



# **Inventory Procedures**

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## Overview

This guide gives step-by-step instructions on performing inventory using the inventory tool in Koha. We'll be utilizing a Bluetooth scanner, a tablet, and a Dropbox account to mobilize and streamline the process.

The inventory procedure involves scanning each item in your collection and telling the computer that the item exists and was seen on a specific date. A complete inventory not only tells which items are currently on the shelf, but which items are absent. With this information, missing items can be marked lost and dealt with appropriately.

The inventory/stocktaking tool in Koha requires certain permissions. If you cannot access the tool, contact SEKLS ([Jason](#)) to get set up.

### What you'll need:

Tablet  
Scanner  
Dropbox App  
A Plan

### Formulating a plan:

Before you start scanning, develop a plan:

- Note your start date for each location, you'll need it to run reports
- Plan out an order to follow when inventorying your collection to prevent skipping over items or duplicate scanning
- Keep track of your progress using the log sheets in [Appendix A](#)

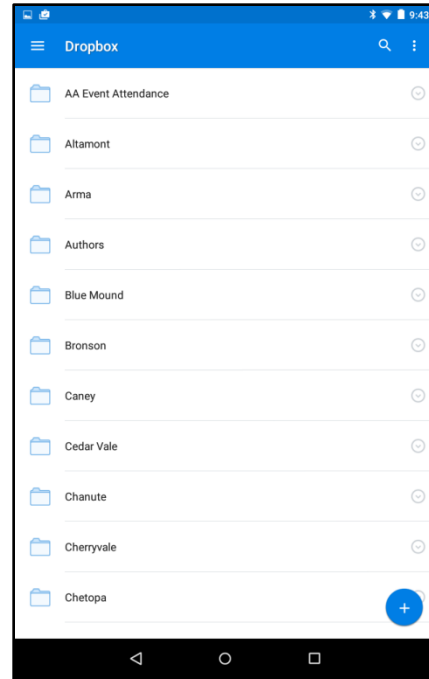
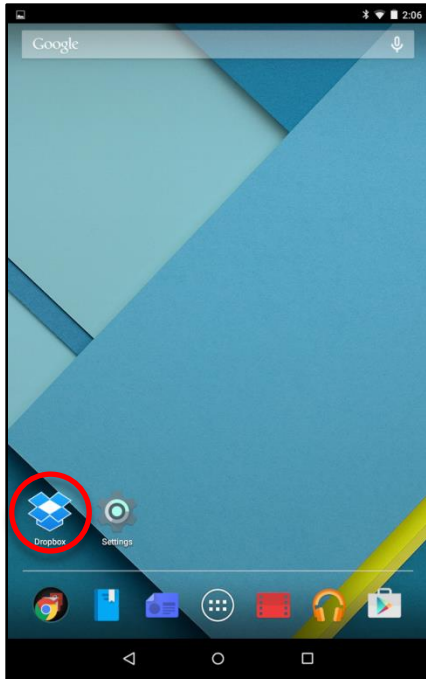
### Basic Workflow:

- 1.) Create a text file in Dropbox
- 2.) Scan items into text file
- 3.) Upload text file to Koha
- 4.) Print out errors
- 5.) Mark items seen
- 6.) Run reports, follow up on errors, and check shelves
- 7.) Rerun reports and submit list of items to be marked lost to SEKLS\*

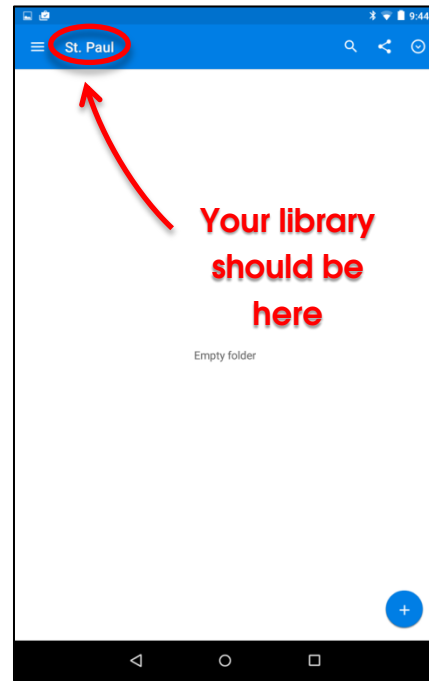
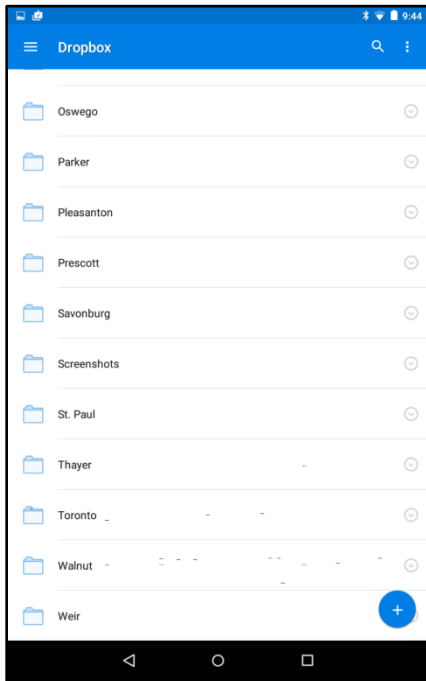
*\*We can do this as a batch and save you time and effort*


## Setting Up the Tablet (Android)

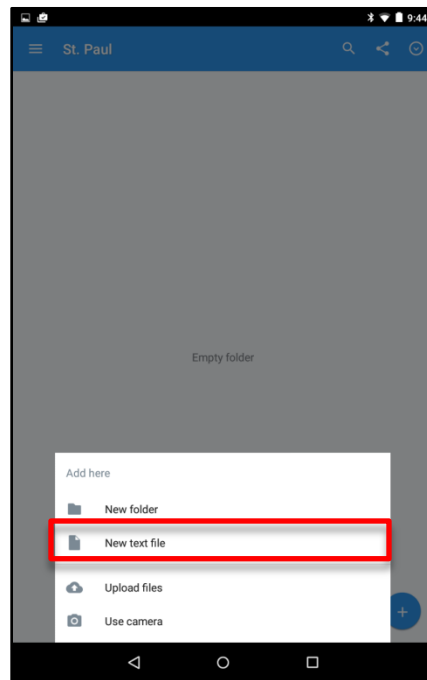
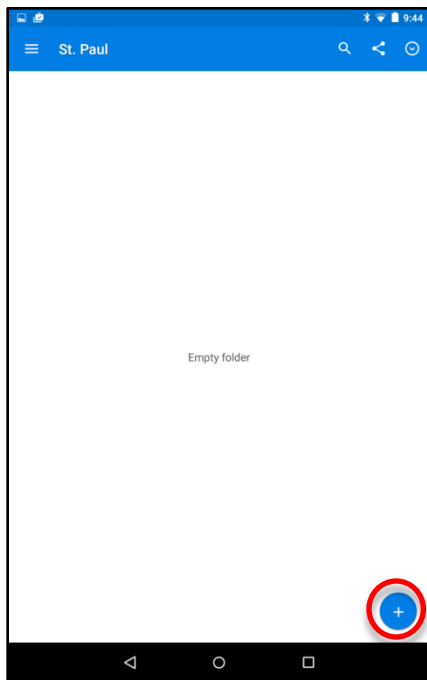
- 1.) Power on the tablet, and open up the Dropbox app



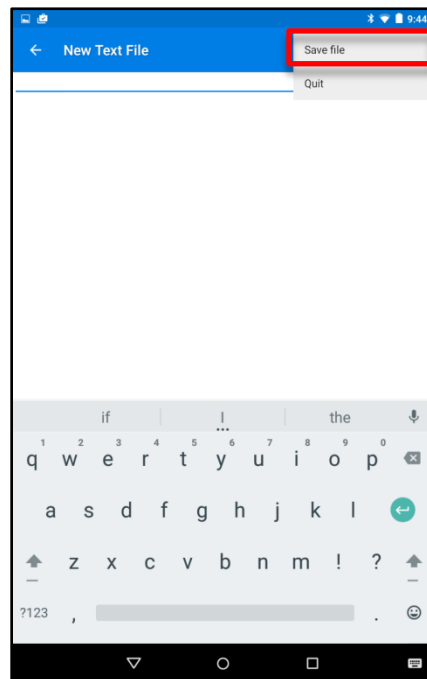
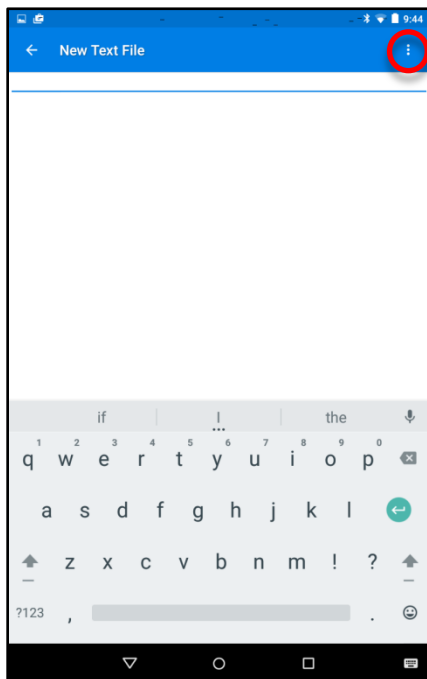
- 2.) Find your library's folder and touch it



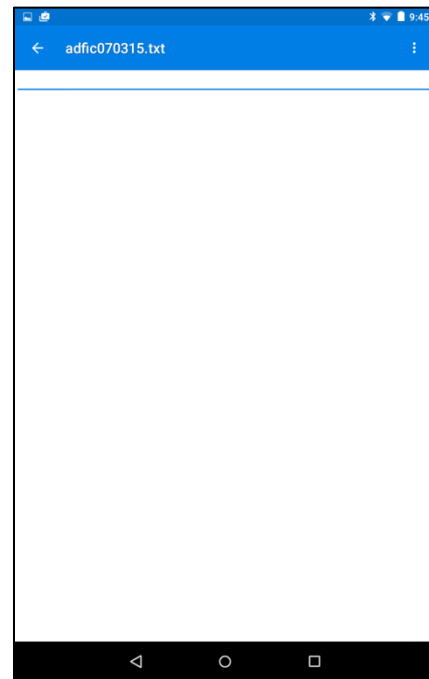
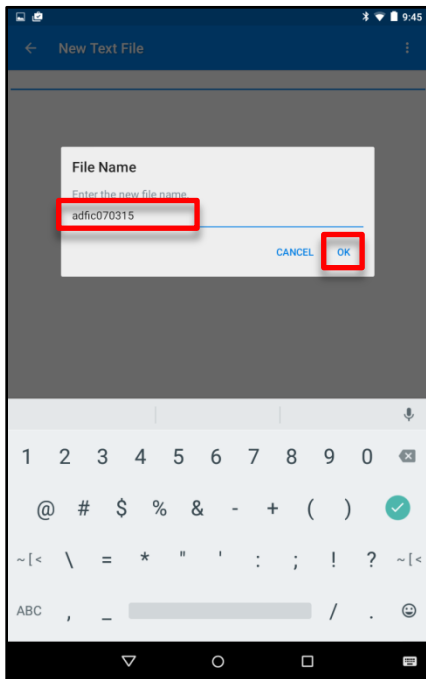
3.) Touch the  in the lower right corner and select “New text file”



4.) Touch the 3 white dots again and choose “Save file”



- 5.) Name the file with something similar to the section you are scanning, and the date then touch OK
- a. Example: adfc070315 for Adult Fiction on 7/03/15

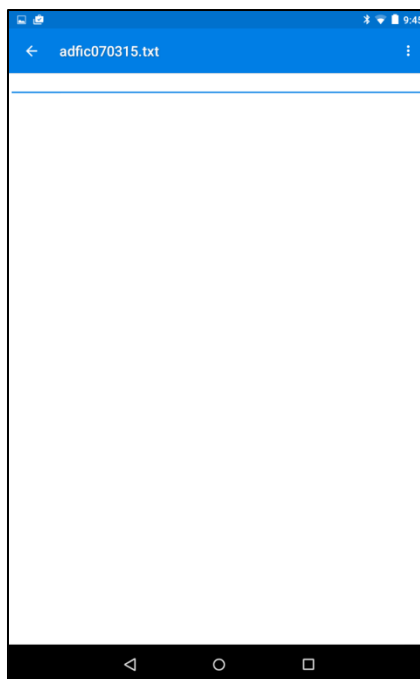


## Setting Up the Scanner

- 1.) Turn on the barcode scanner by holding down the small, round power button until it beeps



- 2.) The tablet thinks the scanner is a keyboard and may take the keyboard away. If your screen looks similar to this, you're ready to scan:



*Note: If you need to use the keyboard (for keying in barcodes or otherwise), turn the scanner off by holding down the power button and the keyboard should pop back up.*

## Scanning

- 1.) Hold down the large trigger button on the scanner, and aim the red laser at a barcode

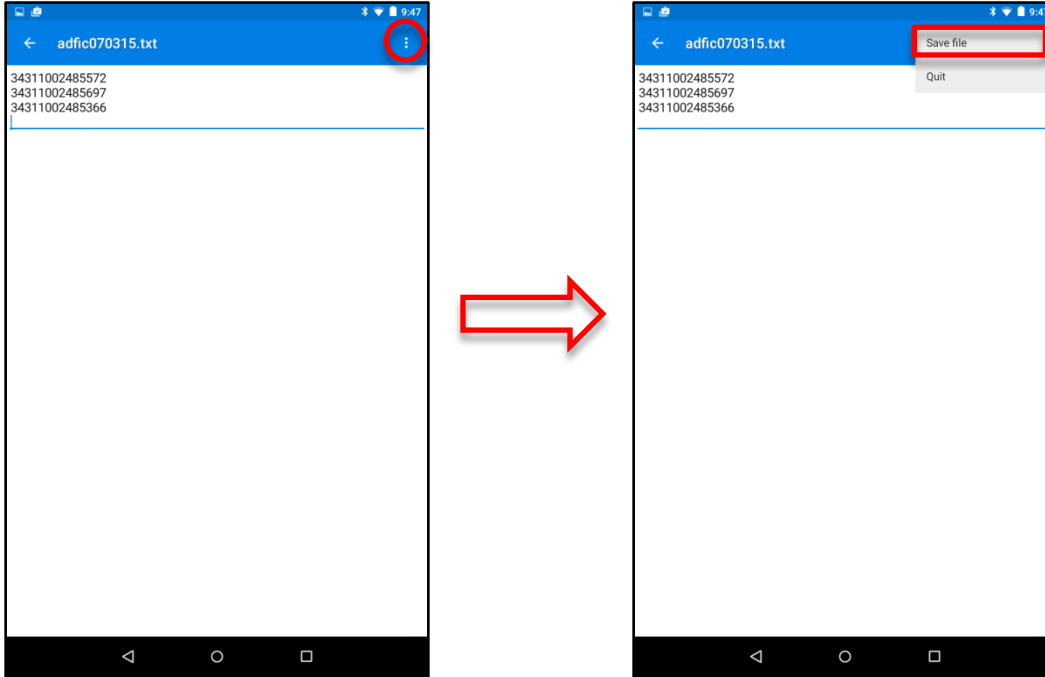


*Note: The Bluetooth scanner is slightly different than the scanners we use. When you scan, the red laser disappears then the scanner vibrates and beeps when the info hits the tablet. This can feel slightly delayed.*

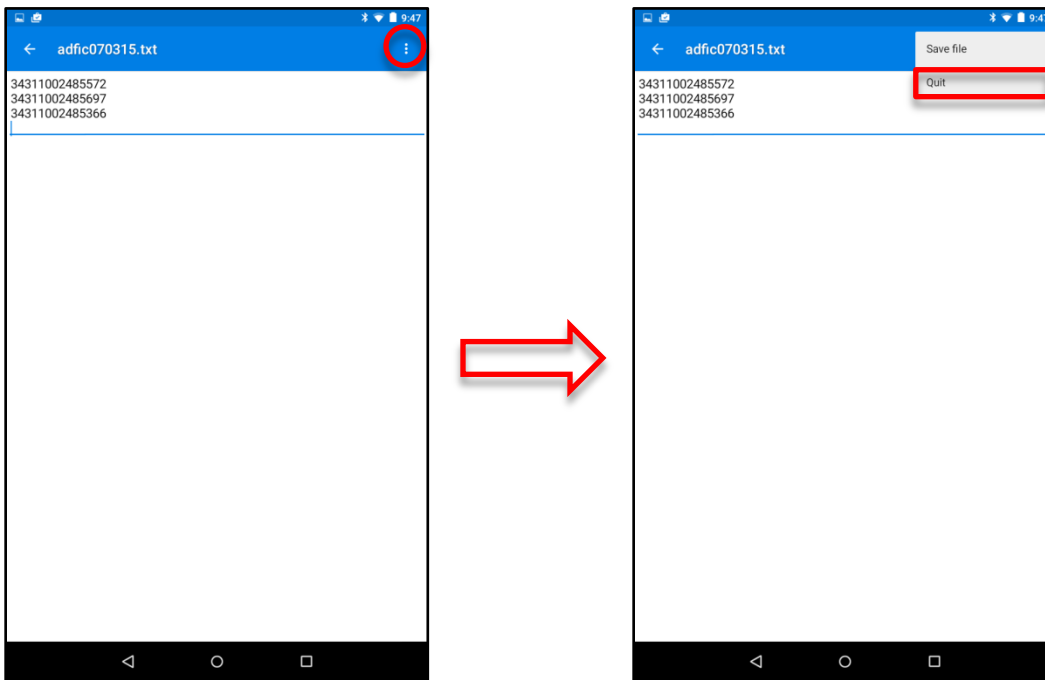
- 2.) Scan, Scan, Scan
  - a. Always be aware of the tablet – if it isn't active, your scans will not be captured. The tablet can be set to stay awake for 30 minutes of inactivity, so as long as you keep up a steady scan, this shouldn't be a problem.
  - b. Duplicate scans don't hurt anything – if you lose track of where you were, it's ok to backtrack and rescan a few shelves
  - c. Watching the screen can help catch errors but leads to slower inventory. Reports will catch most errors later on, so thoroughness can be traded for speed.



- 3.) Save often – Touch the 3 white dots, touch ‘Save file’
- a. If you get distracted, save your document
  - b. If you take a break, save your document
  - c. If your batteries are low, save your document



- 4.) When you're done, save again, then touch the 3 white dots and touch “Quit”



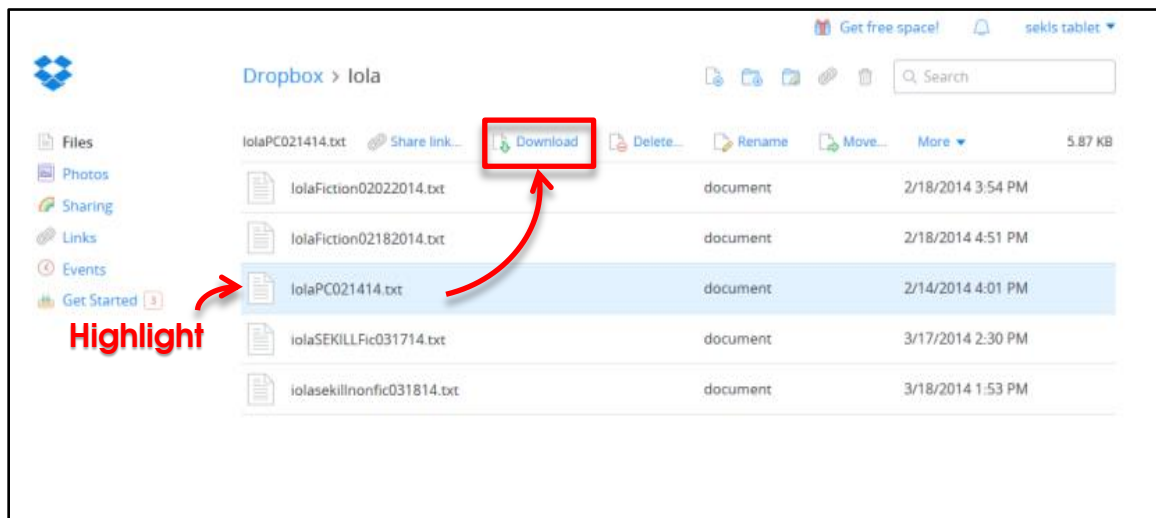
5.) After you hit quit, it will take you back to your folder, where you can view and re-access any previous files:



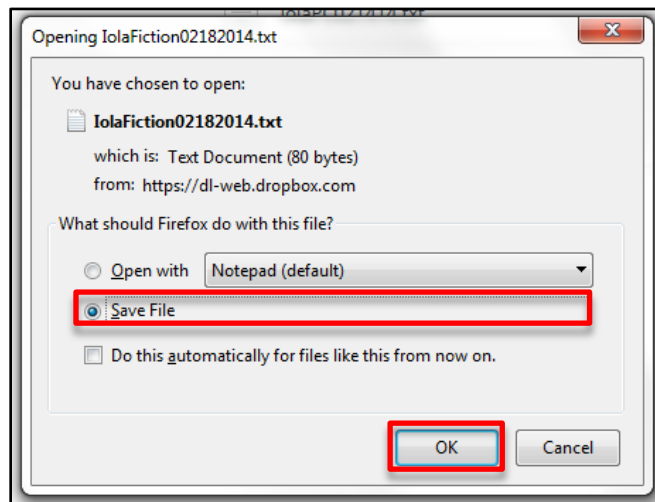
## Uploading Files to Koha

When you're ready to submit your scanned barcodes to Koha, you'll need to retrieve the files from Dropbox and upload them to Koha.

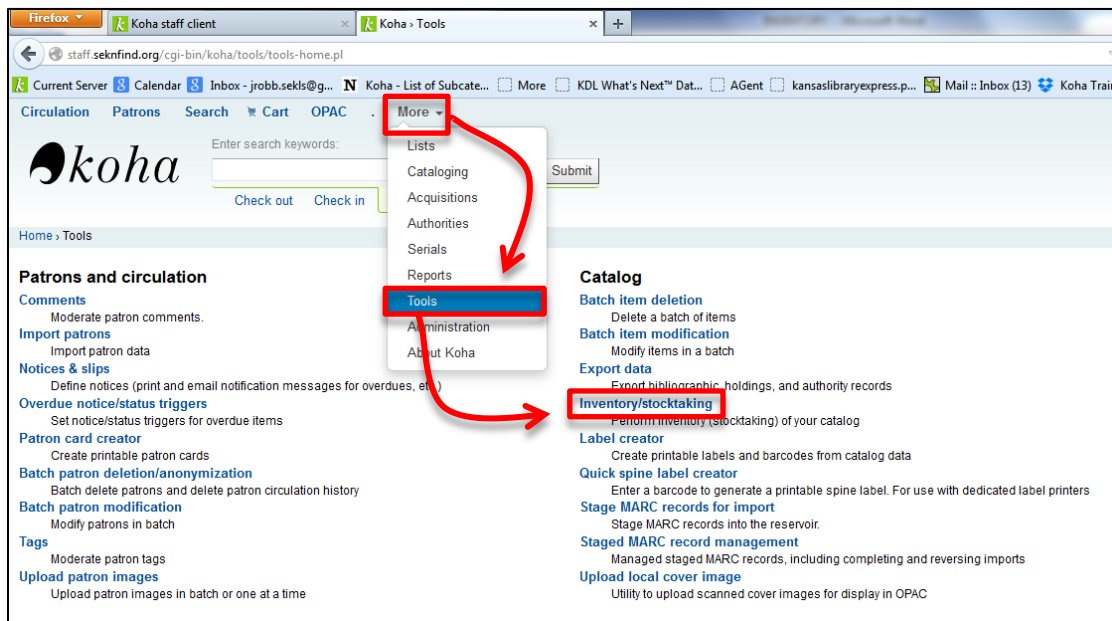
- 1.) Go to [www.dropbox.com](http://www.dropbox.com) on your staff computer and login with:  
*email:*  
*password:*
- 2.) Locate the file(s) you want to upload
- 3.) Download the files by highlighting the file and clicking "Download"



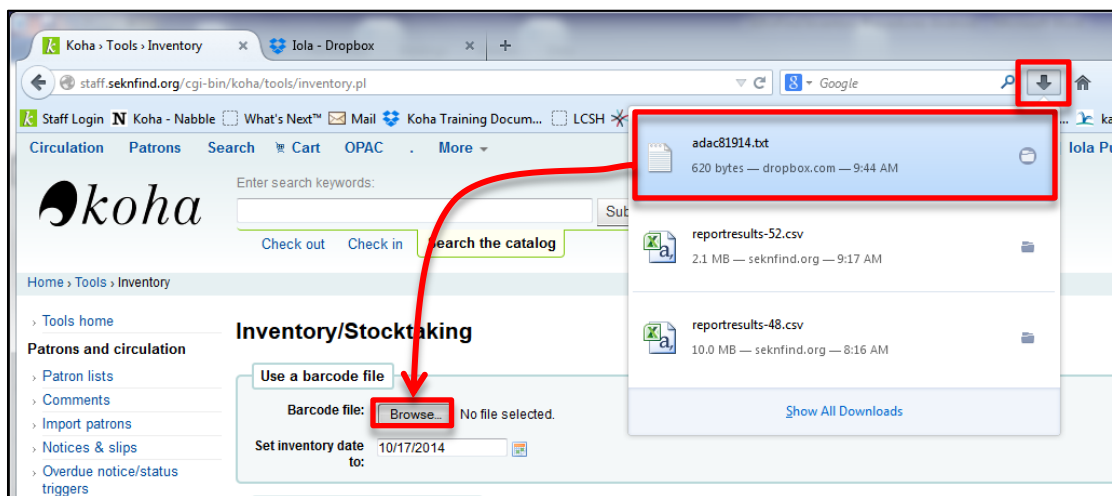
- 4.) Choose to *Save File*; they should automatically go to your Downloads folder



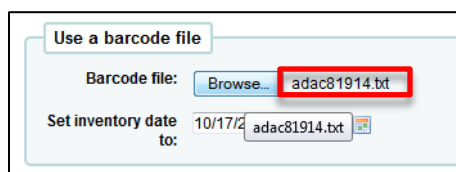
- 5.) Open Koha then go to the inventory tool by clicking *More > Tools* on the top bar, then clicking **Inventory/stocktaking** under **Catalog**



- 6.) Click the download arrow. Click and hold on the desired file then drag your mouse cursor directly on top of the 'Browse...' button.



- 7.) Your file name should be showing next to the browse button now



8.) The inventory date will be set to the date you are performing the upload. You should be uploading daily, so this will not need changed.

### Inventory/Stocktaking

Use a barcode file

Barcode file:  lolaPC021414.txt

Set inventory date to:

Feb  2014

Select items you

	Su	Mo	Tu	We	Th	Fr	Sa
Library:	26	27	28	29	30	31	1
Library:	2	3	4	5	6	7	8
Library:	9	10	11	12	13	14	15
Shelving location (items.location) is:	16	17	18	19	20	21	22
Library:	23	24	25	26	27	28	1

Item call number between:

...and:

**Reminder:** Upload every day you scan! If you do large sections, split them into different files.

The longer you wait to upload a file, the more likely some of the items you scanned will be checked out, and then mistakenly checked in during the upload.

9.) Pick “Home library”, your Library, and the Shelf Location of the items. Ignore the next two boxes. **Forgetting this step can cause system slowness!**

Select items you want to check

Library:  Home library  Current library

Library:

Shelving location (items.location) is:

Item callnumber between:  (items.itemcallnumber)

...and:

**Item statuses**

**items.notforloan**

- Download
- Not For Loan
- Ordered
- Staff Collection

**items.itemlost**

- Claims returned
- Local Availability Only
- Long Overdue (Lost)
- Lost
- Lost and Paid For
- Missing

**items.withdrawn**

- In Repair

**items.damaged**

- Damaged

Inventory date:

Skip copies on loan:

Export to CSV file:

Compare barcodes list to results:

You will be presented with a total count of items and errors:

337 items modified : datelastseen set to 03/18/2014

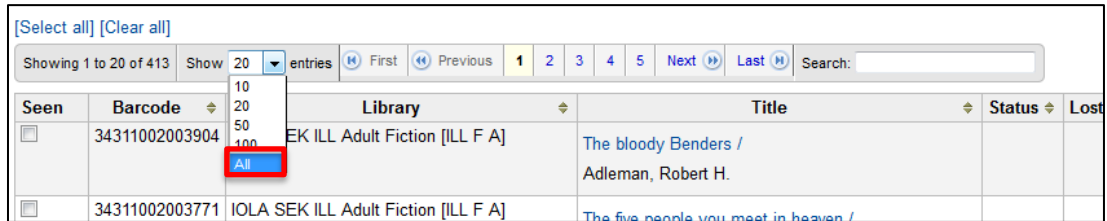
34311002010784 : barcode not found

34311000087984 : item was on loan. It was returned before marked as seen

Jot down or print the yellow box errors out for later investigation. See [Appendix B: Common Errors](#) for a list of errors you might see and [Appendix C: Investigating Errors and Backwards Lookup](#) for instructions on locating and correcting errors.

## 10.) Mark the items as seen (most important step)

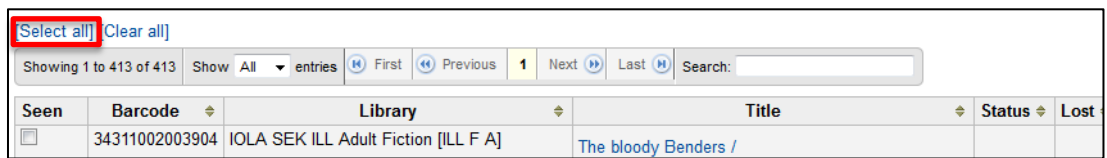
a.) Choose “All” from the “Show entries” dropdown



The screenshot shows a library interface with a table of items. A dropdown menu is open over the 'Show 20 entries' button, with 'All' selected. The table has columns: Seen, Barcode, Library, Title, Status, and Lost. Two items are visible:

Seen	Barcode	Library	Title	Status	Lost
<input type="checkbox"/>	34311002003904	EK ILL Adult Fiction [ILL F A]	The bloody Benders / Adleman, Robert H.		
<input type="checkbox"/>	34311002003771	IOLA SEK ILL Adult Fiction [ILL F A]	The five people you meet in heaven /		

b.) Choose “Select all” to check all the boxes



The screenshot shows the same library interface, but the 'Select all' button is highlighted with a red box. The 'Show All entries' button is now visible, and the 'All' option is selected in the dropdown. The table shows the first item checked:

Seen	Barcode	Library	Title	Status	Lost
<input checked="" type="checkbox"/>	34311002003904	IOLA SEK ILL Adult Fiction [ILL F A]	The bloody Benders /		

c.) Scroll all the way to the bottom and click “Mark seen and quit”



The screenshot shows the bottom of the library interface. The 'Mark seen and quit' button is highlighted with a red box. The table shows the last item checked:

<input checked="" type="checkbox"/>	34311002003276	IOLA SEK ILL Adult Fiction [ILL F Y]	The shack : Young, William P.		
-------------------------------------	----------------	--------------------------------------	----------------------------------	--	--

Below the table, there are buttons: [Select all] [Clear all], Mark seen and quit, Mark Seen and Continue >>, and Continue without Marking >>.

**Neglecting this step results in unchanged Date Last Seen values, and your reports won't remove what you scanned. The file will need re-uploaded and run again.**

## Inventory Reports

To access these reports, click the links below, or go to *More > Reports > Use Saved* and click the *Inventory* tab.

- 1.) **Locate items that weren't scanned during inventory of a shelf location**
  - a. Break down the search by shelf location using this report:  
[1890 - Inventory -- Items not scanned in a Shelf Location](#)
- 2.) **Check in any items found to update their "Date Last Seen"**
- 3.) **At the very end of inventory, you can re-run report [1889 - Inventory -- All items not scanned](#) and email the results to SEKLS ([Jason](#)) so that we may batch modify them into the 'Lost' status.**



# Appendix A: Log Sheet

INVENTORY START DATE: \_\_\_\_\_

Date	Section/Area	Filename	Call# Start	Call# End	Initial

## Appendix B: Common Errors

There are several scenarios that cause the inventory module to throw errors:

**Scanning errors** – The barcodes will be cut-off, less than 14 digits or more than 14 digits, etc. You should find the items associated with these using the custom inventory report.

34311002172 : barcode not found

**Item was on loan** – The item associated with the barcode was checked out, but is now checked in and marked as seen. You should backtrack to see if any fines need resolved on the patron's card or if the item needs to be checked back out. This is common if someone grabs an item and checks it out *after* it has been scanned but *before* the file gets uploaded.

34311000087984 : item was on loan. It was returned before marked as seen

**Item withdrawn** – The item is marked withdrawn. If it shouldn't be, you'll need to go in and restore it.

34311002095686 : item withdrawn

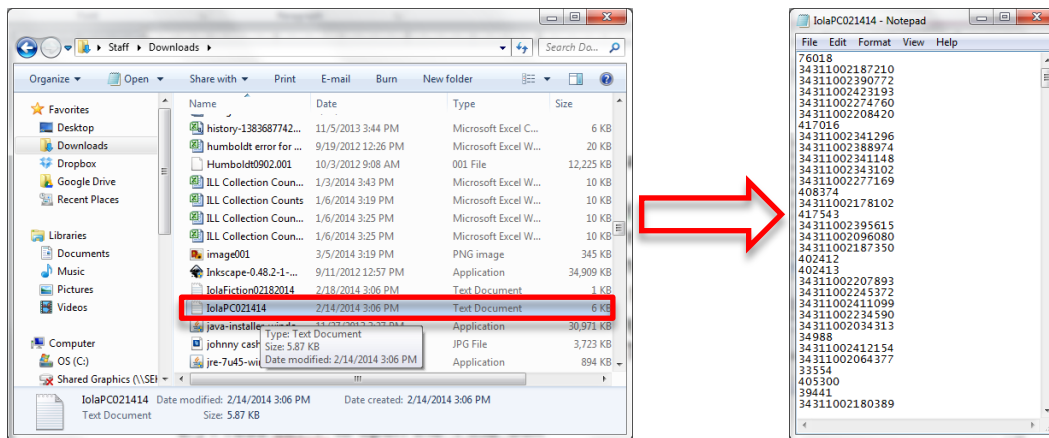
**Non-functional barcode** – The barcode is 14 digits but is still giving a “barcode not found” message. The item is likely no longer on the catalog, or the barcode doesn't match the item. These issues are the hardest to pinpoint, instructions on doing so are found in the next section: [Appendix C](#).

34311002010784 : barcode not found

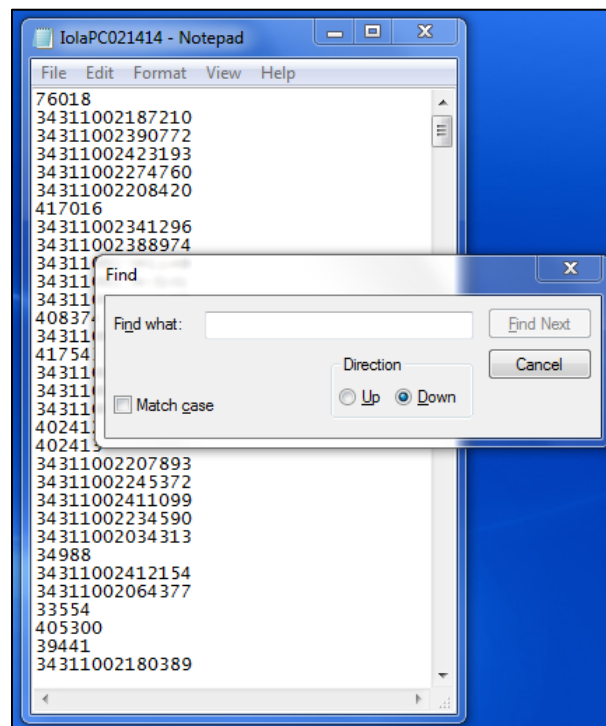
## Appendix C: Investigating Errors and Backwards Lookup

This method is completely optional but available for those who might want to investigate barcodes that weren't found. It can also be handy in locating books that were present in the inventory, but not on the shelf where they should be. The text files contain a snapshot of the order your items were in when inventory was taken. We can use this to figure out what was before and after the item in question to help locate it.

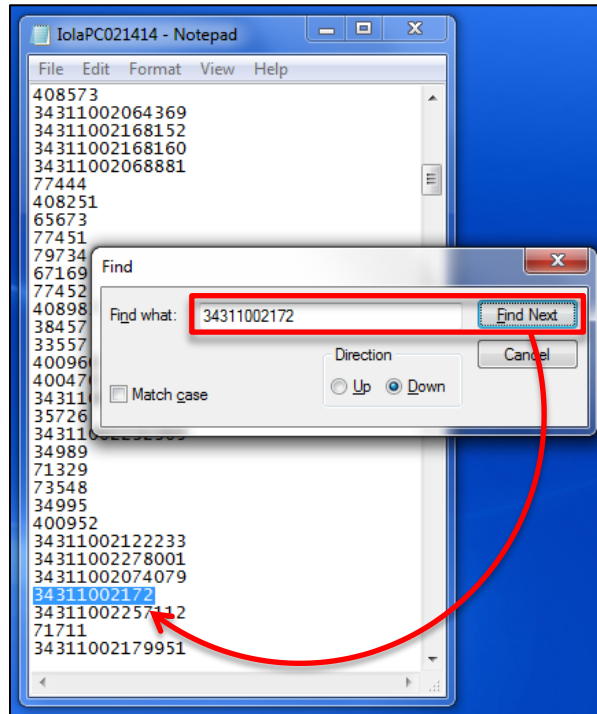
### 1.) Open the text file



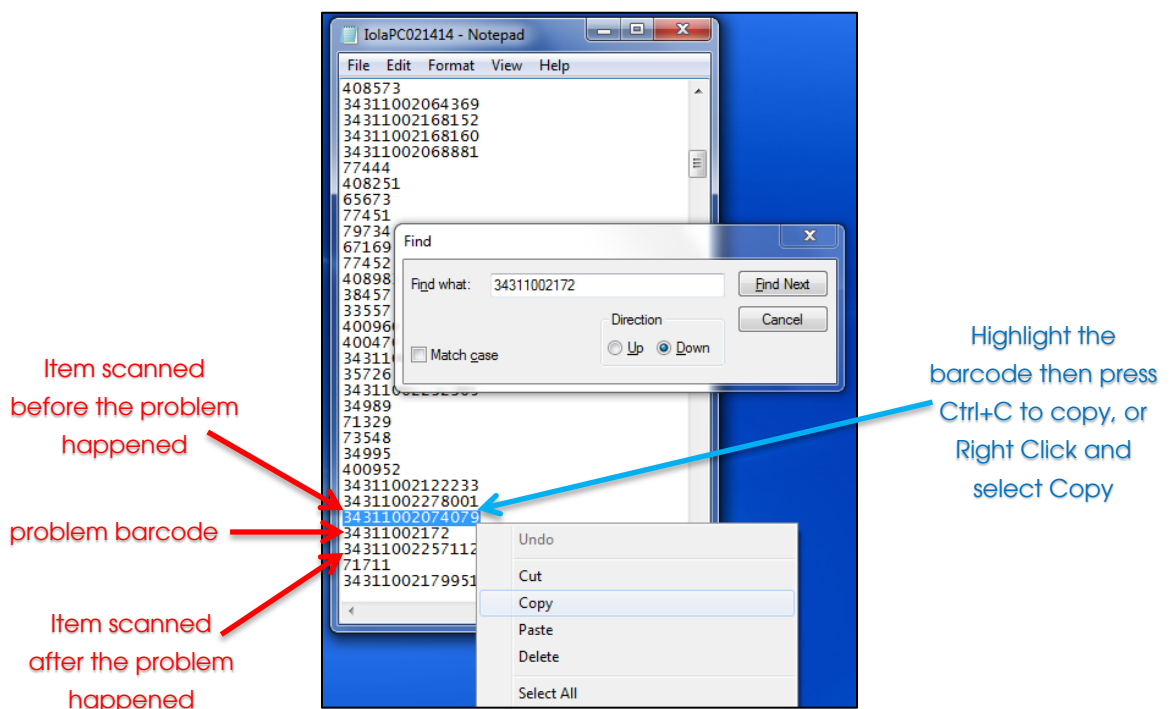
### 2.) Press Ctrl+F to open the 'Find' box



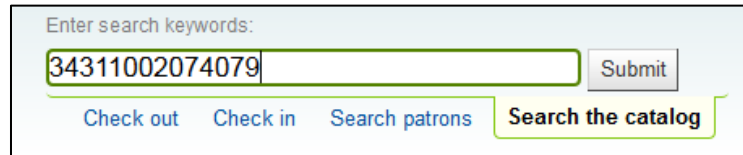
- 3.) Enter the barcode associated with the error (reference the error printouts from earlier) and click "Find Next"



- 4.) Copy the barcode *before* or *after* the erroneous barcode



5.) Search Koha for the copied barcode by pasting it into the search bar (Ctrl+V)



Enter search keywords:  
34311002074079 Submit  
Check out Check in Search patrons Search the catalog

6.) Use the call number from the item before or after the erroneous barcode to find the culprit on the shelf

Activate filters

Item type ▲	Current location ◆	Home library ◆	Collection ◆	Call number ◆	Status ◆	Last seen ◆	Barcode ◆
Book	Iola Public Library	Iola Public Library Professional Collection Adult Non-Fiction	Adult Books	PC 022.3 B	Available	02/14/2014	34311002074079

This barcode was scanned directly before the erroneous barcode, so the item with the error should be sitting on the shelf directly after this item.

- 7.) Determine the issue – checking in the item will quickly tell you what went wrong
- If the barcode is not found, the item either isn't in the catalog, or the barcode is not put into the system correctly
  - If the item checks in, it likely just wasn't scanned correctly. Checking it in at this point will remove it from inventory reports

## Appendix D: Re-pairing the scanner

Sometimes, often after changing batteries, the scanner will insert premature carriage returns. This means instead of getting a scan like this:

```
34311000000001  
34311000000002
```

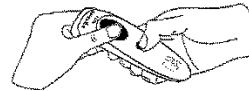
You'll see something like this:

```
3431100000001  
01343110000000  
02
```

Disconnecting the scanner from the tablet then pairing it again usually fixes this issue.

### To unpair:

1. Turn on the scanner
2. Press and hold the trigger button
3. Press and hold the power button
4. Wait for 3 beeps, let go of both buttons



### To re-pair:

1. Turn on the scanner
2. On the tablet, go to Settings > Bluetooth
3. In the list, touch Socket CHS
4. Click 'Pair' on the popup