Koha Inventory Procedure

An inventory is an accounting of each of the items listed in your circulation system – If it has a library barcode; it should be included in your inventory!

Inventory time could also be used as an opportunity to verify physical condition of each of the items within your library.

An inventory should be conducted on a yearly basis in order to keep your records as accurate as possible. Washington County School District policy requires textbook inventory be completed on a yearly basis but there is no formal policy for library books.

The key to conducting an accurate inventory is to develop a feasible plan, work in a designated order and ensure that all items are scanned and downloaded into the Koha system.

Before you begin:

- Develop a plan for progression and make sure that all items in your catalog are on the schedule to be scanned.
- Let your teachers know that you will need to scan their checked out items (i.e. classroom sets) and arrange for a time that you can scan these items without interfering in instructional time.
- Decide upon a "last seen" date – this will assist you with running final reports to find your missing items. It helps to have a consistent date when uploading files.

An inventory begins by scanning your items. There are a few different options in order to scan your items into your Koha system:

1. You may opt to physically check in each item (just as you would any item on a daily basis)
2. You may scan the items bar code into a Notepad (easiest) or MS Word file (requires that you save in .txt before uploading into Koha)
3. You may contact Dale Stapley at the District Media Center to acquire a Dolphin scanner (limited availability). A Dolphin is a hand-held device that stores the bar code numbers internally and downloads into Koha through a USB doc. You may need some technical assistance from Michael Hafen for this method.

As you scan:

- Be sure to mark where you left off each time you scan so you can pick up at the same point the following time.
- Save frequently!! (this is just common sense)
- Always work in order – it does not matter if books are scanned twice so go back a few shelves if you are unsure, but it is much easier to avoid backtracking by marking where you left off previously.
- You may download the files daily or wait until you are entirely done. I prefer to save my files by item type (example: Fiction, Reference, Audio Visual) or location just in case I have to go back and complete a section. I typically wait to upload my files at one time, but it is dependent upon your personal preference.
- FYI: Books can still be checked out when conducting an inventory.

After you finish scanning:

- Upload your barcode scans into Koha
  - Go to the Inventory/stocktaking tool (More>Tools>Inventory/stocktaking)
  - Use the section labeled *Use a barcode file* > browse to the saved file on your computer or flash drive > set date to last seen to whatever date you selected > submit
- When all files have been uploaded into Koha, run the Catalog Inventory report (More > Reports> Catalog Inventory)
  - Set last seen date
  - Order result by: (choose Date Last Seen, Title, or Call Number)
  - Check or uncheck the Skip Copies on Loan box depending on your preference
  - Make sure the Set Copies as Missing is UNCHECKED!!!
  - Print out the report that is provided and double and triple check to make sure these items are indeed not able to be found.
- At this point you should be trying to locate items that were not found in the inventory scans. If an item is located, you may do **one** of the following things:
  - Check in the item so that a last seen date is attached to it
  - Run the Inventory/stocktaking report (More > Tools> Inventory/stocktaking). Within this report you can mark multiple items as seen.
- Once you are CERTAIN that all items have been scanned into the system, you need to run the Catalog Inventory Report and set the copies unaccounted for as missing.

- o More > Reports > Catalog Inventory
- o Set the last seen date to your chosen date
- o Order Result by: (choose Date Last Seen, Title or Call Number)
- o Check or uncheck Skip copies on loan
- o **POINT OF NO RETURN** Check the box next to Set Copies as Missing
- This will now mark all of your items not scanned or verified as MISSING.
- Run a Lost Items Report (More > Reports > Lost Items) Run a report for each Lost Status – Missing, Long Overdue, Lost, and Lost and Paid For. All of these reports will give you a total picture of what books have gone missing and what you need to replace.
- If you are responsible for the textbooks in your school, you will want to now run the same Lost Items Report for the textbooks and complete the Washington County School District Textbook Inventory Forms. You must fill out a sheet for each and every textbook title you own, whether items were lost or not.
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Remember: If you have any questions or suggestions/tips for making the inventory process easier, feel free to post on the wiki homepage and share! And, as always, I am happy to provide assistance – just ask!