

# 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 field 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

The screenshot displays the Koha library management system interface. The browser window shows the URL `192.168.0.15:8080/cgi-bin/koha/tools/tools-home.pl`. The interface includes a search bar with the text "Enter search keywords:" and a "Submit" button. Below the search bar, there are links for "Check Out", "Check In", and "Search the Catalog". The main content area is divided into three columns: "Patrons and circulation", "Catalog", and "Additional Tools".

**Patrons and circulation**

- [Comments](#)  
Moderate patron comments
- [Import patrons](#)  
Import patron data
- [Import Cash Book](#)  
Import Cash book data
- [Notices](#)  
Define notices (print and email notification messages for overdues, etc.)
- [Overdue notice/status triggers](#)  
Set notice/status triggers for overdue items
- [Patron card creator](#)  
Create printable patron cards
- [My Library](#)  
Online Library services
- [Patrons \(anonymize, bulk-delete\)](#)  
Delete old borrowers and anonymize circulation history (deletes borrower reading history)
- [Tags](#)  
Moderate patron tags
- [Upload patron images](#)  
Upload patron images in batch or one at a time

**Catalog**

- [Batch item deletion](#)  
Delete a batch of items
- [Batch item modification](#)  
Modify items in a batch
- [Export bibliographic and holdings](#)  
Export bibliographic and holdings data
- [Inventory/stocktaking](#)  
Perform inventory (stocktaking) of your catalog
- [Label creator](#)  
Create printable labels and barcodes from catalog data
- [Quick spine label creator](#)  
Enter a barcode to generate a printable spine label. For use with dedicated label printers
- [Stage MARC records for import](#)  
Stage MARC records into the reservoir.
- [Staged MARC record management](#)  
Managed staged MARC records, including completing and reversing imports

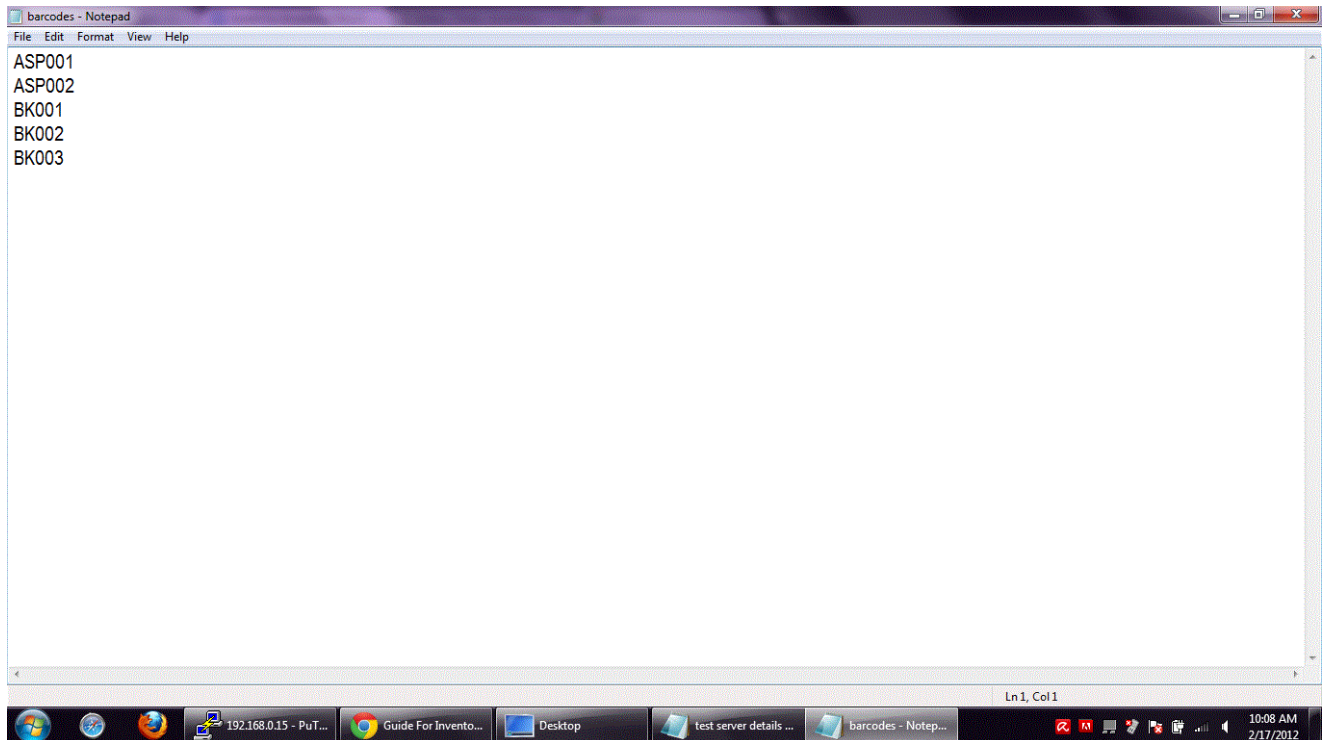
**Additional Tools**

- [Calendar](#)  
Define days when the library is closed
- [CSV profiles](#)  
Manage CSV export profiles
- [Log viewer](#)  
Browse the system logs
- [News](#)  
Write news for the OPAC and staff interfaces
- [Circular Notices](#)  
Circular notices for the patrons
- [Events](#)  
Stay informed about what's happening at the British Council
- [Task scheduler](#)  
Schedule tasks to run

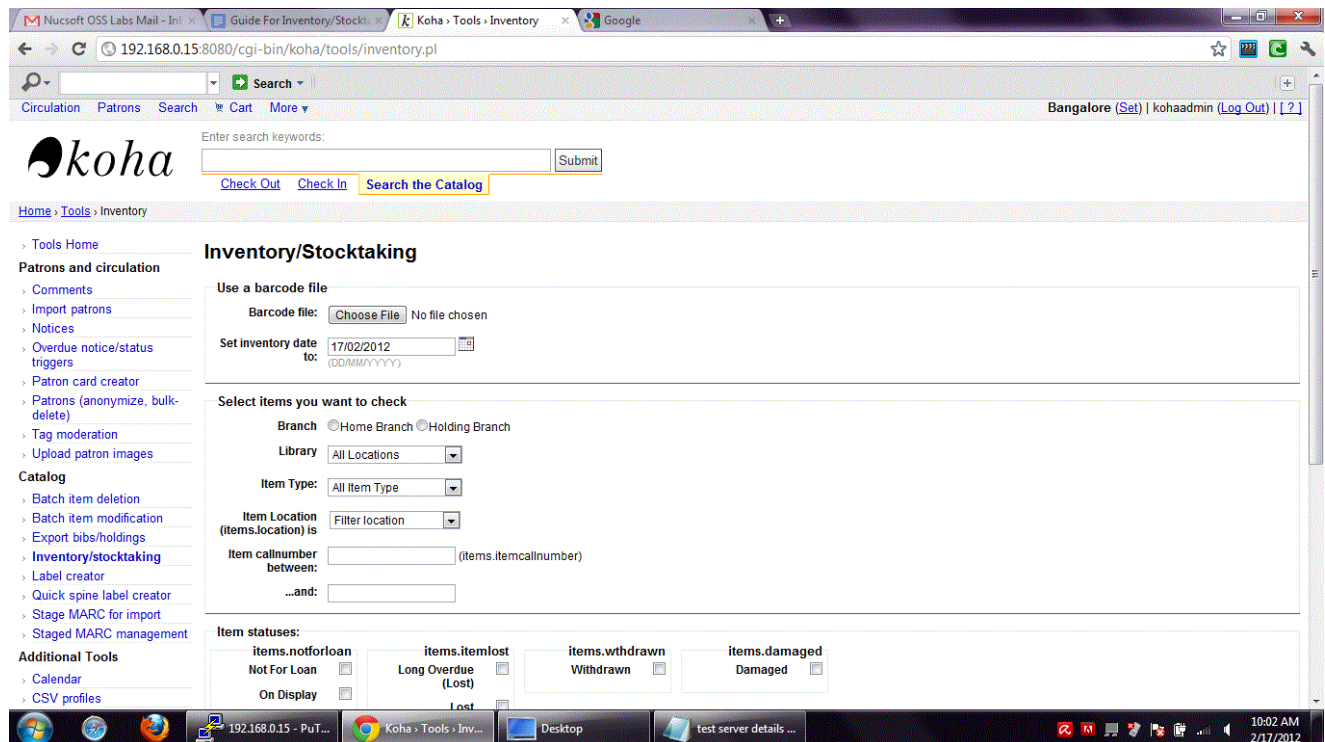
The bottom of the screenshot shows the Windows taskbar with various open applications, including "British C...", "192.168...", "Koha > T...", "Desktop", "Downlo...", "test serv...", "TextPad...", "Calculator", and "mylibrar...". The system clock indicates the time is 12:55 PM on 2/17/2012.

## 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 by 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

Home > Tools > Inventory

## Inventory/Stocktaking

Tools Home

Patrons and circulation

- Comments
- Import patrons
- Notices
- Overdue notice/status triggers
- Patron card creator
- Patrons (anonymize, bulk-delete)
- Tag moderation
- Upload patron images

Catalog

- Batch item deletion
- Batch item modification
- Export bibs/holdings
- Inventory/stocktaking**
- Label creator
- Quick spine label creator
- Stage MARC for import
- Staged MARC management

Additional Tools

- Calendar
- CSV profiles
- Log viewer
- News
- Task scheduler

Use a barcode file

Barcode file:  No file chosen

Set inventory date to:  (DD/MM/YYYY)

Select items you want to check

Branch: ☒ Home Branch ☐ Holding Branch

Library:

Item Type:

Item Location (items.location) is:

Item callnumber between:  (items.itemcallnumber) ...and:

Item statuses:

<b>items.notforloan</b> <input type="checkbox"/> Item in process <input type="checkbox"/> Not For Loan <input type="checkbox"/> On Display <input type="checkbox"/> Ordered <input type="checkbox"/> Staff Collection	<b>items.itemlost</b> <input type="checkbox"/> Long Overdue (Lost) <input type="checkbox"/> Lost <input type="checkbox"/> Lost and Paid For <input type="checkbox"/> Missing	<b>items.withdrawn</b> <input type="checkbox"/> Backdated edition <input type="checkbox"/> Copy damaged <input type="checkbox"/> Later edition available <input type="checkbox"/> Less used <input type="checkbox"/> Long overdue <input type="checkbox"/> Lost & replaced for <input type="checkbox"/> Missing for long time <input type="checkbox"/> Multiple copies	<b>items.damaged</b> <input type="checkbox"/> Damaged
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Click Submit to generate a list of missing items.

Calendar

CSV profiles

Log viewer

News

Task scheduler

Inventory date:  (DD/MM/YYYY)

Skip copies on loan: ☐

Show:  items

Beginning at offset:

Export to csv file: ☐

Compare barcodes list to results: ☐

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

- > Tools Home
- Patrons and circulation**
  - > Comments
  - > Import patrons
  - > Notices
  - > Overdue notice/status triggers
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- Catalog**
  - > Batch item deletion
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  - > Quick spine label creator
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  - > News
  - > Task scheduler

## Inventory/Stocktaking

[\[Select All\]](#) [\[Clear All\]](#)

Seen	Barcode	Title	Unseen since	Problems
<input type="checkbox"/>	BL81212	- All grown up!	14/03/2011	<a href="#">None</a>
<input type="checkbox"/>	BL82760	- Brassed Off_1Disc	18/12/2011	<a href="#">None</a>
<input type="checkbox"/>	BL82439	- Doc Martin_2 Discs	24/01/2012	<a href="#">None</a>
<input type="checkbox"/>	BL80010	- Man and boy	14/03/2011	<a href="#">None</a>
<input type="checkbox"/>	BL80900	- Moonlighting: The Pilot 2_ The lady in the iron mask 3_ A womb with a view vol. 1	14/03/2011	<a href="#">None</a>
<input type="checkbox"/>		- Roman Mysteries - Series 1_ 2 Discs	26/08/2011	<a href="#">None</a>
<input type="checkbox"/>	BL81119	- The Blair Witch Project	06/11/2011	<a href="#">None</a>
<input type="checkbox"/>	BL82225	- The british Transport Films Collection Vol 3: Running A Railway(2 disc)	28/01/2012	<a href="#">None</a>
<input type="checkbox"/>	BL82637	- The Crimson Pirate (DVD) Siodmark, Robert	23/12/2011	<a href="#">None</a>
<input type="checkbox"/>	BL82555	- The Cruel Sea (DVD) Frend, Charles	31/01/2012	<a href="#">None</a>
<input type="checkbox"/>	BL83118	- The Flying Scotsman	22/01/2012	<a href="#">None</a>
<input type="checkbox"/>	BL80541	- The titfield thunderbolt TRUMAN, MICHAEL	13/09/2011	<a href="#">None</a>
<input type="checkbox"/>	BL80481	- Wire in the Blood II	25/11/2011	<a href="#">None</a>
<input type="checkbox"/>	BL8002	199 MUS4/EVI - Evita	14/03/2011	<a href="#">None</a>

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”.

<input type="checkbox"/>	BL81715	ACT/I/RO - For Your Eyes Only(2 Discs) Glen, John	21/01/2012	<a href="#">None</a>
<input type="checkbox"/>	BL83336	ACT/FRO - From Russia With Love_1 Disc	21/01/2012	<a href="#">None</a>
<input type="checkbox"/>	BL80994	ACT/GAN - Gangster Story	14/03/2011	<a href="#">None</a>
<input type="checkbox"/>	BL83044	ACT/GET - Get Smart Segal, Peter	11/12/2011	<a href="#">None</a>
<input type="checkbox"/>	BL83048	ACT/HEL - Hellboy Del Toro, Guillermo	18/01/2012	<a href="#">None</a>
<input type="checkbox"/>	BL83028	ACT/HEL - Hellboy: The golden army Del Toro, Guillermo	11/11/2011	<a href="#">None</a>
<input type="checkbox"/>	BL83096	ACT/IRO - Iron man Favreau, Jon	17/12/2011	<a href="#">None</a>
<input type="checkbox"/>	BL83249	ACT/KIC - Kick-Ass_1 Disc	25/09/2011	<a href="#">None</a>
<input type="checkbox"/>	BL81705	ACT/LIC - Licence to Kill (2 Discs)	07/06/2011	<a href="#">None</a>
<input type="checkbox"/>	BL83758	ACT/LIC - License To Kill_2 Discs	21/01/2012	<a href="#">None</a>
<input type="checkbox"/>	BL83129	ACT/MEC - The Mechanic	27/01/2012	<a href="#">None</a>
<input type="checkbox"/>	BL84004	ACT/MIN - Minority Report_1 Disc	25/01/2012	<a href="#">None</a>
<input type="checkbox"/>	BL83787	ACT/MOO - Moonraker_2 Discs	22/01/2012	<a href="#">None</a>
<input type="checkbox"/>	BL83314	ACT/QUA - Quantum Of Solace_2 Discs	06/01/2012	<a href="#">None</a>
<input type="checkbox"/>	BL80993	ACT/RED - Redneck	17/12/2011	<a href="#">None</a>
<input type="checkbox"/>	BL83568	ACT/RED - Redbelt_1 Disc	23/12/2011	<a href="#">None</a>
<input type="checkbox"/>	BL83073	ACT/RES - Resident Evil Extinction Mulcahy, Russell	05/01/2012	<a href="#">None</a>

[\[Select All\]](#) [\[Clear All\]](#)