Guide to using the Inventory/stocktaking tool in Koha

Overview

For each item Koha tracks a "date last seen" value. During check-out, check-in or renewal this field is updated. This fields can also be updated using the inventory/stocktaking tool by uploading a plain text containing a list of barcodes.
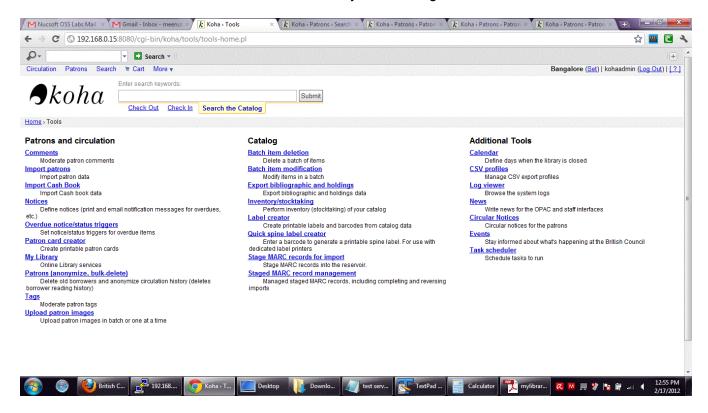
Once the dates are updated, the inventory/stocktaking tool can be used to identify the items that have not been seen since a certain date (usually the start date of the stock-taking period).

The list of items that have not been seen since the start of the stock-taking period can be considered suspected missing.

The library can then undertake an exercise to try and find the missing items. Items that are found can be marked "Seen" using the inventory/stocktaking tool. Such items are then removed from the list of suspected missing items.
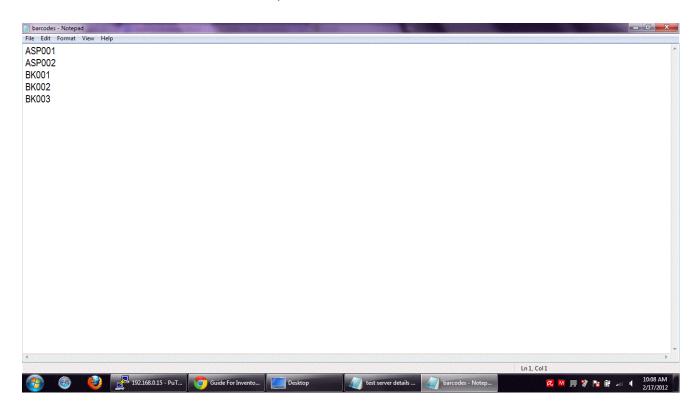
Navigating to the Inventory/stocktaking tool

The tools can be found in Home > Tools > Inventory/Stocktaking

Step by Step Guide

1. Preparation: Identify a material type (e.g. DVDs) that you want to conduct the inventory for. Decide on a stocktaking date or period (start and end date) for this material type.
2. Stocktaking: During the stock taking period, scan the barcodes of all items of this material type that are present in the library into a plain text file (notepad). The notepad file should contain one barcode per row.

3. Upload: Upload this file into Koha using the first section of the tool (Use a barcode file). Simply find the notepad file on your computer and upload it. The "Set inventory date to" is set to today be default, there is no need to change it.

Once the file is uploaded Koha sets the "date last seen" values for all barcodes in the file to today.

You can upload as many files as you want during the stock taking period.

4. Suspected missing list: Once you have loaded barcode files for all items for the selected material type you are ready to generate a list of suspected missing items.

This list can be generated using the second part of the tool (Select items you want to check). Make selections as follows:

- Set Branch to "Home Branch"
- Set Library to your library
- Set Item Type to the selected material type
- Set Inventory date to the start date of the inventory/stocktaking period

Click Submit to generate a list of missing items.

5. Review missing items list: The list contains a list of barcodes (where available) along with the "unseen since" date.

Inventory/Stocktaking

[Select All] [Clear All]

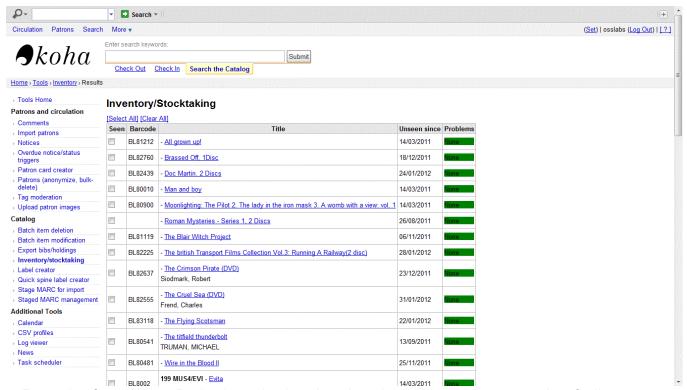| Seen	Barcode	Title	Unseen since	Problems
☐	BL81212	- All grown up!	14/03/2011	None
☐	BL82760	- Brassed Off, 1Disc	18/12/2011	None
☐	BL82439	- Doc Martin, 2 Discs	24/01/2012	None
☐	BL80010	- Man and boy	14/03/2011	None
☐	BL80900	- Moonlighting: The Pilot 2. The lady in the iron mask 3. A womb with a view: vol. 1	14/03/2011	None
☐		- Roman Mysteries - Series 1, 2 Discs	26/08/2011	None
☐	BL81119	- The Blair Witch Project	06/11/2011	None
☐	BL82225	- The british Transport Films Collection Vol.3: Running A Railway(2 disc)	28/01/2012	None
☐	BL82637	- The Crimson Pirate (DVD) Siodmark, Robert	23/12/2011	None
☐	BL82555	- The Cruel Sea (DVD) Frend, Charles	31/01/2012	None
☐	BL83118	- The Flying Scotsman	22/01/2012	None
☐	BL80541	- The titfield thunderbolt TRUMAN, MICHAEL	13/09/2011	None
☐	BL80481	- Wire in the Blood II	25/11/2011	None
☐	BL8002	199 MUS4/EVI - Evita	14/03/2011	None

6. Removing found items: During investigations into the missing items, you may end up finding some of the items in the suspected missing list, these can be removed from the missing list by using the buttons "Mark Seen".

	Barcode	Title		Problems
☐	BL81715	ACT/FOR - For Your Eyes Only(2 Discs) Glen,John	21/01/2012	None
☐	BL83336	ACT/FRO - From Russia With Love, 1 Disc	21/01/2012	None
☐	BL80994	ACT/GAN - Gangster Story	14/03/2011	None
☐	BL83044	ACT/GET - Get Smart Segal, Peter	11/12/2011	None
☐	BL83048	ACT/HEL - Hellboy Del Toro, Guillermo	18/01/2012	None
☐	BL83028	ACT/HEL - Hellboy: The golden army Del Toro, Guillermo	11/11/2011	None
☐	BL83096	ACT/IRO - Iron man Favreau, Jon	17/12/2011	None
☐	BL83249	ACT/KIC - Kick-Ass, 1 Disc	25/09/2011	None
☐	BL81705	ACT/LIC - Licence to Kill (2 Discs)	07/06/2011	None
☐	BL83758	ACT/LIC - License To Kill, 2 Discs	21/01/2012	None
☐	BL83129	ACT/MEC - The Mechanic	27/01/2012	None
☐	BL84004	ACT/MIN - Minority Report, 1 Disc	25/01/2012	None
☐	BL83787	ACT/MOO - Moonraker, 2 Discs	22/01/2012	None
☐	BL83314	ACT/QUA - Quntum Of Solace, 2 Discs	06/01/2012	None
☐	BL80993	ACT/RED - Redneck	17/12/2011	None
☐	BL83568	ACT/RED - Redbelt, 1 Disc	23/12/2011	None
☐	BL83073	ACT/RES - Resident Evil Extinction Mulcahy, Russell	05/01/2012	None

[Select All] [Clear All]

[Mark seen] [Mark Seen and Continue >>] [Continue without Marking >>]