



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
Nebulous Notes Lite
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:

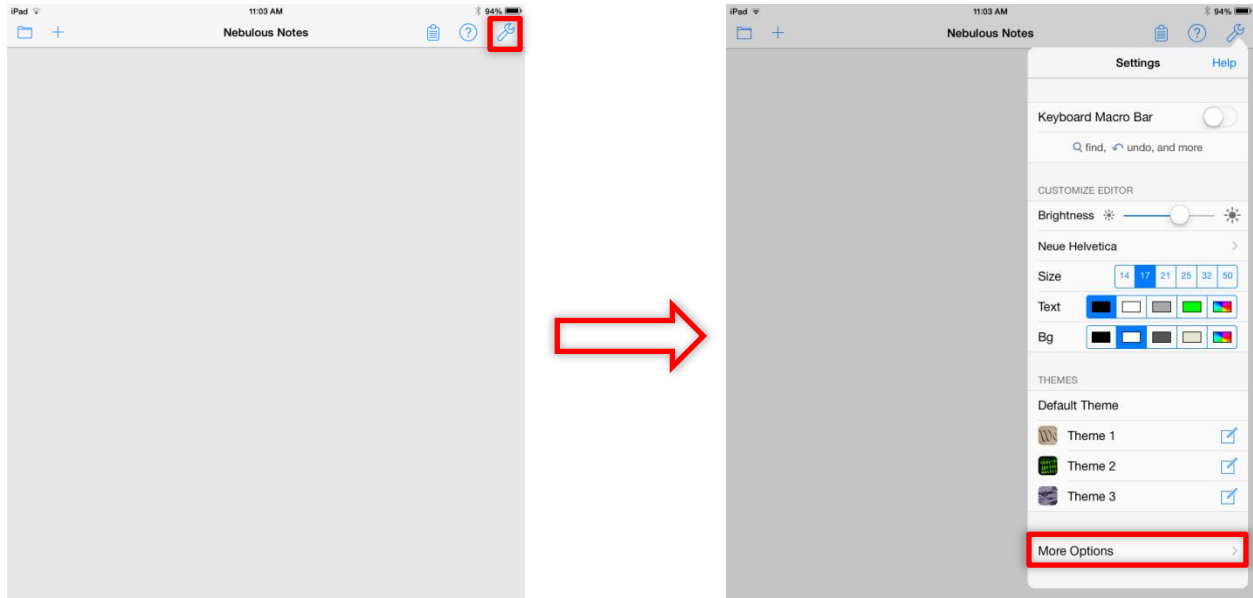
- 1.) Create a text file in Nebulous Notes
- 2.) Scan items into file
- 3.) Download file from Dropbox
- 4.) Upload file to Koha
- 5.) Print out errors
- 6.) Mark items seen
- 7.) Run reports, follow up on errors, and check shelves
- 8.) Rerun reports and submit list of items to be marked lost to SEKLS*

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

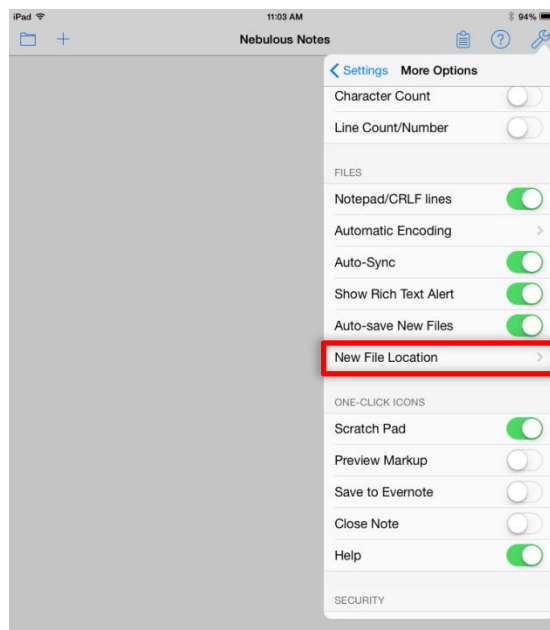
Setting Up the Tablet (iOS)

First-time Setup

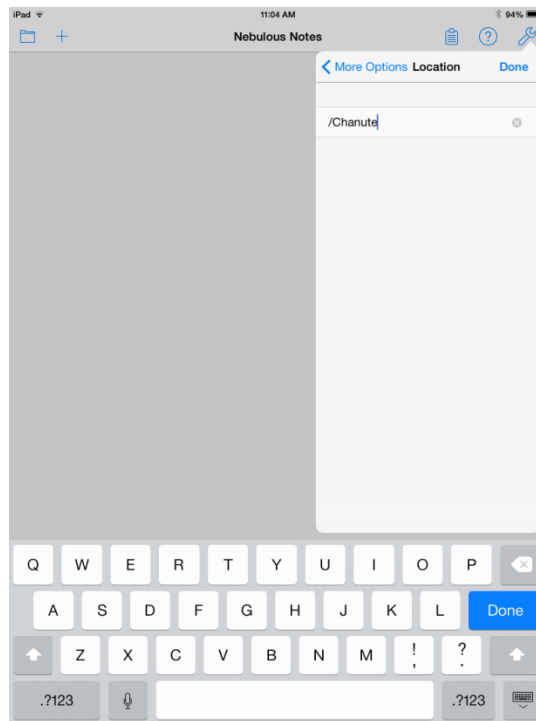
- 1.) Power on the tablet, login to Dropbox if you haven't already, then open up the Nebulous Notes app
- 2.) Click the wrench in the upper right, then More Options



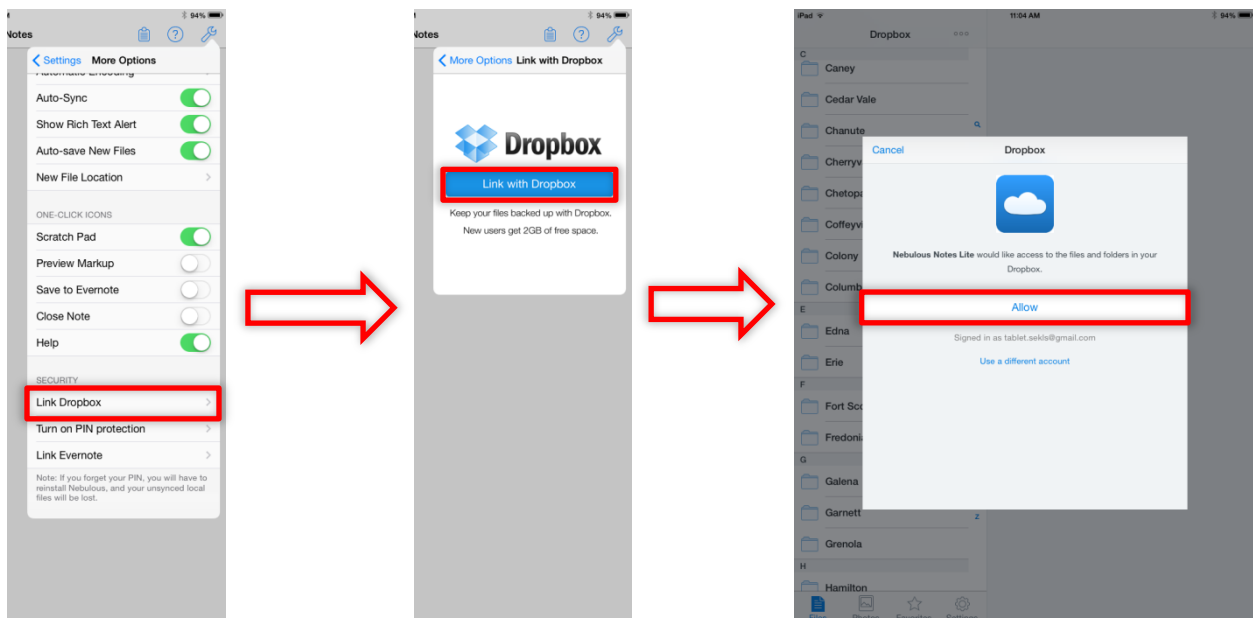
- 3.) Scroll down slightly, click New File Location



4.) Change the location to /Yourlibrary, click done

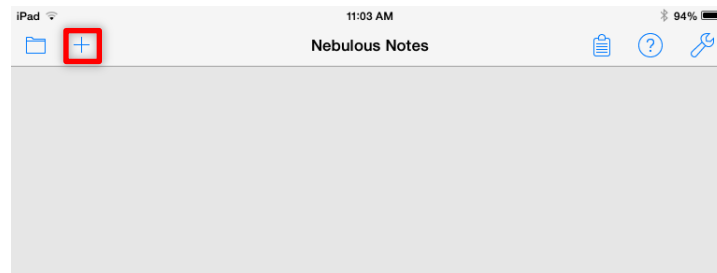


5.) Scroll down, click Link Dropbox > Link with Dropbox > Allow

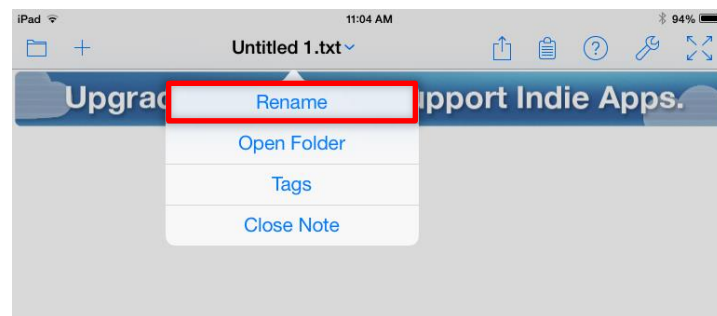


File Setup

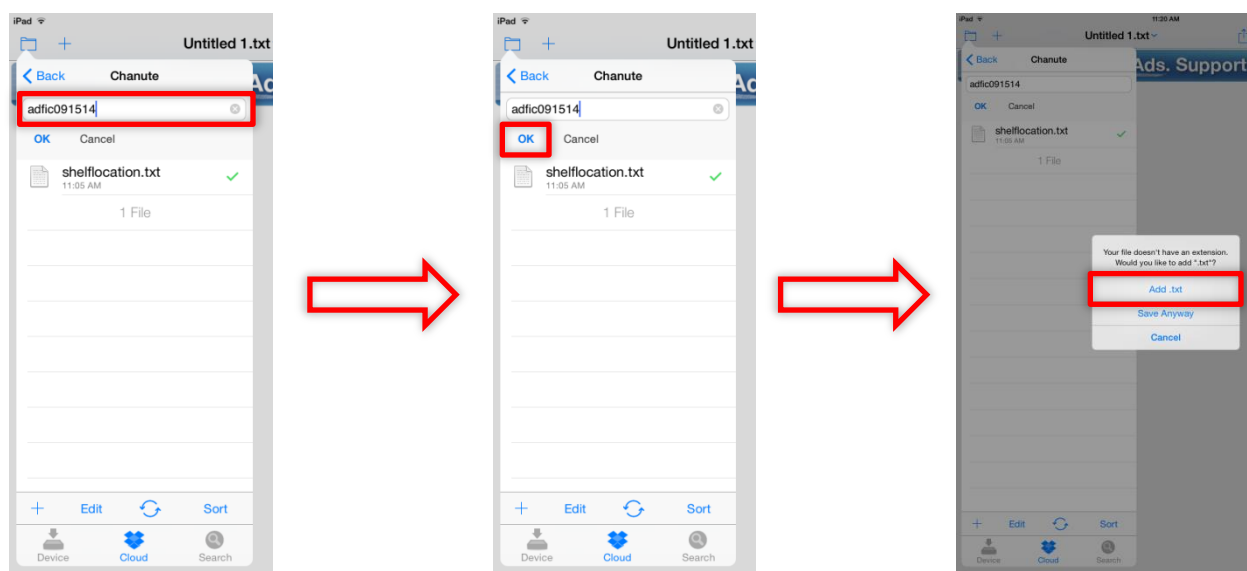
- 1.) Open Nebulous Notes
- 2.) Click the + in the upper left corner



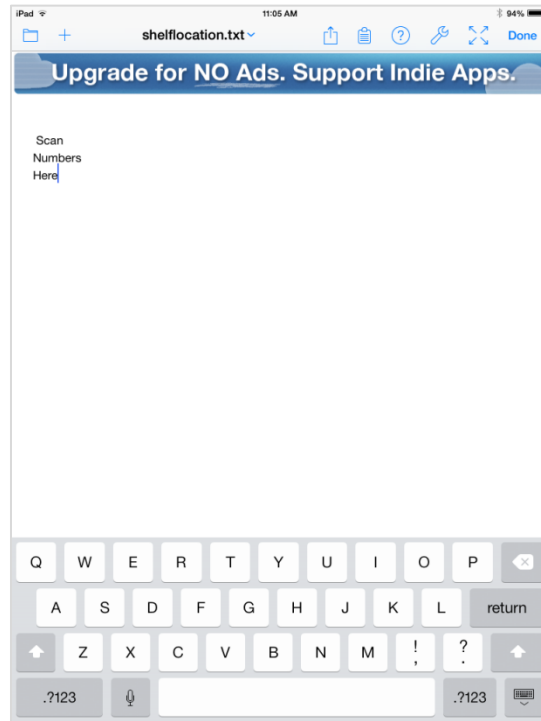
- 3.) Click the title then Rename



- 4.) Name the file with the shelf location and the date then hit okay. Tell it to add .txt if you didn't.



5.) Touch the area below the ad to get a blinking cursor



6.) The file is ready to receive barcodes.

Setting Up the Scanner

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



If the scanner needs paired or re-paired to the tablet, please refer to the instructions that came with it. Re-pairing instructions can also be found in Appendix D.

Note: The keyboard can be shown and hidden by pressing the power button on the scanner twice in quick succession.

Scanning

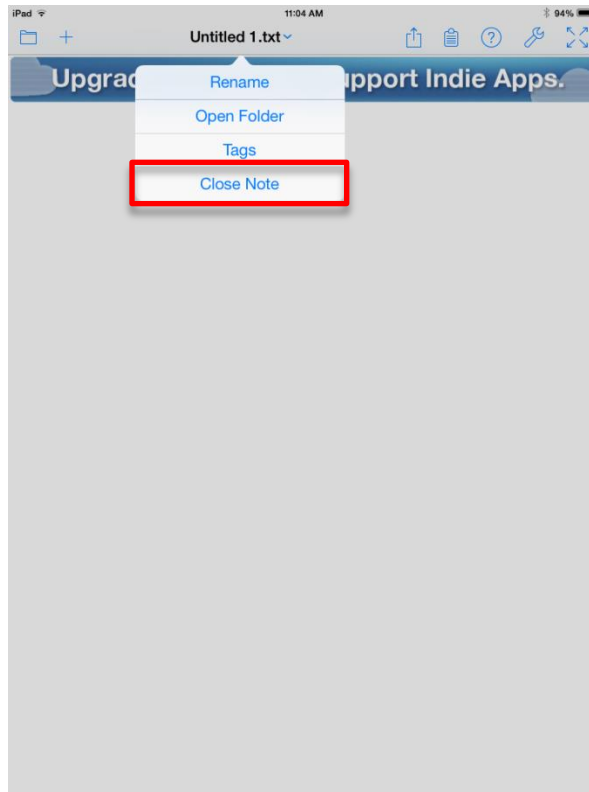
- 1.) Hold down the large trigger button on the scanner, and aim the red laser at a barcode



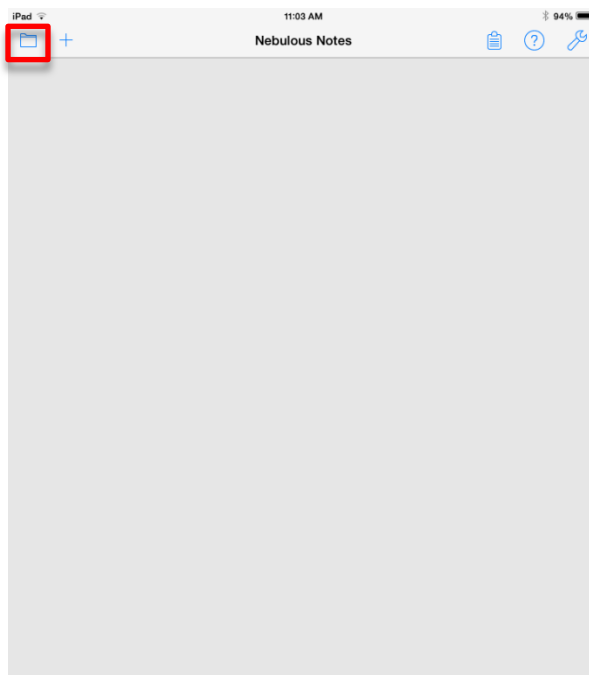
Note: The Bluetooth scanner is slightly different than the scanners we use. When you scan, the red laser disappears then the scanner vibrates and beeps when the info hits the tablet. This can feel slightly delayed.

- 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.) When you're done, click the name of the file and Close Note



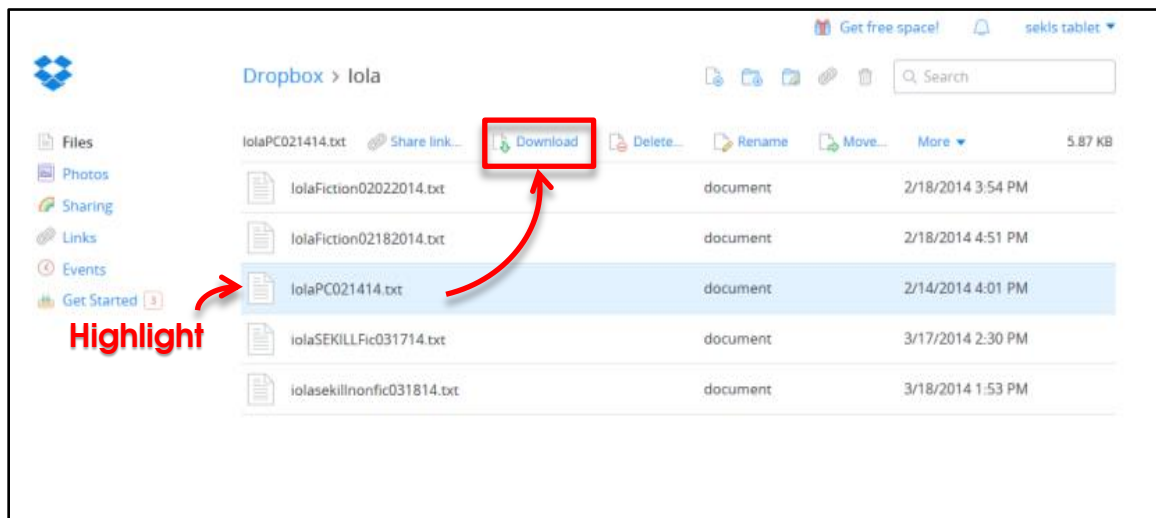
4.) You can always re-access a note by using the folder icon in the upper left corner.



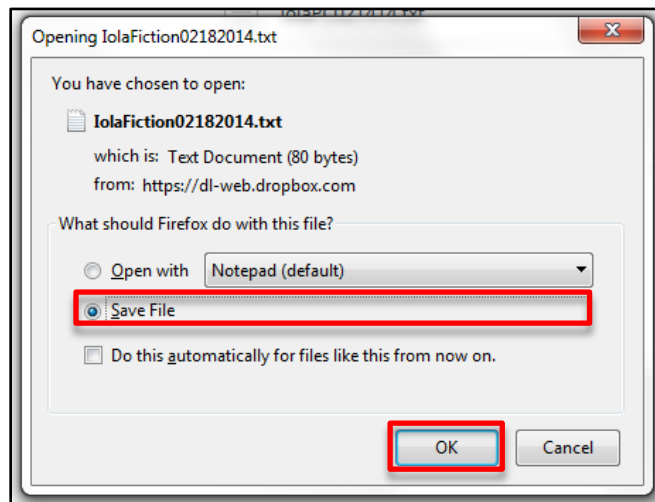
Uploading Files to Koha

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.

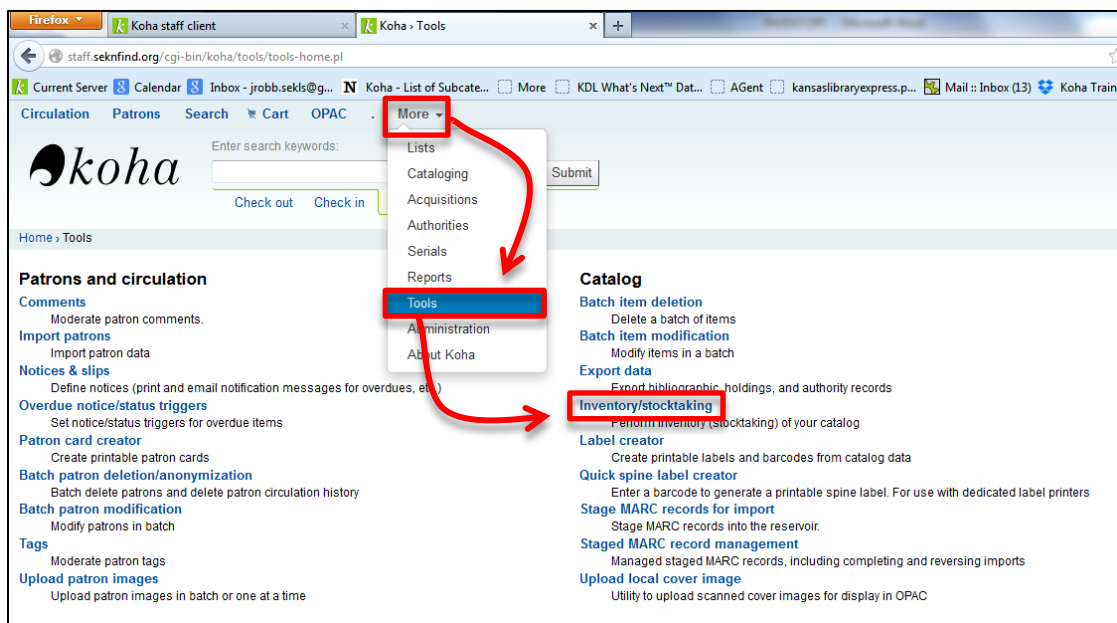
- 1.) Go to www.dropbox.com on your staff computer and login with:
email:
password:
- 2.) Locate the file(s) you want to upload
- 3.) Download the files by highlighting the file and clicking "Download"



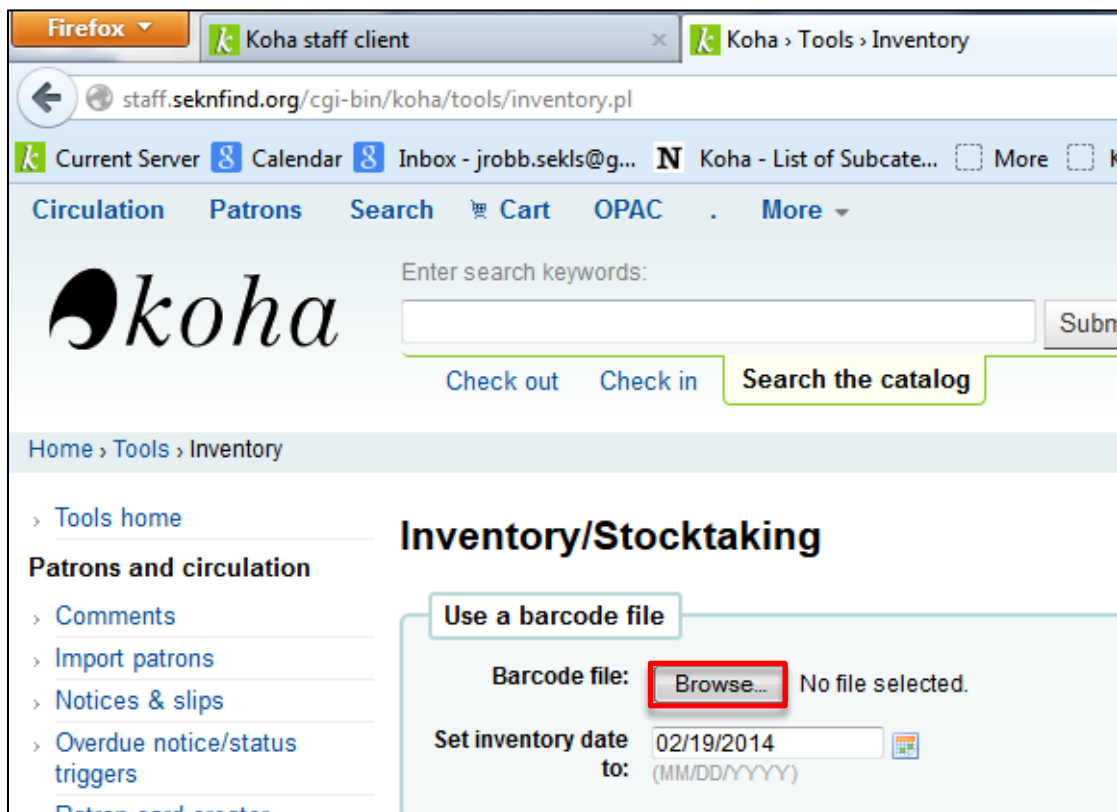
- 4.) Choose to *Save File*; they should automatically go to your Downloads folder



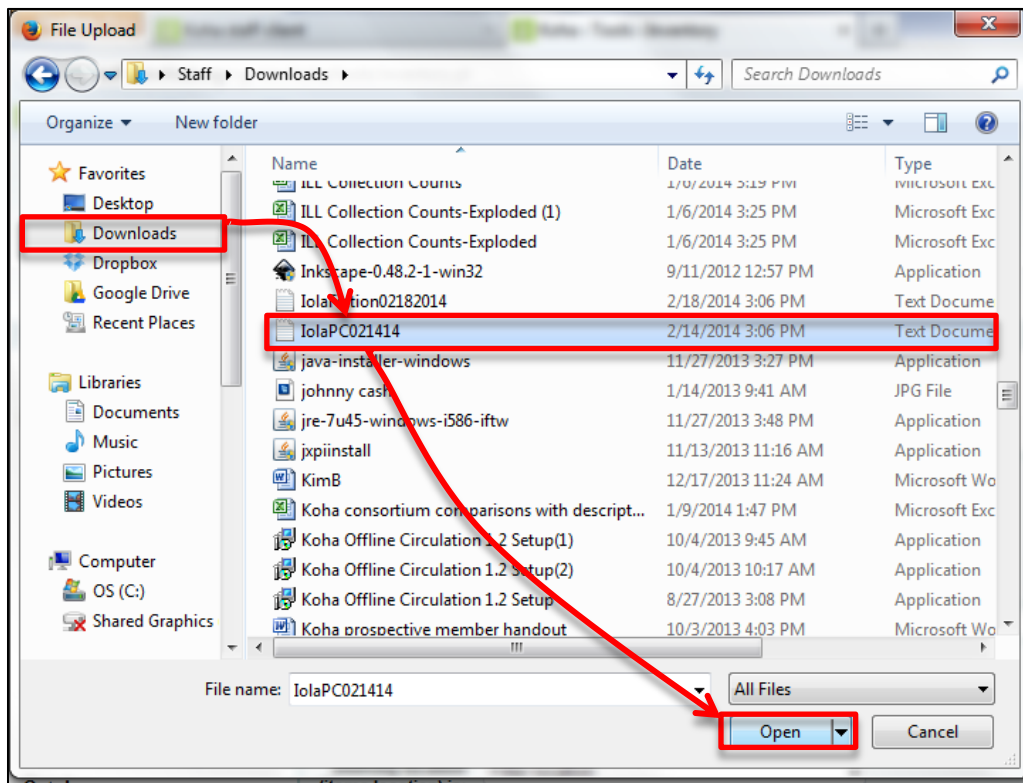
- 5.) Go to the inventory tool in Koha by clicking *More > Tools* on the top bar, then clicking **Inventory/stocktaking** under **Catalog**



- 6.) Click “Browse...”



- 7.) Navigate to your Downloads folder (or wherever the file downloaded to), highlight the file, and click “Open”



- 8.) Choose your inventory date (the date you put in the file name)

Inventory/Stocktaking

Use a barcode file

Barcode file:

Set inventory date to:

Select items you

Library:

Library:

Shelving location (items.location) is:

Item call number between:

...and:

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

9.) Pick “Home library”, your Library, and the Shelf Location of the items. Ignore the next two boxes.

The screenshot shows a web form for selecting items to check. The 'Select items you want to check' section includes:

- Library: Home library Current library
- Library:
- Shelving location (items.location) is:
- Item callnumber between: (items.itemcallnumber)
- ...and:

The 'Item statuses' section is crossed out with a large red X and contains:

- 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

The 'Inventory date' section is also crossed out with a large red X and includes:

- Inventory date:
- Skip copies on loan:
- Export to CSV file:
- Compare barcodes list to results:

A red arrow points to the 'Submit' button at the bottom left.

Each file will need uploaded individually following the above procedure.

If you scan a section with multiple shelving locations represented, you only need to run the file once.

Upload files once a day, even if it means breaking the sections up. This will avoid too many items getting checked in accidentally. You can use the same shelf location filter on multiple files multiple times.

After hitting Submit, you will be presented with a total count of items, as well as any errors or notifications that will look something like this:

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

34311002010784 : barcode not found

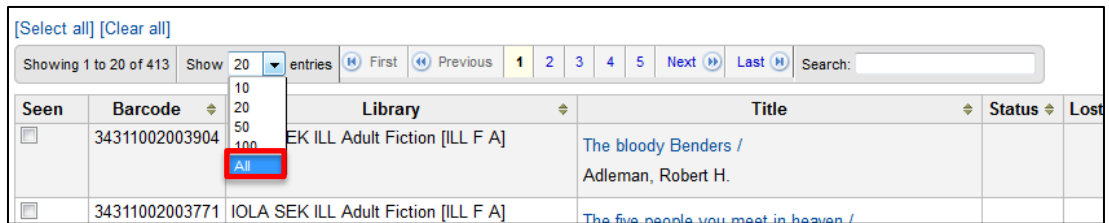
34311000087984 : item was on loan. It was returned before marked as seen

You may choose to ignore these errors and move on, or investigate them. Many of the errors will be resolved when you check your shelves using the reports in the following section.

If you want to investigate them, be sure to **print the errors out** and note which text file they came from. 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.

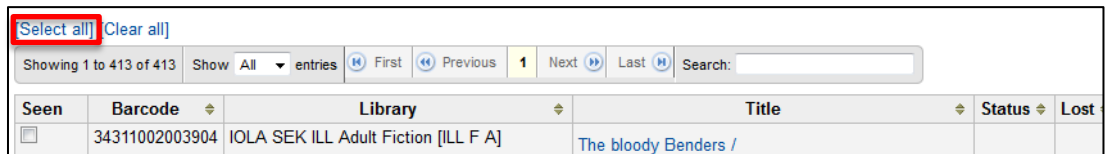
10.) Mark the items as seen

a.) Choose "All" from the "Show entries" dropdown



The screenshot shows a library catalog interface. At the top, there are links for "[Select all]" and "[Clear all]". Below that, it says "Showing 1 to 20 of 413". A dropdown menu for "Show" is open, showing options: 10, 20, 50, 100, and "All". The "All" option is highlighted with a red box. The table below has columns: Seen, Barcode, Library, Title, Status, and Lost. The first row shows a checked box in the "Seen" column, barcode 34311002003904, library "EK ILL Adult Fiction [ILL F A]", and title "The bloody Benders / Adleman, Robert H.".

b.) Choose "Select all" to check all the boxes



The screenshot shows the same library catalog interface. The "[Select all]" link is highlighted with a red box. The "Show" dropdown is now set to "All". The table below shows the first row with a checked box in the "Seen" column.

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



The screenshot shows the bottom of the library catalog interface. The "Mark seen and quit" button is highlighted with a red box. Above it, there are links for "[Select all]" and "[Clear all]". The table below shows the first row with a checked box in the "Seen" column and title "The shack : Young, William P.".

Neglecting this step results in Date Last Seen values of 0000-00-00. If you see those, you've done something wrong. The file needs 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**
[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 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

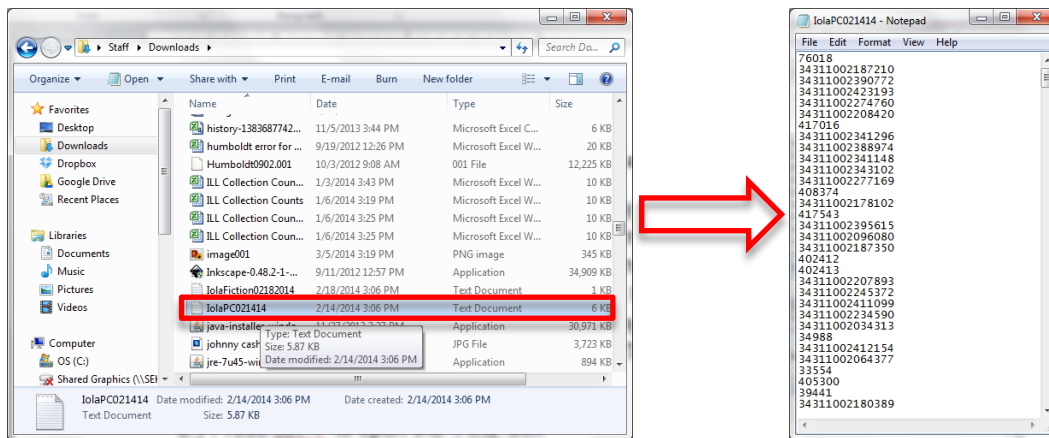
Non-functional barcode – The barcode is 14 digits but is still giving a "barcode not found" message. The item is likely no longer on the catalog, or the barcode doesn't match the item. These issues are the hardest to pinpoint, instructions on doing so are found in the next section: [Appendix C](#).

34311002010784 : barcode not found

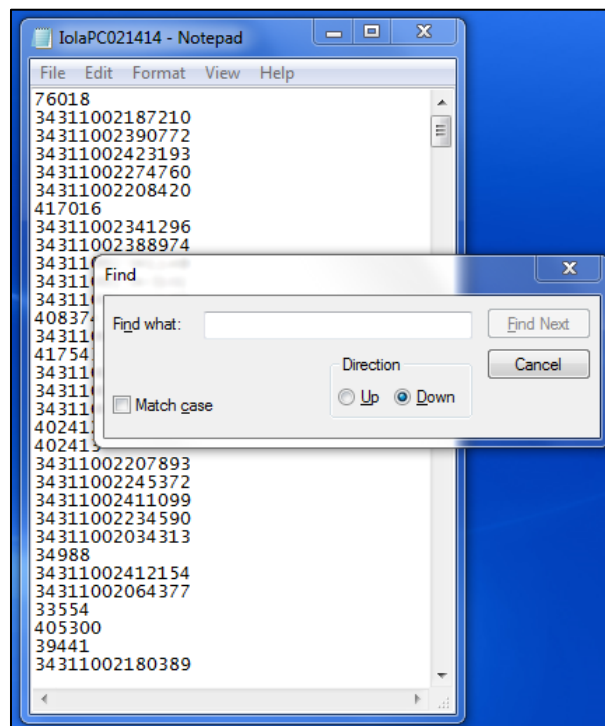
Appendix C: Investigating Errors and Backwards Lookup

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.

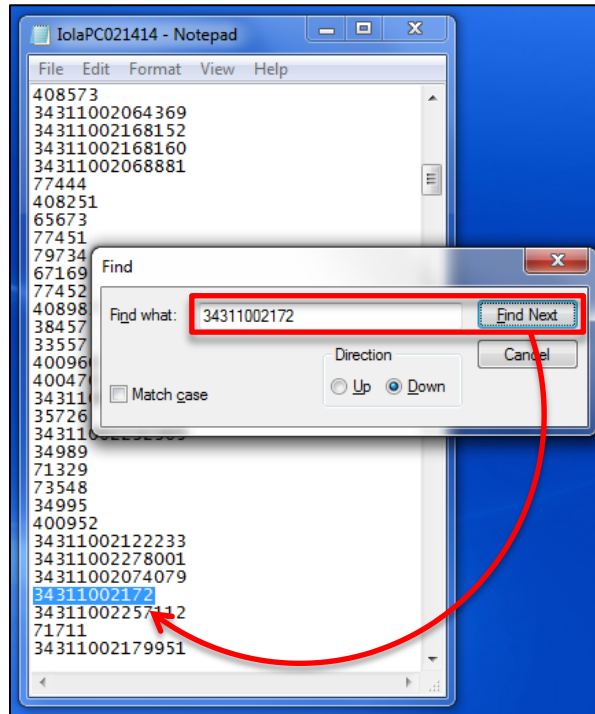
1.) Open the text file



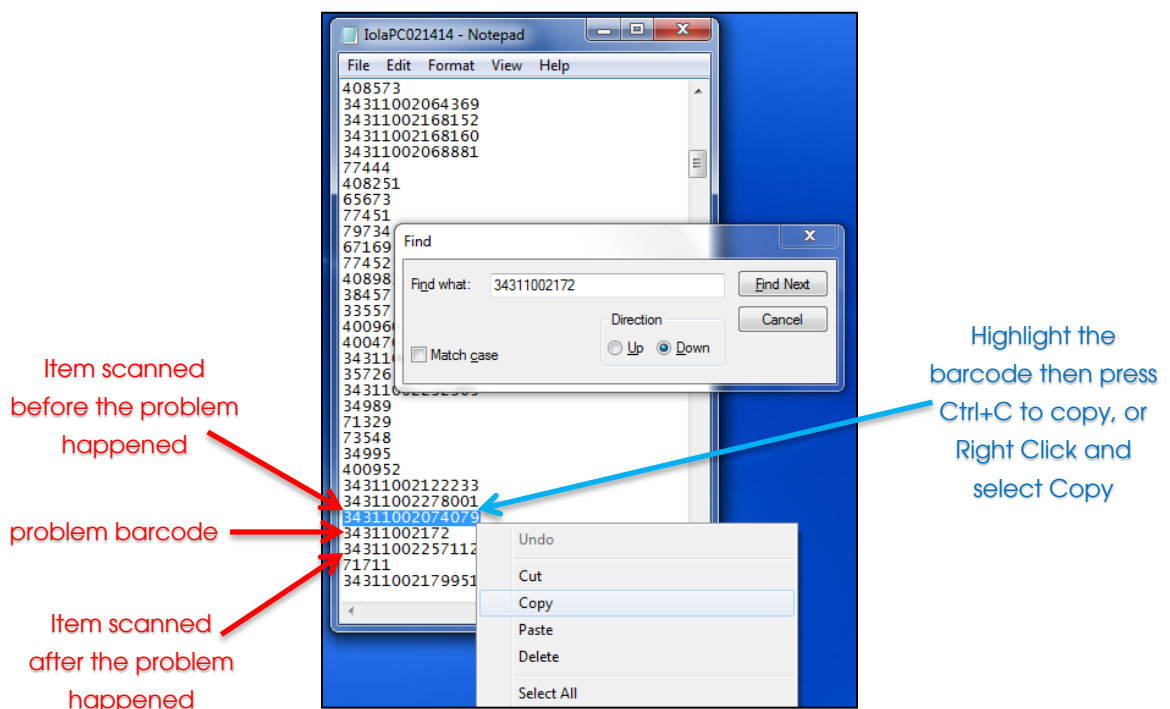
2.) Press Ctrl+F to open the 'Find' box



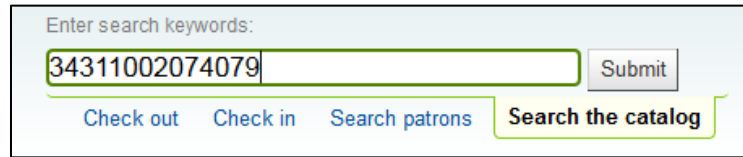
- 3.) Enter the barcode associated with the error (reference the error printouts from earlier) and click "Find Next"



- 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:

```
343110000001  
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 the i next to Not Connected
4. Click Forget This Device
5. Click Socket CHS to pair