

# LESSON

## Inventory Form

Document 3.16  
 Level: 3  
 Skills: Reading, Math  
 Sector: All

### Background Information:

Workplaces across all sectors keep supplies on hand for regular maintenance of the working environment. Depending on the size of the organization, a computerized inventory program may be used to keep a running tally of stock. To verify totals, a manual count is done at regular intervals and checked against the computerized count. Employees responsible for inventory must be able to read and record information, input information into the inventory program, and do an accurate manual count.

### Required Prior Knowledge:

- Knowledge of vocabulary for cleaning supplies
- Familiarity with tables
- Addition and subtraction skills
- Understand and work with integers, ratios

**Delivery time:**  
 60 – 90 minutes

Activity Time	Procedure	Sample Questions	Comments/Notes
<p>#1 5 – 10</p>	<p>Relate to past experience by asking if any participants have been responsible for taking inventory in previous employment situations. If not, relate it to activities like taking mental inventory of items in the home.</p> <p>Discuss the purpose(s) of taking inventory.</p>	<p><i>Think about the last job you had; how did you keep track of the items/materials you used to do your job? Why did you need to do this? How might the company have kept track of stock kept on site? Why do you think they needed to do this?</i></p>	<p>Even if participants have not done formal inventory, they have likely done informal inventory at the beginning or end of their workday of materials used to perform their duties.</p> <p>The purpose(s) include(s):</p> <ul style="list-style-type: none"> <li>○ Maintaining sufficient quantities on hand to facilitate uninterrupted completion of work.</li> <li>○ Monitoring loss/theft.</li> <li>○ Keeping records for financial audit.</li> <li>○ Identifying trends in demand and forecasting supply requirements.</li> </ul>

<p>#2 5-10</p>	<p>Have participants take the role of an <i>Against the Grain</i> employee who has been assigned the duty of doing inventory.</p> <p>Generate discussion about what is involved in performing this activity and what the inventory form might look like.</p>	<p><i>As an employee at Against the Grain, you have the duty of taking inventory of a particular stock.</i></p> <p><i>What kinds of things will you have to do?</i></p> <p><i>Will you have to document your results? Why? What might the form look like?</i></p>	<p>Look for responses that show understanding that inventory is a supply of materials.</p> <p>Taking inventory involves: counting items, checking against previous tallies, recording on a form.</p> <p>Encourage participants to think of other similar forms they have encountered in the workplace.</p>
<p>#3 15-20</p>	<p>Introduce <i>Against the Grain</i> inventory form (completed form) Discuss the layout and content.</p>	<p><i>This is the inventory form your co-worker completed the last time inventory was taken.</i></p> <p><i>How is information recorded on this form? What kind of information do you find? Where?</i></p>	<p>This form is a document that participants will have to both read and complete.</p> <p>Highlight the fact that information is presented in table format. Assist participants in understanding:</p> <ul style="list-style-type: none"> <li>○ column headings and the kind of information documented in each</li> <li>○ how to navigate the table using horizontal and vertical axes (columns and rows).</li> <li>○ what the positive/negative integers represent</li> </ul>
<p>#4 10-15</p>	<p>Introduce reading comprehension questions. Have participants read questions and write answers in the spaces provided on the sheet. Discuss answers as a group.</p>		
<p>Follow-Up Activity</p>	<p>Have participants do inventory of materials in the classroom or school, using blank form 3.16.</p>		

# Against the Grain

## Wood Refinishing for Commercial/Residential

### Monthly Inventory - Maintenance Supplies

Stock #	Item Desc.	Computerized Count	Manual Count	Difference +/-	Recount Authorization	
					recount	initials
031	Pine solvent	14	14			
091	Powder cleanser	12	11	-1	11	MR
041	Paper towel	192 packets (24/box)	189 packets	-3	189	MR
071	Bag of rags	6 bags	6			
051	Sponge	29	25	-4	29	MR
011	Garbage bags – large	92 (100/box)	91	-1	90	MR
021	Garbage bags – small	172 (250/box)	185	+13	184	MR
601	Rubber gloves	15 (pr)	14 pr + 1 odd	-1 odd	14 +1 odd	MR
701	Glass cleaner	13	11	-2	11	MR
801	Wood polish	6	7	+1	7	MR
081	Scrub brush	4	4			
061	Mop	2	2			
201	Broom	3	2	-1	3	MR
301	Dust pan	3	3			

\*Recount by supervisor only\*

Inventory Clerk \_\_\_\_\_ Date \_\_\_\_\_

## ACTIVITY

### Inventory Form

**Instructions:** Read the completed **Against The Grain** inventory count form and answer the following questions.

1. What type of supplies are listed on this form?

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2. What is the title of the person who counts the inventory?

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3. How many columns does the count form contain?

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4. Why is there a recount column?

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5. Who does a recount?

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6. What is the stock number for large garbage bags?

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7. What is the *difference* between the computerized count and the manual count for:

a) Stock item number 041: \_\_\_\_\_

b) Stock item number 021: \_\_\_\_\_

8. Of all the stock items, which two items are stocked in the largest quantities?

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9. **For discussion:** What reason(s) can you think of for the shortages and overages in inventory?

## BRIGHT IDEAS LIGHTING INVENTORY COUNT SHEET

Name: \_\_\_\_\_ Date \_\_\_\_\_

Item(s): Designer Styled AC Quiet Rocker Switches

Description	Colour	Stock Number	Computer Inventory Count	Quantity Counted	Difference +/-
Single Pole Rocker Switch	Ivory	23-2456	10	8	-2
Single Pole Rocker Switch	White	23-2457	15	16	+1
Single Pole Rocker Switch	Grey	23-2458	5	5	✓
Single Pole Rocker Switch, Illuminated	Ivory	23-2579	17	2	
Single Pole Rocker Switch, Illuminated	White	23-2580	90	81	
Single Pole Rocker Switch, Time Delay	Ivory	23-6602	70	75	
Single Pole Rocker Switch, Time Delay	White	23-6603	19	19	
3-Way, Rocker Switch	Ivory	23-8790	208	205	
3-Way, Rocker Switch	White	23-8791	25	24	
3-Way, Rocker Switch	Grey	23-8792	150	150	
3-Way, Rocker Switch, Illuminated	Ivory	23-7845	63	50	
3-Way, Rocker Switch, Illuminated	White	23-7846	89	79	
Back and Side Wired, Smooth Action	Ivory	23-9009	429	445	

(Any number off by 10 or more needs a re-count by another employee)

## ACTIVITY

### Inventory Form

**Instructions:** Read the completed Bright Ideas inventory count form and answer the following questions.

1. What type of items are listed on this form?

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2. How many different colours do the items come in?

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3. What is the colour of stock number 23-6603?

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4. What is the computer inventory count of stock number 23-7845?

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5. What is the quantity counted for stock number 23-9009?

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6. Calculate the *difference* between the computer inventory count and the quantity counted for:

a) Stock item number 23-2579: \_\_\_\_\_

b) Stock item number 23-7846: \_\_\_\_\_

7. Of all the stock items, which item is stocked in the largest quantities?

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**For discussion:** What reason(s) can you think of for the shortages and overages in inventory?

