detail information.



2. Click the container entry to view the corresponding results.

Shelf
Search Shelf Barcode

Home > Record Management - Shelf: 007233

### Shelf Details

007233	Shelf Number 12	Width 53 in	Used Quantity 11
	Owner LC	Height 12 in	Max Quantity 14
	Size Class BH FORT MEADE BOXES - BH	Depth 36 in	Shelf Location Fort Meade   1-1-L-20-12
	Created Date 1/18/2025	Available Quantity 3	

**Containers in Shelf**

Barcode
BH04032
BH04036

**Rearrange**

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Shelf
Search Shelf Bar

Home > Record Management - Shelf: 007233

Shelf Number 240  
Owner LC  
Size Class BH FORT MEADE BOXES - BH  
Created Date 1/18/2025

**Shelf Dimensions**  
Width 53 in  
Height 12 in  
Depth 36 in

**Shelf Capacity**  
Available Quantity 3  
Used Quantity 11  
Max Quantity 14

**Shelf Location**  
Fort Meade | 1-1-L-20-12

**Containers in Shelf** Rearrange

Barcode
BH04032
BH04036

#### 4.3.4 Job Exact Search

1. In the exact lookup bar on desktop or mobile, select the job type drop down arrow and enter the specific job ID. Click the search icon to find the job matching the entered ID. Click the overlay to display the job information.



**Job: 24**

Please Scan Non Tray

Owner: LC

Container Type: Non-Tray

Container Size: NON-TRAY

**Scan Items** 1 Items

+ Enter Barcode    ✓

Pause Job Complete Job

**Job: 24**

Please Scan Non Tray

Owner: LC Container Type: Non-Tray

Container Size: NON-TRAY Media Type: Flat File

**Scan Items** 1 Items

Barcode  2400000001 ✓

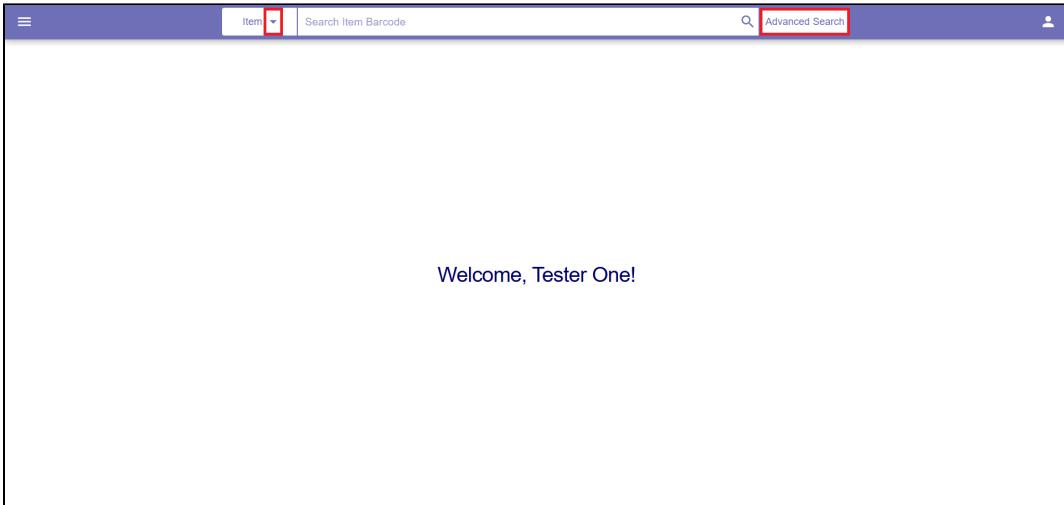
Pause Job Complete Job

## 4.4 Advanced Search

The Advanced Search section provides instructions on using a range of fields to refine and narrow down search results.

### 4.4.1 Non-Trayed/Trayed Items Advanced Search

1. Next to the top search bar on desktop or mobile, select the "Item" drop down arrow and click the "Advanced Search" button.



2. Fill in the fields for various search parameters to refine the search results. Click the "Search" button to initiate the search within the specified criteria.

The image displays two identical screenshots of a software application's "Advanced Item Search" dialog box. The dialog is centered over a dark gray background. At the top of the dialog, there is a header bar with the title "Advanced Item Search" and a close button (X). Below the header are several search criteria fields:

- "Accession Date (From)" and "Accession Date (To)" fields, each with a date input field and a calendar icon.
- "Owner" dropdown menu labeled "Select Owner".
- "Status" dropdown menu labeled "Select Status".
- "Size Class" dropdown menu labeled "Select Size Class".
- "Media Type" dropdown menu labeled "Select Media Type".

At the bottom of the dialog are two buttons: a blue "Search" button and a white "Cancel" button.

3. Click the "Non-Tray Items" or "Tray Items" toggle to filter and display the corresponding results. Click the appropriate trayed or non-trayed item entry from the list to view its detailed information.

Item ▾ Search Item Barcode Advanced Search

Home Advanced Search Results: Item

### Advanced Search

Non-Tray Items		Tray Items		Rearrange	Download Report
Accession Date	Status	Owner	Size Class	Media Type	Item Barcode
6/12/2019	In	Manuscript	DOCUMENT STORAGE BOXES (LEGAL) - DS1	Book/Volume	00075356092
6/12/2019	In	Manuscript	DOCUMENT STORAGE BOXES (LEGAL) - DS1	Book/Volume	00075356195
6/12/2019	In	Manuscript	DOCUMENT STORAGE BOXES (LEGAL) - DS1	Book/Volume	00075356237
6/12/2019	In	Manuscript	DOCUMENT STORAGE BOXES (LEGAL) - DS1	Book/Volume	0007535616A
6/12/2019	In	Manuscript	DOCUMENT STORAGE BOXES (LEGAL) - DS1	Book/Volume	00075356201
6/12/2019	In	Manuscript	DOCUMENT STORAGE BOXES (LEGAL) - DS1	Book/Volume	00075356146
6/12/2019	In	Manuscript	DOCUMENT STORAGE BOXES (LEGAL) - DS1	Book/Volume	00075356213
6/12/2019	In	Manuscript	DOCUMENT STORAGE BOXES (LEGAL) - DS1	Book/Volume	00075356134
6/12/2019	In	Manuscript	DOCUMENT STORAGE BOXES (LEGAL) - DS1	Book/Volume	00075356250

Item ▾ Search Item Barcode Advanced Search

Home Advanced Search Results: Item

### Advanced Search

Non-Tray Items		Tray Items		Download Report
Accession Date	Status	Owner	Size Class	Rearrange
6/12/2019	In	Manuscript	DOCUMENT STORAGE BOXES (LEGAL) - DS1	
6/12/2019	In	Manuscript	DOCUMENT STORAGE BOXES (LEGAL) - DS1	
6/12/2019	In	Manuscript	DOCUMENT STORAGE BOXES (LEGAL) - DS1	
			DOCUMENT	

4. Click the tray barcode, shelf barcode, or request entry to view the corresponding results.

Item ▾ Search Item Barcode Advanced Search

Home > Record Management - Tray/Non-Tray Item: 98765432111

### Tray Item Details

Tray Barcode CL123540	Media Type DVD	Last Requested Date: 1/28/2025
Shelf Barcode 002064	Size Class CL Ft Meade boxes	Last Refile Date: 1/28/2025
Owner LC	Accession Date 1/27/2025	Withdrawal Date
Status In	Shelved Date: 1/28/2025	Location Fort Meade   1-1-L-31-5-12

**Request History**

Request ID	External Request ID	Request Date
68	11	1/28/2025

Records per page: 50 ▾ 1-1 of 1

Item ▾ Search Item Barcode Advanced Search

Home > Record Management - Tray/Non-Tray Item: 98765432111

Tray Barcode CL123540  
 Shelf Barcode 002064  
 Media Type: DVD  
 Size Class: CL Ft Meade boxes  
 Status: In  
 Owner: LC

Dates

Accession Date: 1/27/2025  
 Shelved Date: 1/28/2025  
 Last Requested Date: 1/28/2025  
 Last Refile Date: 1/28/2025  
 Withdrawal Date:

Item Location

Fort Meade | 1-1-L-31-5-12

**Request History**

Request ID	External Request ID	Request Date
68	11	1/28/2025

5. Click the "Download Report" button to download the search results.

Item ▾ Search Item Barcode Advanced Search

Home Advanced Search Results: Item

### Advanced Search

Non-Tray Items Tray Items

Rearrange Download Report

Accession Date	Status	Owner	Size Class	Media Type	Item Barcode
6/12/2019	In	Manuscript	DOCUMENT STORAGE BOXES (LEGAL) - DS1	Book/Volume	00075356092
6/12/2019	In	Manuscript	DOCUMENT STORAGE BOXES (LEGAL) - DS1	Book/Volume	00075356195
6/12/2019	In	Manuscript	DOCUMENT STORAGE BOXES (LEGAL) - DS1	Book/Volume	00075356237
6/12/2019	In	Manuscript	DOCUMENT STORAGE BOXES (LEGAL) - DS1	Book/Volume	0007535616A
6/12/2019	In	Manuscript	DOCUMENT STORAGE BOXES (LEGAL) - DS1	Book/Volume	00075356201
6/12/2019	In	Manuscript	DOCUMENT STORAGE BOXES (LEGAL) - DS1	Book/Volume	00075356146
6/12/2019	In	Manuscript	DOCUMENT STORAGE BOXES (LEGAL) - DS1	Book/Volume	00075356213
6/12/2019	In	Manuscript	DOCUMENT STORAGE BOXES (LEGAL) - DS1	Book/Volume	00075356134
6/12/2019	In	Manuscript	DOCUMENT STORAGE BOXES (LEGAL) - DS1	Book/Volume	00075356250

Item ▾ Search Item Barcode Advanced Search

Home Advanced Search Results: Item

### Advanced Search

Non-Tray Items Tray Items

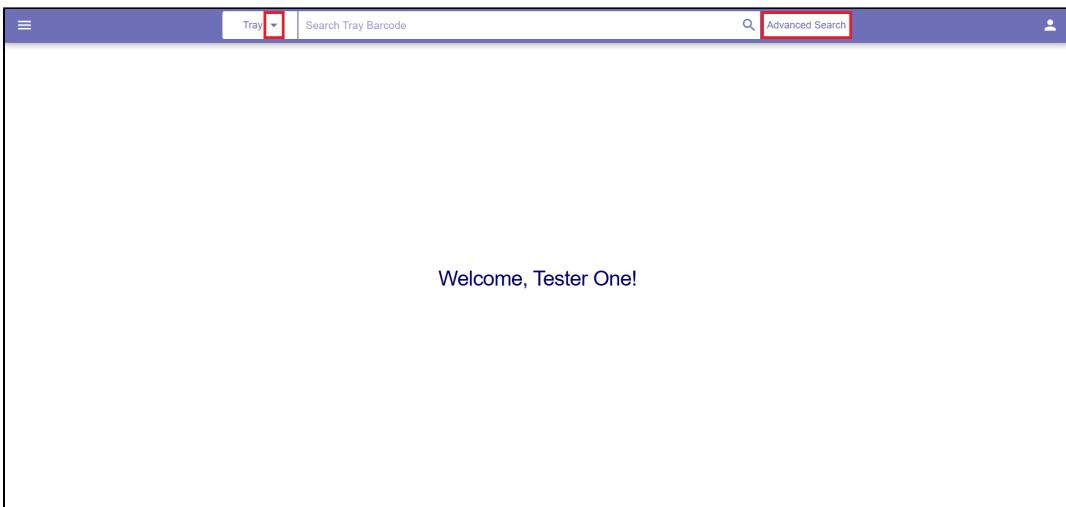
Download Report

Rearrange

Accession Date	Status	Owner	Size Class
6/12/2019	In	Manuscript	DOCUMENT STORAGE BOXES (LEGAL) - DS1
6/12/2019	In	Manuscript	DOCUMENT STORAGE BOXES (LEGAL) - DS1
6/12/2019	In	Manuscript	DOCUMENT STORAGE BOXES (LEGAL) - DS1
			DOCUMENT

#### 4.4.2 Trays Advanced Search

1. Next to the top search bar on desktop or mobile, select the "Tray" drop down arrow and click the "Advanced Search" button.



2. Fill in the fields for various search parameters to refine the search results. Click the "Search" button to initiate the search within the specified criteria and display the corresponding results.

The image displays two identical screenshots of a software application's "Advanced Tray Search" dialog box. The dialog box is centered on the screen and has a red border around its content area. It contains several search parameters:

- Accession Date (From) and Accession Date (To) fields with calendar icons.
- Owner dropdown menu labeled "Select Owner".
- Size Class dropdown menu labeled "Select Size Class".
- Media Type dropdown menu labeled "Select Media Type".
- A blue "Search" button and a white "Cancel" button at the bottom.

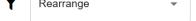
The background of the application shows a "Tray" menu bar with options like "Tray", "Search Tray Barcode", and "Advanced Search". There is also a user profile icon in the top right corner.

3. Click the appropriate tray entry from the list to view its detailed information.

Tray ▾ Search Tray Barcode Advanced Search 

Home > Advanced Search Results: Tray

### Advanced Search

 Rearrange

Accession Date	Owner	Size Class	Media Type	Tray Barcode
1/22/2025	LC	CL Ft Meade boxes	VHS Cassette	CL123330
1/22/2025	LC	CL Ft Meade boxes	VHS Cassette	CL123331
1/27/2025	LC	CL Ft Meade boxes	DVD	CL123540
1/29/2025	LC	CL Ft Meade boxes	Schematic	CL123450

Records per page: 50 ▾ 1-4 of 4

Tray ▾ Search Tray Barcode  

Home > Advanced Search Results: Tray

### Advanced Search

 Filter  Rearrange

Accession Date	Owner	Size Class	Media Type	Tray Barcode
1/22/2025	LC	CL Ft Meade boxes	VHS Cassette	CL
1/22/2025	LC	CL Ft Meade boxes	VHS Cassette	CL
1/27/2025	LC	CL Ft Meade boxes	DVD	CL
1/29/2025	LC	CL Ft Meade boxes	Schematic	CL

Records per page: 50 ▾ 1-4 of 4

4. Click the shelf barcode or trayed item entry to view the corresponding results.

Tray ▾ Search Tray Barcode Advanced Search

Home > Record Management - Tray: CL123540

### Tray Details

Shelf Barcode 002064	Accession Date 1/27/2025
Owner LC	Shelved Date 1/28/2025
Media Type DVD	Location Fort Meade   1-1-L-31-5-12
Size Class CL Ft Meade boxes	

**Items in Tray**

Barcode	Status
98765432111	In
98765432112	In

Rearrange ▾

Tray ▾ Search Tray Barcode Advanced Search

Home > Record Management - Tray: CL123540

### Tray Details

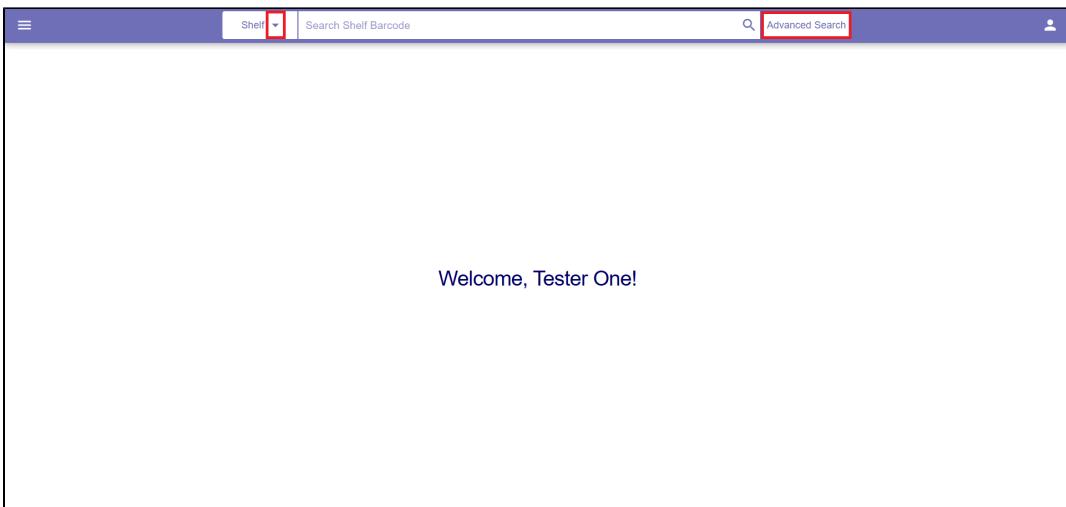
Shelf Barcode 002064	Accession Date 1/27/2025
Owner LC	Shelved Date 1/28/2025
Media Type DVD	Location Fort Meade   1-1-L-31-5-12
Size Class CL Ft Meade boxes	

**Items in Tray**

Barcode	Status
98765432111	In
98765432112	In

#### 4.4.3 Shelves Advanced Search

1. Next to the top search bar on desktop or mobile, select the "Shelf" drop down arrow and click the "Advanced Search" button.



2. Fill in the fields for various search parameters to refine the search results. Click the "Search" button to initiate the search within the specified criteria and display the corresponding results.

The image contains two screenshots of a software application's 'Advanced Shelf Search' feature. Both screenshots show a search form with various dropdown menus and input fields. A red box highlights the 'Building' dropdown in the top screenshot and the 'Size Class' dropdown in the bottom screenshot.

3. Click the appropriate shelf entry from the list to view its detailed information.

The image shows the 'Advanced Search Results: Shelf' page. It features a table with four columns: 'Shelf Barcode', 'Shelf Location', 'Owner', and 'Size Class'. The table lists ten entries. An arrow points to the first entry, which is highlighted in blue. The right side of the screen shows a sidebar with a 'Filter' section and a 'Rearrange' button.

Shelf Barcode	Shelf Location	Owner	Size Class
002179	Fort Meade-1-1-L-4-8	LC	CL Ft Meade boxes
002235	Fort Meade-1-1-L-4-10	LC	CL Ft Meade boxes
000833	Fort Meade-1-1-L-14-7	LC	CL Ft Meade boxes
007271	Fort Meade-1-1-L-14-12	LC	CL Ft Meade boxes
007227	Fort Meade-1-1-L-21-13	LC	CL Ft Meade boxes
007204	Fort Meade-1-1-L-24-13	LC	CL Ft Meade boxes
002060	Fort Meade-1-1-L-31-1	LC	CL Ft Meade boxes
002064	Fort Meade-1-1-L-31-5	LC	CL Ft Meade boxes
002285	Fort Meade-1-1-L-31-10	LC	CL Ft Meade boxes

4. Click the container entry to view the corresponding results.

Shelf Search Shelf Barcode Advanced Search

Home Record Management - Shelf: 002064

### Shelf Details

<b>002064</b>	<b>Shelf Number</b> 5	<b>Width</b> 40 in	<b>Used Quantity</b> 1
	<b>Owner</b> LC	<b>Height</b> 12 in	<b>Max Quantity</b> 12
	<b>Size Class</b> CL Ft Meade boxes	<b>Depth</b> 36 in	<b>Shelf Location</b> Fort Meade   1-1-L-31-5
	<b>Created Date</b> 1/13/2025	<b>Available Quantity</b> 11	

**Containers in Shelf**

Barcode
CL123540

Records per page: 50 1-1 of 1

Shelf Search Shelf Barcode Advanced Search

Home Record Management - Shelf: 002064

Shelf Number 358  
Owner LC  
Size Class CL Ft Meade boxes  
Created Date 1/13/2025

**Shelf Dimensions**  
Width 40 in  
Height 12 in  
Depth 36 in

**Shelf Capacity**  
Available Quantity 11  
Used Quantity 1  
Max Quantity 12

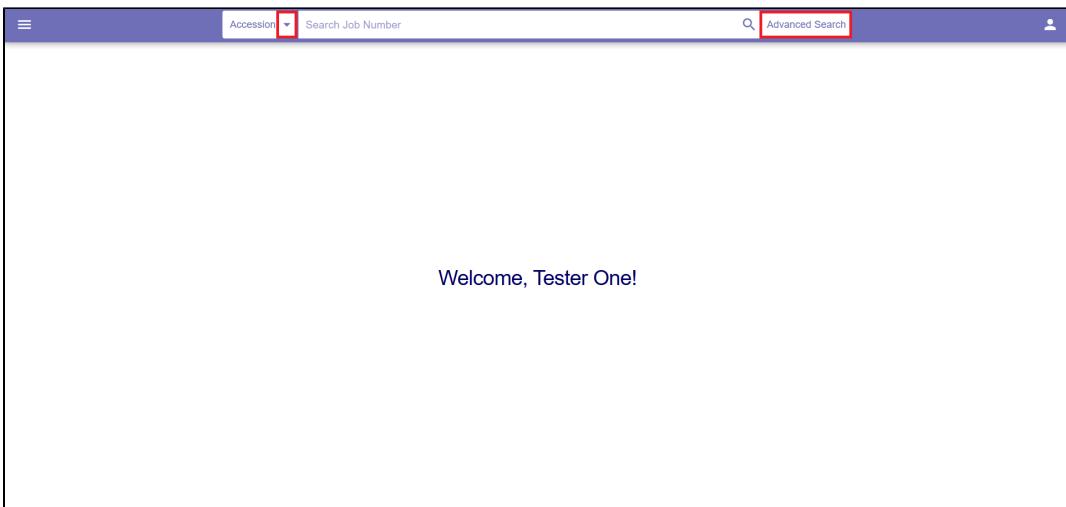
**Shelf Location**  
Fort Meade | 1-1-L-31-5

**Containers in Shelf**

Barcode
CL123540

#### 4.4.4 Jobs Advanced Search

1. Next to the top search bar on desktop or mobile, select the job type drop down arrow and click the "Advanced Search" button.



2. Fill in the fields for various search parameters to refine the search results. Click the "Search" button to initiate the search within the specified criteria and display the corresponding results.

The image displays two identical screenshots of a web-based search interface. At the top, there is a navigation bar with the text "Accession" and "Search Job Number". To the right of the search bar is a magnifying glass icon and the text "Advanced Search". Below the navigation bar is a user profile icon.

The main content area features a modal dialog box titled "Advanced Accession Search" with a red border. The dialog contains several input fields:

- "Created Date (From)" and "Created Date (To)" fields, each with a date input field and a calendar icon.
- "Status" dropdown menu labeled "Select Status".
- "Created By" dropdown menu labeled "Select Created By".
- "Completed By" dropdown menu labeled "Select Completed By".

At the bottom of the dialog are two buttons: a blue "Search" button and a white "Cancel" button.

3. Click the appropriate job entry from the list to view its detailed information.

The screenshot shows two identical search results pages for 'Accession'. The top page has a blue header bar with 'Accession' and a search bar. The bottom page has a white header bar with 'Accession' and a search bar. Both pages show a table titled 'Advanced Search' with columns: Create Date, Job Number, Status, Created By, and Completed By. The data in the table is as follows:

Create Date	Job Number	Status	Created By	Completed By
1/15/2025	1	Completed	Admin Istrator	Admin Istritor
1/15/2025	2	Completed	Tester One	Tester One
1/15/2025	3	Completed	Tester One	Tester One
1/15/2025	4	Completed	Tester One	Tester One
1/15/2025	5	Completed	Tester One	Tester One
1/16/2025	6	Cancelled	Tester One	
1/16/2025	7	Cancelled	Tester One	
1/16/2025	8	Completed	Tester One	Tester One
1/16/2025	9	Completed	Tester One	Tester One

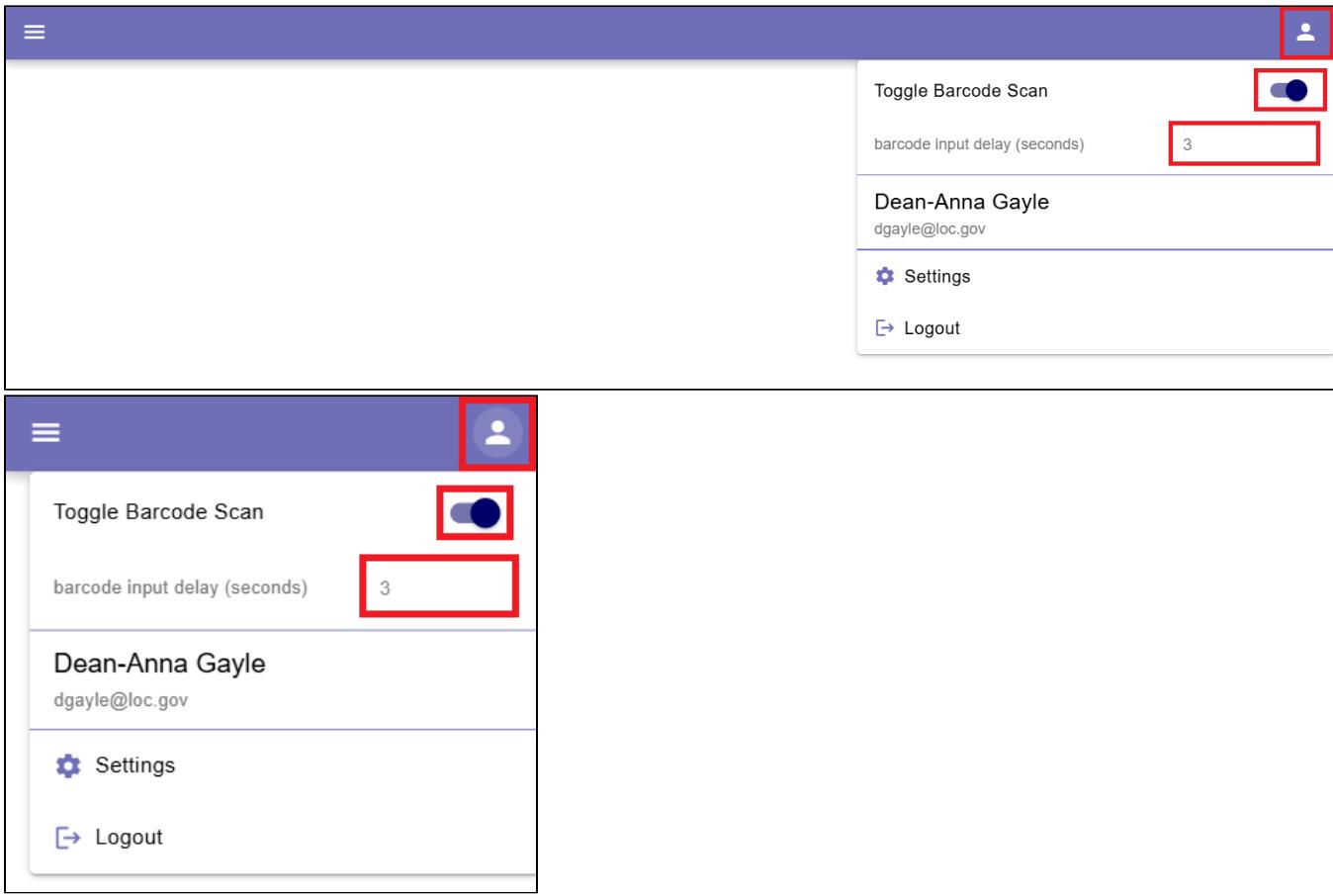
Create Date	Job Number	Status	Created By
1/15/2025	1	Completed	Admin Istrator
1/15/2025	2	Completed	Tester One
1/15/2025	3	Completed	Tester One
1/15/2025	4	Completed	Tester One
1/15/2025	5	Completed	Tester One
1/16/2025	6	Cancelled	Tester One
1/16/2025	7	Cancelled	Tester One
1/16/2025	8	Completed	Tester One
1/16/2025	9	Completed	Tester One
1/16/2025	10	Completed	Tester One
1/16/2025	11	Completed	Tester One
1/16/2025	12	Completed	Tester One
1/16/2025	13	Completed	Tester One
1/16/2025	14	Completed	Tester One
1/16/2025	15	Cancelled	Tester One

## 4.5 Barcode Scan Toggle

This toggleable control simplifies barcode capture by eliminating the requirement to configure prefix and suffix characters on the scanning device, allowing users to seamlessly switch between different barcode types. The barcode input delay allows the user to have a brief pause to enter a barcode via keyboard entry before it is captured.

Navigate to the user menu on desktop or mobile to specify the barcode input delay (in seconds). Any typed text entered after this delay will be captured as a barcode.

By default, the Toggle Barcode Scan is set to "On". If disabled, a prompt will appear confirming that "Barcode scanning is disabled."



## 5. Features

The Features section details instructions on the capabilities offered by FETCH: Accession, Verification, Shelving, Request, Pick List and Retrieval, Refile, Move and Withdraw, and Operational Reporting.

### 5.1 Accession

The Accession section provides instructions on ingesting a non-trayed or trayed item into inventory.

#### 5.1.1 Complete Non-Tray Accession Job on Desktop

1. Navigate to the "Accession" tab from the navigation menu.

The screenshot shows the FETCH software interface. The left sidebar has a dark blue background with white icons and text. A red box highlights the 'Accession' icon. Other icons include Verification, Shelving, Request, Pick List, Refile, Withdrawal, Reports, and Admin. The main area has a light blue header with 'Accession' and a search bar. Below the header is a breadcrumb trail: Home > Accession. The main title is 'Accession Jobs'. There are three columns: Job Number, Job Type, and Status. A message at the top says 'No data available'. On the right, there's a 'Rearrange' button and a 'Start Accession' button.

2. Click the "Start Accession" button to create an Accession Job, then click the "Non-Tray Accession" button.

This screenshot shows the same interface as above, but the 'Start Accession' button is now highlighted with a red box. The rest of the interface remains the same, including the 'No data available' message.

This screenshot shows a modal dialog titled 'Start New Accession' centered over the main content. The dialog has two options: 'Non-Tray Accession' and 'Trayed Accession'. The 'Non-Tray Accession' option is highlighted with a red box. The background of the main area is grayed out.

3. Enter the Owner for the non-tray (Container Size and Media Type may be left blank, as the two fields are optional), then click the "Submit" button.

The screenshot shows the 'Accession Jobs' page. A modal dialog is open, prompting for job details. The fields include 'Owner (Required)' (dropdown menu), 'Container Size (Optional)' (dropdown menu), and 'Media Type (Optional)' (dropdown menu). Below the fields are 'Submit' and 'Cancel' buttons. The entire modal area is highlighted with a red border.

4. Scan the non-trayed barcode.

5. After the initial scan, the following options for barcodes are available:

5a. To edit the Container Size or Media Type, click the three-dot-icon next to the job number and click the "Edit" button. Click the drop down arrows to select a new container size or media type, then click the "Save Edits" button.

The screenshot shows the 'Job: 35' details page. The 'Edit' button is highlighted with a red box. The job number is 12345678901. On the right, the 'Scan Items' section shows one item: 'Barcode' (checkbox) and '12345678901' (checkbox with a green checkmark). Top navigation includes 'Home', 'Accession', '35', and '12345678901'. Buttons for 'Pause Job' and 'Complete Job' are visible.

The screenshot shows the 'Job: 35' details page after edits. The 'Container Size' and 'Media Type' dropdown menus are highlighted with red boxes. The job number is 12345678901. The 'Scan Items' section remains the same. Top navigation and buttons are identical to the previous screenshot.

5b. To add an additional item to the job, scan a barcoded item.

5c. To manually input a barcode, click the "Enter Barcode" button, enter the updated barcode, and click the "Submit" button.

The screenshots illustrate the process of manually entering a barcode. In the first screenshot, the 'Scan Items' panel shows an item with the barcode '12345678901' listed. In the second screenshot, a modal dialog box titled 'Enter Barcode' is displayed, prompting the user to 'Type Barcode' with a placeholder 'Please Enter Barcode'. The 'Submit' button is highlighted with a red box.

5d. To edit a scanned barcode, select the appropriate barcode and click the "Edit barcode" button. Enter the updated barcode and click the "Submit" button.

The screenshot shows the 'Scan Items' section of the Accession Job details page. It displays one item with the barcode '12345678901'. Below the item, there are several metadata fields: Owner (LC), Container Type (Non-Tray), Container Size (AL FORT MEADE BOXES - AL), and Media Type (Book/Volume). At the top right of the 'Scan Items' section, there are buttons for '+ Edit Barcode' (highlighted with a red box), 'Delete', 'Pause Job', and 'Complete Job'.

The screenshot shows the same 'Scan Items' section as above, but with an 'Edit Barcode' dialog box overlaid. The dialog has a text input field containing 'Please Enter Barcode' and two buttons: 'Submit' (highlighted with a red box) and 'Cancel'.

5e. To remove a scanned item(s), select the appropriate barcode(s) and click the "Delete" button.

The screenshot shows the 'Scan Items' section with the barcode '12345678901' selected (indicated by a checked checkbox). The 'Delete' button is visible at the top right of the list. The rest of the interface is identical to the previous screenshots, showing the job details and other metadata fields.

6. Click the "Pause Job" button to pause an Accession Job. While paused, the Accession Job cannot be completed. Click the "Resume Job" button to resume the Accession Job. While the job is in a paused or running state, it will display on the accession dashboard as "In Progress" until completed.

The screenshot shows the 'Scan Items' section of the Accession Job interface. It displays a list of items with a total count of 1 item. The item is identified by the barcode '12345678901'. The 'Barcode' checkbox is checked, and the item is marked with a green checkmark. At the top right of the 'Scan Items' section, there are two buttons: 'Pause Job' (highlighted with a red box) and 'Complete Job'.

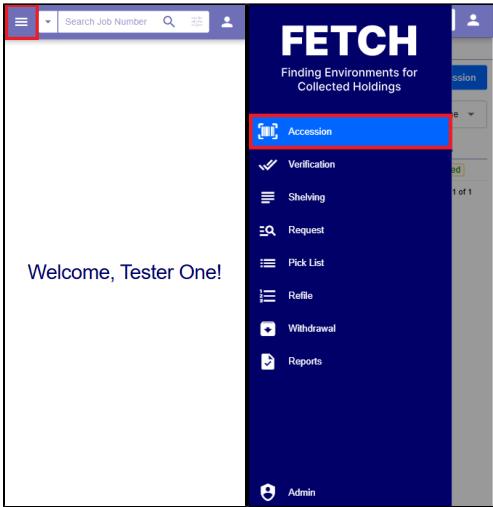
The screenshot shows the 'Scan Items' section of the Accession Job interface. It displays a list of items with a total count of 1 item. The item is identified by the barcode '12345678901'. The 'Barcode' checkbox is checked, and the item is marked with a green checkmark. At the top right of the 'Scan Items' section, there are two buttons: 'Resume Job' (highlighted with a red box) and 'Complete Job'.

7. Click the "Complete Job" button after all items have been accessioned. Upon completion, the Accession Job will transition into a Verification Job and display on the verification dashboard.

The screenshot shows the 'Scan Items' section of the Accession Job interface. It displays a list of items with a total count of 1 item. The item is identified by the barcode '12345678901'. The 'Barcode' checkbox is checked, and the item is marked with a green checkmark. At the top right of the 'Scan Items' section, there are two buttons: 'Pause Job' and 'Complete Job' (highlighted with a red box).

### 5.1.2 Complete Non-Tray Accession Job on Mobile

1. Navigate to the "Accession" tab from the navigation menu.



2. Click the "Start Accession" button to start an Accession Job, then click the "Non-Tray Accession" button.

The image consists of two side-by-side screenshots of the "Accession Jobs" page. Both screenshots show the same layout: a header with "Accession" and a search bar, a breadcrumb navigation "Home &gt; Accession", and a main table with columns "Job Number", "Job Type", and "Status". The first screenshot has a red box around the "Start Accession" button. The second screenshot shows a modal window titled "Start New Accession" with two buttons: "Non-Tray Accession" and "Trayed Accession". The "Non-Tray Accession" button is also highlighted with a red box.

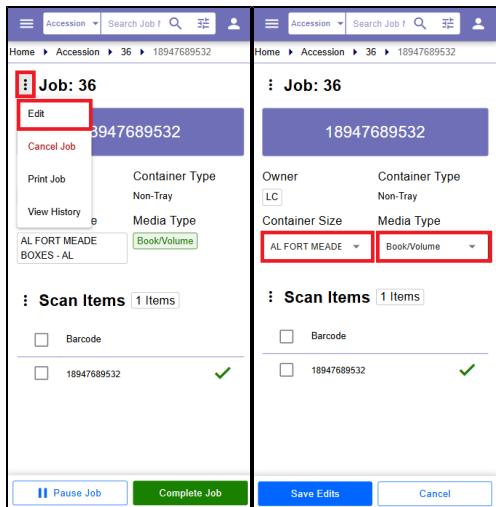
3. Enter the Owner for the non-tray (Container Size and Media Type may be left blank, as the two fields are optional), then click the "Submit" button.

This screenshot shows the "Start New Accession" dialog box. It has a red box around the "Owner (Required)" field, which contains a dropdown menu labeled "Select Owner". Below it are two optional fields: "Container Size (Optional)" with a dropdown menu labeled "Select Size Class" and "Media Type (Optional)" with a dropdown menu labeled "Select Media Type". At the bottom of the dialog are two buttons: "Submit" (highlighted with a blue box) and "Cancel".

4. Scan the non-trayed barcode.

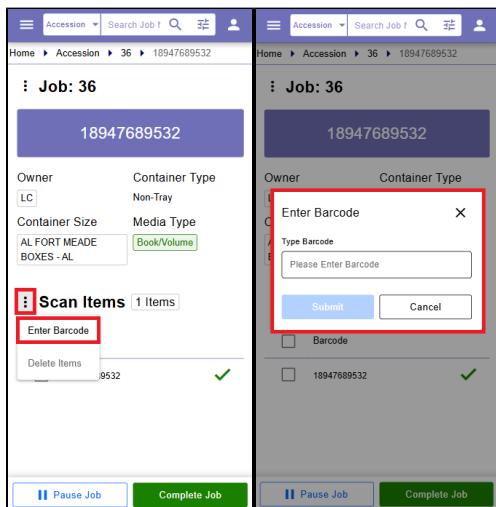
5. After the initial scan, the following options for barcodes are available:

5a. To edit the Container Size or Media Type, click the three-dot-icon next to the job number and click the "Edit" button. Click the drop down arrows to select a new container size or media type, then click the "Save Edits" button.



5b. To add an additional item to the job, scan a barcoded item.

5c. To manually input a barcode, click the 3 dot icon next to "Scan Items". Click the "Enter Barcode" button, enter the new barcode, and click the "Submit" button.



5d. To edit a scanned barcode, select the appropriate barcode, click the 3 dot icon next to "Scan Items", then click the "Edit Barcode" button. Enter the updated barcode and click the "Submit" button.

The first screenshot shows the job details for Job: 36 with item 18947689532. The second screenshot shows the same job after selecting the three-dot menu next to "Scan Items" and choosing "Edit Barcode". A modal dialog titled "Edit Barcode" is displayed with a text input field containing "Please Enter Barcode". The third screenshot shows the modal dialog still open, with the "Barcode" checkbox checked and the barcode value "18947689532" listed below it.

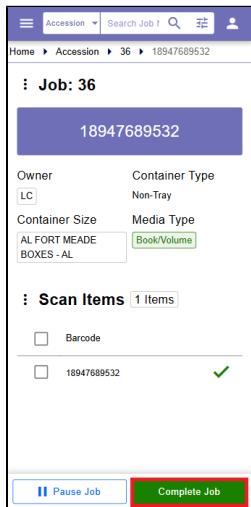
5e. To remove a non-tray(s), select the appropriate barcode(s), click the 3 dot icon next to "Scan Items", then click the "Delete Items" button.

The left screenshot shows the job details for Job: 36 with item 18947689532. The right screenshot shows the same job after selecting the three-dot menu next to "Scan Items" and choosing "Delete Items". A modal dialog titled "Delete Items" is displayed with a text input field containing "18947689532".

6. Click the "Pause Job" button to pause the Accession Job. While paused, the Accession Job cannot be completed. Click the "Resume Job" button to resume the Accession Job. While the job is in a paused or running state, it will display on the accession dashboard as "In Progress" until completed.

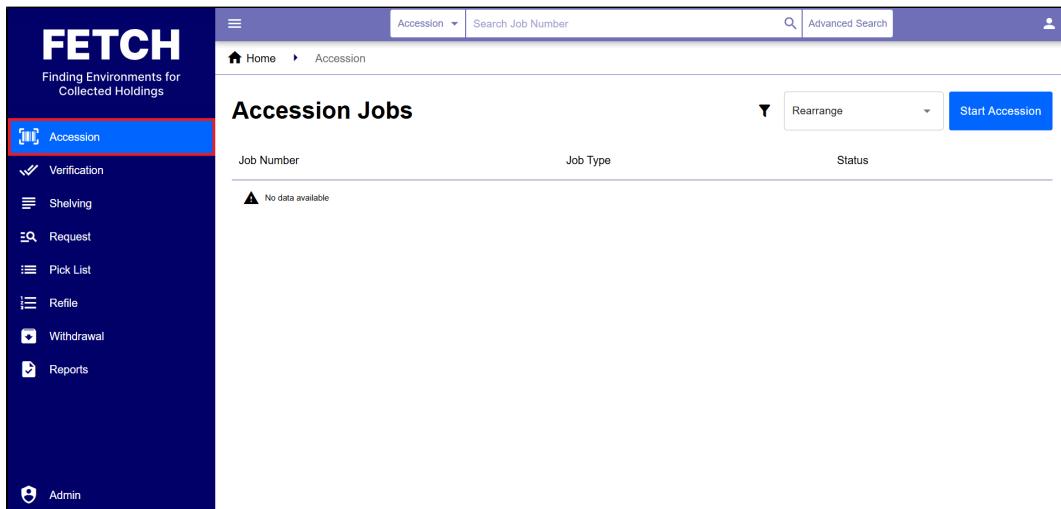
The left screenshot shows the job details for Job: 36 with item 18947689532. The "Barcode" checkbox is checked, and the "Pause Job" button is highlighted with a red box. The right screenshot shows the same job after clicking "Pause Job", with the "Barcode" checkbox unchecked and the "Resume Job" button highlighted with a red box.

7. Click the "Complete Job" button after all items have been accessioned. Upon completion, the Accession Job will transition into a Verification Job and display on the verification dashboard.



### 5.1.3 Complete Trayed Accession Job on Desktop

1. Navigate to the "Accession" tab from the navigation menu.



2. Click the "Start Accession" button to start an Accession Job, then click the "Trayed Accession" button.

The screenshot shows the 'Accession Jobs' page. At the top right, there is a blue 'Start Accession' button with a red border, which is highlighted. Below it, there are three columns: 'Job Number', 'Job Type', and 'Status'. A message at the bottom left says 'No data available' with a warning icon.

This screenshot shows the same 'Accession Jobs' page, but now a modal dialog titled 'Start New Accession' is open. It contains two options: 'Non-Tray Accession' and 'Trayed Accession'. The 'Trayed Accession' option is highlighted with a red border. The background page shows the 'Start Accession' button also highlighted with a red border.

3. Enter the Owner for the trayed item (Media Type may be left blank, as the field is optional), then click the "Submit" button.

This screenshot shows the 'Accession Jobs' page with the 'Trayed Accession' dialog still open. Inside the dialog, there are two dropdown menus: 'Owner (Required)' and 'Media Type (Optional)'. Both dropdowns have a red border around them. Below the dropdowns are two buttons: 'Submit' (blue) and 'Cancel' (white).

4. Scan the tray barcode, then any items within the tray.

5. After scanning, the following options for barcodes are available:

5a. To edit the Container Size or Media Type, click the three-dot-icon next to the job number and click the "Edit" button. Click the drop down arrows to select a new container size or media type, then click the "Save Edits" button.

The image consists of two vertically stacked screenshots of a software application interface. Both screenshots show a top navigation bar with 'Accession' and a search bar, and a bottom navigation bar with 'Home', 'Accession', '37', and 'AH98712'.  
  
The top screenshot shows a sidebar on the left with the following options:

- Job: 37
- Edit (highlighted with a red box)
- Cancel Job
- Edit Tray Barcode
- Delete Tray (highlighted with a red box)
- Print Job
- View History

Below the sidebar, there are three sections:

- Owner: LC
- Container Type: Trayed
- Container Size: AH FORT MEADE BOXES - AH (highlighted with a red box)

On the right, a 'Scan Items' section displays '2 Items':

- + Enter Barcode
- Barcode (checkbox)
- 12398745611 (checkbox checked, green checkmark)
- 12398745610 (checkbox checked, green checkmark)

With buttons for '+ Add Tray (1)', 'Pause Job', and 'Complete Job'.  
  
The bottom screenshot shows the same interface after edits were made. The 'Container Size' dropdown and 'Media Type' dropdown are both highlighted with red boxes. The rest of the interface is identical to the top screenshot.

5b. To add a tray, click the "Add Tray" button. Select the tray from the list options or click the "Add Tray" button to create a new tray.

The screenshot shows two instances of a library management software interface. Both instances have a top navigation bar with 'Accession' dropdown, 'Search Job Number' input, and search/advanced search buttons.

**Job List View:**

- Job: 37
- AH98712
- Owner: LC
- Container Type: Trayed
- Container Size: AH FORT MEADE BOXES - AH
- Media Type: Book/Volume

**Scan Items View:**

- Scan Items: 2 Items
- + Add Tray (1) (highlighted with a red box)
- Enter Barcode
- Delete
- Pause Job
- Complete Job

Barcode	Status
12398745611	✓
12398745610	✓

**Job List View (Second Instance):**

- Job: 37
- AH98712
- Owner: LC
- Container Type: Trayed
- Container Size: AH FORT MEADE BOXES - AH
- Media Type: Book/Volume

**Scan Items View (Second Instance):**

- Scan Items: 2 Items
- + Add Tray (1) (highlighted with a red box)
- Enter Barcode
- Delete
- Pause Job
- Complete Job

A modal window titled "Select Tray" is open, containing:

- + Add Tray (1) (highlighted with a red box)
- Tray #: AH98712
- Trayed

5c. To add an additional item to the job, scan a barcoded item. Or click the "Enter Barcode" button to manually input, enter the updated barcode, and click the "Submit" button.

The screenshot shows the 'Scan Items' section of a software application. It displays two items with barcodes: '12398745611' and '12398745610'. Both items have green checkmarks next to them, indicating they are successfully scanned. The interface includes buttons for '+ Enter Barcode' (highlighted with a red box), 'Delete', 'Pause Job', and 'Complete Job'.

**Scan Items** 2 Items

+ Enter Barcode Delete Pause Job Complete Job

Barcode

12398745611 ✓

12398745610 ✓

**Job: 37**

AH98712

Owner LC

Container Type Trayed

Container Size AH FORT MEADE BOXES - AH

Media Type Book/Volume

The screenshot shows the same 'Scan Items' interface, but a modal dialog box is open over the list. The dialog is titled 'Enter Barcode' and contains a text input field with the placeholder 'Please Enter Barcode'. Below the input field are 'Submit' and 'Cancel' buttons. The entire 'Enter Barcode' dialog is highlighted with a red box.

Enter Barcode

Type Barcode

Please Enter Barcode

Submit Cancel

5d. To edit a scanned barcode, select the appropriate item's barcode and click the "Edit Barcode" button. Enter the new barcode, and click the "Submit" button.

**Scan Items** 2 Items

+ Add Tray (1) | Pause Job | Complete Job

Barcode

12398745611 ✓  
 12398745610 ✓

**Scan Items** 2 Items

+ Add Tray (1) | Pause Job | Complete Job

Barcode

Edit Barcode

Type Barcode  
Please Enter Barcode

Submit Cancel

5e. To remove a scanned item(s), select the appropriate barcode(s) and click the "Delete Items" button.

**Scan Items** 2 Items

+ Add Tray (1) | Pause Job | Complete Job

Barcode

12398745611 ✓  
 12398745610 ✓

5f. To edit a tray's barcode, click the three-dot-icon next to the job number and click the "Edit Tray Barcode" button. Enter the updated barcode, and click the "Submit" button. If the edited barcode has a different 2-character letter prefix than the originally entered barcode, update the container size class using step 5.1.3.5a.

The screenshot shows the 'Scan Items' section of the Accession Job details page. On the left, there is a sidebar with options like 'Edit', 'Cancel Job', 'Edit Tray Barcode' (which is highlighted with a red box), 'Delete Tray', 'Print Job', and 'View History'. The main area displays 'Scan Items 2 Items'. There are two items listed: 'Barcode' (checkboxes for 12398745611 and 12398745610, both marked with green checkmarks). At the top right, there are buttons for '+ Add Tray (1)', 'Pause Job', and 'Complete Job'.

This screenshot shows the 'Edit Tray Barcode' modal dialog box. It contains a text input field labeled 'Type Barcode' with the placeholder 'Please Enter Tray Barcode'. Below the input field are 'Submit' and 'Cancel' buttons. The background of the main interface is dimmed.

5g. To delete a tray, click the three-dot-icon next to the job number and click the "Delete Tray" button. All items scanned within the tray will be deleted as well.

The screenshot shows the 'Scan Items' section of the Accession Job details page. The 'Delete Tray' option in the sidebar is highlighted with a red box. The main area displays 'Scan Items 2 Items'. There are two items listed: 'Barcode' (checkboxes for 12398745611 and 12398745610, both marked with green checkmarks). At the top right, there are buttons for '+ Add Tray (1)', 'Pause Job', and 'Complete Job'.

6. Click the "Pause Job" button to pause the Accession Job. While paused, the Accession Job cannot be completed. Click the "Resume Job" button to resume the Accession Job. While the job is in a paused or running state, it will display on the accession dashboard as "In Progress" until completed.

The screenshot shows the 'Scan Items' section of the Accession Job interface. It displays two items: 'Barcode' (12398745611) and 'Barcode' (12398745610). Both items have green checkmarks indicating they have been scanned. The 'Pause Job' button is highlighted with a red box.

**Job: 37**

AH98712

Owner: LC

Container Type: Trayed

Container Size: AH FORT MEADE BOXES - AH

Media Type: Book/Volume

Scan Items: 2 Items

+ Enter Barcode | Delete | Pause Job | Complete Job

This screenshot is identical to the one above, showing the same trayed accession job with two items ready for scanning. The 'Pause Job' button is highlighted with a red box.

**Job: 37**

AH98712

Owner: LC

Container Type: Trayed

Container Size: AH FORT MEADE BOXES - AH

Media Type: Book/Volume

Scan Items: 2 Items

+ Enter Barcode | Delete | Resume Job | Complete Job

7. Click the "Complete Job" button after all items have been accessioned. Upon completion, the Accession Job will transition into a Verification Job and display on the verification dashboard.

This screenshot is identical to the previous ones, showing the trayed accession job with two items ready for scanning. The 'Complete Job' button is highlighted with a red box.

**Job: 37**

AH98712

Owner: LC

Container Type: Trayed

Container Size: AH FORT MEADE BOXES - AH

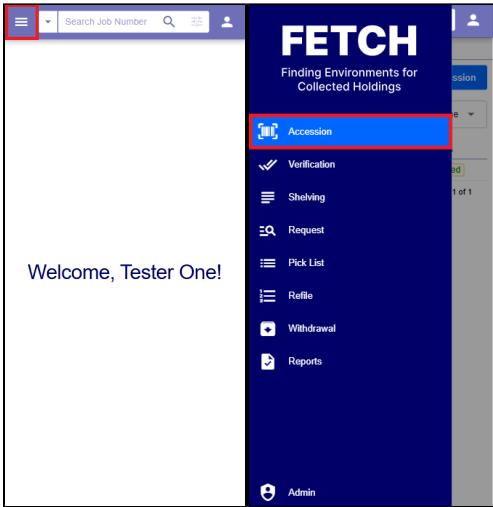
Media Type: Book/Volume

Scan Items: 2 Items

+ Enter Barcode | Delete | Pause Job | Complete Job

#### 5.1.4 Complete Trayed Accession Job on Mobile

1. Navigate to the "Accession" tab from the navigation menu.



2. Click the "Start Accession" button to start an Accession Job, then click the "Trayed Accession" button.

The image consists of two side-by-side screenshots of the "Accession Jobs" page. Both screenshots show the same layout: a header with "Accession" and a search bar, a breadcrumb navigation "Home &gt; Accession", and a main table with columns "Job Number", "Job Type", and "Status". The first screenshot has a red box around the "Start Accession" button. The second screenshot shows a modal window titled "Start New Accession" with two buttons: "Non-Tray Accession" and "Trayed Accession", with the "Trayed Accession" button highlighted by a red box.

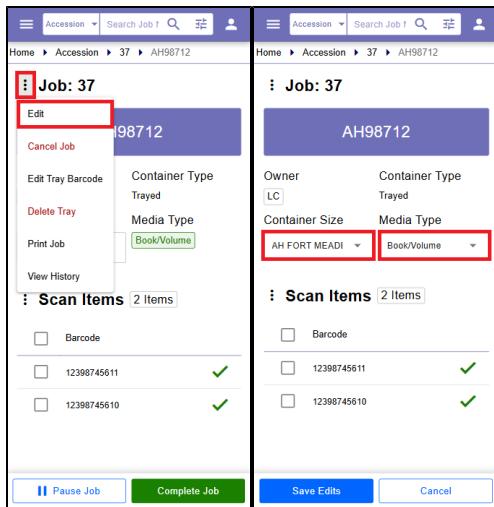
3. Enter the Owner for the tray (Media Type may be left blank, as the field is optional), then click the "Submit" button.

This is a screenshot of the "Start New Accession" dialog box. It includes a back arrow, a close button, and a message "Owner (Required)". Below this is a dropdown menu labeled "Select Owner". There is also a field labeled "Media Type (Optional)" with a dropdown menu labeled "Select Media Type". At the bottom of the dialog are two buttons: "Submit" (highlighted with a red box) and "Cancel".

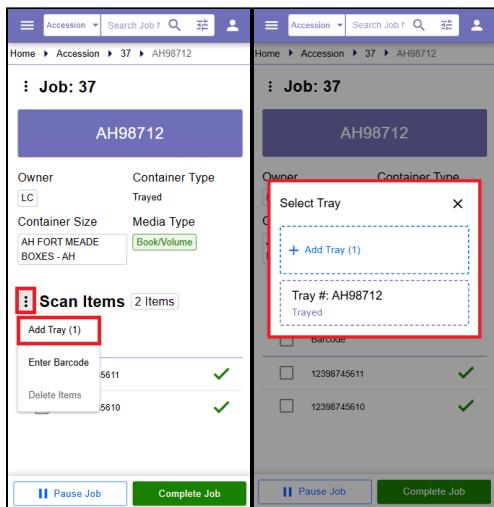
4. Scan the tray barcode, then any items within the tray.

5. After scanning, the following options for barcodes are available:

5a. To edit the Container Size or Media Type, click the three-dot-icon next to the job number and click the "Edit" button. Click the drop down arrows to select a new container size or media type, then click the "Save Edits" button.



5b. To add a tray, click the three-dot-icon next to the "Scan Items" title and click the "Add Tray" button. Select the tray from the list options or click the "Add Tray" button to create a new tray.

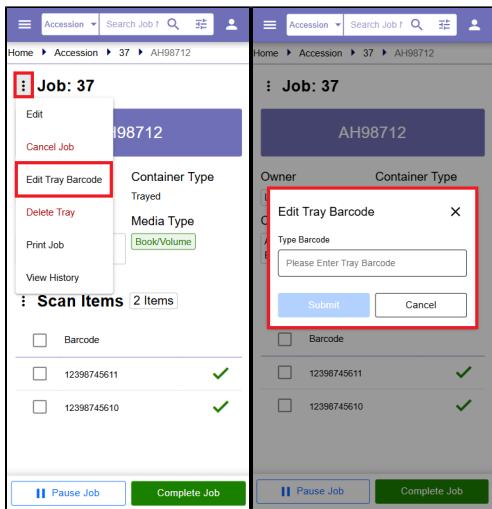


5c. To add an additional item to the job, scan a barcoded item. Or click the three-dot-icon next to the "Scan Items" title, click the "Enter Barcode" option. Enter the new barcode and click the "Submit" button.

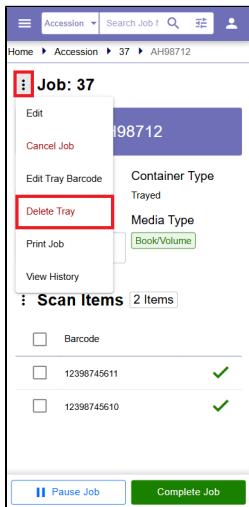
5d. To edit a scanned barcode, select the appropriate item's barcode and click the "Edit Items" button.

5e. To remove a scanned item(s), select the appropriate barcode(s) and click the "Delete Items" button.

5f. To edit a tray's barcode, click the three-dot-icon next to the job number and click the "Edit Tray Barcode" button. Enter the updated barcode, and click the "Submit" button. If the edited barcode has a different 2-character letter prefix than the originally entered barcode, update the container size class using step 5.1.4.5a.



5g. To delete a tray, click the three-dot-icon next to the job number and click the "Delete Tray" button. All items scanned within the tray will be deleted as well.



6. Click the "Pause Job" button to pause an Accession Job. While paused, the Accession Job cannot be completed. Click the "Resume Job" button to resume the Accession Job. While the job is in a paused or running state, it will display on the accession dashboard as "In Progress" until completed.

The screenshot displays two side-by-side views of an accession job interface. Both views show the job details for 'Job: 37' with accession number 'AH98712'. The details include owner 'LC', container type 'Trayed', container size 'AH FORT MEADE BOXES - AH', and media type 'Book/Volume'. Below this, a 'Scan Items' section shows two items: 'Barcode' and two specific item numbers ('12398745611' and '12398745610'), each with a checkbox and a green checkmark. At the bottom, there are two buttons: 'Pause Job' (left) and 'Complete Job' (right). The 'Pause Job' button is highlighted with a red box in the left view, and the 'Resume Job' button is highlighted with a red box in the right view.

7. Click the "Complete Job" button after all items have been accessioned. Upon completion, the Accession Job will transition into a Verification Job and display on the verification dashboard.

This screenshot shows the same 'Scan Items' step as the previous one, but the 'Complete Job' button at the bottom is now highlighted with a red box, indicating it should be clicked once all items are processed.

### 5.1.5 Cancel Accession Job

1. On desktop or mobile, click the three-dot-icon, then click the "Cancel Job" button.

**Job: 37**

Accession 37 AH98712

Cancel Job

Edit Tray Barcode

Delete Tray

Print Job

View History

Owner LC

Container Type Trayed

Container Size AH FORT MEADE BOXES - AH

**Scan Items** 2 Items

+ Enter Barcode Delete

Barcode 12398745611 12398745610

Add Tray (1) Pause Job Complete Job

**Job: 37**

Accession 37 AH98712

Cancel Job

Edit Tray Barcode

Delete Tray

Print Job

View History

Container Type Trayed

Media Type Book/Volume

**Scan Items** 2 Items

Barcode 12398745611 12398745610

Pause Job Complete Job

### 5.1.6 View/Export Accession Job History

1. On desktop or mobile, click the three-dot-icon, then click the "View History" button.

The image consists of two vertically stacked screenshots of a software application interface, likely a library or archival management system.

**Screenshot 1 (Top): Job Details**

This screenshot shows the main job details page. At the top left, it says "Job: 46". Below that are buttons for "Edit", "Cancel Job", "Print Job", and "View History" (which is highlighted with a red box). To the right, there's a large blue rectangular area labeled "Scan Non Tray". Below this area, the following details are listed:

- Owner: Library of Congress
- Container Type: Non-Tray
- Container Size: AL Ft Meade boxes

To the right of the main area, there's a sidebar titled "Scan Items" with "1 Items". It contains a table with one row:

Barcode
47342200886

At the bottom right of the sidebar are "Pause Job" and "Complete Job" buttons.

**Screenshot 2 (Bottom): Job Details with expanded history**

This screenshot shows the same job details page as above, but with the "View History" link expanded. The expanded history section includes additional fields: "Media Type" (Schematic) and "AL Ft Meade boxes".

The "Scan Items" sidebar also shows the expanded history, with the "Barcode" column now including "Media Type" and "AL Ft Meade boxes" for the item.

2. To export the job's history, click the "Export Audit" hyperlink.

The screenshots illustrate a software interface for managing accession jobs. The top screenshot shows a 'Scan Items' list with one item. A 'View History' modal is open, displaying a table of activity logs. The bottom screenshot shows the same interface after the 'View History' modal has been closed.

**Top Screenshot (View History Modal Open):**

User Updated	Last Action	Last Activity
System Generated	Job status changed to Running	1/8/2025, 2:20:37 PM

**Bottom Screenshot (View History Modal Closed):**

User Updated	Last Action	Last Activity
System Generated	Job status changed to Running	1/8/2025, 2:20:37 PM

### 5.1.7 Print Accession Job Summary Report

1. On desktop or mobile, click the three-dot-icon, then click the "Print Job" button.

The screenshots show the 'Scan Items' screen for Job 37. The left screenshot shows the 'Print Job' button highlighted with a red box. The right screenshot shows the 'Print Job' button highlighted with a red box, and the 'Media Type' dropdown is set to 'Book/Volume'.

**Job: 37**

- Edit
- Cancel Job
- Edit Tray Barcode
- Delete Tray
- Print Job**
- View History

Owner: LC

Container Type: Trayed

Container Size: AH FORT MEADE BOXES - AH

**Scan Items** 2 Items

- + Enter Barcode
- Delete
- Add Tray (1)
- Pause Job
- Complete Job

Barcode	Status
12398745611	✓
12398745610	✓

## 5.2 Verification

The Verification section provides instructions on verifying a completed Non-Trayed or Trayed Accession Job.

### 5.2.1 Complete Verification Job on Desktop

1. Navigate to the "Accession" tab from the navigation menu. Select the appropriate Verification Job.

The screenshot shows the 'Verification Jobs' list. The 'Verification' tab is selected in the sidebar, indicated by a red box. The table lists two verification jobs:

Job Number	Job Type	Status
126	Trayed	Running
132	Non-Trayed	Created

Rearrange

Records per page: 50 1-2 of 2

2. Immediately begin barcode scanning to start the verification process. For a trayed verification, first scan the tray's barcode, then scan the trayed item's barcode. For a non-tray verification, scan a non-trayed item barcode. After a non-trayed or trayed item is scanned twice, the "Item Verified" status will display.

The screenshot shows the 'Scan Items' section of a software interface. On the left, there is a summary of the job details: Job: 36, Owner: LC, Container Type: Non-Tray, Container Size: AL FORT MEADE BOXES - AL, and Media Type: Book/Volume. The main area displays a list of items under the heading 'Scan Items 1 Items'. A single item is listed: 'Barcode' followed by the number '18947689532'. To the right of the barcode number is a green checkmark icon with the text 'Item Verified' in a red box. At the top right of the 'Scan Items' section are three buttons: '+ Enter Barcode', 'Delete', 'Pause Job', and 'Complete Job'.

2a. To edit a scanned barcode, select the appropriate barcode and click the "Edit" button.

The first screenshot shows the 'Scan Items' interface with the barcode '18947689532' selected. The 'Edit Barcode' button is highlighted with a red box. The second screenshot shows the 'Edit Barcode' dialog box open, containing a text input field with the placeholder 'Please Enter Barcode' and two buttons: 'Submit' and 'Cancel'. The entire 'Edit Barcode' dialog box is highlighted with a red box.

2b. To delete a barcode, select the appropriate barcode(s), then click the "Delete" button.

The screenshot shows the 'Scan Items' section with one item listed: '18947689532'. Below the list are buttons for '+ Edit Barcode' and 'Delete'. A checkbox labeled 'Barcode' is checked next to the item. A green checkmark icon with the text 'Item Verified' is visible on the right.

3. If an non-trayed item was missed during Accession, it can be added and verified by scanning/entering the barcode twice. To add to a Non-Tray Verification Job, scan a barcode twice or click the "Enter Barcode" button, then enter the new barcode and click the "Submit" button.

The first screenshot shows the 'Scan Items' section with one item listed: '18947689532'. Below the list are buttons for '+ Enter Barcode' and 'Delete'. A checkbox labeled 'Barcode' is unchecked next to the item. A green checkmark icon with the text 'Item Verified' is visible on the right.

The second screenshot shows the same interface, but the 'Enter Barcode' button is highlighted with a red border. A modal dialog box titled 'Enter Barcode' is open, containing a text input field with the placeholder 'Please Enter Barcode' and two buttons: 'Submit' and 'Cancel'.

4. Multiple trays can be verified during a Trayed Verification Job. To verify an additional trayed item, click the "Next Tray" button, then select the additional tray from the list options.

**Job: 38**

AH98710

Owner  
LC

Container Type  
Trayed

Container Size  
AH FORT MEADE BOXES - AH

Media Type  
Book/Volume

**Scan Items** 1 Items

+ Enter Barcode

Barcode

00000000019 Item Verified ✓

**Job: 38**

AH98710

Owner  
LC

Container Type  
Trayed

Container Size  
AH FORT MEADE BOXES - AH

Media Type  
Book/Volume

**Scan Items** 1 Items

+ Enter Barcode

Barcode

Select Tray Item Verified ✓

Tray #: AH98720  
Trayed Not Started

Tray #: AH98710  
Trayed Completed

5. To edit the details of a Non-Trayed or Trayed Verification Job, click the three-dot-icon next to "Job Number" title and click the "Edit" button. The Owner, Media Type, Container size, and Container Type then can be edited. Click the "Save" button to save the changes.

The screenshot shows the 'Verification' section of a software interface. At the top, there's a navigation bar with 'Home', 'Verification', and a search bar for 'Search Job Number'. Below the navigation is a breadcrumb trail: 'Home > Verification > 132'. The main area displays a job titled 'Job: 132'. A context menu is open over the job title, with options: 'Edit' (highlighted with a red box), 'Print Job', 'Cancel Job', and 'View History'. The job details include: 'Owner' (LC), 'Container Type' (Non-Tray), 'Container Size' (NON-TRAY), and 'Media Type' (Book/Volume). To the right, a 'Scan Items' panel shows one item: 'Barcode' (00000000011) with a checked checkbox, and a status message 'Item Verified' with a green checkmark.

This screenshot shows the same interface after the 'Owner' field has been edited. The original value 'LC' has been replaced by a red box, indicating it has been modified. The other fields ('Container Type', 'Container Size', 'Media Type') also have their respective dropdown menus highlighted with red boxes. The 'Scan Items' panel remains the same, showing the single item with its barcode and verification status.

6. Click the "Pause Job" button to pause the Verification Job. While paused, the Verification Job cannot be completed. Click the "Resume Job" button to resume the Verification Job. While the Job is in a paused or running state, it will display on the accession dashboard as "In Progress" until completed.

**Job: 36**

18947689532

Owner  
LC

Container Type  
Non-Tray

Container Size  
AL FORT MEADE BOXES - A1

Media Type  
Book/Volume

**Scan Items** 1 Items

+ Enter Barcode

Barcode  
 18947689532 Item Verified

**Job: 36**

18947689532

Owner  
LC

Container Type  
Non-Tray

Container Size  
AL FORT MEADE BOXES - A1

Media Type  
Book/Volume

**Scan Items** 1 Items

+ Enter Barcode

Barcode  
 18947689532 Item Verified

7. Click the "Complete Job" button after all items have been verified.

**Job: 36**

18947689532

Owner  
LC

Container Type  
Non-Tray

Container Size  
AL FORT MEADE BOXES - A1

Media Type  
Book/Volume

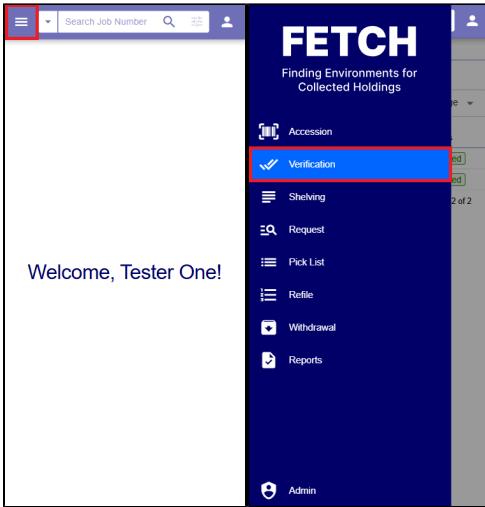
**Scan Items** 1 Items

+ Enter Barcode

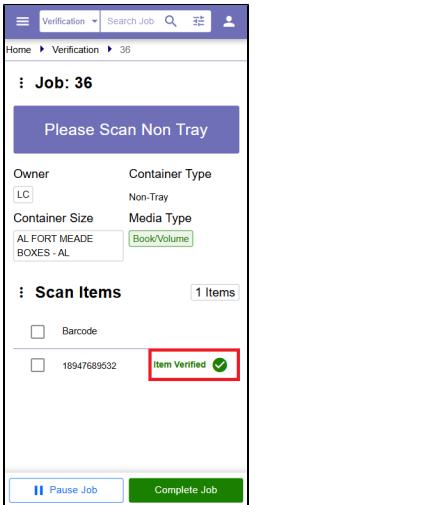
Barcode  
 18947689532 Item Verified

### 5.2.2 Complete Verification Job on Mobile

1. Navigate to the "Verification" tab from the navigation menu. Select the appropriate Verification Job.



2. Immediately begin barcode scanning to start the verification process. For a trayed verification, first scan the tray's barcode, then scan the trayed item's barcode. For a non-tray verification, scan a non-tray item barcode. After a non-trayed or trayed item is scanned twice, the "Item Verified" status will display.



2a. To edit a scanned barcode, select the appropriate barcode and click the "Edit" button.

This block contains three screenshots of the 'Verification' screen for 'Job: 36'.  
1. The first screenshot shows the initial state with a purple 'Please Scan Non Tray' header and a single item in the 'Scan Items' list.  
2. The second screenshot shows the same interface, but the 'Edit Barcode' button for the item '18947689532' is highlighted with a red box.  
3. The third screenshot shows a modal dialog titled 'Edit Barcode' with a text input field 'Please Enter Barcode' and 'Submit' and 'Cancel' buttons. The item '18947689532' is still visible in the background list with its original status.

2b. To delete a barcode, select the appropriate barcode(s), then click the "Delete" button.

The screenshots show the 'Scan Items' step of a verification job. On the left, a single item is selected and highlighted with a red box around the 'Delete' button. On the right, after the item is deleted, the 'Delete' button is no longer present.

3. If an non-trayed item was missed during Accession, it can be added and verified by scanning/entering the barcode twice. To add to a Non-Trayed Verification Job, scan a barcode twice or click the "Enter Barcode" button, then enter the new barcode and click the "Submit" button.

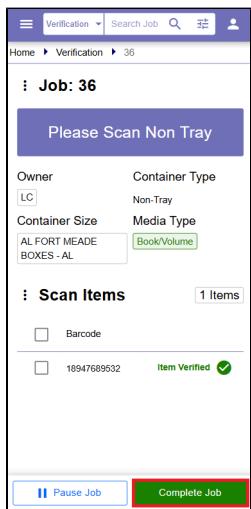
The screenshots show the 'Scan Items' step of a verification job. On the left, the 'Enter Barcode' button is highlighted with a red box. On the right, a modal dialog titled 'Enter Barcode' is displayed, containing a text input field with placeholder text 'Please Enter Barcode' and two buttons: 'Submit' and 'Cancel'. A red box highlights the entire dialog.

4. Multiple trays can be verified during a Trayed Verification Job. To verify an additional trayed item, click the "Next Tray" button, then select the additional tray from the list options.

5. To edit the details of a Non-Trayed or Trayed Verification Job, click the three-dot-icon next to "Job Number" title and click the "Edit" button. The Owner, Media Type, Container size, and Container Type then can be edited. Click the "Save" button to save the changes.

6. Click the "Pause Job" button to pause the Verification Job. While paused, the Verification Job cannot be completed. Click the "Resume Job" button to resume the Verification Job. While the Job is in a paused or running state, it will display on the accession dashboard as "In Progress" until completed.

7. Click the "Complete Job" button after all items have been verified.



### 5.2.3 Cancel Verification Job

1. On desktop or mobile, click the three-dot-icon, then click the "Cancel Job" button. All aspects of the Verification Job are deleted and the status of the corresponding Accession Job reverts back to "Paused".

The screenshots show the 'Job: 132' page. The left panel displays the job details: Owner (LC), Container Type (Non-Tray), Container Size (NON-TRAY), and Media Type (Book/Volume). The right panel shows the 'Scan Items' section with one item: 'Barcode' (00000000011) with 'Item Verified' checked. At the bottom are 'Pause Job' and 'Complete Job' buttons, with 'Complete Job' being red. In the bottom screenshot, the 'Cancel Job' button is also highlighted in red.

#### 5.2.4 View/Export Verification Job History

1. On desktop or mobile, click the three-dot-icon, then click the "View History" button.

The screenshots show the software interface for viewing verification job history. The top part is the desktop version, and the bottom part is the mobile version. Both versions have a similar layout:

- Job Details Panel (Left):** Displays the job number (Job: 132), owner (LC), container type (Non-Tray), container size (NON-TRAY), and media type (Book/Volume). The "View History" button is highlighted with a red box.
- Scan Items List (Right):** Shows 1 item. The list includes a barcode field, a checkbox for "Barcode", and the value "0000000011". To the right of the value is a green checkmark labeled "Item Verified".
- Control Buttons (Bottom):** Includes "Pause Job" (blue button) and "Complete Job" (green button).

2. To export the job's history, click the "Export Audit" hyperlink.

Verification ▾ Search Job Number Advanced Search

Home ▶ Verification ▶ 132

### Job: 132

Please Scan Non Tray

Owner LC

Container Type Non-Tray

Container Size

**View History**

User Updated	Last Action	Last Activity
ims_a1	Job status changed to Running	4/2/2025, 12:24:09 PM
ims_a1	Job status changed to Paused	4/2/2025, 12:23:36 PM
ims_a1	Job status changed to Created	4/2/2025, 12:20:18 PM

**Export Audit**

Pause Job Complete Job

Item Verified ✓

**View History**

User Updated	Last Action	Last Activity
ims_a1	Job status changed to Running	4/2/2025, 12:24:09 PM
ims_a1	Job status changed to Paused	4/2/2025, 12:23:36 PM
ims_a1	Job status changed to Created	4/2/2025, 12:20:18 PM

**Export Audit**

Pause Job Complete Job

#### 5.2.5 Print Verification Job Summary Report

1. On desktop or mobile, click the three-dot-icon, then click the "Print Job" button.

**Job: 132**

- [Edit](#)
- [Print Job](#)
- [Cancel Job](#)
- [View History](#)

Please Scan Non Tray

**Owner**  
LC

**Container Type**  
Non-Tray

**Container Size**  
NON-TRAY

**Media Type**  
Book/Volume

**Scan Items** 1 Items

+ Enter Barcode

Barcode	Item Verified
00000000011	✓

**Job: 132**

- [Edit](#)
- [Print Job](#)
- [Cancel Job](#)
- [View History](#)

Please Scan Non Tray

**Container Type**  
Non-Tray

**Media Type**  
Book/Volume

**NON-TRAY**

**Scan Items** 1 Items

+ Enter Barcode

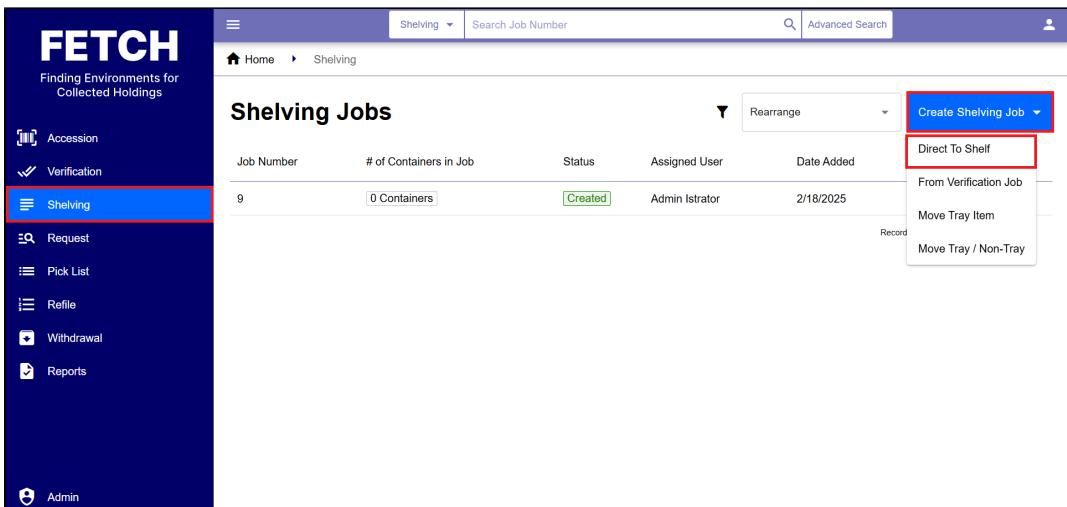
Barcode	Item Verified
00000000011	✓

## 5.3 Shelving

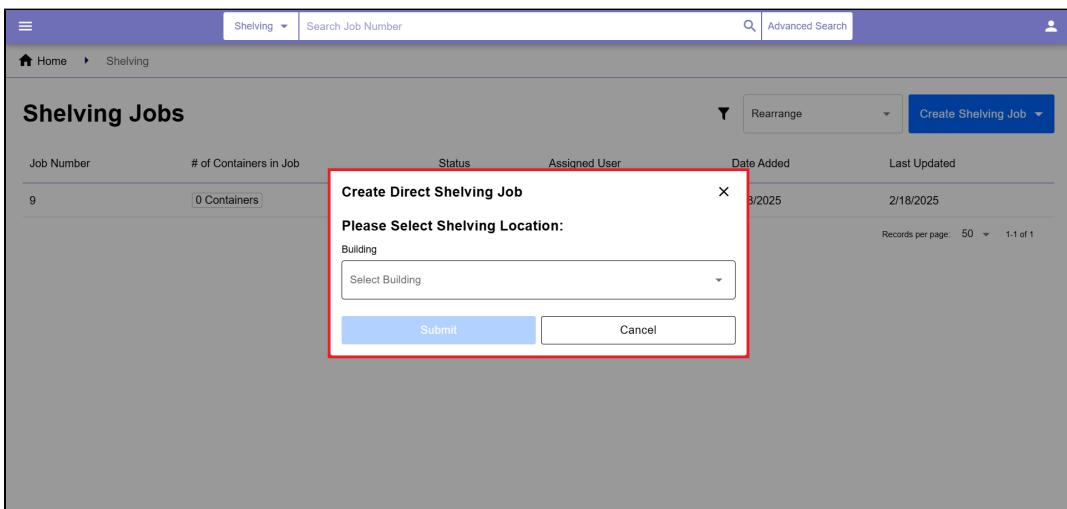
The Shelving section provides instructions on shelving accessioned non-trayed or trayed items using the Direct-to-Shelf method or a Verification Job.

### 5.3.1 Create "Direct-to-Shelf" Shelving Job on Desktop

1. To create a Shelving Job without using a Verification Job, navigate to the "Shelving" tab from the navigation menu, click the "Create Shelving Job" button, then click the "Direct To Shelf" button.

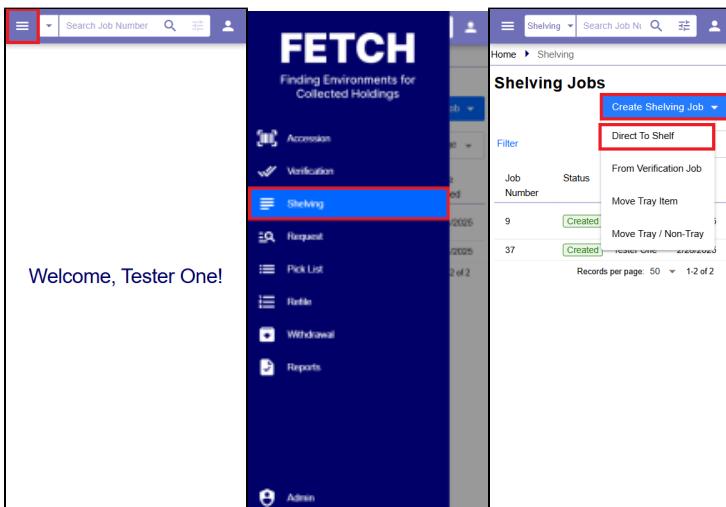


2. Select and submit a shelving building for the Direct-to-Shelf Job for creation.

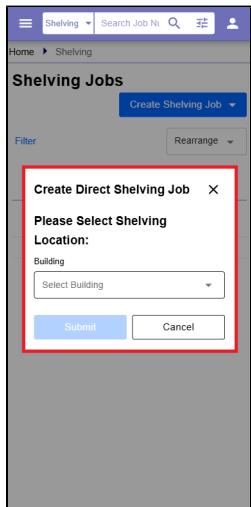


### 5.3.2 Create "Direct-to-Shelf" Shelving Job on Mobile

1. To create a Shelving Job without using a Verification Job, navigate to the "Shelving" tab from the navigation menu, click the "Create Shelving Job" button, then click the "Direct To Shelf" button.

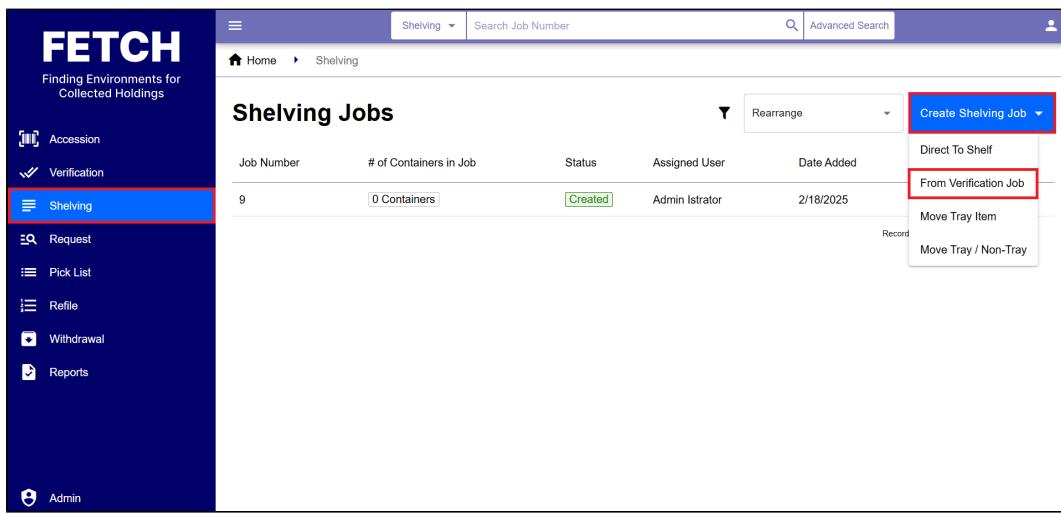


2. Select and submit a shelving building for the Direct-to-Shelf Job for creation.



### 5.3.3 Create Shelving Job from Verification Job on Desktop

1. To create a Shelving Job using completed Verification Job(s), navigate to the "Shelving" tab from the navigation menu, click the "Create Shelving Job" button, then click the "From Verification" button.



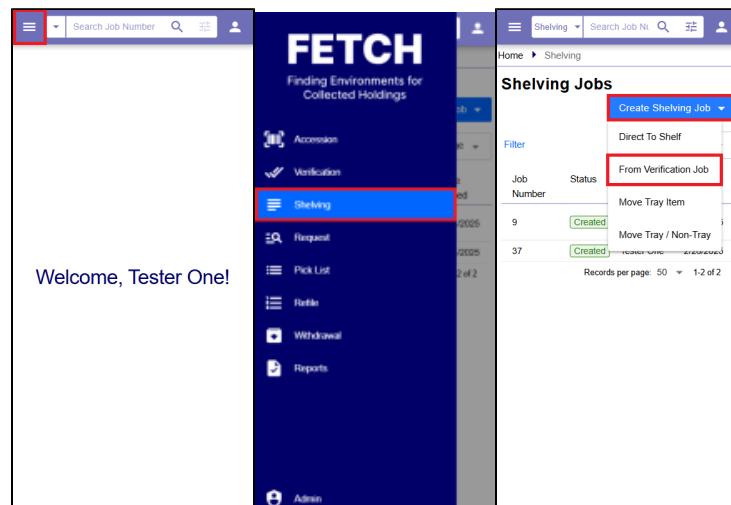
2. Assign the shelving location and enter the Verification Job(s) Number(s) to shelf.

a. If the shelving location should be system-generated, then click the "No" button for the "Assign Shelving Location" question. Select the building location in which the job should be shelved and click the "Submit" button.

b. If the shelving location should be defined by the user, then click the "Yes" button for the "Assign Shelving Location" question. Select the shelving location information and click the "Submit" button.

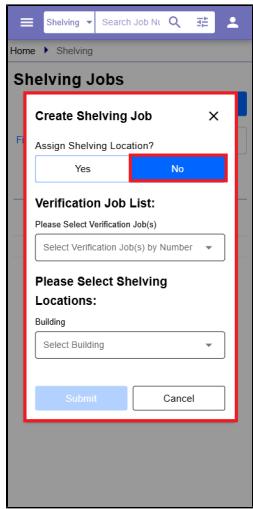
#### 5.3.4 Create Shelving Job from Verification Job on Mobile

1. To create a Shelving Job using completed Verification Job(s), navigate to the "Shelving" tab from the navigation menu, click the "Create Shelving Job" button, then click the "From Verification" button.

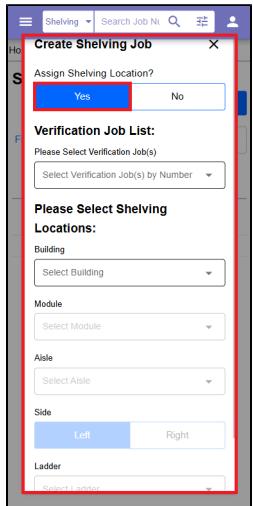


2. Assign the shelving location and enter the Verification Job(s) Number(s) to shelf.

- a. If the shelving location should be system-generated, then click the "No" button for the "Assign Shelving Location" question. Select the building location in which the job should be shelved and click the "Submit" button.



- b. If the shelving location should be defined by the user, then click the "Yes" button for the "Assign Shelving Location" question. Select the shelving location information and click the "Submit" button.



### 5.3.5 Assign Shelving Job on Desktop

1. Navigate to the unassigned shelving job from the shelving dashboard. Click the three-dot-icon and click the "Edit" button. After the "Assigned User" dropdown activates, select the user and click the "Save Edits" button.

Job Number: 41

Building: Fort Meade

Assigned User: (highlighted with a red box)

Date Created: 2/26/2025

Status: Created

Execute Job

Containers in Job:

Barcode	Owner	Size Class	Item Location
▲ No data available			

Job Number: 41

Building: Fort Meade

Assigned User: (highlighted with a red box)

Date Created: 2/26/2025

Status: Created

Save Edits Cancel

Containers in Job:

Barcode	Owner	Size Class	Item Location
▲ No data available			

### 5.3.6 Assign Shelving Job on Mobile

1. Navigate to the unassigned shelving job from the shelving dashboard. Click the three-dot-icon and click the "Edit" button. After the "Assigned User" dropdown activates, select the user and click the "Save Edits" button.

Job Number: 41

Assigned User: (highlighted with a red box)

Date Created: 2/26/2025

Containers in Job:

Barcode	Owner	Size Class	Item Location
▲ No data available			

Save Edits Cancel

### 5.3.7 Complete "Direct-to-Shelf" Shelving Job on Desktop

1. Scan the shelf where the non-tray or trayed item will be placed. To select a different shelf, click the "Scan New Shelf" Button.

The screenshot shows the shelving interface with the following details:

- Shelf Number:** Please Scan Shelf
- Owner:** Tester One
- Size Class:** CH FORT MEADE BOXES - CH
- Assigned User:** Tester One
- Date Created:** 2/26/2025
- Buttons:** Scan New Shelf (highlighted), Complete Job

The screenshot shows the shelving interface with the following details:

- Shelf Number:** 023206
- Owner:** LC
- Size Class:** CH FORT MEADE BOXES - CH
- Assigned User:** Tester One
- Date Created:** 2/26/2025
- Buttons:** Scan New Shelf (highlighted), Complete Job

2. Scan the non-tray or trayed item barcode, then enter the non-tray or trayed item's shelf position and click the "Submit" button.

The screenshot shows the shelving interface with the following details:

- Shelf Number:** 023206
- Owner:** LC
- Container Location:** 8596859670
- Shelf Position:** Enter Shelf Position
- Buttons:** Submit (highlighted), Cancel

3. Click the "Complete Job" button after all items have been scanned and shelved.

The screenshot shows a shelving job interface. At the top, there's a header with 'Shelving' and a search bar. Below the header, the path 'Home > Shelving > 43' is visible. A large blue box labeled 'Shelf Number:' contains the value '023206'. To its right, details are listed: 'Owner: LC', 'Size Class: CH FORT MEADE BOXES - CH', 'Assigned User: Tester One', and 'Date Created: 2/26/2025'. Below these details are two buttons: 'Scan New Shelf' (blue) and 'Complete Job' (green). In the main body, under 'Containers in Job:', there's a table with one row. The row contains 'Barcode: 85968596970', 'Owner: LC', 'Size Class: CH FORT MEADE BOXES - CH', 'Item Location: CSR2C-37-L-8-1-9', and a status column with a green checkmark and the text 'Shelved'.

### 5.3.8 Complete "Direct-to-Shelf" Shelving Job on Mobile

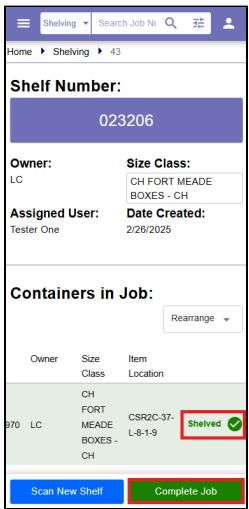
1. Scan the shelf where the non-tray or trayed item will be placed. To select a different shelf, click the "Scan New Shelf" Button.

The image contains two side-by-side screenshots of a mobile shelving application. Both screenshots show the same basic layout: a header with 'Shelving' and a search bar, a path 'Home > Shelving > 43', and a 'Barcode scanning is enabled' message with a 'Disable Scan' button. The first screenshot on the left has a red box around the 'Shelf Number' field, which contains the placeholder text 'Please Scan Shelf'. The second screenshot on the right shows the same fields filled with data: 'Shelf Number: 023206', 'Owner: LC', 'Size Class: CH FORT MEADE BOXES - CH', 'Assigned User: Tester One', and 'Date Created: 2/26/2025'. The 'Scan New Shelf' button at the bottom of both screenshots is highlighted with a red box.

2. Scan the non-tray or trayed item barcode, then enter the non-tray or trayed item's shelf position and click the "Submit" button.

This screenshot shows a modal dialog box titled 'Container Location' with an 'X' button in the top right corner. Inside the dialog, there's a text input field containing the barcode '8596859670'. Below the input field is a label 'Shelf Position' and a text input field with the placeholder 'Enter Shelf Position'. At the bottom of the dialog are two buttons: 'Submit' (blue) and 'Cancel' (white). The background of the main interface shows the same shelving job details as the previous screenshots, with a red box highlighting the 'Scan New Shelf' button at the bottom.

3. Click the "Complete Job" button after all items have been scanned and shelved.



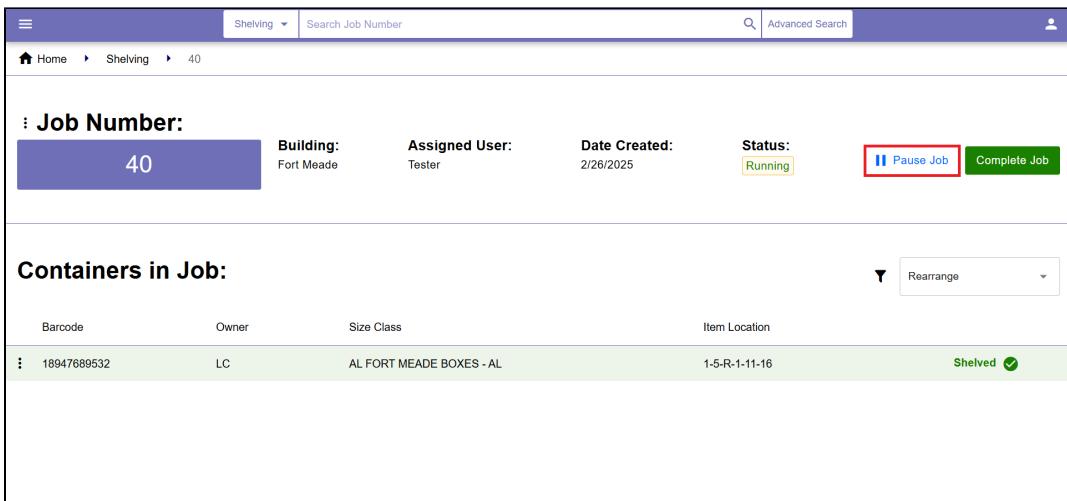
### 5.3.9 Complete Shelving Job from Verification Job on Desktop

1. Click the "Execute Job" button to begin shelving, then scan the non-tray or trayed item's barcode. A popup will then display the shelving location for the non-tray or trayed item. Scan the shelf to confirm this location, or click the "Select New Location" button to choose a different shelving location.

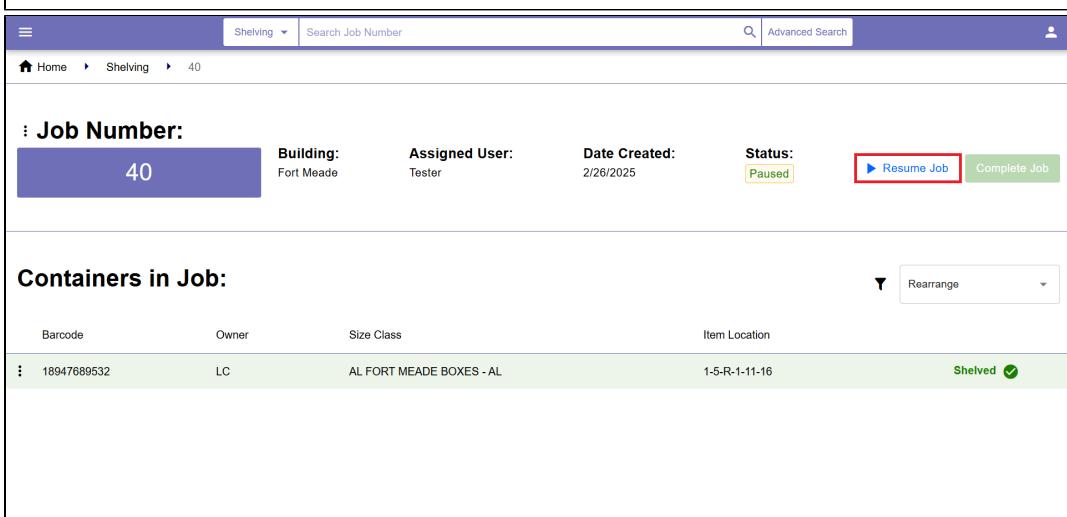
The screenshot shows a shelving dashboard. At the top, there's a header with a search bar for 'Job Number' and a button for 'Advanced Search'. Below the header, the navigation path is 'Home > Shelving > 40'. The main area has a section titled 'Job Number:' with a large input field containing '40'. To the right of the input field are details: 'Building: Fort Meade', 'Assigned User: Tester', 'Date Created: 2/26/2025', and 'Status: Created'. A red-bordered button labeled 'Execute Job' is located at the bottom right of this section. Below this is a section titled 'Containers in Job:' with a table. The table columns are 'Barcode', 'Owner', 'Size Class', and 'Item Location'. One row is visible: 'Barcode: 18947689532', 'Owner: LC', 'Size Class: AL FORT MEADE BOXES - AL', and 'Item Location: 1-5-R-1-11-16'. A 'Rearrange' button is at the top right of the table.

This screenshot shows the same shelving dashboard as above, but with a modal window open over it. The modal is titled 'Place Container' and contains a large input field with the value '18947689532'. Below this are some location details: 'Module: 1', 'Aisle: 5', 'Side: R', 'Ladder: 1', 'Shelf: 11', and 'Shelf Position: 16'. The modal also includes instructions: 'Please scan shelf to verify' and 'OR' followed by a blue button labeled 'Select New Location'. To the right of the modal, the status is shown as 'Running' with buttons for 'Pause Job' and 'Complete Job'. The rest of the dashboard is dimmed, indicating the modal is active.

2. To pause a Shelving Job, click the "Pause Job" button. While paused, the Shelving Job cannot be completed. To resume a Shelving Job, click the "Resume Job" button. While the job is in a paused or running state, it will display on the shelving dashboard as "Paused" or "Running" until completed.



The screenshot shows a shelving application interface. At the top, there's a navigation bar with 'Shelving' and a search bar labeled 'Search Job Number'. Below the navigation bar, the path 'Home > Shelving > 40' is displayed. The main content area starts with a section titled 'Job Number:' containing a large blue box with the number '40'. To the right of this box are details: 'Building: Fort Meade', 'Assigned User: Tester', 'Date Created: 2/26/2025', and 'Status: Running'. There are two buttons: a red-bordered 'Pause Job' button and a green 'Complete Job' button. Below this is a section titled 'Containers in Job:' with a table. The table has columns: Barcode, Owner, Size Class, and Item Location. A single row is shown: 'Barcode: 18947689532, Owner: LC, Size Class: AL FORT MEADE BOXES - AL, Item Location: 1-5-R-1-11-16'. A green 'Shelfed' status with a checkmark is shown to the right. A 'Rearrange' button with a dropdown arrow is also present.

This screenshot shows the same shelving application interface, but the job status has been changed to 'Paused'. The 'Status' box now says 'Paused' with a yellow background. The 'Resume Job' button, which was previously red, is now green with a play icon. All other elements remain the same as in the first screenshot.

3. To edit the shelving location of an item, click the three-dot-icon next to the item's barcode and click the "Edit" button. Select the item's new shelving location and click the "Submit" button.

**Job Number:** 40

**Building:** Fort Meade **Assigned User:** Tester **Date Created:** 2/26/2025 **Status:** Running

**Containers in Job:**

Barcode	Owner	Size Class	Item Location	Status
18947689532	LC	AL FORT MEADE BOXES - AL	1-5-R-1-11-16	Shelved ✓

**Edit Location**

**Job Number:** 40

**Building:** Fort Meade

**Containers in Job:**

Barcode	Owner	Size Class	Item Location	Status
18947689532	LC	AL	1-5-R-1-11-16	Shelved ✓

**Edit Shelving Location**

Module: 1

Aisle: 5 Side: Right

Ladder: 1

Shelf: 11 Shelf Position: Select Shelf Position

**Submit** **Cancel**

4. Click the "Complete Job" button after all items have been scanned and shelved.

**Job Number:** 40

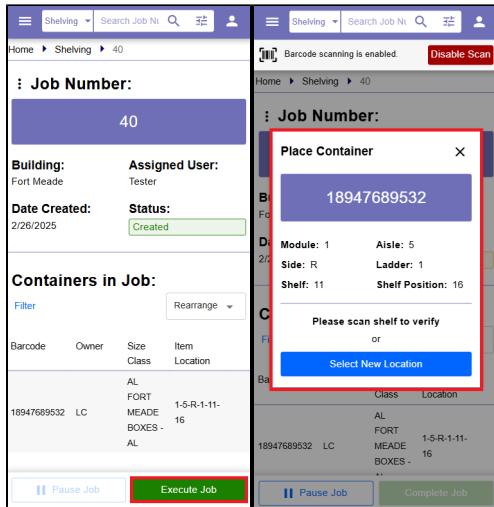
**Building:** Fort Meade **Assigned User:** Tester **Date Created:** 2/26/2025 **Status:** Running

**Containers in Job:**

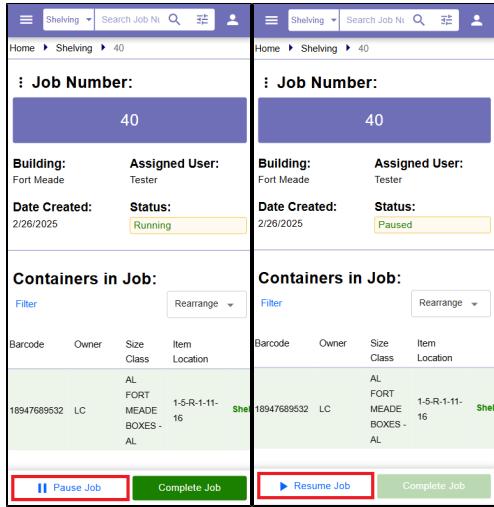
Barcode	Owner	Size Class	Item Location	Status
18947689532	LC	AL FORT MEADE BOXES - AL	1-5-R-1-11-16	Shelved ✓

### 5.3.10 Complete Shelving Job from Verification Job on Mobile

1. Click the "Execute Job" button to begin shelving, then scan the non-tray or trayed item's barcode. A popup will then display the shelving location for the non-tray or trayed item. Scan the shelf to confirm this location, or click the "Select New Location" button to choose a different shelving location.



2. To pause a Shelving Job, click the "Pause Job" button. While paused, the Shelving Job cannot be completed. To resume a Shelving Job, click the "Resume Job" button. While the job is in a paused or running state, it will display on the shelving dashboard as "Paused" or "Running" until completed.



3. To edit the shelving location of an item, click the three-dot-icon next to the item's barcode and click the "Edit" button. Select the item's new shelving location and click the "Submit" button.

The screenshot shows the shelving application's main interface. On the left, a large blue box displays the Job Number (40). Below it, sections for Building (Fort Meade), Assigned User (Tester), Date Created (2/26/2025), and Status (Running). A table titled 'Containers in Job' lists items with columns for Barcode, Owner, Size Class, Item, and Location. One row is highlighted with a red box around the 'Edit Location' button. On the right, a modal window titled 'Edit Shelving Location' is open, containing fields for Module (1), Aisle (5), Side (Left), Ladder (1), Shelf (11), and Shelf Position (Select Shelf Position). Buttons for 'Submit' and 'Cancel' are at the bottom.

- Click the "Complete Job" button after all items have been scanned and shelved.

This screenshot shows the same shelving application interface as the previous one, but the 'Containers in Job' table has been updated. The row for the item with barcode 18947689532 now has a green checkmark in the 'Shelved' column, indicating it has been successfully shelved. The 'Edit Location' button is still highlighted with a red box.

### 5.3.11 View/Export Shelving Job History

- On desktop or mobile, click the three-dot-icon, then click the "View History" button.

The screenshot shows a web-based shelving application interface. At the top, there's a navigation bar with 'Shelving' and a search bar for 'Job Number'. Below the navigation, the path 'Home > Shelving > 23' is displayed. The main content area starts with a section titled 'Job Number:' containing fields for 'Edit', 'Print Job', and a large blue button labeled '23'. To the right of this are details: 'Building: Fort Meade', 'Assigned User: Tester', 'Date Created: 1/9/2025', and 'Status: Completed'. A red box highlights the 'View History' link. Below this is a section titled 'Containers in Job:' with a table header row for 'Barcode', 'Owner', 'Size Class', and 'Item Location'. A single data row is shown: '12345678911', 'Library of Congress', 'AL Ft Meade boxes', and '2-1-L-8-2-8'. To the right of the table is a 'Rearrange' button.

This screenshot shows the same application interface, but the 'View History' link from the first screenshot has been clicked, opening a new view. The top navigation and job number details remain the same. The 'Containers in Job:' section is still present. A new section titled 'History' is visible, containing a table with columns 'Barcode', 'Owner', 'Size Class', and 'Item Location'. One row is listed: '12345678911', 'Library of Congress', 'AL Ft Meade boxes', and '2-1-L-8-2-8'. The word 'Shelved' is followed by a green checkmark icon. A 'Filter' button is located at the top left of the history table.

2. To export the job's history, click the "Export Audit" hyperlink.

**Job Number:** 23

**Building:** Fort Meade

**Containers in Job:**

Barcode	Owner
12345678911	Library of Congress

**View History**

User Updated	Last Action	Last Activity
ims_a1	Job status changed to Completed	1/9/2025, 12:16:10 PM
System Generated	Job status changed to Running	1/9/2025, 12:14:55 PM
System Generated	Job status changed to Created	1/9/2025, 12:14:52 PM

**Status:** Completed

**Export Audit**

**Rearrange**

**Close**

### 5.3.12 Print Shelving Job Summary Report

1. On desktop or mobile, click the three-dot-icon next to the "Job Number" title, then click the "Print Job" option.

**Job Number:**

37	Building: Fort Meade	Assigned User: Tester	Date Created: 2/26/2025	Status: Completed
<a href="#">Edit</a>	<a href="#">Print Job</a>	<a href="#">View History</a>		

**Containers in Job:**

Barcode	Owner	Size Class	Item Location	Status
AH98712	LC	AH FORT MEADE BOXES - AH	6-65-L-35-28-9	Shelfed ✓

**Job Number:**

37	Assigned User: Tester	Status: Completed
<a href="#">Edit</a>	<a href="#">Print Job</a>	<a href="#">View History</a>
Date Created: 2/26/2025		

**Containers in Job:**

Barcode	Owner	Size Class	Item Location	Status
AH98712	LC	AH FORT MEADE BOXES - AH	6-65-L-35-28-9	Shelfed

## 5.4 Request

The Request section provides instructions on creating and managing inventory requests.

### 5.4.1 Create Manual Request on Desktop

1. Navigate to the "Request" tab from the navigation menu. From the "Request View" or "Batch View" tabs, click the "Create" button, then click the "Create Manual Requests" option.

2. Populate the required and any optional fields and click the "Submit" button. Click the "Next" button to submit the current request and make an additional one.

#### 5.4.2 Create Manual Request on Mobile

1. Navigate to the "Request" tab from the navigation menu. From the "Request View" or "Batch View" tabs, click the "Create" button, then click the "Create Manual Requests" option.

Welcome, Tester One!

**Requests**

- [Request View](#)
- [Add to Pick List](#)
- [Create a Pick List](#)
- Create Manual Requests**
- [Import Requests from File](#)

Request ID #	Request Type	External Request ID
32		2222200001
36	Regular	7777770000 35
25		4444000002
23	Inventory Project	33300000002 23
24	Special Project	33300000003 24

Records per page: 50 ▾ 1-5 of 5

2. Populate the required and any optional fields and click the "Submit" button. Click the "Next" button to submit the current request and make an additional one.

**Create Manual Request**

Item Barcode (Required)  
Enter or Scan Item Barcode

External Request Id (Required)  
Enter External Request Id

Requestor Name  
Enter Requestor Name

Priority  
Select Priority

Select Request Type  
Select Request Type

Delivery Location  
Select Delivery Location

**Submit** **Next** **Cancel**

#### 5.4.3 Edit Request on Desktop

1. Navigate to the "Request" tab from the navigation menu and click the Request to be edited.

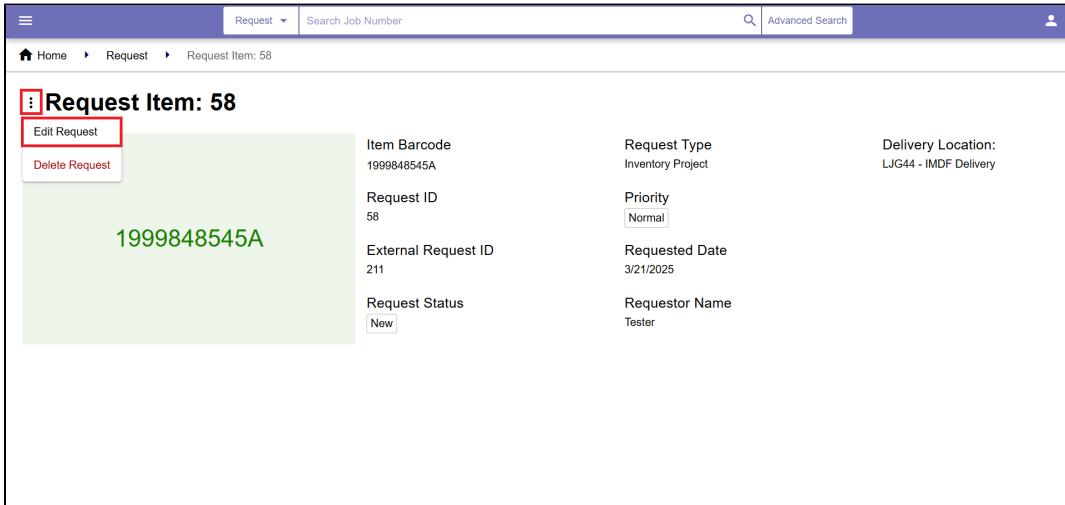
**Requests**

- [Request View](#)
- [Batch View](#)

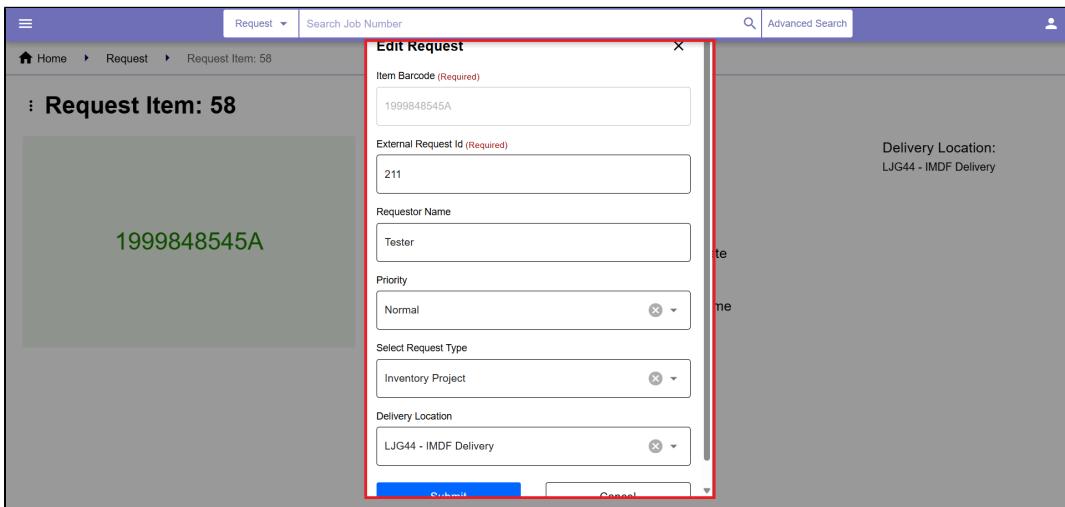
Request ID #	Request Type	Barcode	External Request ID	Building	Requestor Name	Request Status	Priority	Media Type	Item Location	Delivery Location
52	Inventory Project	63123456789	2	Fort Meade	Afa	New	High	Book/Volume	1-1-L-10-1-57	LJG44 - IMDF Delivery
55	Inventory Project	68000000002	5	Fort Meade	Afa	New	High	Flat File	1-1-L-10-1-54	LJG44 - IMDF Delivery
58	Inventory Project	1999848545A	211	Fort Meade	Tester	New	Normal	Microfilm	1-1-L-31-1-12	LJG44 - IMDF Delivery

Records per page: 50 ▾ 1-3 of 3

2. Click the three-dot-icon and click the "Edit Request" button.



3. Edit the listed data and click the "Save Edits" button.



#### 5.4.4 Edit Request on Mobile

1. Navigate to the "Request" tab from the navigation menu and click the Request to be edited.

Welcome, Tester One!

**Requests**

Request ID #	Request Type	Barcode	Request Name
52	Inventory Project	63123456789	Afa
55	Inventory Project	68000000002	Afa
58	Inventory Project	1999848545A	Tester

2. Click the three-dot-icon and click the "Edit Request" button.

**Request Item: 58**

**Edit Request**

Item Barcode	Request Type
1999848545A	Inventory Project
Request ID	Priority
58	Normal
External Request ID	Requested Date
211	3/21/2025
Request Status	Requestor Name
New	Tester
Delivery Location:	
LJG44 - IMDF Delivery	

3. Edit the listed data and click the "Save Edits" button.

**Edit Request**

**Item Barcode (Required)**  
1999848545A

**External Request Id (Required)**  
211

**Requestor Name**  
Tester

**Priority**  
Normal

**Select Request Type**  
Inventory Project

**Delivery Location**  
LJG44 - IMDF Delivery

**Submit**   **Cancel**

### 5.4.5 Delete Request on Desktop

1. Navigate to the "Request" tab from the navigation menu and click the Request to be canceled.

The screenshot shows the FETCH application interface. On the left, a dark sidebar contains links: Accession, Verification, Shelving, **Request** (which is selected and highlighted with a red border), Pick List, Refile, Withdrawal, Reports, and Admin. The main area is titled 'Requests' and shows a table with three rows of data. The columns are: Request ID #, Request Type, Barcode, External Request ID, Building, Requestor Name, Request Status, Priority, Media Type, Item Location, and Delivery Location. Row 52: Inventory Project, 63123456789, 2, Fort Meade, Afa, New, High, Book/Volume, 1-1-L-10-1-57, LJG44 - IMDF Delivery. Row 55: Inventory Project, 68000000002, 5, Fort Meade, Afa, New, High, Flat File, 1-1-L-10-1-54, LJG44 - IMDF Delivery. Row 58: Inventory Project, 1999848545A, 211, Fort Meade, Tester, New, Normal, Microfilm, 1-1-L-31-1-12, LJG44 - IMDF Delivery. The row for Request ID 58 is also highlighted with a red border. At the bottom right, there are buttons for 'Rearrange' and 'Create'.

2. Click the three-dot-icon and click the "Delete Request" button.

The screenshot shows the 'Request Item: 58' details page. The top navigation bar includes 'Home', 'Request', and 'Request Item: 58'. The main content area is titled 'Request Item: 58' and contains the following information:

- Item Barcode: 1999848545A
- Request Type: Inventory Project
- Delivery Location: LJG44 - IMDF Delivery
- Request ID: 58
- Priority: Normal
- External Request ID: 211
- Requested Date: 3/21/2025
- Request Status: New
- Requestor Name: Tester

A large green box highlights the item barcode '1999848545A'. The 'Delete Request' button in the top-left corner of the details panel is also highlighted with a red border.

### 5.4.6 Delete Request on Mobile

1. Navigate to the "Request" tab from the navigation menu and click the Request to be canceled.

Welcome, Tester One!

Request ID #	Request Type	Barcode	Request Name
52	Inventory Project	63123456789	Afa
55	Inventory Project	68000000002	Afa
58	Inventory Project	1999848545A	Tester

2. Click the three-dot-icon and click the "Delete Request" button.

**Request Item: 58**

Item Barcode	Request Type
1999848545A	Inventory Project
Request ID	Priority
58	Normal
External Request ID	Requested Date
211	3/21/2025
Request Status	Requestor Name
New	Tester
Delivery Location:	
LJG44 - IMDF Delivery	

#### 5.4.7 Import Bulk Request from File on Desktop

1. Navigate to the "Request" tab from the navigation menu. From the "Request View" or "Batch View" tabs, click the "Create" button, then click the "Import Requests from File" option.

**Requests**

Request ID #	Request Type	Barcode	External Request ID	Building	Requestor Name	Request Status	Priority	Media Type	Action Buttons
52	Inventory Project	63123456789	2	Fort Meade	Afa	New	High	Book/Value	Add to Pick List
55	Inventory Project	68000000002	5	Fort Meade	Afa	New	High	Flat File	Create a Pick List
58	Inventory Project	1999848545A	211	Fort Meade	Tester	New	Normal	Microfilm	Create Manual Requests

2. Click the "Download Template" hyperlink and populate the columns. Upload the populated template file, and click the "Submit" button.

The screenshot shows the 'Requests' page with a modal dialog titled 'Import Request File'. The dialog has a red border and contains the following fields:

- Support files: .csv
- Click to Download Template
- A dashed rectangular area labeled 'Click Here or Drag File to Upload'
- Two buttons at the bottom: 'Submit' (blue) and 'Cancel' (white)

In the background, there is a table with columns: Request ID #, Request Type, Barcode, External Request ID, Media Type, Item Location, Delivery Location, and Date Created. The table contains three rows of data.

3. If the batch request upload fails, see the downloaded error report detailing any errors found during the upload process. After resolving the errors, re-upload the corrected file to proceed.

4. Click the "Batch View" button to view the uploaded batch request.

The screenshot shows the 'Batch Requests' page with a modal dialog. The dialog has a red border and contains the following fields:

- Request View
- Batch View (highlighted with a red box)

In the background, there is a table with columns: Import Source, # of Requests, Status, Uploaded By, and Date Imported. The table contains two rows of data, both marked as 'Completed'.

#### 5.4.8 Import Bulk Request from File on Mobile

1. Navigate to the "Request" tab from the navigation menu. From the "Request View" or "Batch View" tabs, click the "Create" button, then click the "Import Requests from File" option.

Welcome, Tester One!

Request ID #	Type	External ID
32		2222200001
36	Regular	7777770000 35
25		4444000002
23	Inventory Project	33300000002 23
24	Special Project	33300000003 24

Records per page: 50 1-5 of 5

2. Click the "Download Template" hyperlink and populate the columns. Upload the populated template file, and click the "Submit" button.

Import Request File

Support files: .csv [Click to Download Template](#)

Click Here or Drag File to Upload

Submit Cancel

Request ID #	Type	External ID
3		
23	Inventory Project	33300000002 23
24	Special Project	33300000003 24

Records per page: 50 1-5 of 5

3. If the batch request upload fails, see the downloaded error report detailing any errors found during the upload process. After resolving the errors, re-upload the corrected file to proceed.

4. Click the "Batch View" button to view the uploaded batch request.

The screenshot shows the 'Batch Requests' section of the application. At the top, there are tabs for 'Request View' and 'Batch View', with 'Batch View' highlighted by a red box. Below this is a 'Filter' section and a table of imported files. The table has columns for 'Import Source', '# of Requests', 'Status', and 'Uploaded By'. Two rows are listed: 'text/csv' with 5 requests (status 'Completed', uploaded by 'tester1@loc.gov') and 'text/csv' with 3 requests (status 'Completed', uploaded by 'tester1@loc.gov'). At the bottom, it says 'Records per page: 50' and '1-8 of 8'.

## 5.5 Pick List and Retrieval

The Pick List and Retrieval section provides instructions on generating inventory retrieval lists and fetching those items from their permanent location.

### 5.5.1 Create Pick List Job on Desktop

1. Navigate to the "Request" tab from the navigation menu and click the "Create" button. Then click the "Create a Pick List" option.

The screenshot shows the 'Requests' page. On the left, a sidebar menu has 'Request' selected and highlighted with a red box. The main area shows a table of requests with columns: Request ID #, Request Type, Barcode, External Request ID, Building, Requestor Name, Status, Priority, Media Type, and various status buttons like 'Requested', 'Microfilm', etc. At the top right, there is a 'Create' button with a dropdown menu. The 'Create a Pick List' option is highlighted with a red box. Other options in the dropdown include 'Add to Pick List', 'Create Manual Requests', and 'Import Requests from File'.

2. Select the building where the requested items are originating from.

The screenshot shows a list of requests with a modal dialog titled "Filter Requests By Building" overlaid. The modal has a dropdown menu labeled "Select Building" with options like "Fort Meade" and "PickList". Below the dropdown are "Submit" and "Cancel" buttons. The main table lists requests with columns: Request ID #, Request Type, Barcode, External Request ID, Building, Requestor Name, Status, Priority, Media Type, Item Location, Delivery Location, and Date Created. One request is highlighted with a red border.

Request ID #	Request Type	Barcode	External Request ID	Building	Requestor Name	Status	Priority	Media Type	Item Location	Delivery Location	Date Created
32		2222220001		Fort Meade	PickList	Requested	Normal	Microfilm	1-1-L-20-12-14	LJG44 - IMDF Delivery	2/21/2025
36	Regular	77777770000	35	Fort Meade	Tester	Requested	Normal	Book/Volume	1-2-R-7-10-6	LJG44 - IMDF Delivery	2/21/2025
25		44440000002		Fort Meade	Tester	Requested	Normal	Microfilm	1-1-L-19-13-14	LJG44 - IMDF Delivery	2/20/2025
23	Inventory Project	33300000002	23	Fort Meade	Tester	Requested	Normal	Archival Box	1-1-L-19-13-13	LJG44 - IMDF Delivery	2/20/2025
24	Special Project	33300000003	24	Fort Meade	Tester	Requested	Normal	Archival Box	1-1-L-19-13-13	LJG49 - CMD Front Office	2/20/2025

Records per page: 50 1-5 of 5

3. Select applicable requests for retrieval and click the "Create Pick List" button. The request is generated into a Pick List Job, accessible either via the hyperlink job number or through the pick list dashboard.

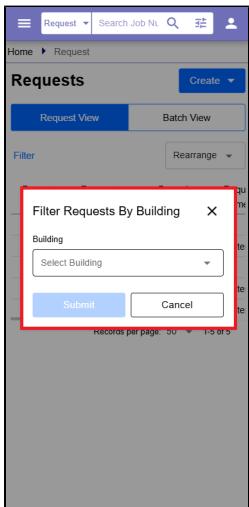
The screenshot shows the same Requests page as above, but with two requests selected (indicated by checked checkboxes). A red box highlights the "Create Pick List" button at the top right of the table area. The table structure is identical to the previous screenshot.

### 5.5.2 Create Pick List Job on Mobile

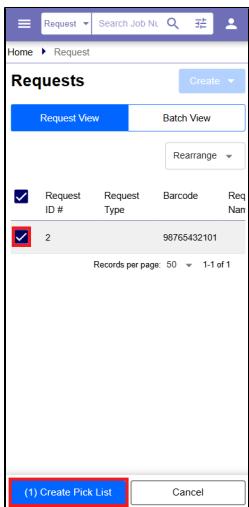
1. Navigate to the "Request" tab from the navigation menu and click the "Create" button. Then click the "Create a Pick List" option.

The screenshot shows the mobile version of the application. On the left, there's a sidebar with icons for Accession, Verification, Shelving, and Request. The "Request" icon is highlighted with a red box. On the right, the main screen shows the "Requests" list with a "Create" button at the top. A red box highlights the "Create a Pick List" option in the dropdown menu that appears when the "Create" button is clicked. The list of requests is identical to the ones shown in the desktop screenshot.

2. Select the building where the requested items are originating from.



3. Select applicable requests for retrieval and click the "Create Pick List" button. The request is generated into a Pick List Job, accessible either via the hyperlink job number or through the pick list dashboard.



### 5.5.3 Assign Pick List Job on Desktop

1. Click the three-dot-icon and click the "Edit" button. After the "Assigned User" dropdown activates, select the user and click the "Save Edits" button.

**Pick List #:**

<a href="#">Edit</a>	17	Building:	Assigned User:	# of Items:	Date Created:	Status:	<a href="#">Pause Job</a>	<a href="#">Complete Job</a>
<a href="#">Delete Job</a>		Fort Meade		1	2/21/2025	Running		
<a href="#">Print Job</a>								
<a href="#">View History</a>								

**Items in Job:**

Barcode	Tray Barcode	Item Location
44440000002	BH444444	1-1-L-19-13-14

**Pick List #:**

17	Building:	Assigned User:	# of Items:	Date Created:	Status:
	Fort Meade		1	2/21/2025	Running

**Items in Job:**

Barcode	Tray Barcode	Item Location
44440000002	BH444444	1-1-L-19-13-14

#### 5.5.4 Assign Pick List Job on Mobile

1. Click the three-dot-icon and click the "Edit" button. After the "Assigned User" dropdown activates, select the user and click the "Save Edits" button.

**Pick List #:**

<a href="#">Edit</a>	17	Assigned User:	Date Created:	Status:
<a href="#">Delete Job</a>		Fort Meade	2/21/2025	Running
<a href="#">Print Job</a>				
<a href="#">View History</a>				

**Items in Job:**

Barcode	Tray Barcode	Item Location
44440000002	BH444444	1-1-L-19-13-14

[Pause Job](#) [Complete Job](#)

**Pick List #:**

17	Assigned User:	Date Created:
	Fort Meade	2/21/2025

**Items in Job:**

Barcode	Tray Barcode	Item Location
44440000002	BH444444	1-1-L-19-13-14

[Save Edits](#) [Cancel](#)

#### 5.5.5 Add to Pick List Job on Desktop

1. Navigate to the "Request" tab from the navigation menu and click the "Create" button. Then click the "Add to Pick List" option.

Request ID #	Request Type	Barcode	External Request ID	Building	Requestor Name	Status	Priority	Media Type	Item Location	Delivery Location	Date Created
32		2222200001		Fort Meade		Requested		Microfilm	1-1-L-20-12-14	LJG44	2/21/2025
36	Regular	7777770000 35		Fort Meade	Tester	Requested	Normal	Book/Volume	1-2-R-7-10-6	LJG44 - IMDF Delivery	2/21/2025
25		44440000002		Fort Meade		PickList		Microfilm	1-1-L-19-13-14		2/20/2025
23	Inventory Project	33300000002 23		Fort Meade	Tester	Requested	Normal	Archival Box	1-1-L-19-13-13	LJG44 - IMDF Delivery	2/20/2025
24	Special Project	33300000003 24		Fort Meade	Tester	Requested	Normal	Archival Box	1-1-L-19-13-13	LJG49 - CMD Front Office	2/20/2025

2. Select the building where the requested items are originating from and the Pick List Job ID to which items will be added.

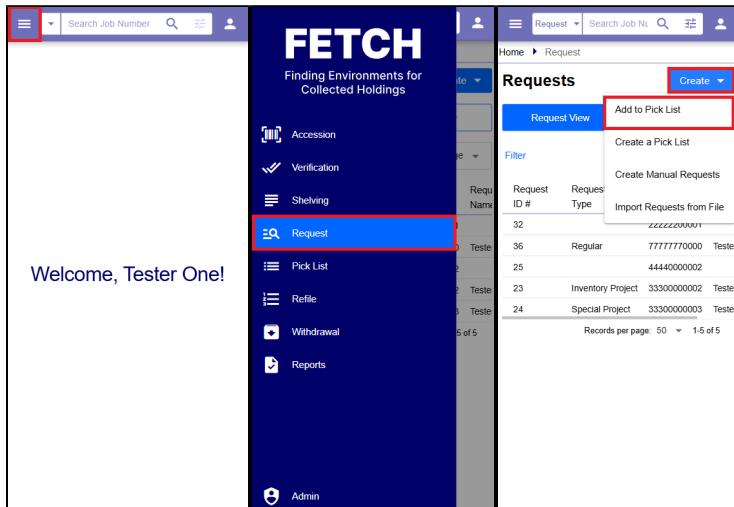
Request ID #	Request Type	Barcode	External Request ID	Building	Requestor Name	Status	Priority	Media Type	Item Location	Delivery Location	Date Created
32		2222200001		Fort Meade		Requested		Microfilm	1-1-L-20-12-14	LJG44	2/21/2025
36	Regular	7777770000 35		Fort Meade	Tester	Requested	Normal	Book/Volume	1-2-R-7-10-6	LJG44 - IMDF Delivery	2/21/2025
25		44440000002		Fort Meade		PickList		Microfilm	1-1-L-19-13-14		2/20/2025
23	Inventory Project	33300000002 23		Fort Meade	Tester	Requested	Normal	Archival Box	1-1-L-19-13-13	LJG44 - IMDF Delivery	2/20/2025
24	Special Project	33300000003 24		Fort Meade	Tester	Requested	Normal	Archival Box	1-1-L-19-13-13	LJG49 - CMD Front Office	2/20/2025

3. Select applicable requests for addition and click the "Add to Pick List" button. The updated Pick List Job can be accessed either via the hyperlink job number or through the pick list dashboard.

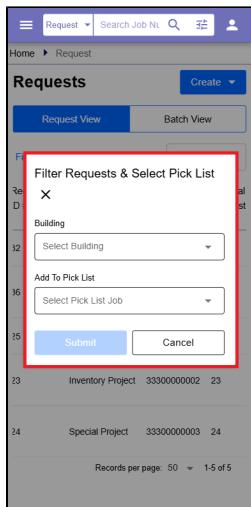
Request ID #	Request Type	Barcode	External Request ID	Building	Requestor Name	Status	Priority	Media Type	Item Location	Delivery Location	Date Created
<input checked="" type="checkbox"/> 32		2222200001		Fort Meade		Requested		Microfilm	1-1-L-20-12-14	LJG44	2/21/2025
<input checked="" type="checkbox"/> 36	Regular	7777770000 35		Fort Meade	Tester	Requested	Normal	Book/Volume	1-2-R-7-10-6	LJG44 - IMDF Delivery	2/21/2025
<input type="checkbox"/> 23	Inventory Project	33300000002 23		Fort Meade	Tester	Requested	Normal	Archival Box	1-1-L-19-13-13	LJG44 - IMDF Delivery	2/20/2025
<input type="checkbox"/> 24	Special Project	33300000003 24		Fort Meade	Tester	Requested	Normal	Archival Box	1-1-L-19-13-13	LJG49 - CMD Front Office	2/20/2025

### 5.5.6 Add to Pick List Job on Mobile

1. Navigate to the "Request" tab from the navigation menu and click the "Create" button. Then click the "Add to Pick List" option.



2. Select the building where the requested items are originating from and the Pick List Job ID to which items will be added.



3. Select applicable requests for addition and click the "Add to Pick List" button. The updated Pick List Job can be accessed either via the hyperlink job number or through the pick list dashboard.

Requests

Request View Batch View

Rearrange

Request ID #	Request Type	Barcode
32		2222200001
36	Regular	7777770000
23	Inventory Project	3330000002
24	Special Project	3330000003

Records per page: 50 1-4 of 4

(2) Add To Pick List Cancel

### 5.5.7 Remove from Pick List Job

1. On desktop or mobile, click the three-dot-icon next to the requested item for removal, then click the "Revert Item to Queue" button. The requested item is then removed from the pick list job and readded to the request queue on the request dashboard.

Picklist Search Job Number Advanced Search

Home > Pick List > 17

**Pick List #:** 17

**Building:** Fort Meade **Assigned User:** Tester **# of Items:** 1 **Date Created:** 2/21/2025 **Status:** Running

**Items in Job:**

Barcode	Tray Barcode	Item Location
4444000002	BH444444	1-1-L-19-13-14

Revert Item to Queue

Picklist Search Job Nur

Home > Pick List > 17

**Pick List #:** 17

**Building:** Fort Meade **Assigned User:** Tester

**# of Items:** 1 **Date Created:** 2/21/2025

**Status:** Running

**Items in Job:**

Barcode	Tray Barcode	Item Location
4444000002	BH444444	1-1-L-19-13-14

Revert Item to Queue

II Pause Job Complete Job

### 5.5.8 Delete Pick List Job

1. On desktop or mobile, click the three-dot-icon, then click the "Delete Job" button. All items in the job will be automatically reverted back to the Request Queue.

The top screenshot shows the 'Pick List #' screen for job 17. The 'Delete Job' button is highlighted with a red box. The bottom screenshot shows the same screen after the job has been deleted, with the 'Status' field now showing 'Paused'.

**Pick List #:**

**Items in Job:**

Barcode	Tray Barcode	Item Location
44440000002	BH444444	1-1-L-19-13-14

**Pick List #:**

**Items in Job:**

Barcode	Tray Barcode	Item Location
44440000002	BH444444	1-1-L-19-13-14

### 5.5.9 Retrieve Pick List Job on Desktop

1. Click the "Retrieve Pick List" button to begin the retrieval process. The default Pick List order is organized in location logical order. Click an item within the job to view its location details. Scan the trayed or non-trayed item to retrieve it. Once scanned, the item will automatically move to the bottom of the list.

The screenshot shows the 'Pick List #' screen for job 21. A modal window titled 'Item Details' is open, displaying the barcode '77777770000'. The 'Status' field in the background shows 'Running'. The 'Items in Job:' table has a row for barcode '77777770000' highlighted with a red box. A red box also highlights the 'Cancel' button at the bottom of the 'Item Details' modal.

**Pick List #:**

**Items in Job:**

Barcode	Tray Barcode
77777770000	

**Item Details**

77777770000

Item Barcode: 77777770000

Module: 1      Aisle: 2  
Side: R      Ladder: 7  
Shelf: 10      Shelf Position: 6

**Status:**

Running

**Rearrange**

3. Click the "Pause Job" button to pause a Pick List Job. While paused, the Pick List Job cannot be completed. Click the "Resume Job" button to resume the Pick List Job. While the job is in a paused or running state, it will display on the pick list dashboard as "In Progress" until completed.

This screenshot shows the 'Picklist' interface. At the top, there's a navigation bar with 'Home', 'Pick List', and the number '21'. Below it, the main area starts with 'Pick List #:' followed by '21'. To the right of the number are details: 'Building: Fort Meade', 'Assigned User: Tester', '# of Items: 1', 'Date Created: 2/25/2025', and 'Status: Running'. A red box highlights the 'Running' status. There are two buttons: 'Pause Job' (with a red border) and 'Complete Job'. Below this, a section titled 'Items in Job:' lists one item: 'Barcode: 77777770000', 'Tray Barcode: LC', 'Owner: CH FORT MEADE BOXES - CH', and 'Item Location: 1-2-R-7-10-6'. A 'Rearrange' button is also present.

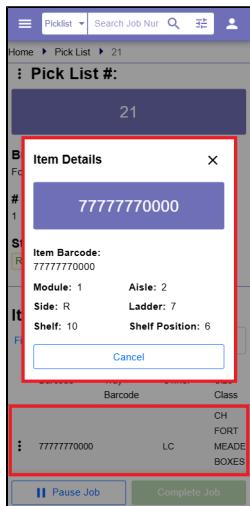
This screenshot shows the same 'Picklist' interface after the job has been paused. The 'Status' field now says 'Paused' (highlighted with a red box). The 'Resume Job' button is now highlighted with a red border. All other elements remain the same as in the previous screenshot.

4. Click the "Complete Job" button after all items have been scanned and retrieved.

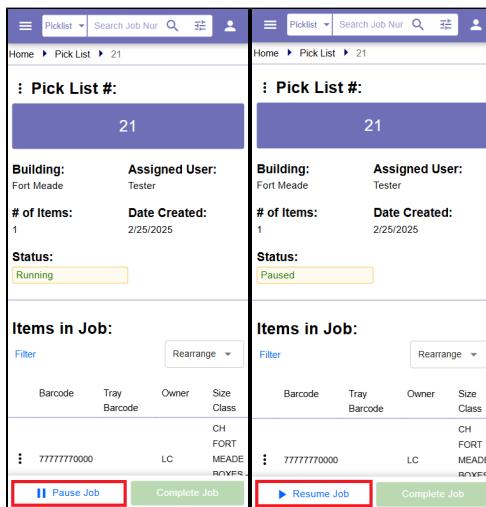
This screenshot shows the 'Picklist' interface again. The 'Status' field is still 'Running' (highlighted with a red box). The 'Complete Job' button is now highlighted with a red border. In the 'Items in Job:' section, the first item has a green background and a red box around the 'Retrieved' status indicator, which contains a green checkmark.

### 5.5.10 Retrieve Pick List Job on Mobile

1. Click the "Retrieve Pick List" button to begin the retrieval process. The default Pick List order is organized in location logical order. Click an item within the job to view its location details. Scan the trayed or non-trayed item to retrieve it. Once scanned, the item will automatically move to the bottom of the list.



3. Click the "Pause Job" button to pause a Pick List Job. While paused, the Pick List Job cannot be completed. Click the "Resume Job" button to resume the Pick List Job. While the job is in a paused or running state, it will display on the pick list dashboard as "In Progress" until completed.



4. Click the "Complete Job" button after all items have been scanned and retrieved.

**Pick List #:** 21

**Building:** Fort Meade **Assigned User:** Tester

**# of Items:** 1 **Date Created:** 2/25/2025

**Status:** Running

**Items in Job:**

Owner	Size	Item	Location
LC	CH FORT MEADE BOXES - 6	1-2-R-7-10	Retrieved

**Actions:** Pause Job | Complete Job

### 5.5.11 View/Export Pick List Job History

1. On desktop or mobile, click the three-dot-icon, then click the "View History" button.

**Pick List #:** 17

**Building:** Fort Meade **Assigned User:** Tester **# of Items:** 1 **Date Created:** 2/21/2025 **Status:** Paused

**Actions:** Resume Job | Complete Job

**Items in Job:**

Barcode	Tray Barcode	Item Location
44440000002	BH444444	1-1-L-19-13-14

**Pick List #:** 17

**Assigned User:** Tester **Date Created:** 2/21/2025

**Status:** Paused

**Items in Job:**

Barcode	Tray Barcode	Item Location
44440000002	BH444444	1-1-L-19-13-14

**Actions:** Resume Job | Complete Job

2. To export the job's history, click the "Export Audit" hyperlink.

**View History**

**Export Audit**

User Updated	Last Action	Last Activity
tester1@locetest.gov	Job status changed to Completed	1/7/2025, 8:02:08 PM
tester1@locetest.gov	Job status changed to Running	1/7/2025, 8:01:58 PM
tester1@locetest.gov	Job status changed to Created	1/7/2025, 8:01:52 PM

**Status**  
Completed

**Rearrange**

**Item Location**  
1-1-R-32-7-8      Retrieved ✓

**Close**

### 5.5.12 Print Pick List Job Summary Report

1. On desktop or mobile, click the three-dot-icon next to the "Job Number" title, then click the "Print Job" option.

**Pick List #:**

Building:	Assigned User:	# of Items:	Date Created:	Status:
Fort Meade	Tester	1	2/21/2025	Paused

**Items in Job:**

Barcode	Tray Barcode	Item Location
44440000002	BH444444	1-1-L-19-13-14

**Pick List #:**

Assigned User:	Date Created:
Tester	2/21/2025

**Status:**

**Items in Job:**

Barcode	Tray Barcode	Item Location
44440000002	BH444444	1-1-L-19-13-14

## 5.6 Refile

The Refile section provides instructions on returning non-trayed or trayed items to their permanent locations.

### 5.6.1 Add to Refile Queue on Desktop

1. Navigate to the "Refile" tab from the navigation menu. From the "Refile Job" or "Refile Queue" tabs, click the "Create" button, then click the "Add Item to Queue" option.

The screenshot shows the FETCH software interface. On the left, a dark sidebar menu lists various functions: Accession, Verification, Shelving, Request, Pick List, Refile (which is selected and highlighted in red), Withdrawal, Reports, and Admin. The main content area is titled "Refile Queue". It displays two items in the queue:

Item Location	Container Type	Media Type	Item Barcode	Owner	Container Size
3-14-R-2-22-2	Tray	Book/Volume	32323232323	LC	XS
1-1-L-1-1-75	Non-Tray	Book/Volume	11111111111	LC	NON-TRAY

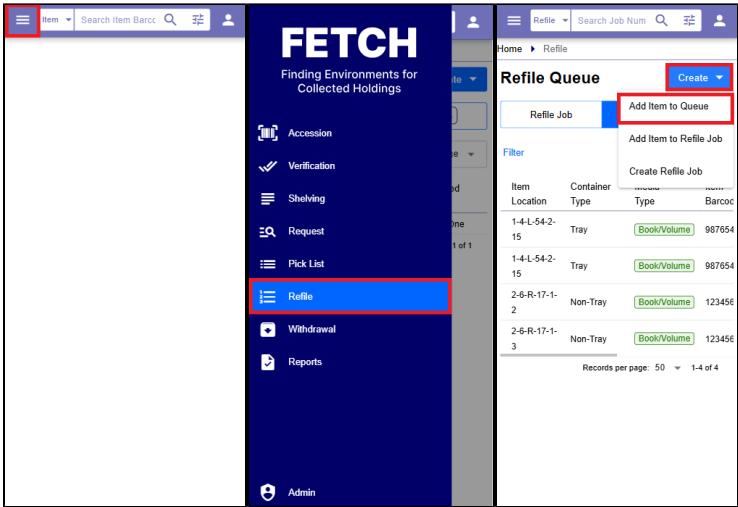
At the top right of the main content area, there are buttons for "Rearrange", "Create", and "Add Item to Queue" (which is highlighted with a red box). Below the table, it says "Add Item to Refile Job" and "Create Refile Job". At the bottom right, it shows "Records per page: 50" and "1 of 2".

2. Scan the item's barcode to add to the Refile Queue. Continue scanning items to add them to the queue, or click the "Done" button to finish the process. After scanning, the Refile Queue counter will update.

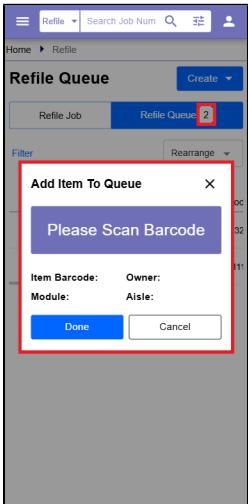
This screenshot shows the same Refile Queue page as above, but with an "Add Item To Queue" dialog box overlaid. The dialog box has a purple header "Add Item To Queue" and a purple body "Please Scan Barcode". It contains fields for "Item Barcode:" and "Owner:", and dropdowns for "Module:" and "Aisle:". At the bottom are "Done" and "Cancel" buttons. The rest of the page is dimmed.

### 5.6.2 Add to Refile Queue on Mobile

1. Navigate to the "Refile" tab from the navigation menu. From the "Refile Job" or "Refile Queue" tabs, click the "Create" button, then click the "Add Item to Queue" option.



2. Scan the item's barcode to add to the Refile queue. Continue scanning items to add them to the queue, or click the "Done" button to finish the process. After scanning, the Refile queue counter will update.



### 5.6.3 Create New Refile Job on Desktop

1. Navigate to the "Refile" tab from the navigation menu. From the "Refile Job" or "Refile Queue" tabs, click the "Create" button, then click the "Create Refile Job" option.

**Refile Jobs**

Job ID #	# of Items	# of Items Shelved	Status	Assigned User	Date Created	Action Buttons
2	0	0	Created	Tester One	2/18/2025	<a href="#">Create Refile Job</a>
4	2	1	Running	Tester One	2/19/2025	<a href="#">2/26/2025</a>
6	0	0	Created		2/26/2025	<a href="#">2/26/2025</a>
7	0	0	Created		2/26/2025	<a href="#">2/26/2025</a>
8	0	0	Created		2/26/2025	<a href="#">2/26/2025</a>

2. Select the building where the refiling will occur.

**Refile Jobs**

Filter Queue By Building

Building

Select Building

[Submit](#) [Cancel](#)

Job ID #	# of Items	# of Items Shelved	Date Created	Last Updated
2	0	0	2/18/2025	2/18/2025
4	2	1	2/19/2025	2/26/2025
6	0	0	2/26/2025	2/26/2025
7	0	0	2/26/2025	2/26/2025
8	0	0	2/26/2025	2/26/2025

3. Select applicable items for refile and click the "Create Refile Job" button. The selection is generated into a Refile Job, accessible either via the hyperlink job number or through the refile dashboard.

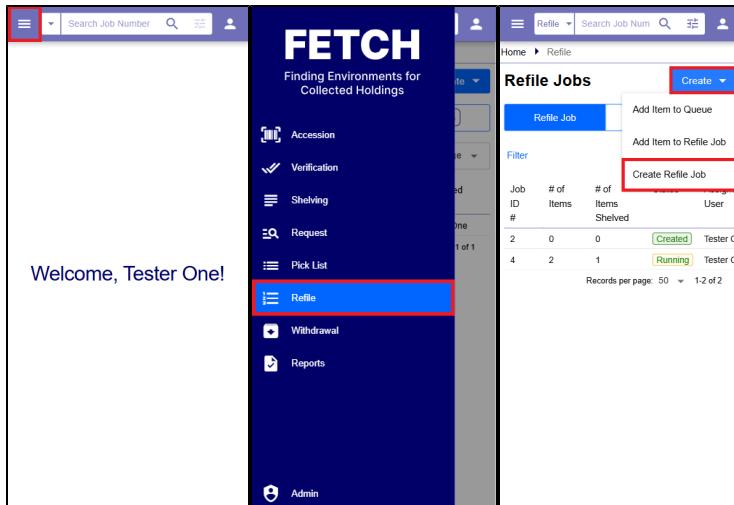
**Refile Queue**

Item Location	Container Type	Media Type	Item Barcode	Owner	Container Size
<input type="checkbox"/> 3-14-R-2-22-2	Tray	Book/Volume	32323232323	LC	XS
<input type="checkbox"/> 1-1-L-1-1-75	Non-Tray	Book/Volume	11111111111	LC	NON-TRAY
<input checked="" type="checkbox"/> 3-14-L-26-40-4	Non-Tray	Book/Volume	00000132275	LC	NON-TRAY

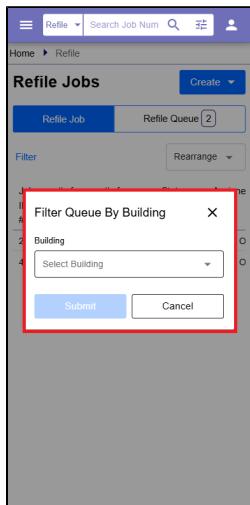
(1) [Create Refile Job](#) [Cancel](#)

#### 5.6.4 Create New Refile Job on Mobile

1. Navigate to the "Refile" tab from the navigation menu. From the "Refile Job" or "Refile Queue" tabs, click the "Create" button, then click the "Create Refile Job" option.



2. Select the building where the refiling will occur.



3. Select applicable items for refile and click the "Create Refile Job" button. The selection is generated into a Refile Job, accessible either via the hyperlink job number or through the refile dashboard.

Refile Queue

Refile Job	Refile Queue	3	
Filter	Rearrange		
Item Location	Container Type	Media Type	
3-14-R-2-22-2	Tray	Book/Volume	3
1-1-L-1-1-75	Non-Tray	Book/Volume	1
3-14-L-26-40-4	Non-Tray	Book/Volume	0

Records per page: 50 1-3 of 3

(1) Create Refile Job Cancel

### 5.6.5 Assign Refile Job on Desktop

1. Click the three-dot-icon and click the "Edit Job Info" button. After the "Assigned User" dropdown activates, select the user and click the "Save Edits" button.

Refile Job #:

<a href="#">Edit Job Info</a>	1	Assigned User:	# of Items:	Date Created	Status
<a href="#">Edit Items</a>		GIC	3	4/24/2025	Created
<a href="#">Delete Job</a>					<a href="#">Execute Refile Job</a>
<a href="#">Print Job</a>					
<a href="#">View History</a>					

1 Job:

Item Location	Tray Barcode	Barcode	Owner	Size Class
3-12-L-2-9-3	00015147763	GIC	Flat6	
3-12-L-2-9-6	00015147787	GIC	Flat6	
5-55-L-32-11-5	00102860020	Manuscript	DOCUMENT STORAGE BOXES (LEGAL) - DS1	

Refile Job #:

1	Assigned User:	# of Items:	Date Created	Status
	<input type="text"/>	3	4/24/2025	Created
				<a href="#">Save Edits</a> <a href="#">Cancel</a>

Items in Job:

Item Location	Tray Barcode	Barcode	Owner	Size Class
3-12-L-2-9-3	00015147763	GIC	Flat6	
3-12-L-2-9-6	00015147787	GIC	Flat6	
5-55-L-32-11-5	00102860020	Manuscript	DOCUMENT STORAGE BOXES (LEGAL) - DS1	

### 5.6.6 Assign Refile Job on Mobile

1. Click the three-dot-icon and click the "Edit Job Info" button. After the "Assigned User" dropdown activates, select the user and click the "Save Edits" button.

The image contains two side-by-side screenshots of a software application's interface. Both screenshots show a header with 'Refile' and a search bar. Below the header, the title 'Refile Job #' is displayed with the number '1'. The left screenshot has a red box around the 'Edit Job Info' button. The right screenshot has a red box around the 'Assigned User' dropdown menu, which lists 'Tester One' and 'Running'.

### 5.6.7 Add to Refile Job on Desktop

1. Navigate to the "Refile" tab from the navigation menu. From the "Refile Job" or "Refile Queue" tabs, click the "Create" button, then click the "Add Item to Refile Job" option.

The image shows the main interface of the FETCH software. On the left is a dark sidebar with various menu items: Accession, Verification, Shelving, Request, Pick List, Refile (which is highlighted with a red box), Withdrawal, Reports, and Admin. The main area is titled 'Refile Jobs'. It features a table with columns: Job ID #, # of Items, # of Items Shelved, Status, Assigned User, Date Created, and an 'Add Item to Refile Job' link. The 'Create' button at the top right of the table is also highlighted with a red box. The status column includes entries like 'Created' and 'Running'. The date created column shows dates from 2/18/2025 to 2/26/2025. At the bottom of the table, there are links for 'Records per page' (set to 50) and '1-5 of 5'.

2. Select the building where the refiling will occur and the Refile Job ID to which items will be added.

Refile Jobs

Job ID #	# of Items
2	0
4	2
6	0
7	0
8	0
9	1

Assigned User  
Tester One  
Tester One  
Tester One

Records per page: 50 | 1-6 of 6

3. Select applicable items for addition and click the "Add to Refile Job" button. The updated Refile Job can be accessed either via the hyperlink job number or through the refile dashboard.

Refile Queue

Item Location	Item Barcode
<input type="checkbox"/> 3-14-R-2-22-2	32323232323
<input checked="" type="checkbox"/> 1-1-L-1-1-75	11111111111

Records per page: 50 | 1-2 of 2

### 5.6.8 Add to Refile Job on Mobile

1. Navigate to the "Refile" tab from the navigation menu. From the "Refile Job" or "Refile Queue" tabs, click the "Create" button, then click the "Add Item to Refile Job" option.

The screenshot shows the FETCH software interface. On the left, there is a sidebar with various menu items: Accession, Verification, Shelving, Request, Pick List, Refile (which is highlighted with a red box), Withdrawal, Reports, and Admin. The main content area displays a "Refile Jobs" screen. At the top right of this screen is a "Create" button. Below it is a sub-menu with "Add Item to Queue" and "Add Item to Refile Job", with "Add Item to Refile Job" also highlighted with a red box. The main table lists two jobs:

Job ID	# of Items	# of Items Shelves	Status	User
2	0	0	Created	Tester O
4	2	1	Running	Tester O

At the bottom of the screen, there is a "Records per page" dropdown set to 50 and a page indicator "1-2 of 2".

2. Select the building where the refiling will occur and the Refile Job ID to which items will be added.

This screenshot shows a modal dialog box titled "Filter Queue & Select Refile Job". It contains two dropdown menus: "Select Building" and "Select Refile Job", both of which are highlighted with a red box. At the bottom of the dialog are "Submit" and "Cancel" buttons.

3. Select applicable items for addition and click the "Add to Refile Job" button. The updated Refile Job can be accessed either via the hyperlink job number or through the refile dashboard.

This screenshot shows the "Refile Queue" screen. A modal dialog at the bottom is highlighted with a red box and contains the text "(1) Add To Refile Job". The main table lists items with checkboxes:

Item Location	Item Barcode
3-14-R-2-22-2	32323232323
<input checked="" type="checkbox"/> 1-1-L-1-1-75	11111111111

At the bottom of the screen, there is a "Records per page" dropdown set to 50 and a page indicator "1-2 of 2".

## 5.6.9 Remove from Refile Job

1. On desktop or mobile, click the three-dot-icon next to the item for removal, then click the "Revert Item to Queue" button. The item is then removed from the refile job and readded to the Refile Queue on the Refile dashboard.

The screenshots show the Refile Job #1 interface. The top screenshot displays a single item selected, with its three-dot menu open and the 'Revert Item to Queue' option highlighted. The bottom screenshot shows multiple items selected, with both the three-dot menu and the 'Revert Item to Queue' option highlighted.

**Refile Job #:**

Assigned User:	# of Items:	Date Created	Status
1	3	4/24/2025	Created

**Items in Job:**

Item Location	Tray Barcode	Barcode	Owner	Size Class
3-12-L-2-9-3	00015147763	GIC	Flat6	
Revert Item to Queue	00015147787	GIC	Flat6	
5-55-L-32-11-5	00102860020	Manuscript	DOCUMENT STORAGE BOXES (LEGAL) - DS1	

2. To remove multiple items from a Refile Job on desktop or mobile, click the three-dot-icon and click the "Edit Items" button. Select the items for removal and click the "Revert Items to Queue". The items are then removed from the refile job and readded to the Refile Queue on the Refile dashboard.

**Refile Job #:**

1	Assigned User:	# of Items:	Date Created	Status	<a href="#">Revert Items to Queue</a>	<a href="#">Cancel</a>
		3	4/24/2025	Created		

**Items in Job:**

<input checked="" type="checkbox"/>	Item Location	Tray Barcode	Barcode	Owner	Size Class
<input checked="" type="checkbox"/>	3-12-L-2-9-3		00015147763	GIC	Flat6
<input checked="" type="checkbox"/>	3-12-L-2-9-6		00015147787	GIC	Flat6
<input checked="" type="checkbox"/>	5-55-L-32-11-5		00102860020	Manuscript	DOCUMENT STORAGE BOXES (LEGAL) - DS1

Home > Refile > 1	Refile	Search Job Num	<input type="text"/>																				
<b>Refile Job #:</b>																							
<table border="1"> <tr> <td>1</td> <td>Assigned User:</td> <td># of Items:</td> </tr> <tr> <td></td> <td></td> <td>3</td> </tr> <tr> <td>Date Created</td> <td>Status</td> <td></td> </tr> <tr> <td>4/24/2025</td> <td>Created</td> <td></td> </tr> </table>						1	Assigned User:	# of Items:			3	Date Created	Status		4/24/2025	Created							
1	Assigned User:	# of Items:																					
		3																					
Date Created	Status																						
4/24/2025	Created																						
<b>Items in Job:</b>																							
<table border="1"> <thead> <tr> <th><input checked="" type="checkbox"/></th> <th>Item Location</th> <th>Tray Barcode</th> <th>Barcode</th> <th>Owner</th> <th>Size Class</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>3-12-L-2-9-3</td> <td></td> <td>00015147763</td> <td>GIC</td> <td>Flat6</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>3-12-L-2-9-6</td> <td></td> <td>00015147787</td> <td>GIC</td> <td>Flat6</td> </tr> </tbody> </table>						<input checked="" type="checkbox"/>	Item Location	Tray Barcode	Barcode	Owner	Size Class	<input checked="" type="checkbox"/>	3-12-L-2-9-3		00015147763	GIC	Flat6	<input checked="" type="checkbox"/>	3-12-L-2-9-6		00015147787	GIC	Flat6
<input checked="" type="checkbox"/>	Item Location	Tray Barcode	Barcode	Owner	Size Class																		
<input checked="" type="checkbox"/>	3-12-L-2-9-3		00015147763	GIC	Flat6																		
<input checked="" type="checkbox"/>	3-12-L-2-9-6		00015147787	GIC	Flat6																		
<a href="#">Revert Items to Queue</a> <a href="#">Cancel</a>																							

### 5.6.10 Delete Refile Job

1. On desktop or mobile, click the three-dot-icon, then click the "Delete Job" button. Items within the job will be readded to the Refile Queue on the Refile dashboard.

**Refile Job #:**

Assigned User:	# of Items:	Date Created:	Status
1	3	4/24/2025	Created

**Items in Job:**

Item Location	Tray Barcode	Barcode	Owner	Size Class
3-12-L-2-9-3		00015147763	GIC	Flat6
3-12-L-2-9-6		00015147787	GIC	Flat6
5-55-L-32-11-5		00102860020	Manuscript	DOCUMENT STORAGE BOXES (LEGAL) - DS1

Assigned User:	# of Items:	Status
1	3	Created

**Items in Job:**

Item Location	Tray Barcode	Barcode	Owner
3-12-L-2-9-3		00015147763	GIC
3-12-L-2-9-6		00015147787	GIC

### 5.6.11 Execute Refile Job on Desktop

- Click the "Execute Refile Job" to start the Refile Job.

**Refile Job #:**

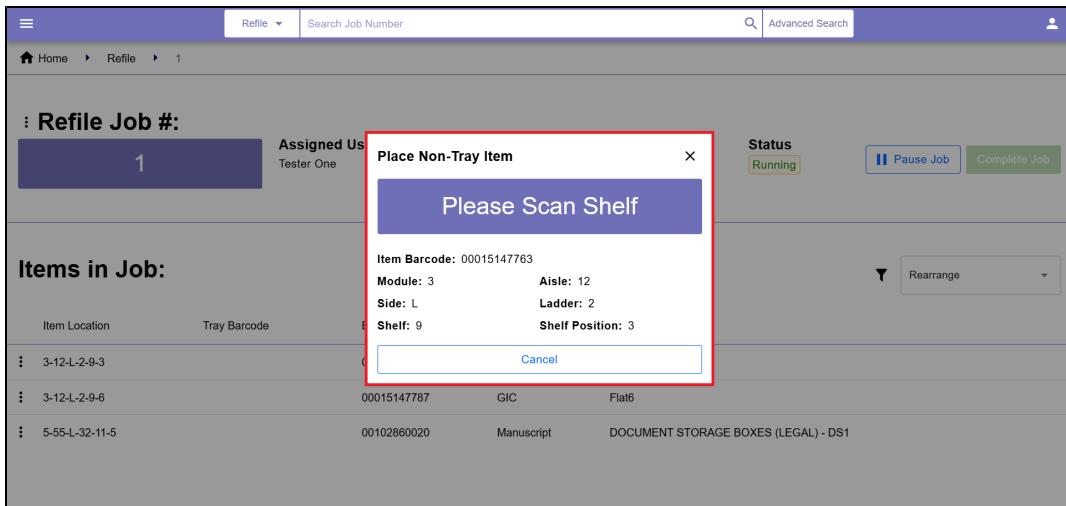
Assigned User:	# of Items:	Date Created:	Status
Tester One	1	4/24/2025	Created

**Items in Job:**

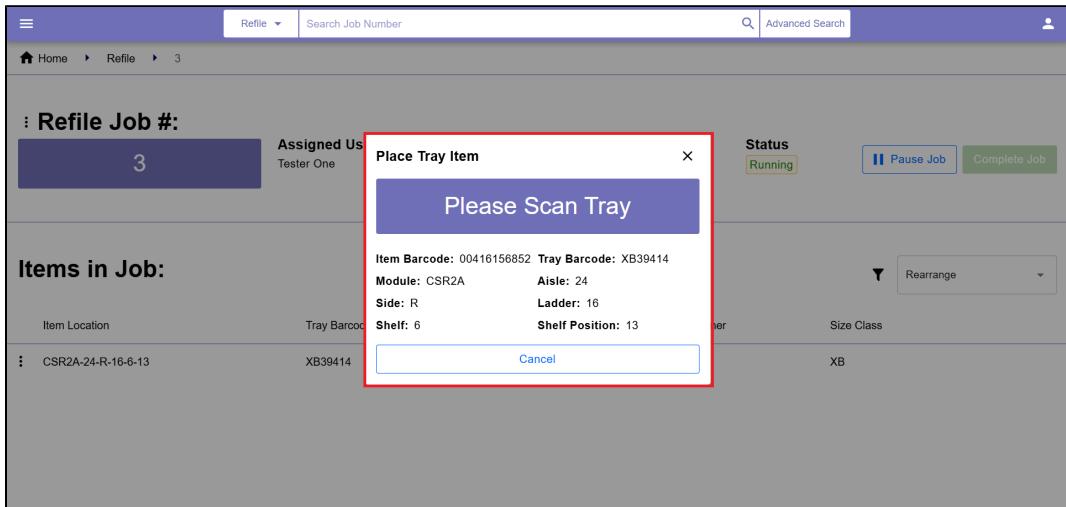
Item Location	Tray Barcode	Barcode	Owner	Size Class
CSR2A-24-R-16-6-13	XB39414	00416156852	LC	XB

- The default Refile list order is organized in location logical order. Click an item within the job to view its location details. Scan the trayed or non-trayed item to retrieve it.

2a. If refiling a non-trayed item, then scan the shelf's barcode. Once scanned, the item will automatically move to the bottom of the list.



2b. If refiling a trayed item, then scan the tray's barcode. Once scanned, the item will automatically move to the bottom of the list.



3. Click the "Pause Job" button to pause a Refile Job. While paused, the Refile Job cannot be completed. Click the "Resume Job" button to resume the Refile Job. While the job is in a paused or running state, it will display on the refile dashboard until completed.

**Refile Job #:**

1	Assigned User: Tester One	# of Items: 3	Date Created 4/24/2025	Status Running	<b>Pause Job</b>	Complete Job
---	------------------------------	------------------	---------------------------	-------------------	------------------	--------------

**Items in Job:**

Item Location	Tray Barcode	Barcode	Owner	Size Class	Action
3-12-L-2-9-3	00015147763	GIC	Flat6		Refiled ✓
5-55-L-32-11-5	00102860020	Manuscript	DOCUMENT STORAGE BOXES (LEGAL) - DS1		Refiled ✓
3-12-L-2-9-6	00015147787	GIC	Flat6		Refiled ✓

**Refile Job #:**

1	Assigned User: Tester One	# of Items: 3	Date Created 4/24/2025	Status Paused	<b>Resume Job</b>	Complete Job
---	------------------------------	------------------	---------------------------	------------------	-------------------	--------------

**Items in Job:**

Item Location	Tray Barcode	Barcode	Owner	Size Class	Action
3-12-L-2-9-3	00015147763	GIC	Flat6		Refiled ✓
5-55-L-32-11-5	00102860020	Manuscript	DOCUMENT STORAGE BOXES (LEGAL) - DS1		Refiled ✓
3-12-L-2-9-6	00015147787	GIC	Flat6		Refiled ✓

4. Click the "Complete Job" button after all items have been scanned and refiled.

**Refile Job #:**

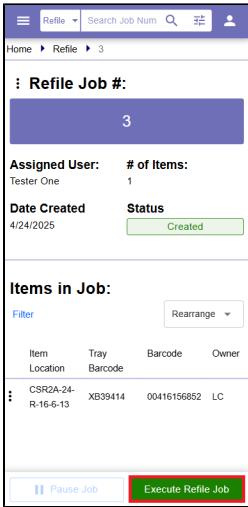
1	Assigned User: Tester One	# of Items: 3	Date Created 4/24/2025	Status Running	<b>Pause Job</b>	Complete Job
---	------------------------------	------------------	---------------------------	-------------------	------------------	--------------

**Items in Job:**

Item Location	Tray Barcode	Barcode	Owner	Size Class	Action
3-12-L-2-9-3	00015147763	GIC	Flat6		Refiled ✓
5-55-L-32-11-5	00102860020	Manuscript	DOCUMENT STORAGE BOXES (LEGAL) - DS1		Refiled ✓
3-12-L-2-9-6	00015147787	GIC	Flat6		Refiled ✓

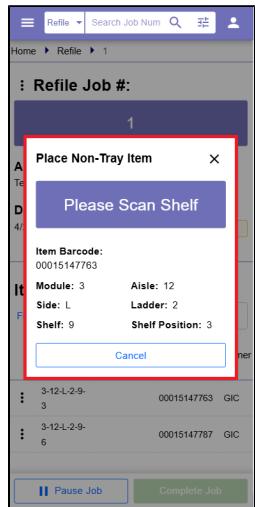
### 5.6.12 Execute Refile Job on Mobile

1. Click the "Execute Refile Job" to start the Refile Job.

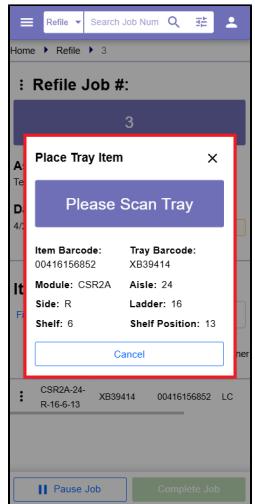


2. Scan the non-tray or trayed item's barcode.

2a. If refiling a non-trayed item, then scan the shelf's barcode.



2b. If refiling a trayed item, then scan the tray's barcode.



3. Click the "Pause Job" button to pause a Refile Job. While paused, the Refile Job cannot be completed. Click the "Resume Job" button to resume the Refile Job. While the job is in a paused or running state, it will display on the refile dashboard until completed.

The image contains two side-by-side screenshots of a software interface for managing a Refile Job. Both screenshots show a Refile Job with ID 1. In the first screenshot, the status is listed as 'Status: Running'. In the second screenshot, the status is listed as 'Status: Paused'. Both screenshots include sections for 'Assigned User' (Tester One), 'Date Created' (4/24/2025), and 'Items in Job'. The 'Items in Job' section lists three items with their respective barcode numbers and locations. At the bottom of each screenshot are two buttons: 'Pause Job' (highlighted in red) and 'Complete Job'.

4. Click the "Complete Job" button after all items have been scanned and refiled.

This screenshot shows the Refile Job dashboard for Job #1. The status is listed as 'Status: Running'. The 'Items in Job' section lists two items with their respective barcode numbers and locations. The 'Barcode' column includes a 'Refiled' checkbox with a checkmark. At the bottom of the screen are two buttons: 'Pause Job' and 'Complete Job'.

### 5.6.13 View/Export Refile Job History

1. On desktop or mobile, click the three-dot-icon, then click the "View History" button.

**Refile Job #:**

Assigned User:	# of Items:	Date Created	Status													
Tester One	3	4/24/2025	Completed													
<a href="#">Edit Job Info</a> <a href="#">Edit Items</a> <a href="#">Delete Job</a> <a href="#">Print Job</a>																
<b>Items in Job:</b> <table border="1"> <thead> <tr> <th>Item Location</th> <th>Tray Barcode</th> <th>Barcode</th> <th></th> </tr> </thead> <tbody> <tr> <td>3-12-L-2-9-3</td> <td>00015147763</td> <td>Refilled ✓</td> </tr> <tr> <td>5-55-L-32-11-5</td> <td>00102860020</td> <td>Refilled ✓</td> </tr> <tr> <td>3-12-L-2-9-6</td> <td>00015147787</td> <td>Refilled ✓</td> </tr> </tbody> </table>				Item Location	Tray Barcode	Barcode		3-12-L-2-9-3	00015147763	Refilled ✓	5-55-L-32-11-5	00102860020	Refilled ✓	3-12-L-2-9-6	00015147787	Refilled ✓
Item Location	Tray Barcode	Barcode														
3-12-L-2-9-3	00015147763	Refilled ✓														
5-55-L-32-11-5	00102860020	Refilled ✓														
3-12-L-2-9-6	00015147787	Refilled ✓														

**Refile Job #:**

Assigned User:	# of Items:	Date Created	Status													
Tester One	3	4/24/2025	Completed													
<a href="#">Edit Job Info</a> <a href="#">Edit Items</a> <a href="#">Delete Job</a> <a href="#">Print Job</a>																
<b>Items in Job:</b> <table border="1"> <thead> <tr> <th>Item Location</th> <th>Tray Barcode</th> <th>Barcode</th> <th></th> </tr> </thead> <tbody> <tr> <td>3-12-L-2-9-3</td> <td>00015147763</td> <td>Refilled</td> </tr> <tr> <td>5-55-L-32-11-5</td> <td>00102860020</td> <td>Refilled</td> </tr> <tr> <td>3-12-L-2-9-6</td> <td>00015147787</td> <td>Refilled</td> </tr> </tbody> </table>				Item Location	Tray Barcode	Barcode		3-12-L-2-9-3	00015147763	Refilled	5-55-L-32-11-5	00102860020	Refilled	3-12-L-2-9-6	00015147787	Refilled
Item Location	Tray Barcode	Barcode														
3-12-L-2-9-3	00015147763	Refilled														
5-55-L-32-11-5	00102860020	Refilled														
3-12-L-2-9-6	00015147787	Refilled														

2. To export the job's history, click the "Export Audit" hyperlink.

**Refile Job #:**

Assigned User: 1

**Items in Job:**

Item Location	Tray Barcode
1-1-R-32-7-8	

**View History**

Status: Running

Export Audit (button highlighted in red)

User Updated	Last Action	Last Activity
tester1@locetest.gov	Job status changed to Running	1/7/2025, 8:02:44 PM
tester1@locetest.gov	Job status changed to Created	1/7/2025, 8:02:30 PM

**Record Storage Box**

Close

Pause Job Complete Job

#### 5.6.14 Print Refile Job Summary Report

1. On desktop or mobile, click the three-dot-icon, then click the "Print Job" button.

The screenshots show the 'Refile Job #' screen in the FETCH software. The top part displays a summary of the job: Assigned User (Tester One), # of Items (3), Date Created (4/24/2025), and Status (Completed). Below this is a table titled 'Items in Job:' with columns for Item Location, Tray Barcode, and Barcode. The bottom part of the screen also shows the 'Items in Job:' table.

Item Location	Tray Barcode	Barcode	Status
3-12-L-2-9-3	00015147763		Refiled ✓
5-55-L-32-11-5	00102860020		Refiled ✓
3-12-L-2-9-6	00015147787		Refiled ✓

## 5.7 Move and Withdraw

The Move and Withdraw section provides instructions on transferring and removing inventory.

### 5.7.1 Move Item from Tray to New Tray on Desktop

1. Navigate to the "Shelving" tab from the navigation menu and click the "Move Tray Item" button.

The screenshot shows the 'Shelving' tab selected in the navigation menu. The main area displays a table of shelving jobs with columns for Job Number, Status, Assigned User, Date Added, Direct To Shelf, From Verification Job, and a dropdown menu. The dropdown menu contains 'Move Tray Item' and 'Move Tray / Non-Tray'. The table lists several jobs, all of which have a 'Created' status and were added on 2/26/2025.

Job Number	Status	Assigned User	Date Added	Direct To Shelf	From Verification Job
42	Created		2/26/2025		
9	Created	Administrator	2/18/2025		
44	Created	Tester One	2/26/2025		
45	Created		2/26/2025		
46	Created		2/26/2025		
47	Created		2/26/2025		
48	Created		2/26/2025		
49	Created		2/26/2025		
50	Created		2/26/2025		
38	Created		2/26/2025		

2. Scan the new tray barcode in which the item(s) will be moved to.

The screenshot shows a software interface for moving items to a new tray. At the top, there's a navigation bar with 'Shelving' and a search bar. Below it, the path 'Home > Shelving > Move Tray Item' is visible. The main area has a heading 'Tray Barcode:' followed by a large input field containing 'Please Scan Tray'. To the right of this field are four labels: 'Owner:', 'Size Class:', 'Assigned User:', and 'Date Transferred:', each with a corresponding dropdown or input field. Below these are two buttons: 'Complete Transfer' (green) and 'Cancel Transfer' (red). A large empty area below the input field is highlighted with a red box.

3. Scan the barcode of the item(s) that will be moved.

This screenshot continues the process. The tray barcode 'AH87654' is now entered in the input field. The 'Owner:' field shows 'Library of Congress', 'Size Class:' shows 'AH Ft Meade boxes', 'Assigned User:' shows 'Tester One', and 'Date Transferred:' is empty. The 'Complete Transfer' and 'Scan New Tray' buttons are present. Below this, a section titled 'Scan Items to Tray:' is shown with three columns: 'Item Barcode', 'Tray Barcode', and 'Owner'. A note says 'No data available'. A 'Rearrange' button is also visible.

The next screenshot shows the results of scanning an item. The 'Item Barcode' column contains '98765456754', the 'Tray Barcode' column contains 'AH87654', and the 'Owner' column contains 'Library of Congress'. To the right of the 'Owner' column is a green box with a checkmark and the text 'Ready To Transfer'. The rest of the interface is identical to the previous screenshot.

4. Click the "Complete Transfer" button.

Shelving Search Job Number Advanced Search

Home > Shelving > Move Tray Item

**Tray Barcode:**

AH87654	Owner: Library of Congress	Size Class: AH Ft Meade boxes	Assigned User: Tester One	Date Transferred:	<b>Complete Transfer</b>	Scan New Tray
---------	----------------------------	-------------------------------	---------------------------	-------------------	--------------------------	---------------

**Scan Items to Tray:**

Item Barcode	Tray Barcode	Owner	Ready To Transfer
98765456754	AH87654	Library of Congress	Ready To Transfer ✓

Rearrange

### 5.7.2 Move Item from Tray to New Tray on Mobile

1. Navigate to the "Shelving" tab from the navigation menu and click the "Move Tray Item" button.

The screenshot shows the mobile version of the FETCH application. On the left, there's a sidebar with icons for Accession, Verification, Shelving (which is highlighted with a red box), Request, Pick List, Refile, Withdrawal, and Reports. The main area displays a list of "Shelving Jobs". A dropdown menu titled "Create Shelving Job" is open, showing options like "Direct To Shelf", "From Verification Job", and "Move Tray Item" (which is also highlighted with a red box). The list of jobs includes items such as job number 42 (Created, Tester One, 2/26/2025), job number 9 (Created, Tester One, 2/26/2025), and several others from 44 to 54, all in the "Created" state.

2. Scan the originating tray's barcode.

Shelving Search Job N. Advanced Search

Home > Shelving > Move Tray Item

**Tray Barcode:**

Please Scan Tray
------------------

Owner: Size Class:  
Assigned User: Date Transferred:

Complete Transfer Cancel Transfer

3. Scan the barcode of the item(s) that will be moved.

Tray Barcode: AH87654

Owner: Library of Congress Size Class: AH Ft Meade boxes

Assigned User: Tester One Date Transferred:

Scan Items to Tray:

Item Barcode	Tray Barcode	Owner
▲ No data available		

Complete Transfer Scan New Tray

Tray Barcode: AH87654

Owner: Library of Congress Size Class: AH Ft Meade boxes

Assigned User: Tester One Date Transferred:

Scan Items to Tray:

Item Barcode	Tray Barcode	Owner
98765456754	AH87654	Library of Congress Ready To Transfer

Complete Transfer Scan New Tray

4. Click the "Complete Transfer" button.

Tray Barcode: AH87654

Owner: Library of Congress Size Class: AH Ft Meade boxes

Assigned User: Tester One Date Transferred:

Scan Items to Tray:

Item Barcode	Tray Barcode	Owner
98765456754	AH87654	Library of Congress Ready To Trans

Complete Transfer Scan New Tray

### 5.7.3 Move Tray or Non-Tray to New Shelf on Desktop

1. Navigate to the "Shelving" tab from the navigation menu and click the "Move Tray/Non-Tray" button.

The screenshot shows the 'Shelving Jobs' page in the FETCH system. The left sidebar has a 'Shelving' item selected, indicated by a red box. The main area displays a table of shelving jobs:

Job Number	Status	Assigned User	Date Added
42	Created		2/26/2025
9	Created	Admin Istrator	2/18/2025
44	Created	Tester One	2/26/2025
45	Created		2/26/2025
46	Created		2/26/2025
47	Created		2/26/2025
48	Created		2/26/2025
49	Created		2/26/2025
50	Created		2/26/2025
38	Created		2/26/2025

A red box highlights the 'Move Tray / Non-Tray' option in the top right corner of the table header.

2. Scan the new shelf barcode in which the tray or non-tray will be moved to.

The screenshot shows the 'Move Tray/Non-Tray' page. The top navigation bar includes 'Shelving' and 'Move Tray/Non-Tray'. The main area has a large red box containing the text 'Please Scan Shelf'. Below this, there are fields for 'Owner:', 'Size Class:', 'Assigned User:', and 'Date Transferred:', each with a dropdown arrow. At the bottom right are 'Complete Transfer' and 'Cancel Transfer' buttons.

3. Scan the barcode of the tray or non-tray that will be moved and enter it's current shelf position.

**Shelf Barcode:**

100164	Owner: Library of Congr	Size Class: Place Container(s)	Assigned User: Date Transferred:	Complete Transfer	Scan New Shelf
--------	-------------------------	--------------------------------	----------------------------------	-------------------	----------------

**Transfer:**

Barcode	Owner	Shelf Position	Location	Rearrange
▲ No data available		Enter Shelf Postion		
		<input type="button" value="Confirm"/>	<input type="button" value="Cancel"/>	

**Shelf Barcode:**

100164	Owner: Library of Congress	Size Class: BL Ft Meade boxes	Assigned User: Tester One	Date Transferred:	Complete Transfer	Scan New Shelf
--------	----------------------------	-------------------------------	---------------------------	-------------------	-------------------	----------------

**Transfer:**

Barcode	Owner	Size Class	Location	Rearrange
94587346578	Library of Congress	BL Ft Meade boxes	1-1-L-9-1-8	<input checked="" type="checkbox"/> Ready To Transfer

5. Click the "Complete Transfer" button.

**Shelf Barcode:**

100164	Owner: Library of Congress	Size Class: BL Ft Meade boxes	Assigned User: Tester One	Date Transferred:	Complete Transfer	Scan New Shelf
--------	----------------------------	-------------------------------	---------------------------	-------------------	-------------------	----------------

**Transfer:**

Barcode	Owner	Size Class	Location	Rearrange
94587346578	Library of Congress	BL Ft Meade boxes	1-1-L-9-1-8	<input checked="" type="checkbox"/> Ready To Transfer

#### 5.7.4 Move Tray or Non-Tray to New Shelf on Mobile

1. Navigate to the "Shelving" tab from the navigation menu and click the "Move Tray/Non-Tray" button.

The screenshot shows the FETCH software interface. On the left, a sidebar menu has 'Shelving' selected, highlighted with a red box. The main area displays a list of 'Shelving Jobs' with columns for Job Number, Status, and Date Transferred. A dropdown menu at the top right shows options like 'Create Shelving Job', 'Direct To Shelf', 'From Verification Job', 'Move Tray Item', and 'Move Tray / Non-Tray'. A message 'Welcome, Tester One!' is visible in the center.

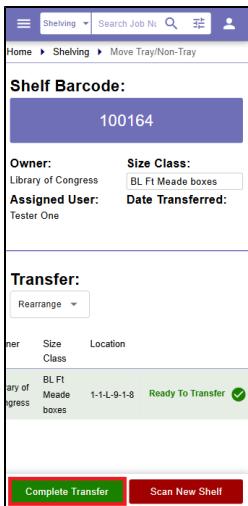
2. Scan the new shelf barcode in which the tray or non-tray will be moved to.

This screenshot shows the 'Move Tray/Non-Tray' transfer screen. It prompts the user to 'Please Scan Shelf'. Below this, it shows owner and size class information: 'Owner: Library of Congress' and 'Size Class: BL Ft Meade boxes'. There are also fields for 'Assigned User: Tester One' and 'Date Transferred:'. At the bottom are 'Complete Transfer' and 'Cancel Transfer' buttons.

3. Scan the barcode of the tray or non-tray that will be moved and enter its current shelf position.

This screenshot shows the 'Move Tray/Non-Tray' transfer screen with the shelf barcode '100164' entered. The 'Place Container(s)' field contains '94587346578'. The 'Transfer:' section shows the current shelf position 'Enter Shelf Postion' and buttons for 'Confirm' and 'Cancel'. The status bar at the bottom indicates 'Ready To Transfer' with a green checkmark. At the bottom are 'Complete Transfer' and 'Scan New Shelf' buttons.

5. Click the "Complete Transfer" button.



### 5.7.5 Withdraw Items or Trays on Desktop

1. Navigate to the "Withdrawal" tab from the navigation menu and click the "Create Withdraw" button.

The screenshot shows the 'Withdraw' tab selected in the top navigation bar. The main area is titled 'Withdraw Jobs' and displays a single job entry: Job ID # 16, 2 Items, Status Created, Date Created 2/27/2025. A red box highlights the 'Create Withdraw Job' button. On the left sidebar, the 'Withdrawal' option is also highlighted with a red box.

2. After clicking the "Add Items" button, the following options for barcodes are available:

The screenshot shows the 'Withdraw Job' screen. At the top, there's a header with 'Withdraw' and a search bar. Below the header, the job number '18' is displayed. To the right of the job number, it says 'Assigned User: Tester', '# of Items: 0', 'Date Created: 2/28/2025', and 'Status: Created'. A green 'Withdraw Items' button is on the far right. In the center, there's a section titled 'Items in Job:' with columns for Shelf Barcode, Tray Barcode, Barcode, Owner, and Item Status. A message 'No data available' is shown. To the right of these columns is a dropdown menu with options: 'Rearrange', 'Add Items' (which is highlighted with a red box), 'Manually Enter Barcode', 'Scan Item(s)', and 'Bulk Upload Items'.

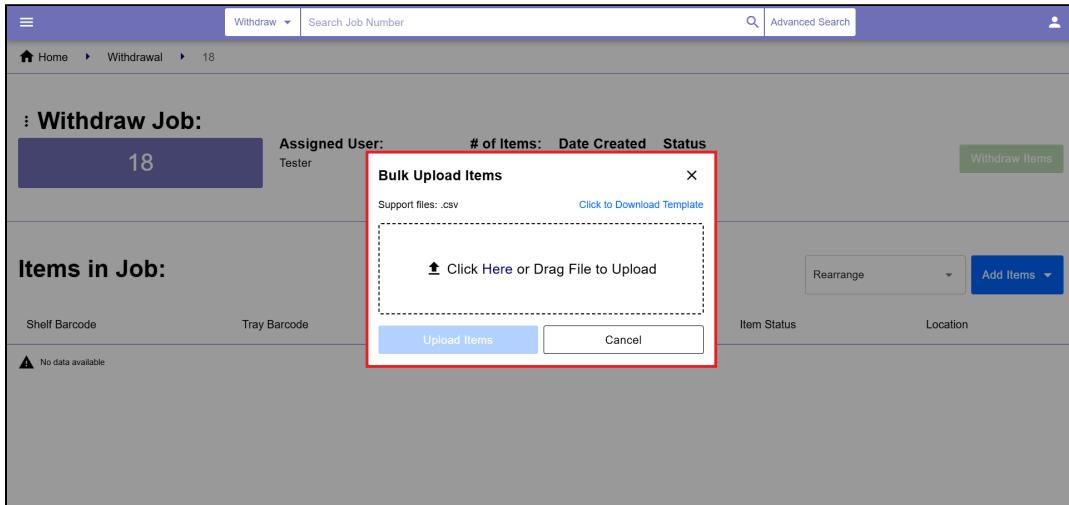
2a. To manually input a barcode, click the "Manually Enter Barcode" button, enter the item's barcode, and click the "Submit" button.

This screenshot shows the same 'Withdraw Job' screen as above, but with a modal dialog titled 'Manual Barcode Entry' overlaid. The dialog has a text input field labeled 'Type Barcode' containing 'Please Enter Barcode', a blue 'Submit' button, and a white 'Cancel' button. The rest of the interface is dimmed behind the modal.

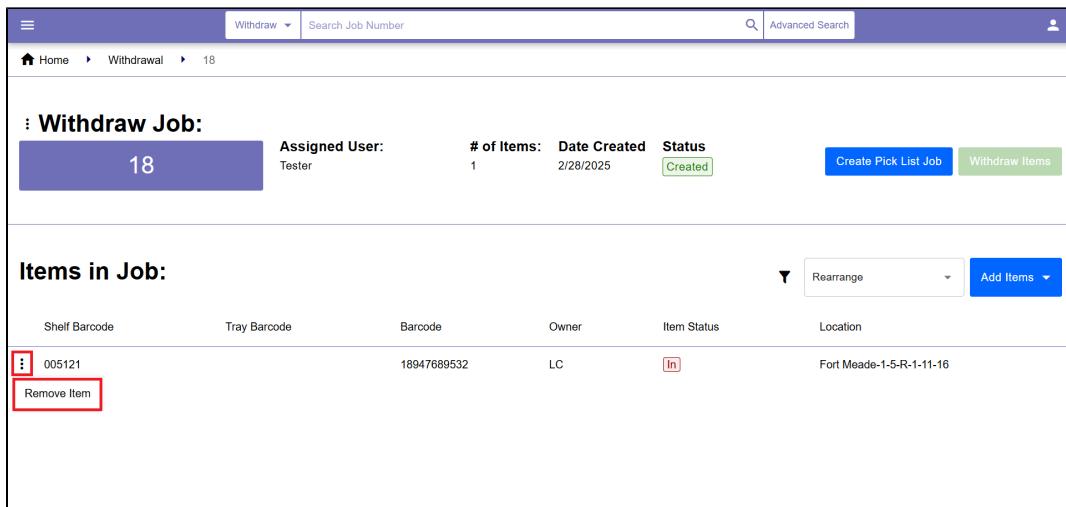
2b. To scan a barcode, click the "Scan Item(s)" button. Users can continually scan items for withdrawal or complete the process by clicking the "Done" button.

This screenshot shows the 'Withdraw Job' screen again, but now with a modal dialog titled 'Scan Item' overlaid. The dialog has a purple background with the text 'Please Scan Item' in white, a blue 'Done' button, and a white 'Cancel' button. The background of the main screen is dimmed.

2c. To bulk upload barcodes, click the "Bulk Upload Items" button. Click the "Download Template" hyperlink and populate the area(s) that will be bulk created.



3. Click the three-dot-icon next to the item for removal and click the "Remove Item" button.



4. Only items with a status of "Out" can be withdrawn. If an item has a status of "In", click the "Create Pick List Job" to create a Pick List Job for all items with a status of "In". If all items have a status of "Out", click the "Withdraw Items" to complete the Withdraw Job. The request is generated into a Pick List Job, accessible either via the hyperlink job number or through the pick list dashboard.

**Withdraw Job:**

Assigned User: Tester	# of Items: 1	Date Created: 2/28/2025	Status: <span style="background-color: #c8e6c9; border: 1px solid #2e6b2e; color: #2e6b2e; padding: 2px;">Created</span>
--------------------------	---------------	-------------------------	--

**Items in Job:**

Shelf Barcode	Tray Barcode	Barcode	Owner	Item Status	Location
005121	18947689532	LC	<span style="background-color: #ffcccb; border: 1px solid #d9534f; color: #d9534f; padding: 2px;">In</span>	Fort Meade-1-5-R-1-11-16	

5. Refer to Section 5.6 to retrieve the generated Pick List Job. Once the Pick List job is retrieved, the item's status will update to "Out". Click the "Withdraw Items" button after all items have a status of "Out" to complete the Withdraw Job.

**Withdraw Job:**

Assigned User: Tester	# of Items: 1	Date Created: 2/28/2025	Status: <span style="background-color: #c8e6c9; border: 1px solid #2e6b2e; color: #2e6b2e; padding: 2px;">Created</span>
--------------------------	---------------	-------------------------	--

**Items in Job:**

Shelf Barcode	Tray Barcode	Barcode	Owner	Item Status	Location
005121	18947689532	LC	<span style="background-color: #ffcccb; border: 1px solid #d9534f; color: #d9534f; padding: 2px;">Out</span>	Fort Meade-1-5-R-1-11-16	

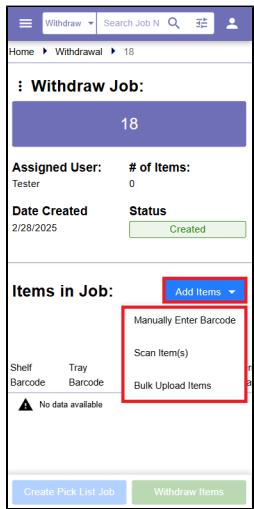
### 5.7.6 Withdraw Items or Trays on Mobile

1. Navigate to the "Withdrawal" tab from the navigation menu and click the "Create Withdraw" button.

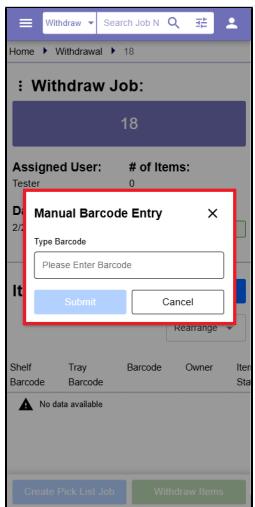
The screenshot shows the mobile application interface for creating a withdrawal job. The left sidebar has a red box around the "Withdrawal" tab, which is highlighted in blue. The main content area displays the "Withdraw Jobs" screen with a red box around the "Create Withdraw Job" button. The right sidebar shows a list of withdrawal jobs with their details.

Job ID #	# of Items	Status	Date Created
1	3 items	<span style="background-color: #c8e6c9; border: 1px solid #2e6b2e; color: #2e6b2e; padding: 2px;">Created</span>	11/27/2024
2	0 items	<span style="background-color: #c8e6c9; border: 1px solid #2e6b2e; color: #2e6b2e; padding: 2px;">Created</span>	12/2/2024

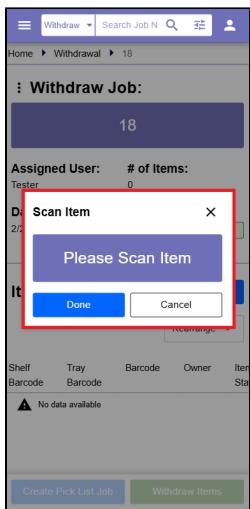
2. After clicking the "Add Items" button, the following options for barcodes are available:



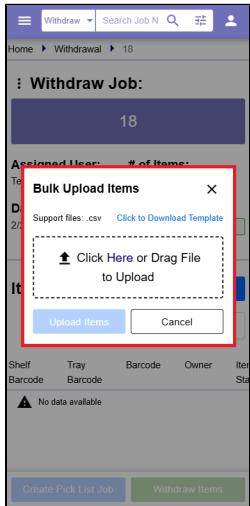
2a. To manually input a barcode, click the "Manually Enter Barcode" button, enter the item's barcode, and click the "Submit" button.



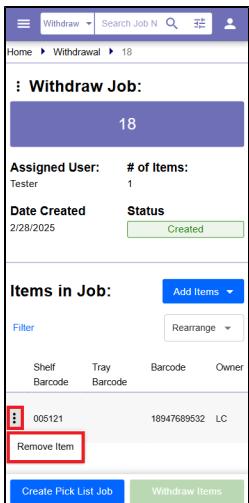
2b. To scan a barcode, click the "Scan Item(s)" button. Users can continually scan items for withdrawal or complete the process by clicking the "Done" button.



2c. To bulk upload barcodes, click the "Bulk Upload Items" button. Click the "Download Template" hyperlink and populate the area(s) that will be bulk created.



3. Click the three-dot-icon next to the item for removal and click the "Remove Item" button.



4. Only items with a status of "Out" can be withdrawn. If an item has a status of "In", click the "Create Pick List Job" to create a Pick List Job for all items with a status of "In". If all items have a status of "Out", click the "Withdraw Items" to complete the Withdraw Job. The request is generated into a Pick List Job, accessible either via the hyperlink job number or through the pick list dashboard.

The screenshot shows the 'Withdraw Job' interface. At the top, it displays 'Assigned User: Tester' and '# of Items: 1'. Below this, the 'Date Created' is listed as '2/28/2025' and the 'Status' is 'Created'. The main section, 'Items in Job:', lists one item with the following details:

Barcode	Owner	Item Status	Location
18947689532	LC	In	Fort Meade-1-5-R-1-11-16

At the bottom, there are two buttons: 'Create Pick List Job' (highlighted with a red box) and 'Withdraw Items'.

5. Refer to Section 5.6 to retrieve the generated Pick List Job. Once the Pick List job is retrieved, the item's status will update to "Out". Click the "Withdraw Items" button after all items have a status of "Out" to complete the Withdraw Job.

The screenshot shows the 'Withdraw Job' interface with the same item details as the previous screenshot. The difference is that the item's status has been updated to 'Out'. The 'Location' column still shows 'Fort Meade-1-5-R-1-11-16'. The bottom buttons are 'Add To Pick List Job' (highlighted with a blue box) and 'Withdraw Items'.

### 5.7.7 Assign Withdraw Job on Desktop

1. Click the three-dot-icon and click the "Edit" button. After the "Assigned User" dropdown activates, select the user and click the "Save Edits" button.

**Withdraw Job:**

Assigned User:	# of Items:	Date Created:	Status
18	0	2/28/2025	Created

**Items in Job:**

Shelf Barcode	Tray Barcode	Barcode	Owner	Item Status	Location
No data available					

**Withdraw Job:**

Assigned User:	# of Items:	Date Created:	Status
18	0	2/28/2025	Created

**Items in Job:**

Shelf Barcode	Tray Barcode	Barcode	Owner	Item Status	Location
No data available					

### 5.7.8 Assign Withdraw Job on Mobile

1. Click the three-dot-icon and click the "Edit" button. After the "Assigned User" dropdown activates, select the user and click the "Save Edits" button.

**Withdraw Job:**

Assigned User:	# of Items:
18	0

**Items in Job:**

Shelf Barcode	Tray Barcode	Barcode	Owner	Item Status
No data available				

### 5.7.9 Delete Withdraw Job

1. On desktop or mobile, click the three-dot-icon, then click the "Delete Job" button.

**Withdraw Job:**

Assigned User:	# of Items:	Date Created	Status
6	1	3/14/2025	Created

**Trays in Job:**

Shelf Barcode	Tray Barcode	Owner
007233	BH353535	LC

**Items in Job:**

Shelf Barcode	Tray Barcode	Barcode	Owner	Item Status	Location
007233	BH353535	35000000002	LC	Out	Fort Meade-1-L-20-12-14

### 5.7.10 View/Export Withdraw Job History

1. On desktop or mobile, click the three-dot-icon, then click the "View History" button.

**Withdraw Job:**

Assigned User:	# of Items:	Date Created:	Status
6	1	3/14/2025	Created

**Trays in Job:**

Shelf Barcode	Tray Barcode	Owner
007233	BH353535	LC

**Items in Job:**

Shelf Barcode	Tray Barcode	Barcode	Owner	Item Status	Location
007233	BH353535	3500000002	LC	Out	Fort Meade-1-1-L-20-12-14

**Withdraw Job:**

Assigned User:	# of Items:	Status
6	1	Created

**Trays in Job:**

Shelf Barcode	Tray Barcode	Owner
007233	BH353535	LC

**Items in Job:**

Shelf Barcode	Tray Barcode	Barcode	Owner	Item Status	Location
007233	BH353535	3500000002	LC	Out	Fort Meade-1-1-L-20-12-14

2. To export the job's history, click the "Export Audit" hyperlink.

The screenshot shows a library management application interface. At the top, there's a navigation bar with a home icon, 'Withdrawal' dropdown, 'Search Job Number' input, 'Advanced Search' button, and user profile icon. Below the navigation is a breadcrumb path: Home > Withdrawal > 5. The main title is 'Withdraw Job:' with a count of 5 items. To the right is a 'Withdraw Items' button. A modal window titled 'View History' is open, showing a table with columns: User Updated, Last Action, and Last Activity. One row shows 'ims\_a1' with 'Created' as the last action at '1/9/2025, 11:26:27 AM'. An 'Export Audit!' button is highlighted with a red box. In the background, a table lists 'Items in Job:' with columns: Shelf Barcode, Tray Barcode, and Item Status. The first item has a 'Close' button over it. Other items listed are CH11111, CL472449, CL361451, and 656500000000, all marked as 'Out'.

Shelf Barcode	Tray Barcode	Item Status
100181	CH11111	Out
100126	CL472449	Out
100167	CL361451	Out
100298	656500000000	Out

The screenshot shows a mobile application interface. At the top, there is a navigation bar with icons for Home, Withdraw, Search, and a user profile. Below the navigation bar, the text "Withdrawal > 5" is displayed. The main content area has a title "Withdraw Job:" followed by a large number "5". A modal dialog box titled "View History" is open. Inside the dialog, there is a table with three columns: "User Updated", "Last Action", and "Last Activity". The first row shows "ims\_a1" as the user, "Job status changed to Created" as the action, and "11/26/2027 AM" as the activity. There is also a red box highlighting the "Export Audit" button. At the bottom of the dialog, there is a "Close" button.

## **5.7.11 Print Withdraw Job Summary Report**

1. On desktop or mobile, click the three-dot-icon, then click the "Print Job" button.

**Withdraw Job:**

Assigned User:		# of Items:	Date Created	Status
Tester	15	2	2/27/2025	Completed

**Print Job**

**Trays in Job:**

Shelf Barcode	Tray Barcode	Owner
007240	BH333333	LC

**Items in Job:**

Shelf Barcode	Tray Barcode	Barcode	Owner	Item Status	Location
007240	BH333333	33300000002	LC	Withdrawn ✓	Fort Meade-1-1-L-19-13-13
003061		43434300002	LC	Withdrawn ✓	Fort Meade-1-1-L-4-1-72

**Withdraw Job:**

Assigned User:		# of Items:	Status
Tester	15	2	Completed

**Print Job**

**Trays in Job:**

Shelf Barcode	Tray Barcode	Owner
007240	BH333333	LC

**Items in Job:**

Shelf	Tray	Barcode	Owner

## 5.8 Operational Reporting

The Operational Reporting section provides instructions on generating and exporting operational insights.

### 5.8.1 Report Types

Report	Description
Item Accession	Total number of items accessioned based on owner, media type, or size class within a specified date range.
Total Item Retrieved	Total number of items retrieved based on owner within a specified date range.
Verification Change	List of actions taken by users during Verification Jobs, including items added, deleted, and changes to size class and media type, within a specified date range.
User Job Summary	List of various job types completed by users along with the total number of items processed for each job type within a specified date range.
Open Locations	List of available shelf locations within a building.
Tray/Item Count by Aisle	Total number of items and trays stored within specified aisles of a building.
Non-Tray Count	Total number of non-trays based on owner, aisle range, shelved date range, and size class within a building.
Items in Trays	Total number of items within trays based on owner, aisle range, shelved date range, and size class within a building.
Shelving Job Discrepancy	List of errors made by users during Shelving Jobs (from Verification Job), including location discrepancy, owner discrepancy, and size discrepancy, within a specified date range.

Move and Withdraw Discrepancy	List of errors made by users during moves or withdraws, including owner/size discrepancy, shelf capacity exceedance, and item not accessioned/verified, within a specified date range.
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### 5.8.2 Generate and Export Report on Desktop

1. Navigate to the "Reports" tab from the navigation menu and click the "Select Report" button to select the report type.

The screenshot shows the FETCH software interface. On the left, there's a dark sidebar with various navigation options: Accession, Verification, Shelving, Request, Pick List, Refile, Withdrawal, and Reports. The 'Withdrawal' option has a checked checkbox. The 'Reports' option is highlighted with a blue rectangle. At the top right, there's a search bar for 'Search Item Barcode' and an 'Advanced Search' button. Below the search bar, the breadcrumb navigation shows 'Home > Reports'. The main content area is titled 'Reports' and contains a dropdown menu labeled 'Select Report'. This dropdown menu lists several report types: Item Accession, Item in Tray, Move/Withdraw Discrepancy, Non-Tray Count, Open Locations, Refile Discrepancy, Shelving Job Discrepancy, Total Item Retrieved, Tray/Item Count By Aisle, and User Job Summary. The 'Item in Tray' option is the first item in the list.

2. Define the parameters for the report and click the "Run Report" button.

The screenshot shows the 'Item in Tray' report configuration screen. At the top left, there's a 'Reports' section with a dropdown set to 'Item in Tray' and a 'Redo Report' button. To the right, a detailed configuration form is displayed, also enclosed in a large red box. The form has several dropdown menus: 'Building (Required)', 'Module', 'Owner', and 'Aisle (From)'. It also has two text input fields for 'Enter Aisle (From)' and 'Enter Aisle (To)'. At the bottom, there are two date pickers labeled 'Date (From)' and 'Date (To)', each with an example placeholder 'Ex: MM/DD/YYYY'.

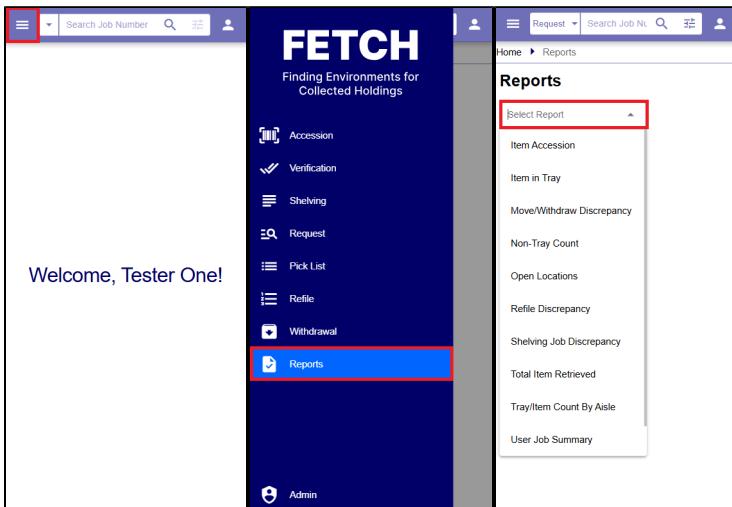
3. The report is then generated based on the set criteria. To print or export the generated report via CSV, click the "Export Report" button.

The screenshot shows a report table with columns for Size Class, Total Tray Count, and Total Item Count. The rows list categories AL through DL with their respective counts. To the right of the table are three buttons: 'Rearrange', 'Export Report' (which is highlighted with a red box), 'Print', and 'Download CSV'.

Size Class	Total Tray Count	Total Item Count
AL	1690	47784
AH	8795	187702
BL	9068	161027
BH	26529	520053
CL	11164	239499
CH	9599	136077
DL	9237	208547

### 5.8.3 Generate and Export Report on Mobile

1. Navigate to the "Reports" tab from the navigation menu and click the "Select Report" button to select the report type.



2. Define the parameters for the report and click the "Run Report" button.

The screenshot shows the 'Item in Tray' report configuration dialog. It includes fields for Building (Required), Module, Owner, Aisle (From) and Aisle (To), and Date (From) and Date (To). The 'Run Report' button is highlighted with a red box.

3. The report is then generated based on the set criteria. To print or export the generated report via CSV, click the "Export Report" button.

The screenshot shows a software interface titled 'Reports'. At the top, there's a search bar labeled 'Search Job Number' and a 'Redo Report' button. Below the search bar is a dropdown menu with the option 'Export Report' highlighted by a red box. Other options in the dropdown are 'Print' and 'Download CSV'. The main area displays a table with columns 'Size Class', 'Total Tray Count', and 'Count'. The data includes rows for AL, AH, BL, BH, CL, CH, DL, DH, EL, EH, and XA. At the bottom of the table, it says 'Records per page: 50' and '1-11 of 11'.

## 6. System Administration

The System Administration section provides instructions on managing system configurations and operations. These steps can also be completed on the mobile version of the app, as the actions remain consistent across both desktop and mobile platforms, despite the screenshots being taken from the desktop version.

### 6.1 Manage User Groups and Permissions

#### 6.1.1 Permissions Matrix

Feature	Permission	Option	Description
Accession	Access to the Accession Module	Yes/No	If Yes, user will see the Accession link on the navigation menu and be able to access all of the features inside of accession, including printing.  If No, the Accession link will not display on the navigation menu and the user will not be able to access the accession features.
	Cancel Accessioning Job (Trayed and Non-Trayed)	Yes/No	If Yes, the user can see the "Cancel Accession" button and access this feature.  If No, the user will not see the "Cancel Accession" button.
Verification	Access to the Verification Module	Yes/No	If Yes, user will see the Verification link on the navigation menu and be able to access all of the features inside of verification, including printing.  If No, the Verification link will not display on the navigation menu and the user will not be able to access the verification features.
Shelving	Access to the Shelving Module	Yes/No	If Yes, user will see the Shelving link on the navigation menu and be able to access the features inside of shelving based on other permissions. The "Create Shelving Job" button will appear on the shelving dashboard.  If No, the Shelving link will not display on the navigation menu and the user will not be able to access the shelving features.
	View All Shelving Jobs	Yes/No	If Yes, user can view all shelving jobs whether they are assigned or not.  If No, user can only see the shelving jobs assigned to them.
	Assign and Reassign Shelving Job	Yes/No	If Yes, user can open a shelving job and have access to assign or reassign it to a user.  If No, user will not have access to assign or reassign a job to a user.
	Create and Execute From Verification Shelf Job	Yes/No	If Yes, user will see the "Create Shelving Job" Button and will have access to the "From Verification Job" button. User will have full access to create and execute a from verification job.  If No, the user will not see the From Verification Job Button when clicking on the "Create Shelving Job" button and will not have access to create or execute a from verification job.

	Create and Execute Direct to Shelf Job	Yes/No	If Yes, user will see the "Create Shelving Job" Button and will have access to the "Direct to Shelf" button. User will have full access to create and execute a direct to shelf job.  If No, the user will not see the "Direct to Shelf Button" when clicking on the "Create Shelving Job" button and will not have access to create or execute a direct to shelf job.
	Move Trays and Items Shelving Locations	Yes/No	If Yes, user will see the "Create Shelving Job" Button and will have access to the "Move Item" and "Move Tray/Non-Tray" buttons and have all access to these features.  If No, user can not see the option to "Move Item" and "Move Tray/Non-Tray" under the "Create Shelving Job" button and will have no access to these features.
Request	Access to the Request Module	Yes/No	If Yes, user will see the Request link on the navigation menu and be able to access the features inside of requests based on other permissions. User will see the "Create" Button.  If No, the Request link will not display on the navigation menu and the user will not be able to access the request features.
	Create and Submit Manual Request	Yes/No	If Yes, the user will see the link to "Create Manual Requests" under the Create button and will have all access to this feature.  If No, the user will not see the link to "Create Manual Requests" under the Create button and will not have access to this feature.
	Create and Submit Batch Request	Yes/No	If Yes, the user will see the link to "Import requests from file" under the Create button and will have all access to this feature.  If No, the user will not see the link to "Import requests from file" under the Create button and will not have access to this feature.
	Delete Request	Yes/No	If Yes, the user can see the "Delete Request" button and access this feature.  If No, the user will not see the "Delete Request" button.
Pick List	Access to the Pick List Module	Yes/No	If Yes, user will see the Pick Lists link on the navigation menu and be able to access all of the features inside of a Pick List based on other permissions, including printing.  If No, the Pick List link will not display on the navigation menu and the user will not be able to access the Pick List features.
	View All Pick List Jobs	Yes/No	If Yes, user can view all pick lists whether they are assigned or not.  If No, user can only see the pick lists assigned to them.
	Assign and Reassign Pick List Job	Yes/No	If Yes, user can open a pick lists and have access to assign or reassign it to a user.  If No, user will not have access to assign or reassign a job to a user.
	Create New Pick List Job	Yes/No	If Yes, the user will see the link to "Create a Pick List" under the Create button and will have all access to this feature.  If No, the user will not see the link to "Create a Pick List" under the Create button and will not have access to this feature.
	Add Request to Pick List Job	Yes/No	If Yes, the user will see the link to "Add to a Pick List" under the Create button and will have all access to this feature.  If No, the user will not see the link to "Add to a Pick List" under the Create button and will not have access to this feature.
	Edit Pick List Job	Yes/No	If Yes, user will see the option to edit a job and will have full access to this functionality.  If No, user can not see the option to edit a job.
	Delete Pick List Job	Yes/No	If Yes, user can open a pick list and have access to view and click the delete button.  If No, user will not have access to the delete button.
Refile	Access to Refile Module	Yes/No	If Yes, user will see the Refile link on the navigation menu and be able to access to the "Create" button on the refile dashboard.  If No, the Refile link will not display on the navigation menu and the user will not be able to access the Refile features.
	View All Refile Jobs	Yes/No	If Yes, user can view all Refile Jobs whether they are assigned or not.  If No, user can only see the Refile jobs assigned to them.
	Assign and Reassign Refile Job	Yes/No	If Yes, user can open a refile job and have access to assign or reassign it to a user.  If No, user will not have access to assign or reassign a job to a user.
	Add Refile Item to Queue	Yes/No	If Yes, the user will see the link to "Add Item to Queue" under the Create button and will have all access to this feature.  If No, the user will not see the link to "Add Item to Queue" under the Create button and will not have access to this feature.
	Create New Refile Job	Yes/No	If Yes, the user will see the link to "Create Refile Job" under the Create button and will have all access to this feature .If No, the user will not see the link to "Create Refile Job" under the Create button and will not have access to this feature.
	Add Item to Refile Job	Yes/No	If Yes, the user will see the link to "Add Item to refile Job" under the Create button and will have all access to this feature.  If No, the user will not see the link to "Add Item to refile Job" under the Create button and will not have access to this feature.
	Edit Refile Job	Yes/No	If Yes, user will see the option to edit a job and will have full access to this functionality.  If No, user can not see the option to edit a job.

	Execute and Complete Refile Job	Yes/No	If Yes, user will have full access to Execute a refile job. If No, user can not see the option to execute a refile job.
	Delete Refile Job	Yes/No	If Yes, user will see the option to delete a job and will have full access to this functionality. If No, user can not see the option to delete a job.
Withdraw	Access to the Withdraw Module	Yes/No	If Yes, user will see the Withdraw link on the navigation menu and be able to access to all Withdraw features. If No, the Withdraw link will not display on the navigation menu and the user will not be able to access the withdraw features.
Operational Reporting	Access to Reports	Yes/No	If Yes, user will see the Reports link on the navigation menu and be able to access to all Reporting features. If No, the Reports link will not display on the navigation menu and the user will not be able to access the reporting features.
	Access to Search	Yes/No	If Yes, user will see the search link on the navigation menu and be able to access to all search features. User will be blocked from accessing results for those portions of the system that they do not have access to based on other permissions assigned. For example, a user that searches for an Accession Job will be blocked from accessing that job if they do not have permissions to the Accession Module. If No, the Search link will not display on the navigation menu and the user will not be able to access the advanced search features.
	Access to Item Detail	Yes/No	If Yes, user will have access to view item detail pages after completing a search for the item. If No, user does not have access to the item detail page.
	Access to Tray Detail	Yes/No	If Yes, user will have access to view item detail pages after completing a search for the items. If No, user does not have access to the tray detail page.
	Access to Shelving Detail	Yes/No	If Yes, user will have access to view shelf detail pages after completing a search for the shelf. If No, user does not have access to the shelf detail page.
Admin	Access to Admin Module	Yes/No	If Yes, the user will see the link to the Admin module on the navigation menu. If No, the user will not see the link for the Admin Module on the navigation menu and will have no access to any Admin features.
	Manage Groups and Permissions	Yes/No	If Yes, the user will see the link for Permissions on the admin dashboard and have full access to this feature. If No, the user will not see the link for Permissions in the admin dashboard.
	Manage Locations	Yes/No	If Yes, the user will see the link for Location Manager on the admin dashboard and have full access to this feature. If No, the user will not see the link for Location Manager in the admin dashboard.
	Manage Owner	Yes/No	If Yes, the user will see the link for Owners on the admin dashboard and have full access to this feature. If No, the user will not see the link for Owners in the admin dashboard.
	Manage Media Type	Yes/No	If Yes, the user will see the link for Media Type on the admin dashboard and have full access to this feature. If No, the user will not see the link for Media Type in the admin dashboard.
	Manage Size Class	Yes/No	If Yes, the user will see the link for Size Class on the admin dashboard and have full access to this feature. If No, the user will not see the link for Size Class in the admin dashboard.
	Manage Shelf Type	Yes/No	If Yes, the user will see the link for Shelf Type on the admin dashboard and have full access to this feature. If No, the user will not see the link for Shelf Type in the admin dashboard.

### 6.1.2 Create Permission Group

1. On desktop or mobile, navigate to the "Admin" menu. Click the "Groups & Permissions" button.

The screenshot shows the Admin Dashboard of the FETCH application. On the left, there's a sidebar with various administrative tasks: Accession, Verification, Shelving, Request, Pick List, Refile, Withdrawal, and Reports. Below this is a blue navigation bar with the word "Admin". The main content area is titled "Admin Dashboard" and contains a "Groups & Permissions" section. This section has a red box around it, indicating it's the current focus. Below it are "List Configurations" and "Location Manager". At the top of the page, there's a header with "Item" dropdown, "Search Item Barcode", and "Advanced Search" fields.

2. Click the "Add New" button.

This screenshot shows the "Groups & Permissions" page. It lists several existing groups: Tester, OffsiteMH, Admin, Supervisors, Reporting, and OnsiteMH. A red box highlights the "+ Add New Group" button, which is located at the bottom right of the group list. The page has a standard header with "Item", "Search Item Barcode", and "Advanced Search" fields, and a breadcrumb navigation path: Home > Admin > Groups & Permissions.

3. Enter the name of the permission group and click the "Submit" button.

This screenshot shows the "Groups & Permissions" page with a modal dialog open. The dialog is titled "Add New Group" and has a red box around it. It contains a "Group Name" input field with the placeholder "Enter Group Name". At the bottom of the dialog are two buttons: "Submit" (highlighted with a red box) and "Cancel". The background of the main page is dimmed, and the "Groups & Permissions" section is also dimmed, indicating the modal is active. The page header and breadcrumb are visible at the top.

2. Click the three-dot-icon next to the newly created permission group and click the "Edit Permissions" button.

The screenshot shows the 'Groups & Permissions' page. At the top, there are navigation links: Home, Admin, and Groups & Permissions. Below the header, there is a search bar with 'Search Item Barcode' and an 'Advanced Search' link. The main area displays a grid of permission groups. The 'Tester' group is highlighted with a red border and has a context menu open over it. The menu items are: 'Edit Permissions' (which is also highlighted with a red box), 'Add/Edit User(s) in Group', 'Rename Group Name', and 'Delete Group'. Other groups listed are OffsiteMH, Admin, and Supervisors. A button '+ Add New Group' is located at the bottom right of the grid.

3. Update the selected permissions using the radio buttons or click the "Enable All Permissions" button to grant all permissions.

The screenshot shows the 'ACCESSION' tab selected in the 'Groups & Permissions' interface. The 'Tester' group is selected. There is a blue button 'Enable All Accession Permissions' with a red border. Below it, there are two sections: 'Can Cancel Accession' and 'Can Access Accession', each with a 'Yes' and 'No' radio button pair. Both 'Yes' buttons are highlighted with a red box.

#### 6.1.3 Modify Users in a Permission Group

1. On desktop or mobile, navigate to the "Admin" menu. Click the "Groups & Permissions" button.

The screenshot shows the Admin Dashboard of the FETCH system. On the left, a sidebar lists various administrative tasks: Accession, Verification, Shelving, Request, Pick List, Refile, Withdrawal, and Reports. Below this is a blue navigation bar with the word "Admin". The main content area is titled "Admin Dashboard" and contains three menu items: "Groups & Permissions" (which is highlighted with a red border), "List Configurations", and "Location Manager".

2. Click the three-dot-icon next to the permission group and click the "Add/Edit User(s) in Group" button.

This screenshot shows the "Groups & Permissions" page. It displays five permission groups: Tester, OffsiteMH, Admin, Supervisors, and OnsiteMH. The "Tester" group has a dropdown menu open, showing options like "Edit Permissions", "Add/Edit User(s) in Group" (which is highlighted with a red border), "Rename Group Name", and "Delete Group".

3. Search for a user to be added and click the "Add User(s)" button. To remove a user, click the "x" icon next to the user's name.

This screenshot shows the "Groups & Permissions" page with the "Add / Edit User(s)" modal dialog open over the "OffsiteMH" group. The dialog has a search field "Select User To Add" containing "Tester One" and two buttons at the bottom: "Add User(s)" (highlighted with a red border) and "Cancel".

#### 6.1.4 Edit Permissions in a Group

1. On desktop or mobile, navigate to the "Admin" menu. Click the "Groups & Permissions" button.

The screenshot shows the Admin Dashboard interface. On the left, there's a sidebar with various administrative tasks like Accession, Verification, Shelving, etc. The main area is titled "Admin Dashboard" and contains three buttons: "Groups & Permissions" (which is highlighted with a red box), "List Configurations", and "Location Manager". At the bottom left of the main area, there's a blue bar with the word "Admin".

2. Click the three-dot-icon next to the permission group that will be edited and click the "Edit Permissions" button.

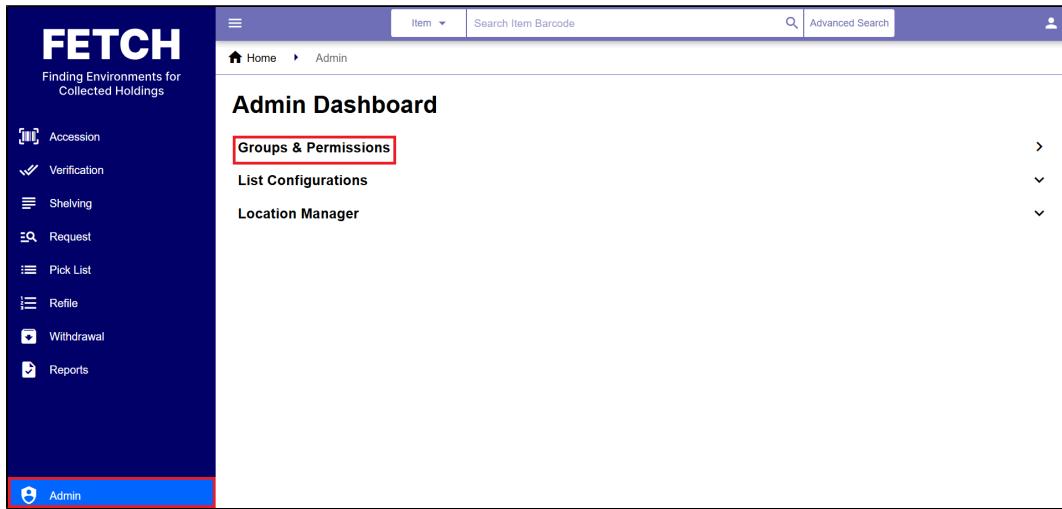
The screenshot shows the "Groups & Permissions" page. It lists several groups: "Tester", "OffsiteMH", "Admin", and "Supervisors". The "Tester" group is selected, indicated by a blue border around its box. Inside the "Tester" box, the "Edit Permissions" button is highlighted with a red box. Below the "Tester" box are buttons for "Add/Edit User(s) in Group", "Rename Group Name", and "Delete Group".

3. Update the selected permissions using the radio buttons or click the "Enable All Permissions" button to grant all permissions.

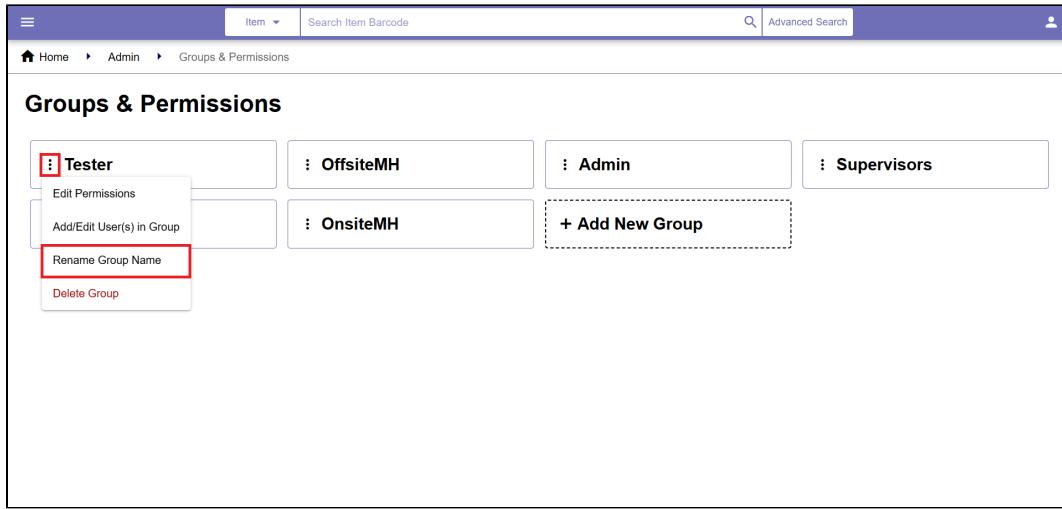
The screenshot shows the "Accession" permissions sub-page. At the top, there's a navigation path: Home > Admin > Groups & Permissions > Tester. Below that is a horizontal menu with tabs: ACCESSION, VERIFICATION, SHELVING, REQUEST, PICKLIST, REFILE, WITHDRAW, REPORTING, and ADMIN. The ACCESSION tab is active and highlighted with a blue underline. Under the ACCESSION tab, there's a button labeled "Enable All Accession Permissions" which is highlighted with a red box. Below this button, there are two sections: "Can Cancel Accession" and "Can Access Accession", each with "Yes" and "No" radio buttons. The "Yes" radio button in the "Can Access Accession" section is highlighted with a red box.

### 6.1.5 Rename Permission Group

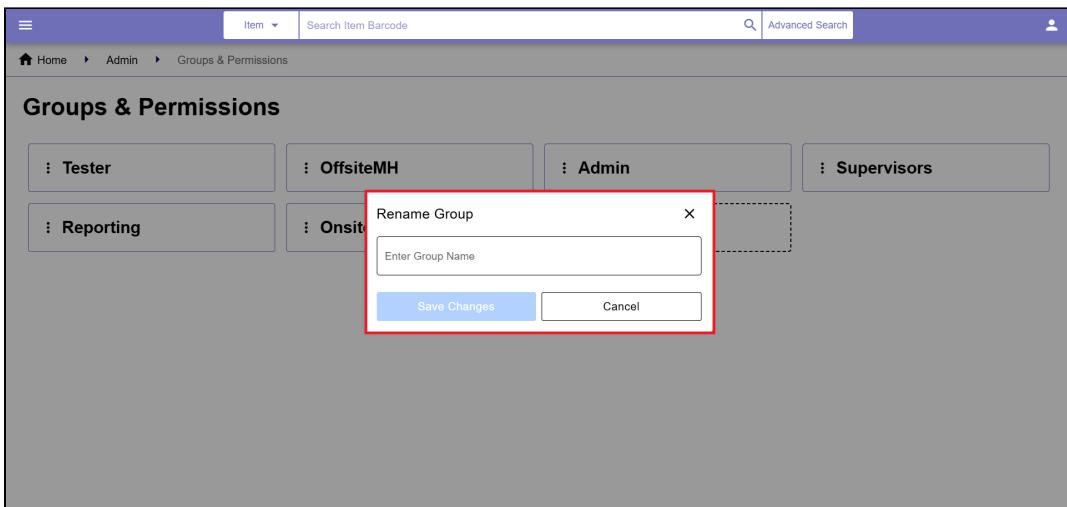
1. On desktop or mobile, navigate to the "Admin" menu. Click the "Groups & Permissions" button.



2. Click the three-dot-icon next to the permission group that will be renamed and click the "Rename Group" button.

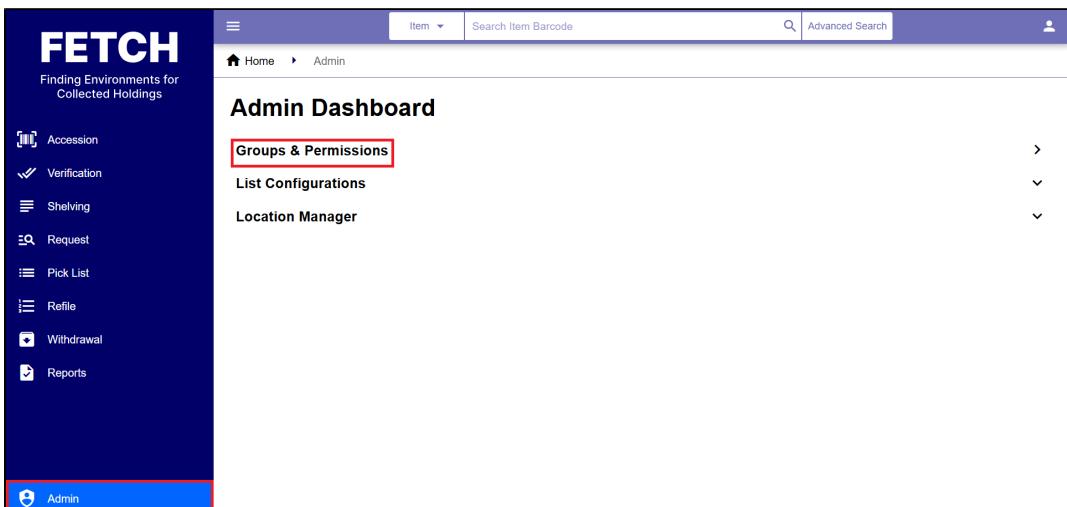


3. Enter the group's new name and click the "Save Changes" button.

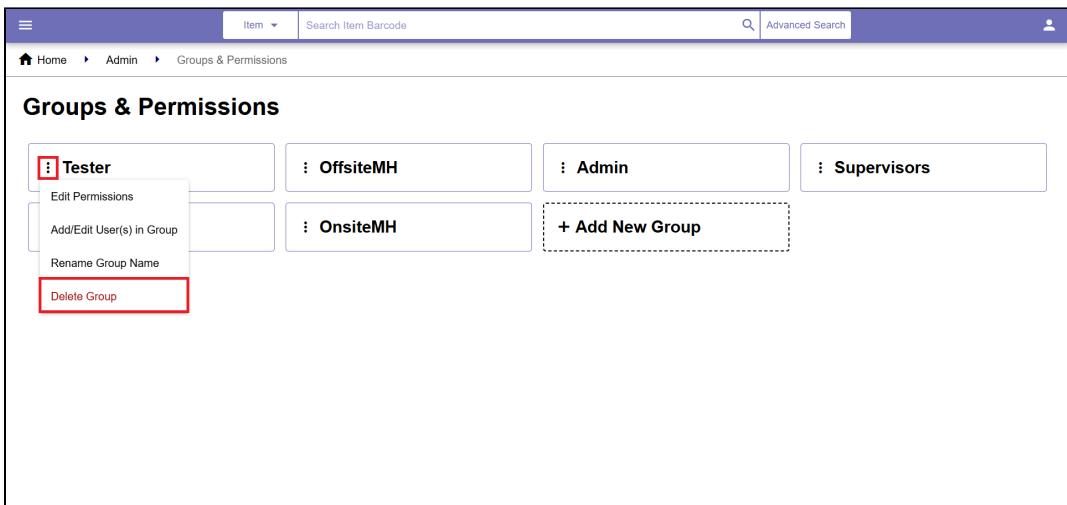


### 6.1.6 Delete Permission Group

1. On desktop or mobile, navigate to the "Admin" menu. Click the "Groups & Permissions" button.



2. Click the three-dot-icon next to the permission group that will be deleted and click the "Delete Group" button.



## 6.2 Manage Owners

### 6.2.1 Create Owner

1. On desktop or mobile, navigate to the "Admin" menu. Click the "List Configurations" accordion and then click the "Add/Edit/Remove Owner" option.

The screenshot shows the Admin Dashboard interface. On the left is a sidebar with various navigation links: Accession, Verification, Shelving, Request, Pick List, Refile, Withdrawal, and Reports. Below these is an 'Admin' button, which is highlighted with a red box. The main content area is titled 'Admin Dashboard' and contains a 'Groups & Permissions' section with an 'Add/Edit/Remove Owners' link, also highlighted with a red box. Other links in this section include 'List Configurations', 'Add/Edit/Remove Media Type', 'Add/Edit/Remove Size Class', and 'Add/Edit/Remove Shelf Type'. Below this is a 'Location Manager' section.

2. Click the "Add Owner" button, enter the new owner's details, then click the "Add Owner" button for submission.

The screenshot shows the 'Owner' page. On the left, there is a list of existing owners: Brethren of the Coast, Collections & Management, The Fellowship of the Ring, Consortium of Hobbits, Congressional Research Services, Department of Buried Treasure, and Library of Congress. A 'Rearrange' button is available above this list. In the center, a modal dialog box titled 'Add New Owner' is open. It contains three fields: 'Owner Tier (Required)' with a dropdown menu labeled 'Select Owner Tier', 'Parent Owner' with a dropdown menu labeled 'Select Parent Owner', and 'Owner Name (Required)' with an input field labeled 'Enter Owner Name'. At the bottom of the dialog are two buttons: 'Add Owner' (highlighted with a red box) and 'Cancel'. To the right of the dialog, a table lists the current owners with their respective 'Owner Tier' values: 1, 2, 1, 1, 2, and 1. At the bottom right of the page, there are buttons for 'Records per page: 50' and '1-7 of 7'.

### 6.2.2 Edit Owner

1. On desktop or mobile, navigate to the "Admin" menu. Click the "List Configurations" accordion and then click the "Add/Edit/Remove Owner" option.

The screenshot shows the Admin Dashboard of the FETCH system. On the left, there's a sidebar with various administrative tasks: Accession, Verification, Shelving, Request, Pick List, Refile, Withdrawal, and Reports. Below these is a blue 'Admin' button. The main content area is titled 'Admin Dashboard' and contains sections for 'Groups & Permissions' (with 'List Configurations' and 'Add/Edit/Remove Owners' highlighted), 'Add/Edit/Remove Media Type', 'Add/Edit/Remove Size Class', and 'Add/Edit/Remove Shelf Type'. At the bottom is a 'Location Manager' section.

2. Click the three-dot-icon next to the owner that will be edited and click the "Edit Owner" button.

This screenshot shows the 'Owner' management page. It lists various owners with their names, parent owners, and owner tiers. The first row, 'LC', has a three-dot menu icon followed by 'Edit Owner' and 'Delete Owner' buttons, both of which are highlighted with red boxes. The table columns are 'Owner Name', 'Parent Owner', and 'Owner Tier'. The data rows are:

Owner Name	Parent Owner	Owner Tier
LC		1
Edit Owner		1
Delete Owner	LC	2
PRES	LC	2
SCD	LC	2
GIC	GICD	3
Serials and Government Publishing	GICD	3
Geography and Maps	SCD	3
Manuscript	SCD	3

3. Enter the owner's new details and click the "Update Owner" button.

This screenshot shows the 'Edit Owner' dialog box overlaid on the 'Owner' management page. The dialog fields are: 'Owner Tier (Required)' set to 'Organization', 'Parent Owner' dropdown set to 'Select Parent Owner', 'Owner Name (Required)' input field containing 'LC', and two buttons at the bottom: 'Update Owner' (highlighted with a red box) and 'Cancel'. The background table shows the same owner data as the previous screenshot.

### 6.2.3 Remove Owner

1. On desktop or mobile, navigate to the "Admin" menu. Click the "List Configurations" accordion and then click the "Add/Edit/Remove Owner" option.

The screenshot shows the Admin Dashboard. On the left is a sidebar with various navigation options: Accession, Verification, Shelving, Request, Pick List, Refile, Withdrawal, and Reports. Below these is a blue bar labeled 'Admin'. The main content area is titled 'Admin Dashboard' and contains a 'Groups & Permissions' section. Under this section, 'List Configurations' and 'Add/Edit/Remove Owners' are highlighted with red boxes. Other items in the list include 'Add/Edit/Remove Media Type', 'Add/Edit/Remove Size Class', 'Add/Edit/Remove Shelf Type', and 'Location Manager'. At the top of the page is a header with 'Item' dropdown, 'Search Item Barcode', and 'Advanced Search' fields.

2. Click the three-dot-icon next to the owner that will be deleted and click the "Delete Owner" button. Note, an Owner associated in another table cannot be removed.

The screenshot shows the 'Owner' management page. The title is 'Owner'. There is a table with columns: 'Owner Name', 'Parent Owner', and 'Owner Tier'. The data rows are:

Owner Name	Parent Owner	Owner Tier
LC		1
LC		1
PRES	LC	2
SCD	LC	2
GIC	GICD	3
Serials and Government Publishing	GICD	3
Geography and Maps	SCD	3
Manuscript	SCD	3

A red box highlights the 'Delete Owner' button in the first row. A blue 'Add Owner' button is visible at the top right of the table area. The top navigation bar includes 'Home', 'Admin', and 'Manage Owners'.

## 6.3 Manage Media Types

### 6.3.1 Create Media Type

1. On desktop or mobile, navigate to the "Admin" menu. Click the "List Configurations" accordion and then click the "Add/Edit/Remove Media Type" option.

The screenshot shows the Admin Dashboard of the FETCH system. On the left is a dark sidebar with various administrative menu items: Accession, Verification, Shelving, Request, Pick List, Refile, Withdrawal, and Reports. Below these is a blue 'Admin' button. The main content area has a purple header bar with 'Item ▾', 'Search Item Barcode', and 'Advanced Search'. Underneath is a breadcrumb navigation: Home > Admin. The main title is 'Admin Dashboard'. A 'Groups & Permissions' section is visible. The 'List Configurations' section is highlighted with a red box. Under 'List Configurations', there are four options: 'Add/Edit/Remove Owners', 'Add/Edit/Remove Media Type' (which is also highlighted with a red box), 'Add/Edit/Remove Size Class', and 'Add/Edit/Remove Shelf Type'. At the bottom of the dashboard is a 'Location Manager' section.

2. Click the "Add Media Type" button, enter the new media type's details, then click the "Add Media Type" button for submission.

The screenshot shows the 'Media Type' management page. The top navigation is identical to the Admin Dashboard. The main title is 'Media Type'. On the left is a list of existing media types: Cuneiform Tablet, Newspaper, Cassette Disk, Sheet Music, DVD, Blu-Ray Disc, Microfilm, Schematic, and VHS Cassette. To the right of this list is a modal dialog titled 'Add New Media Type' with a red border. It contains a 'Name (Required)' field with the placeholder 'Enter Name', an 'Add Media Type' button in blue, and a 'Cancel' button. Above the modal is a 'Rearrange' dropdown and a '+ Add Media Type' button, both of which are also highlighted with a red box.

### 6.3.2 Edit Media Type

1. On desktop or mobile, navigate to the "Admin" menu. Click the "List Configurations" accordion and then click the "Add/Edit/Remove Media Type" option.

The screenshot shows the Admin Dashboard again, focusing on the 'List Configurations' section. The sidebar and header are identical to the previous screenshot. The 'List Configurations' section is highlighted with a red box. Under it, the 'Add/Edit/Remove Media Type' option is also highlighted with a red box. The rest of the dashboard structure is the same as the first screenshot.

2. Click the three-dot-icon next to the media type that will be edited and click the "Edit Media Type" button.

A screenshot of a web application interface titled 'Media Type'. The top navigation bar includes 'Item', 'Search Item Barcode', 'Advanced Search', and a user profile icon. Below the navigation is a breadcrumb trail: Home > Admin > Manage Media Types. The main content area is titled 'Media Type' and contains a table with a single row. The row has a 'Name' column with the value 'Cuneiform Tablet' and a 'Actions' column containing three icons: a three-dot menu, 'Edit Media Type' (which is highlighted with a red box), and 'Delete Media Type'. A blue 'Add Media Type' button is located in the top right corner of the table header.

3. Enter the media type's new details and click the "Update Media Type" button.

A screenshot of the same web application interface, now showing an 'Edit Media Type' dialog box overlaid on the list page. The dialog has a title 'Edit Media Type' and a close button. It contains a 'Name (Required)' field with the placeholder 'Enter Name' and two buttons at the bottom: 'Update Media Type' (highlighted with a red box) and 'Cancel'. The background list page shows other media types like 'Book/Volume', 'Flat File', 'Microfilm', and 'Archival Box'. The bottom right corner of the screen shows pagination information: 'Records per page: 50' and '1-4 of 4'.

### 6.3.3 Remove Media Type

1. On desktop or mobile, navigate to the "Admin" menu. Click the "List Configurations" accordion and then click the "Add/Edit/Remove Media Type" option.

The screenshot shows the Admin Dashboard of the FETCH application. On the left is a dark sidebar with various administrative menu items: Accession, Verification, Shelving, Request, Pick List, Refile, Withdrawal, and Reports. Below these is a blue 'Admin' button. The main content area has a purple header bar with 'Item ▾', 'Search Item Barcode', and 'Advanced Search'. Below the header, the breadcrumb navigation shows 'Home > Admin'. The main content is titled 'Admin Dashboard' and contains a 'Groups & Permissions' section with 'List Configurations' highlighted by a red box. Other sections include 'Add/Edit/Remove Owners', 'Add/Edit/Remove Media Type' (also highlighted by a red box), 'Add/Edit/Remove Size Class', 'Add/Edit/Remove Shelf Type', and 'Location Manager'.

2. Click the three-dot-icon next to the Media Type that will be deleted and click the "Delete Media Type" button. Note, a Media Type associated in another table cannot be removed.

The screenshot shows the 'Manage Media Types' page. The title is 'Media Type'. At the top right are 'Rearrange' and '+ Add Media Type' buttons. The main list shows media types: Cuneiform Tablet, Sheet Music, DVD, Blu-Ray Disc, Microfilm, Schematic, and VHS Cassette. The 'Cuneiform Tablet' row has a three-dot icon followed by 'Edit Media Type' and 'Delete Media Type' (highlighted by a red box). The other rows have similar three-dot icons followed by 'Edit Media Type'.

## 6.4 Manage Size Classes

### 6.4.1 Create Size Class

1. On desktop or mobile, navigate to the "Admin" menu. Click the "List Configurations" accordion and then click the "Add/Edit/Remove Size Class" option.

The screenshot shows the Admin Dashboard of the FETCH application. On the left is a dark sidebar with various administrative menu items: Accession, Verification, Shelving, Request, Pick List, Refile, Withdrawal, and Reports. Below these is a blue 'Admin' button. The main content area has a purple header bar with 'Item' and 'Search Item Barcode' dropdowns, a magnifying glass icon for search, and an 'Advanced Search' link. The title 'Admin Dashboard' is at the top. Under 'Groups & Permissions', there is a red-bordered 'List Configurations' section. This section contains several sub-links: 'Add/Edit/Remove Owners', 'Add/Edit/Remove Media Type', 'Add/Edit/Remove Size Class' (which is also highlighted with a red border), and 'Add/Edit/Remove Shelf Type'. At the bottom of the dashboard is a 'Location Manager' section.

2. Click the "Add Size Class" button, enter the new size class's details, then click the "Add Size Class" button for submission.

The screenshot shows the 'Add New Size Class' dialog box overlaid on the 'Size Class' list. The dialog has fields for 'Full Name (Required)' (with 'Enter Full Name' placeholder), 'Short Name (Required)' (with 'Enter Short Name' placeholder), 'Width (in) (Required)', 'Depth (in) (Required)', and 'Height (in) (Required)' (all with '0.00' placeholder). There is also a dropdown for 'Owner(s)' with 'Select Owner(s)' placeholder. At the bottom are 'Add Size Class' and 'Cancel' buttons. The background shows a list of existing size classes: Flat2, EH-S, HP-A/B, NON-TRAY, SER-C2, SER-A, RB-B, Flat20, and Flat12. A red box highlights the 'Add New Size Class' dialog.

#### 6.4.2 Edit Size Class

1. On desktop or mobile, navigate to the "Admin" menu. Click the "List Configurations" accordion and then click the "Add/Edit/Remove Size Class" option.

The screenshot shows the Admin Dashboard of the FETCH application. The sidebar and main content area are identical to the previous screenshot, but the 'Add/Edit/Remove Size Class' link in the 'List Configurations' section of the sidebar is also highlighted with a red border, indicating it is the selected option.

2. Click the three-dot-icon next to the size class that will be edited and click the "Edit Size Class" button.

The screenshot shows a table titled 'Size Class' with columns: Full Name, Short Name, Width (in), Depth (in), Height (in), and Owner(s). The rows list various size classes. The first row, 'Flat2', has a red box around its three-dot icon and the 'Edit Size Class' button.

Full Name	Short Name	Width (in)	Depth (in)	Height (in)	Owner(s)
Flat2	Flat2	0.00	0.00	0.00	
	EH-S	0.00	0.00	0.00	
	HP-A/B	0.00	0.00	0.00	
NON-TRAY	NT	0.00	0.00	0.00	
SER-C2	SER-C2	0.00	0.00	0.00	
SER-A	SER-A	0.00	0.00	0.00	
RB-B	RB-B	0.00	0.00	0.00	
Flat20	Flat20	0.00	0.00	0.00	
Flat12	Flat12	0.00	0.00	0.00	

3. Enter the size class's new details and click the "Update Size Class" button.

The screenshot shows the 'Edit Size Class' dialog box. It contains fields for Full Name (Flat2), Short Name (Flat2), Width (in) (0.00), Depth (in) (0.00), Height (in) (0.00), and Owner(s) (Select Owner(s)). The 'Update Size Class' button is highlighted with a red box.

#### 6.4.3 Remove Size Class

1. On desktop or mobile, navigate to the "Admin" menu. Click the "List Configurations" accordion and then click the "Add/Edit/Remove Size Class" option.

The screenshot shows the Admin Dashboard of the FETCH system. On the left is a dark sidebar with various menu items: Accession, Verification, Shelving, Request, Pick List, Refile, Withdrawal, and Reports. Below these is a blue 'Admin' button. The main content area has a header 'Admin Dashboard' and a 'Groups & Permissions' section. Under 'Groups & Permissions', there are several options: 'List Configurations' (highlighted with a red box), 'Add/Edit/Remove Owners', 'Add/Edit/Remove Media Type', 'Add/Edit/Remove Size Class' (highlighted with a red box), and 'Add/Edit/Remove Shelf Type'. A 'Location Manager' section is also visible.

2. Click the three-dot-icon next to the size class that will be deleted and click the "Delete Size Class" button. Note, a Size Class associated in another table cannot be removed.

The screenshot shows the 'Manage Size Class' page. At the top right are 'Rearrange' and '+ Add Size Class' buttons. The main area is a table titled 'Size Class' with columns: Full Name, Short Name, Width (in), Depth (in), Height (in), and Owner(s). The table lists several entries, with the first entry 'Flat2' highlighted by a red box. The 'Edit Size Class' and 'Delete Size Class' buttons for this entry are also highlighted with red boxes.

Full Name	Short Name	Width (in)	Depth (in)	Height (in)	Owner(s)
Flat2	Flat2	0.00	0.00	0.00	
Edit Size Class	EH-S	0.00	0.00	0.00	
Delete Size Class	HP-A/B	0.00	0.00	0.00	
NON-TRAY	NT	0.00	0.00	0.00	
SER-C2	SER-C2	0.00	0.00	0.00	
SER-A	SER-A	0.00	0.00	0.00	
RB-B	RB-B	0.00	0.00	0.00	
Flat20	Flat20	0.00	0.00	0.00	
Flat12	Flat12	0.00	0.00	0.00	

## 6.5 Manage Shelf Types

### 6.5.1 Create Shelf Type

1. On desktop or mobile, navigate to the "Admin" menu. Click the "List Configurations" accordion and then click the "Add/Edit/Remove Shelf Type" option.

The screenshot shows the Admin Dashboard of the FETCH application. On the left is a dark sidebar with various menu items: Accession, Verification, Shelving, Request, Pick List, Refile, Withdrawal, and Reports. Below these is a blue 'Admin' button. The main content area has a purple header bar with 'Item' and 'Search Item Barcode' fields, and a magnifying glass icon for Advanced Search. The title 'Admin Dashboard' is at the top. Under 'Groups & Permissions', there are several sections: 'List Configurations' (highlighted with a red box), 'Add/Edit/Remove Owners', 'Add/Edit/Remove Media Type', 'Add/Edit/Remove Size Class', and 'Add/Edit/Remove Shelf Type' (also highlighted with a red box). A 'Location Manager' section is also present.

2. Click the "Add Shelf Type" button, enter the new shelf type's details, then click the "Add Shelf Type" button for submission.

The screenshot shows the 'Shelf Type' creation dialog box. At the top right is a 'Rearrange' dropdown and a '+ Add Shelf Type' button (highlighted with a red box). The main form has two input fields: 'Shelf Type Name (Required)' with placeholder 'Enter Shelf Type Name' and 'Size Class (Required)' with a dropdown menu 'Select Size Class'. At the bottom are 'Add Shelf Type' and 'Cancel' buttons. To the left of the dialog is a list of existing shelf types: 53, 40, 48, 30, 20, Map, MapSM, and MapXL.

### 6.5.2 Edit Shelf Type

1. On desktop or mobile, navigate to the "Admin" menu. Click the "List Configurations" accordion and then click the "Add/Edit/Remove Shelf Type" option.

The screenshot shows the Admin Dashboard again, focusing on the 'List Configurations' section. The sidebar and main content area are identical to the first screenshot, with the 'List Configurations' section highlighted by a red box.

2. Click the three-dot-icon next to the shelf type that will be edited and click the "Edit Shelf Type" button.

The screenshot shows a web-based application interface for managing shelf types. At the top, there's a navigation bar with 'Shelf' and 'Search Shelf Barcode' buttons. Below the navigation is a breadcrumb trail: Home > Admin > Manage Shelf Type. The main area is titled 'Shelf Type' and contains a list of shelf types: 53, 40, 48, 30, 20, Map, MapSM, and MapXL. To the right of the list is a 'Rearrange' dropdown and a blue 'Add Shelf Type' button. A context menu is open over the 'MapXL' entry, with options 'Edit Shelf Type' (highlighted with a red box), 'Delete Shelf Type', and 'MapXL'. The background has horizontal grid lines.

3. Enter the shelf type's new details and click the "Update Shelf Type" button.

This screenshot shows the 'Edit Shelf Type' dialog box overlaid on the shelf type list. The dialog has fields for 'Shelf Type Name (Required)' containing 'MapXL', 'Size Class (Required)' set to 'NON-TRAY' (with a note 'Select Size Class'), and 'Max Capacity' set to '75'. At the bottom are 'Update Shelf Type' and 'Cancel' buttons. The background shelf type list remains visible.

### 6.5.3 Remove Shelf Type

1. On desktop or mobile, navigate to the "Admin" menu. Click the "List Configurations" accordion and then click the "Add/Edit/Remove Shelf Type" option.

The screenshot shows the Admin Dashboard of the FETCH application. On the left, there's a sidebar with various menu items: Accession, Verification, Shelving, Request, Pick List, Refile, Withdrawal, and Reports. Below the sidebar is a blue navigation bar with an 'Admin' button. The main content area has a title 'Admin Dashboard' and a section titled 'Groups & Permissions' which includes 'List Configurations' and 'Add/Edit/Remove Shelf Type'. Both of these items are highlighted with red boxes.

2. Click the three-dot-icon next to the shelf type that will be deleted and click the "Delete Shelf Type" button. Note, a Shelf Type associated in another table cannot be removed.

The screenshot shows the 'Manage Shelf Type' page. At the top, there's a search bar with 'Shelf' selected and 'Search Shelf Barcode'. Below the search bar, the breadcrumb navigation shows 'Home > Admin > Manage Shelf Type'. The main content area is titled 'Shelf Type' and contains a table with several entries. The first entry, '53', has its details expanded. Within this expanded view, the 'Delete Shelf Type' button is highlighted with a red box. A blue button labeled '+ Add Shelf Type' is also visible at the top right of the table area.

## 6.6 Manage Buildings

### 6.6.1 Create Building

1. On desktop or mobile, navigate to the "Admin" menu. Click the "Location Manager" accordion and then click the "Buildings" option.

The screenshot shows the Admin Dashboard with the 'Location Manager' section expanded. Under 'Buildings', there is a red box around the 'Buildings' link. The 'Admin' button at the bottom left is also highlighted with a red box.

2. Click the "Add Building" button, enter the new building's name, then click the "Add Building" button for submission.

The screenshot shows the 'Buildings' page with a modal window titled 'Add New Building'. The 'Building Name (Required)' field contains 'Enter Building Name'. The 'Add Building' button is highlighted with a red box. The 'Add Building' button in the top right corner of the modal is also highlighted with a red box.

### 6.6.2 Edit Building

1. On desktop or mobile, navigate to the "Admin" menu. Click the "Location Manager" accordion and then click the "Buildings" option.

The screenshot shows the Admin Dashboard with the 'Location Manager' section expanded. Under 'Buildings', there is a red box around the 'Buildings' link. The 'Admin' button at the bottom left is highlighted with a red box.

2. Click the three-dot-icon next to the building that will be edited and click the "Edit Building" button.

The screenshot shows a list of buildings. The first building, 'Fort Meade', has its 'Edit Building' button highlighted with a red box. The second building, 'Cabin Branch', also has an 'Edit Building' button. The page includes a header with 'Item', 'Search Item Barcode', 'Advanced Search', and a user icon. Below the header is a breadcrumb navigation: Home > Admin > Manage Buildings. The main title is 'Buildings'. There are columns for 'Building', 'Created Date', and 'Last Updated'. At the bottom right, there are buttons for 'Rearrange' and '+ Add Building', and a footer showing 'Records per page: 50' and '1-2 of 2'.

3. Enter the building's new name and click the "Update Building" button.

The screenshot shows an 'Edit Building' dialog box. Inside the box, there is a form with a single input field labeled 'Enter Building Name'. Below the input field are two buttons: 'Update Building' and 'Cancel'. Both the input field and the 'Update Building' button are highlighted with a red box. The background of the dialog box is semi-transparent gray, and it is overlaid on the 'Buildings' list page from the previous screenshot.

## 6.7 Manage Modules

### 6.7.1 Create Module

1. On desktop or mobile, navigate to the "Admin" menu. Click the "Location Manager" accordion and then click the "Modules" option.

The screenshot shows the Admin Dashboard with a sidebar containing various administrative functions like Accession, Verification, Shelving, Request, Pick List, Refile, Withdrawal, and Reports. The 'Location Manager' section is expanded, showing sub-options for Buildings, Modules, Aisles, Ladders, and Shelves. The 'Modules' option is highlighted with a red box. At the bottom left of the sidebar, there is a blue button labeled 'Admin'.

2. Select the building in which the new module will be created and click the "Manage Modules" button.

The screenshot shows the Admin Dashboard with the 'Modules' section selected. A modal dialog box titled 'Manage Modules' is open, prompting the user to 'Select Building'. The 'Manage Modules' button at the bottom left of the dialog is highlighted with a red box.

3. Click the "Add Module" button, enter the new module's number, and click the "Add Module" button.

The screenshot shows the 'Fort Meade: Modules' page with a table of existing modules. A modal dialog box titled 'Add New Module' is open, prompting the user to 'Enter Module Number'. The 'Add Module' button at the bottom left of the dialog is highlighted with a red box.

Module	Created Date	Last Updated
1	1/19/2025	2025
2	1/19/2025	2025
3	1/19/2025	2025
4	1/19/2025	2025
5	1/19/2025	2025
6	1/19/2025	1/19/2025
CSR2A	1/19/2025	1/19/2025
CSR2B	1/19/2025	1/19/2025
CSR2C	1/19/2025	1/19/2025

## 6.7.2 Edit Module

1. On desktop or mobile, navigate to the "Admin" menu. Click the "Location Manager" accordion and then click the "Modules" option.

The screenshot shows the Admin Dashboard interface. On the left, there is a sidebar with various navigation options: Accession, Verification, Shelving, Request, Pick List, Refile, Withdrawal, and Reports. Below these are two main sections: 'Groups & Permissions' and 'List Configurations'. Under 'List Configurations', the 'Location Manager' section is expanded, revealing 'Buildings', 'Modules' (which is highlighted with a red box), 'Aisles', 'Ladders', 'Shelves', and 'Bulk Upload Ladders/Shelves'. At the bottom of the sidebar, there is an 'Admin' button. The main content area is titled 'Admin Dashboard' and contains a search bar for 'Item' and 'Search Item Barcode'.

2. Select the building in which the module will be edited and click the "Manage Modules" button.

The screenshot shows the Admin Dashboard with the 'Modules' section selected. A modal dialog box titled 'Manage Modules' is open in the center. It contains a dropdown menu labeled 'Building (Required)' with the placeholder 'Select Building'. Below the dropdown are two buttons: 'Manage Modules' (highlighted with a red box) and 'Cancel'. The background of the dashboard shows other sections like 'Groups & Permissions', 'List Configurations', and 'Aisles'.

3. Click the three-dot-icon next to the module that will be edited and click the "Edit Module" button.

The screenshot shows the 'Fort Meade: Modules' list view. The table has columns for 'Module', 'Created Date ↑', and 'Last Updated'. There are nine rows of data. In the first row, the 'Module' column contains '1' and the 'Edit Module' button (highlighted with a red box). The other rows show modules 3 through 9, all labeled 'CSR2A', 'CSR2B', or 'CSR2C' with a creation date of 1/19/2025 and a last update date of 1/19/2025. At the top right of the table, there are 'Rearrange' and '+ Add Module' buttons.

Module	Created Date ↑	Last Updated
1	1/19/2025	1/19/2025
3	1/19/2025	1/19/2025
4	1/19/2025	1/19/2025
5	1/19/2025	1/19/2025
6	1/19/2025	1/19/2025
CSR2A	1/19/2025	1/19/2025
CSR2B	1/19/2025	1/19/2025
CSR2C	1/19/2025	1/19/2025

- Enter the module's new number and click the "Update Module" button.

The screenshot shows a table of modules with columns for Module, Created Date, and Last Updated. Module 1 is selected and has an edit modal overlayed. The modal title is "Edit Module". It contains a "Module Number (Required)" field with the value "2025" and a "Cancel" button. A red box highlights the "Edit Module" button, which is blue with white text. The table rows show other modules like 2, 3, 4, 5, 6, and CSR2A through CSR2C, each with their respective creation and last update dates.

Module	Created Date	Last Updated
1	1/19/2025	2025
2	1/19/2025	2025
3	1/19/2025	2025
4	1/19/2025	2025
5	1/19/2025	1/19/2025
6	1/19/2025	1/19/2025
CSR2A	1/19/2025	1/19/2025
CSR2B	1/19/2025	1/19/2025
CSR2C	1/19/2025	1/19/2025

## 6.8 Manage Aisles

### 6.8.1 Create Aisle

- On desktop or mobile, navigate to the "Admin" menu. Click the "Location Manager" accordion and then click the "Aisles" option.

The screenshot shows the Admin Dashboard with the "Location Manager" accordion expanded. Under "Modules", the "Aisles" option is highlighted with a red box. Other options like "Buildings", "Ladders", and "Shelves" are also listed. The left sidebar contains links for Accession, Verification, Shelving, Request, Pick List, Refile, Withdrawal, and Reports. The bottom navigation bar has an "Admin" button highlighted with a red box.

- Select the building and module in which the new aisle will be created and click the "Manage Aisles" button.

The screenshot shows the Admin Dashboard with a sidebar containing 'Groups & Permissions', 'List Configurations', 'Location Manager' (which is expanded), 'Buildings', 'Modules', 'Aisles' (which is selected and highlighted in red), 'Ladders', 'Shelves', and 'Bulk Upload Ladders/Shelves'. The main content area displays a 'Manage Aisles' modal with fields for 'Building (Required)' and 'Module (Required)'. The 'Manage Aisles' button at the bottom left is also highlighted in red.

3. Click the "Add Aisle" button, enter the new aisle's number and priority (location logical order), and click the "Add Aisle" button.

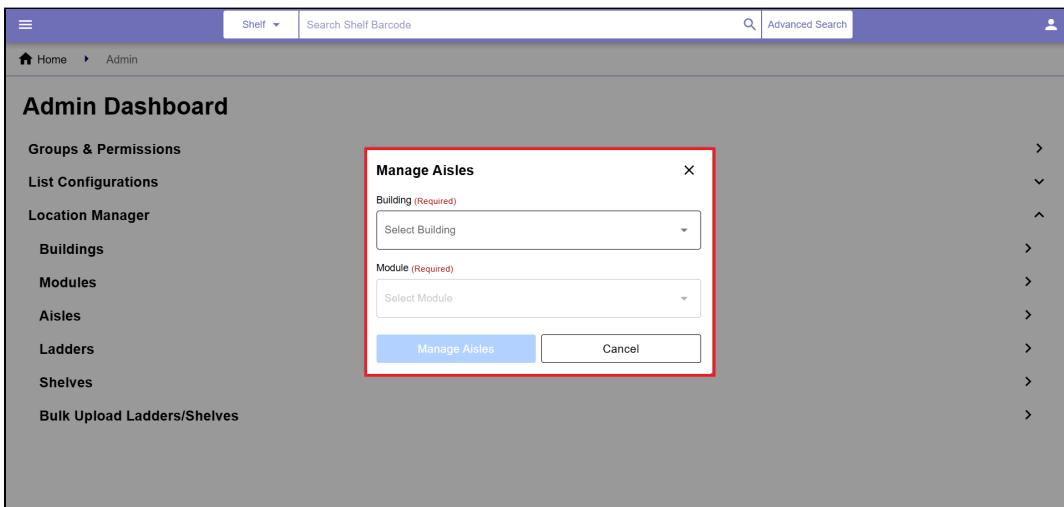
The screenshot shows the 'Fort Meade (1): Aisles' page with a table of existing aisles numbered 1 through 5. To the right is a 'Last Updated' column with dates from 1/19/2025. A 'Rearrange' dropdown and a '+ Add Aisle' button are at the top right. A 'Manage Aisles' modal is open, prompting for 'Aisle Number (Required)' and 'Aisle Priority'. The 'Add Aisle' button at the bottom left of the modal is highlighted in red.

## 6.8.2 Edit Aisle

1. On desktop or mobile, navigate to the "Admin" menu. Click the "Location Manager" accordion and then click the "Aisles" option.

The screenshot shows the Admin Dashboard with the 'Location Manager' section expanded. Under 'Location Manager', the 'Aisles' option is selected and highlighted in red. The sidebar on the left includes 'Accession', 'Verification', 'Shelving', 'Request', 'Pick List', 'Refile', 'Withdrawal', and 'Reports'. The 'Admin' button at the bottom left of the sidebar is also highlighted in red.

2. Select the building and module in which the aisle will be edited and click the "Manage Aisles" button.



3. Click the three-dot-icon next to the aisle that will be edited and click the "Edit Aisle" button.

Aisle	Location Logical Order	Created Date	Last Updated
1		1/19/2025	1/19/2025
	Edit Aisle		
3		1/19/2025	1/19/2025
4		1/19/2025	1/19/2025
5		1/19/2025	1/19/2025

4. Enter the aisle's new priority (location logical order) and click the "Update Aisle" button.

The screenshot shows the Fetch software interface. At the top, there's a navigation bar with 'Shelf' and 'Search Shelf Barcode' on the left, and 'Advanced Search' and a user icon on the right. Below the navigation is a breadcrumb trail: 'Home > Admin > Manage Aisles'. The main title is 'Fort Meade (1): Aisles'. On the left, there's a table with columns 'Aisle' and 'Location Logical Order'. The table has five rows labeled 1 through 5. To the right of the table is a modal window titled 'Edit Aisle'. Inside the modal, there are two input fields: 'Aisle Number (Required)' containing '1' and 'Aisle Priority' containing 'Enter Aisle Priority'. At the bottom of the modal are 'Update Aisle' and 'Cancel' buttons. A red box highlights the 'Edit Aisle' modal.

## 6.9 Manage Ladders

### 6.9.1 Create Ladder

1. On desktop or mobile, navigate to the "Admin" menu. Click the "Location Manager" accordion and then click the "Ladders" option.

The screenshot shows the Fetch software interface with a dark blue sidebar on the left. The sidebar contains various menu items with icons: Accession, Verification, Shelving, Request, Pick List, Refile, Withdrawal, and Reports. Below these is a blue 'Admin' button. The main area is titled 'Admin Dashboard' and features an 'Admin' menu at the top. Under 'Admin', there's a 'Groups & Permissions' section with a dropdown arrow. Below it is a 'List Configurations' section with a dropdown arrow. The 'Location Manager' section is expanded, showing 'Buildings', 'Modules', 'Aisles', and 'Ladders'. The 'Ladders' item is highlighted with a red box. Other sections include 'Shelves' and 'Bulk Upload Ladders/Shelves'. A red box also highlights the 'Ladders' item in the 'Location Manager' list.

2. Select the building, module, aisle, and side in which the new ladder will be created and click the "Manage Ladders" button.

The screenshot shows the Admin Dashboard with a sidebar containing 'Groups & Permissions', 'List Configurations', 'Location Manager' (which is expanded), 'Buildings', 'Modules', 'Aisles', 'Ladders' (which is highlighted with a red box), 'Shelves', and 'Bulk Upload Ladders/Shelves'. A modal window titled 'Manage Ladders' is open, prompting for 'Building (Required)', 'Module (Required)', 'Aisle (Required)', and 'Side (Required)'. It includes dropdown menus for 'Select Building', 'Select Module', 'Select Aisle', and buttons for 'Left' and 'Right'. At the bottom are 'Manage Ladders' and 'Cancel' buttons.

3. Click the "Add Ladder" button, enter the new ladder's number and priority (location logical order), and click the "Add Ladder" button.

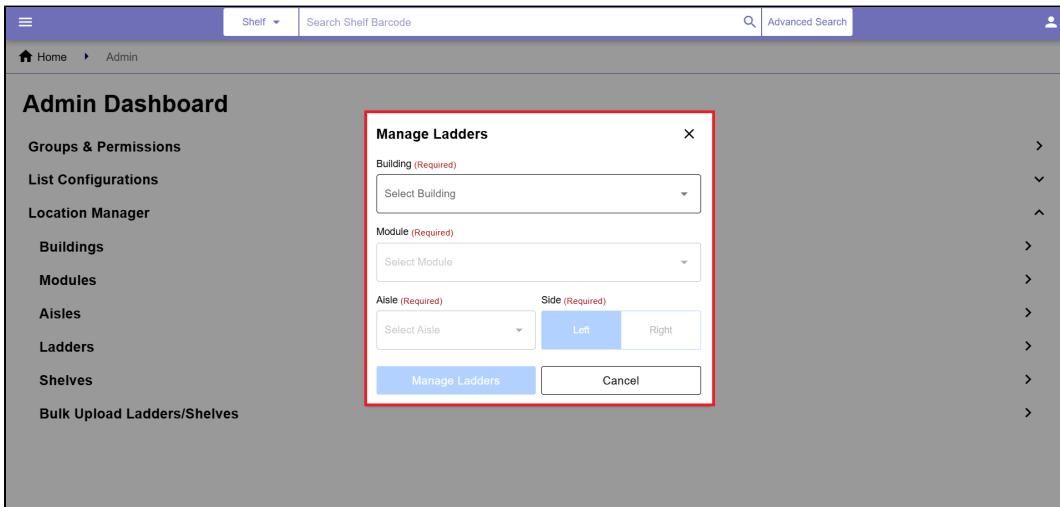
The screenshot shows the 'Fort Meade (1-1-L): Ladders' page. On the left is a list of ladders numbered 2 through 9. To the right is a table with columns 'Last Updated' and 'Location Logical Order'. A modal window titled 'Add New Ladder' is open, prompting for 'Ladder Number (Required)' and 'Ladder Priority'. It includes an 'Enter Ladder Number' input field, an 'Enter Ladder Priority' input field, and 'Add Ladder' and 'Cancel' buttons. The 'Add Ladder' button is highlighted with a red box.

## 6.9.2 Edit Ladder

1. On desktop or mobile, navigate to the "Admin" menu. Click the "Location Manager" accordion and then click the "Ladders" option.

The screenshot shows the Admin Dashboard with the 'Location Manager' section expanded. Under 'Location Manager', the 'Ladders' option is highlighted with a red box. Other options include 'Buildings', 'Modules', 'Aisles', 'Shelves', and 'Bulk Upload Ladders/Shelves'. A blue bar at the bottom contains the word 'Admin'.

2. Select the building, module, aisle, and side in which the new ladder will be created and click the "Manage Ladders" button.



3. Click the three-dot-icon next to the ladder that will be edited and click the "Edit Ladder" button.

Ladder	Location Logical Order	Created Date	Last Updated
⋮ 2		1/19/2025	1/19/2025
⋮ 1		1/19/2025	1/19/2025
⋮ 4		1/19/2025	1/19/2025
⋮ 5		1/19/2025	1/19/2025
⋮ 6		1/19/2025	1/19/2025
⋮ 7		1/19/2025	1/19/2025
⋮ 8		1/19/2025	1/19/2025
⋮ 9		1/19/2025	1/19/2025

4. Enter the ladder's new priority (location logical order) and click the "Update Ladder" button.

The screenshot shows a list of ladders numbered 2 through 9. A modal window titled "Edit Ladder" is open over the list, focusing on ladder number 1. The modal contains fields for "Ladder Number (Required)" (set to 1) and "Ladder Priority" (with placeholder "Enter Ladder Priority"). At the bottom are "Update Ladder" and "Cancel" buttons. The background list shows "Last Updated" dates for each ladder from 1/19/2025 to 1/19/2025.

## 6.10 Manage Shelves

### 6.10.1 Create Shelf

1. On desktop or mobile, navigate to the "Admin" menu. Click the "Location Manager" accordion and then click the "Shelves" option.

The screenshot shows the Admin Dashboard with the "Location Manager" section expanded. Under "Location Manager", the "Shelves" option is highlighted with a red box. Other options like "Buildings", "Modules", "Aisles", and "Ladders" are also listed. A "Bulk Upload Ladders/Shelves" link is visible below. The left sidebar has a blue header "FETCH" and various navigation items like "Accession", "Verification", "Shelving", etc., with "Shelving" also highlighted with a red box. The "Admin" button at the bottom left is also highlighted with a red box.

2. Select the building, module, aisle, side, and ladder in which the new shelf will be created and click the "Manage Shelves" button.

The screenshot shows the Admin Dashboard with the 'Shelf' menu selected. A modal window titled 'Manage Shelves' is open, containing fields for 'Building (Required)', 'Module (Required)', 'Aisle (Required)', 'Side (Required)', and 'Ladder (Required)'. There are also 'Select Building', 'Select Module', 'Select Aisle', and 'Select Ladder' dropdowns. At the bottom are 'Manage Shelves' and 'Cancel' buttons.

3. Click the "Add Shelf" button, enter the new shelf's details, and click the "Add Shelf" button.

The screenshot shows the 'Fort Meade (1-1-L-1): Shelves' page. A modal window titled 'Add New Shelf' is open, containing fields for 'Owner (Required)', 'Container Size (Required)', 'Shelf Type (Required)', 'Container Type (Required)', 'Shelf Barcode (Required)', 'Shelf Number (Required)', and 'Shelf Priority'. To the right is a table of existing shelves with columns for 'Owner', 'Shelf Barcode', and 'Location Logical Order'. A red box highlights the '+ Add Shelf' button at the top right of the modal.

## 6.10.2 Edit Shelf

1. On desktop or mobile, navigate to the "Admin" menu. Click the "Location Manager" accordion and then click the "Shelves" option.

The screenshot shows the Admin Dashboard with the 'Admin' menu selected. The 'Location Manager' and 'Shelves' options under the 'Shelving' section are highlighted with red boxes. The left sidebar shows various navigation links like Accession, Verification, Shelving, Request, Pick List, Refile, Withdrawal, and Reports.

2. Select the building, module, aisle, side, and ladder in which the shelf will be edited and click the "Manage Shelves" button.

The screenshot shows the Admin Dashboard with the 'Admin' tab selected. A modal window titled 'Manage Shelves' is open. Inside the modal, there are four dropdown menus: 'Building (Required)', 'Module (Required)', 'Aisle (Required)', and 'Ladder (Required)'. Each dropdown has a red border around it. Below the dropdowns are two buttons: 'Manage Shelves' (blue) and 'Cancel' (white). The background of the dashboard shows various navigation links like 'Buildings', 'Modules', 'Aisles', 'Ladders', and 'Shelves'.

3. Click the three-dot-icon next to the shelf that will be edited and click the "Edit Shelf" button.

Shelf Number	Shelf Width	Shelf Height	Shelf Depth	Size Class	Shelf Type	Container Type	Owner	Shelf Barcode	Location Logical Order
⋮ 3	53	12	36	CH FORT MEADE BOXES - CH	53	Tray	LC	003043	
⋮	53	12	36	CH FORT MEADE BOXES - CH	53	Tray	LC	003041	
⋮ 2	53	12	36	DL FORT MEADE BOXES - DL	53	Tray	LC	003044	
⋮ 4	53	12	36	CH FORT MEADE BOXES - CH	53	Tray	LC	003042	
⋮ 6	53	14	36	CH FORT MEADE BOXES - CH	53	Tray	LC	000764	
⋮ 9	53	14	36	CH FORT MEADE BOXES - CH	53	Tray	LC	007347	
⋮ 13	53	12	36	BH FORT MEADE BOXES - BH	53	Tray	LC	007351	

4. Enter the shelf's new details and click the "Update Shelf" button.

The screenshot shows the Fetch software interface. At the top, there's a navigation bar with 'Shelf' and 'Search Shelf Barcode'. Below it is a breadcrumb menu: Home > Admin > Manage Shelves. The main title is 'Fort Meade (1-1-L-1): Shelves'. On the left, there's a table of shelves with columns: Shelf Number, Shelf Width, Shelf Height, and Shelf Depth. On the right, a modal window titled 'Edit Shelf' is open, containing fields for Owner (LC), Container Size (CH FORT MEADE BOXES - CH), Shelf Type (65), Container Type (Tray), Shelf Barcode (003043), and Shelf Number (3). A sidebar on the right lists shelves by owner, shelf barcode, and logical order.

Shelf Number	Shelf Width	Shelf Height	Shelf Depth
3	53	12	36
5	53	12	36
2	53	12	36
4	53	12	36
6	53	14	36
9	53	14	36
13	53	12	36

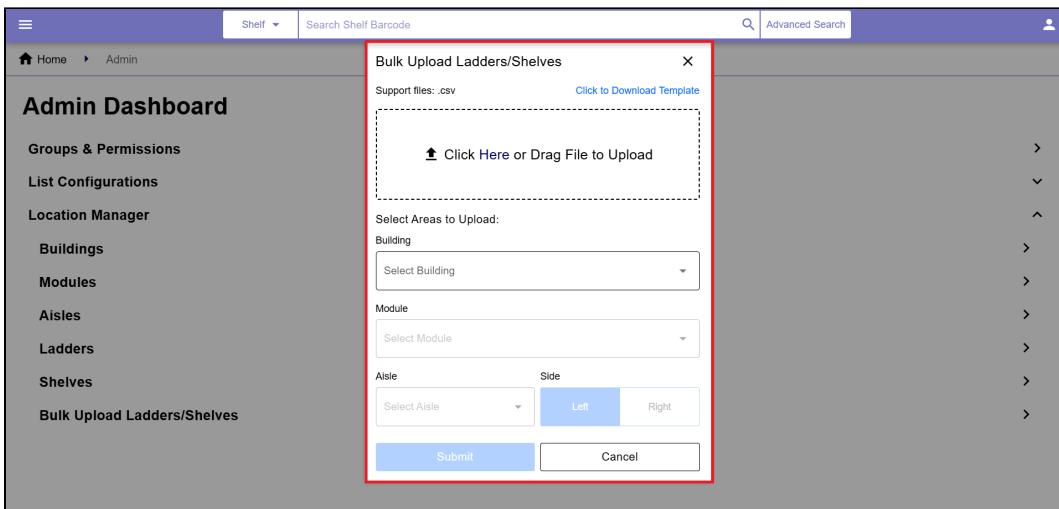
Owner	Shelf Barcode	Location Logical Order
LC	003043	
LC	003041	
LC	003044	
LC	003042	
LC	000764	
LC	007347	
LC	007351	

## 6.11 Bulk Create Ladders/Shelves

1. On desktop or mobile, navigate to the "Admin" menu. Click the "Location Manager" accordion and then click the "Bulk Upload Ladders/Shelves" option.

The screenshot shows the Fetch Admin Dashboard. On the left, a sidebar lists various admin functions: Accession, Verification, Shelving, Request, Pick List, Refile, Withdrawal, and Reports. The 'Admin' button is highlighted with a red box. The main area is titled 'Admin Dashboard' and contains an 'Location Manager' accordion. Under 'Location Manager', there are sections for Buildings, Modules, Aisles, Ladders, and Shelves. The 'Bulk Upload Ladders/Shelves' link is highlighted with a red box.

2. Click the "Download Template" hyperlink and populate the columns. Upload the populated template file, select the areas to upload, and click the "Submit" button.



## 7. System Updates

To update the FETCH software on desktop or mobile, follow the "new content is available" on-screen prompt to apply changes after development and deployment are complete.

## 8. Troubleshooting

To resolve any performance or functionality issues:

1. Navigate to the internet browser's settings menu and clear cache and browsing history.
2. After each deployment, manually reload the application if offline/online resyncing options do not display.

If issues persist, contact FETCH's system administrator.

## 9. Glossary

Term	Definition
Accession	That part of the ingest process in which an item's barcode and other basic metadata (e.g. owner, collection, container and media type, etc.) are entered into the IMS. This process will include tray material and non tray material.
Aisle	A linear collection of ladders. Aisles generally have both a left and right side.
Bin	[See tote].
Building	[See facility].
Cart	A type of conveyance that has wheels and shelves and is used to transport or temporarily store materials.
Collection (ReCAP only)	The group of materials within a library that are have a shared custodial relationship. They may be part of a branch library or other intellectual grouping. They generally share intellectual oversight or use restrictions. There may be several sub-collections within a collection.
Container	An object that is used to hold or transport another object. In some cases it may have a single barcode for the object within (like an archival box) in others it may contain objects with their own barcodes (like books within a tray).
Container Code	The code or term for specific types of container used for long-term storage. Each of these containers are associated with particular sizes or types of boxes.

Conveyance	A system or device for transporting or moving items. Conveyances generally have wheels.
Customer	[No longer used; see collection/sub-collection].
Deaccession	The process for removing an item from a storage facility. Items may be removed either when they are in their permanent or temporary location (direct) or on loan, lost or missing (indirect).
Delete	Permanent erasing information/data from the software. For example ability to delete an empty workorder, or tray.
Entity	A data construct for discrete things that have specific attributes. Entities often have defined relationships with other entities. e.g., an item, building, workflow, etc.
Facility	An independent structure with roof and walls. A single building may contain multiple modules or rooms.
Failed Request	An error or other termination of a request workflow. Examples may include an item not being on the shelf.
Footprint	[No longer used. See Shelf position].
ILS	Integrated Managements System. Synonymous with LSP Library Services Platform) or LMS (Library Management System).
IMS	Inventory Management System.
In Transit Location	The location of an item while it is being conveyed from one location to another. It won't be in transit in the IMS, but will be in the library catalog and will be talking about it.
Item	A single barcoded object.
Ladder	A vertical group of shelves, it is defined by specific number designations to be in the same grouping location. Ladders may be stacked on top of each other.
Library Division	Departments within a library.
Light-up Shelves	Adding shelves to the IMS to include aisle, number Left or right face, height and shelf number.
Location Identifier	A unique string (Building-Module-Aisle-Side-Ladder-Shelf-Shelf Position) to represent the specific position of an item.
Module	A block of aisles contained in a single room or modular building.
Move	The process of moving an item from one tray/shelf in the facility to another one.
Open Workorder	A status that indicates a workflow has not yet been completed.
ORS	Originating Request System. Where requests for objects originate. Examples may include ILS/IMS/LSP/Aeon.
Owner	The primary authority with whom decisions about the ultimate disposition of an item rest. The lowest level of designated ownership in the hierarchy. The owning institution, library, collection, or sub-collection.
Patron	Library user/end user.
Permanent Location	The location where an item has been assigned permanently and is not intended to be moved from that location except during use. Most items will be permanently assigned to a Tray, Shelf, Ladder, Aisle, Module, and Facility. items are intended to be returned to their permanent location after use.
Refile	Returning an item to its permanent or temporary location.
Rejection	Terminating the accessioning of an item into the facility before the accession is complete.
Resource Sharing	A type of use where one libraries borrows an item from another library for one of their own patrons. Also known as Interlibrary loan.
Retrieve	The process for which an item is fetched from its permanent or temporary location for a specific purpose.
Return	The act of a patron returning an item from circulation. It refers to the act of an item being back in the hands of the Library, whatever location it goes to from the patron.
Scan and Deliver	A type of use (retrieval) where an item is briefly retrieved so that a small portion is digitized and electronically sent to a patron. Use instead of EDD.
Shelf Position	The specific location of an item or tray on a shelf (e.g., front/middle/back) or footprint (1,2,3,4). An assigned spot on a shelf.
SUPPRESS	Process of making some data inactive but it remains in the system for statistical purposes or other reference. Suppressed items may not show up on all reports. For example, an item is physically deaccessioned and the barcode is suppressed such that the data remains usable.

Tags	A searchable, customizable note added to a record (Item, Tray, Shelf, etc) within the IMS.
Temporary Location	A location where items are assigned for medium periods of time. Items may be assigned a temporary location if they need to be stored for days or weeks (possibly months), but not intended as their permanent home.
Tote	Typically, a plastic container with a closeable top that will be moved either by fitting on designated dollies or moved by hand trucks. Typically used to move material to and from the shelving facility.
Transfer	A process for reassigning an item from one permanent location to another. Examples may include moving items from on-site to storage.
Tray	A barcoded open container that contains several individually barcoded items.
Truck	[See cart].
Use	The purpose for which an item is retrieved. Examples may include circulation, scan and deliver, resource sharing, or staff maintenance.
Verify	The process of confirming that a previous process was performed accurately. Examples may include confirming that all barcodes that were added to a new tray are present or confirming that a book that was reshelved was put into the correct tray.
Workflow	A sequence of tasks that runs from initiation through completion.