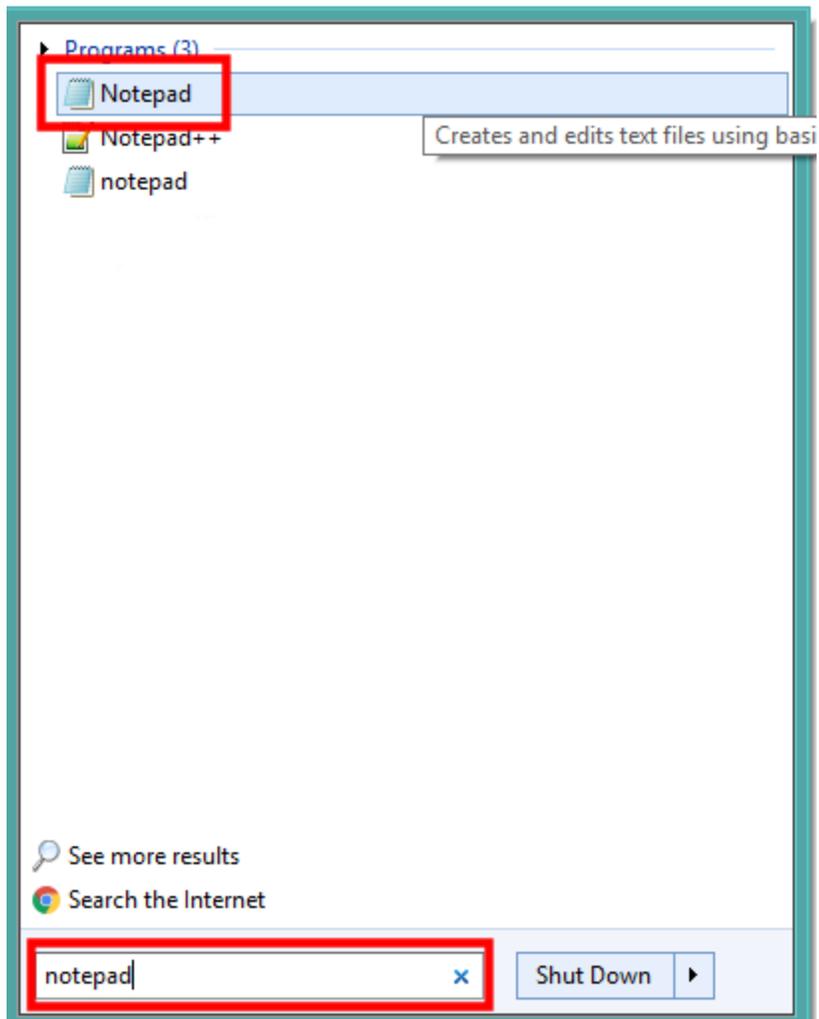


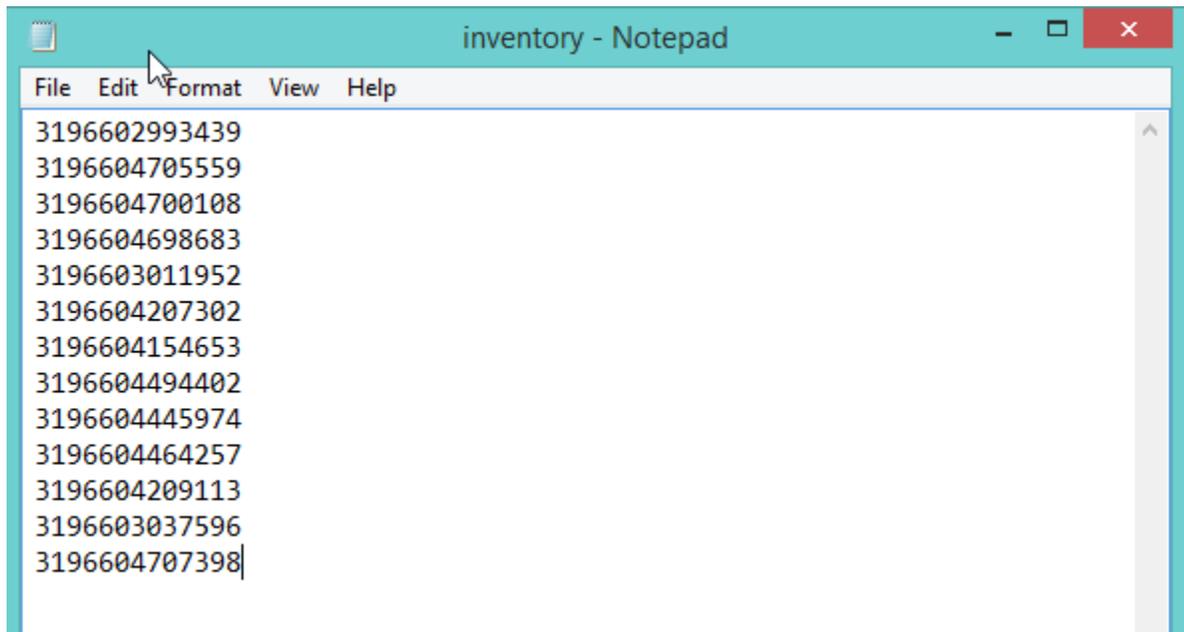
## Koha Inventory Process

**NOTE:** You will need a laptop and barcode scanner to perform an inventory of your collection in Koha. You will be scanning barcodes into a text file and uploading that file into the Koha inventory tool to mark the items as seen.

1. Open **Notepad** on your computer (Click the Start button and search for notepad)



2. Choose a section to start at (e.g. Adult Fiction) and take your laptop and barcode scanner to the stacks (or wheel a cart of books to your computer) and start scanning the barcodes into Notepad. **Make a note of the first Call Number you started at** (you will need this later for Step 13.)
3. You will now have a list that looks like this:



4. Save your file of barcodes and **make a note of the Call Number of the last barcode you scanned** (you will need this later for Step 13.)
5. In Koha, navigate to **Tools > Inventory**.

6. Under **Use a Barcode file**, click **Choose File**.

**Inventory**

**Use a barcode file**

**Barcode file:**  No file chosen

**Set inventory date to:**  

**Compare barcodes list to results:**

**Do not check in items scanned during inventory:**

**Check barcodes list for items shelved out of order:**

7. Find your barcode file on your computer and click **Open**.
8. Under **Set inventory date to:**, the default inventory date will be set to today's date, however you can click the calendar button to the right of the box and select the date you scanned your barcodes on. (Leaving it as today's date is fine.)

9. Check the box next to **Compare barcodes list to results:**

## Inventory

Use a barcode file

Barcode file:  inventory.txt

Set inventory date to:  

**Compare barcodes list to results:**

Do not check in items scanned during inventory:

Check barcodes list for items shelved out of order:

10. **VERY IMPORTANT!** Next, check the box next to **Do not check in items scanned during inventory:** (In case something got checked out between the time you finished scanning items and when you run the inventory tool, make sure this is checked.)

## Inventory

Use a barcode file

Barcode file:  inventory.txt

Set inventory date to:  

Compare barcodes list to results:

**Do not check in items scanned during inventory:**

Check barcodes list for items shelved out of order:

11. Introduced in Koha 18.11, if you want to use your inventory as a shelf-reading tool, check the box next to **Check barcodes list for items shelved out of order**.

## Inventory

Use a barcode file

Barcode file:  inventory.txt

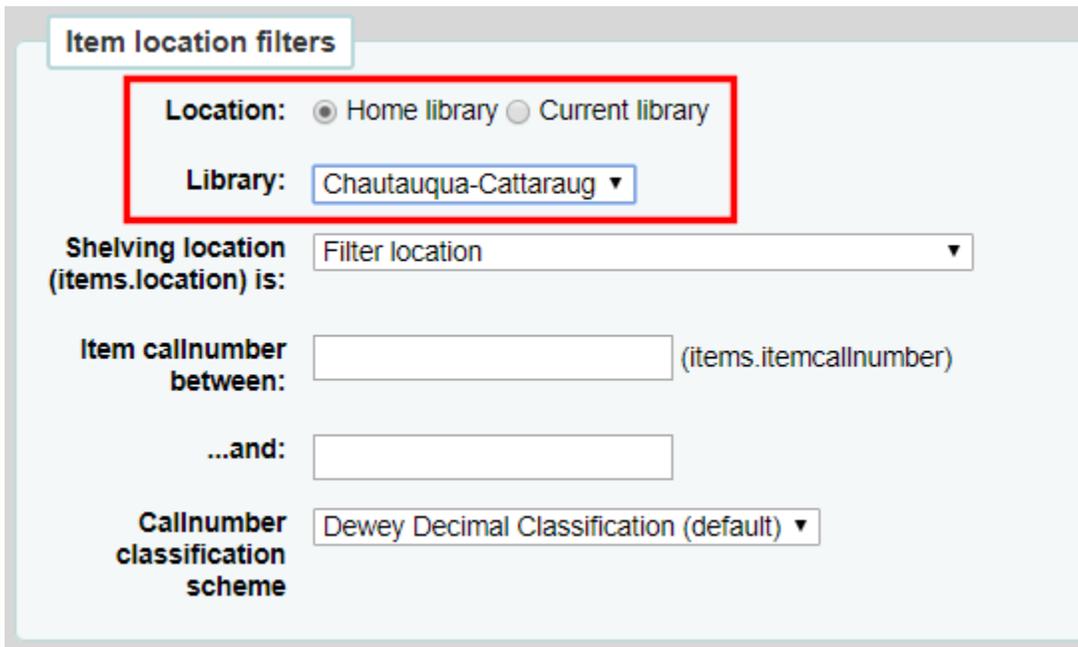
Set inventory date to:  

Compare barcodes list to results:

Do not check in items scanned during inventory:

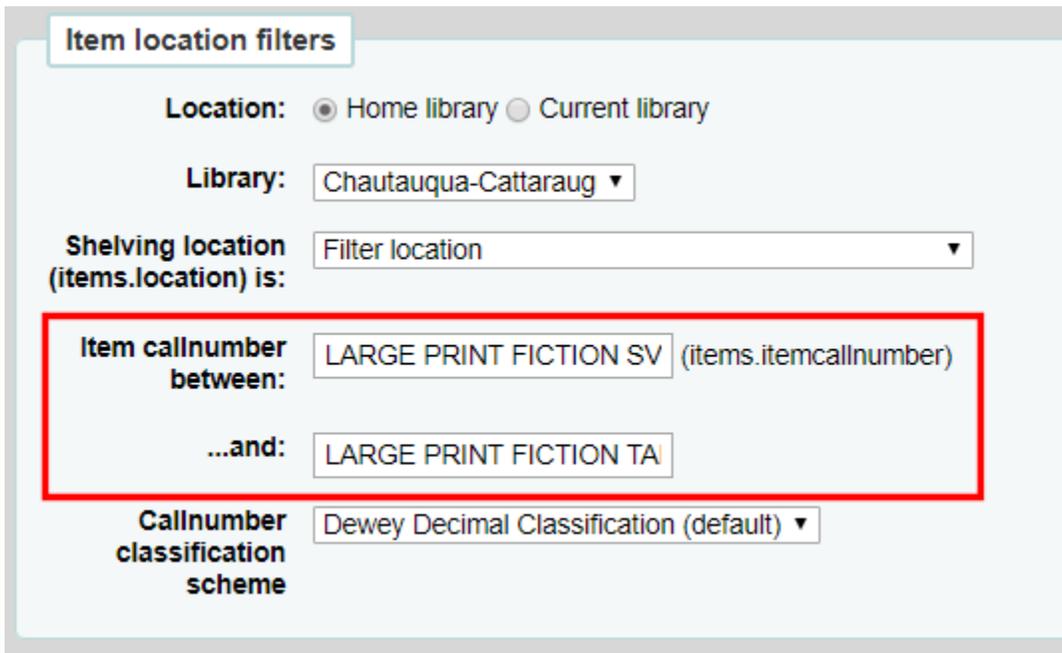
**Check barcodes list for items shelved out of order:**

12. Under **Item location filters**, next to **Library:**, click the bullet for **Home library** and **choose your library** from the drop-down menu.



The screenshot shows the 'Item location filters' section of a software interface. A red rectangular box highlights the 'Location' and 'Library' fields. The 'Location' field has two radio buttons: 'Home library' (which is selected) and 'Current library'. The 'Library' field is a dropdown menu currently showing 'Chautauqua-Cattaraug'. Below these fields, there are other filter options: 'Shelving location (items.location) is:' with a dropdown menu set to 'Filter location'; 'Item callnumber between:' with two empty text input boxes; '...and:' with one empty text input box; and 'Callnumber classification scheme' with a dropdown menu set to 'Dewey Decimal Classification (default)'.

13. If you were able to scan an entire shelving location section, choose that location from the **Shelving location** drop-down. Otherwise, **enter the beginning and ending Call Numbers** for the items that you scanned.



This screenshot shows the same 'Item location filters' form as above, but with a red rectangular box highlighting the 'Item callnumber between:' and '...and:' fields. The 'Item callnumber between:' field has two text input boxes containing 'LARGE PRINT FICTION SV' and '(items.itemcallnumber)'. The '...and:' field has one text input box containing 'LARGE PRINT FICTION TA'. The other fields in the form, including the 'Location' and 'Library' fields, are the same as in the previous screenshot.

14. Leave the **Callnumber** classification scheme as **default**.

15. Under **Optional filters for inventory list or comparing barcodes**, ensure the **Skip items on loan:** box is checked.

Optional filters for inventory list or comparing barcodes

<b>items.notforloan</b>	<b>items.itemlost</b>	<b>items.withdrawn</b>	<b>items.damaged</b>
Coming Soon <input type="checkbox"/>	Long Overdue (Lost) <input type="checkbox"/>	Delete <input type="checkbox"/>	Bindery <input type="checkbox"/>
In Process <input type="checkbox"/>	Lost <input type="checkbox"/>	Discard <input type="checkbox"/>	Claims Returned <input type="checkbox"/>
Not For Loan <input type="checkbox"/>	Lost and Paid For <input type="checkbox"/>		Damaged <input type="checkbox"/>
Ordered <input type="checkbox"/>	Missing <input type="checkbox"/>		In Repair <input type="checkbox"/>
Staff Collection <input type="checkbox"/>			
For loan <input type="checkbox"/>			

Last inventory date:  (Skip records marked as seen on or after this date.)

**Skip items on loan:**

Skip items on hold awaiting pickup:

16. Under **Optional filters for inventory list or comparing barcodes**, check the box next to **Skip items on hold awaiting pickup**.

Optional filters for inventory list or comparing barcodes

<b>items.notforloan</b>	<b>items.itemlost</b>	<b>items.withdrawn</b>	<b>items.damaged</b>
Coming Soon <input type="checkbox"/>	Long Overdue (Lost) <input type="checkbox"/>	Delete <input type="checkbox"/>	Bindery <input type="checkbox"/>
In Process <input type="checkbox"/>	Lost <input type="checkbox"/>	Discard <input type="checkbox"/>	Claims Returned <input type="checkbox"/>
Not For Loan <input type="checkbox"/>	Lost and Paid For <input type="checkbox"/>		Damaged <input type="checkbox"/>
Ordered <input type="checkbox"/>	Missing <input type="checkbox"/>		In Repair <input type="checkbox"/>
Staff Collection <input type="checkbox"/>			
For loan <input type="checkbox"/>			

Last inventory date:   (Skip records marked as seen on or after this date.)

Skip items on loan:

**Skip items on hold awaiting pickup:**

17. Click **Submit**.

For loan

Last inventory date:

Skip items on loan:

Skip items on hold awaiting pickup:

Additional options

Export to CSV file:

**Submit**

18. The resulting list will display items that were not scanned in the Call Number section you specified in Step 13 as well as items that may be shelved out of order.

Inventory

13 items modified - datelastseen set to 07/19/2019

Number of potential barcodes read: 13

Showing 1 to 4 of 4 Show 20 entries First Previous 1 Next Last Search:

Barcode	Call number	Library	Title	Not for loan	Lost	Damaged	Withdrawn	Last seen	Problems
3196604719296	LARGE PRINT FICTION SWEENEY, LEANN	Chautauqua-Cattaraugus Library System <i>Large Print</i>	<i>The cat, the collector and the killer / by Sweeney, Leann,</i>	0	0	0	0	06/21/2019	Missing (not scanned)
3196604698479	LARGE PRINT FICTION SWEENEY, LEANN	Chautauqua-Cattaraugus Library System <i>Large Print</i>	<i>The cat, the professor and the poison / by Sweeney, Leann.</i>	0	0	0	0	07/18/2019	Missing (not scanned)
3196604154653	LARGE PRINT FICTION SYMONS, J.	Chautauqua-Cattaraugus Library System <i>Large Print</i>	<i>Playing happy families / by Symons, Julian,</i>	0	0	0	0	07/19/2019	Item may be shelved out of order
3196604207302	LARGE PRINT FICTION SYMONS, JULIAN	Chautauqua-Cattaraugus Library System <i>Large Print</i>	<i>The man who hated television, and other stories / by Symons, Julian,</i>	0	0	0	0	07/19/2019	Item may be shelved out of order

19. If you would like to print this list to look for missing items later, use the browser's print function.

**NOTE: If any of the items you scanned and saved in your barcodes file had a lost status (Long Overdue (Lost), Lost, Lost and Paid For, or Missing), Koha will automatically take it out of the lost status and make it available.**