Maine Balsam Library Consortium

Cataloging Directions

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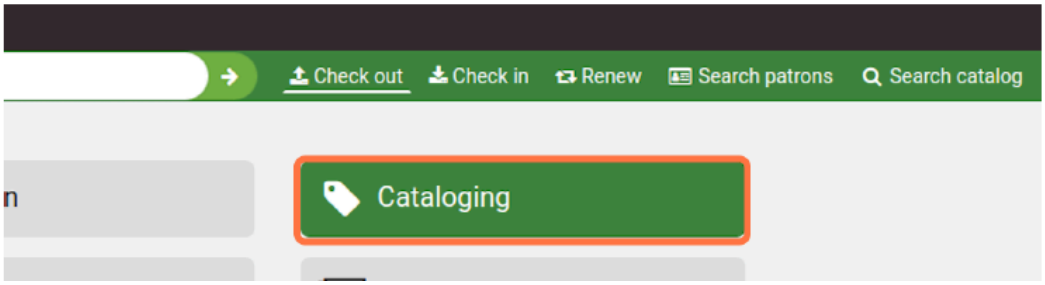
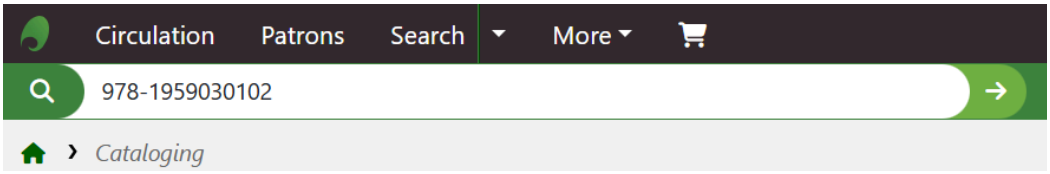
1.1 Item Cataloging: Adding an item to an existing record in the Balsam catalog

Step 1: Go to https://staff-balsam.bywatersolutions.com/ and enter your login credentials. The homepage defaults to check out.

Step 2: Click ‘Cataloging‘

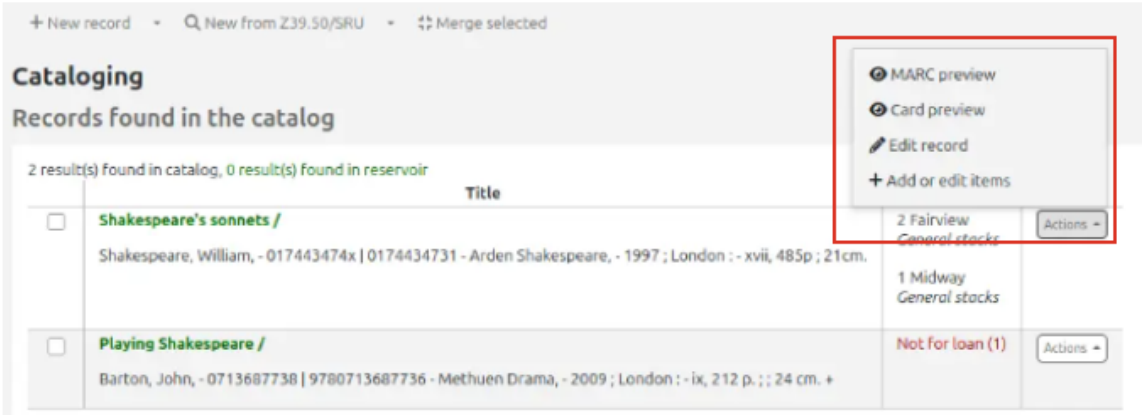


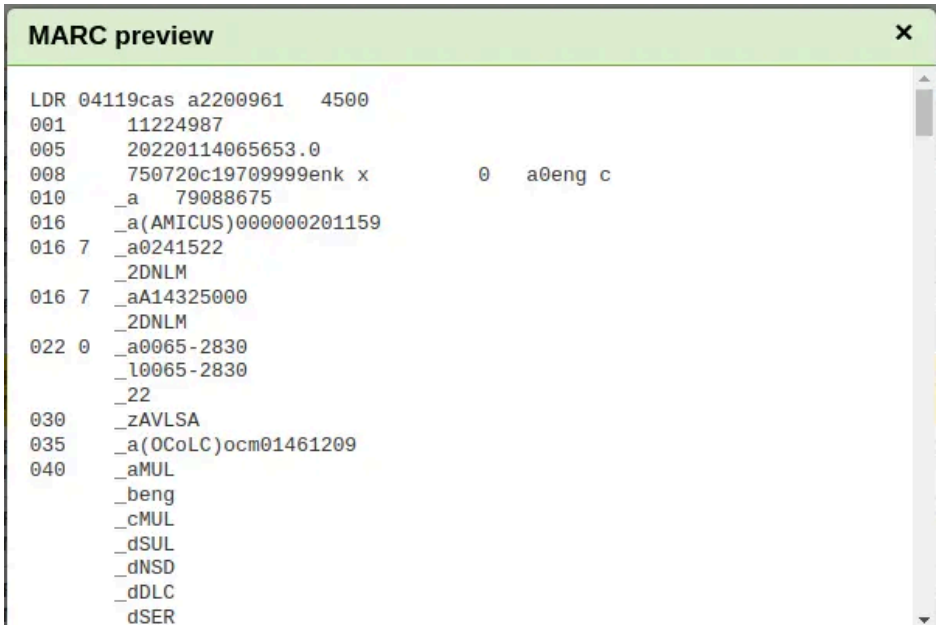
Step 3: Type in search terms like ISBN (978-1959030102) or Title (move like water).



Step 4: Click the search button.

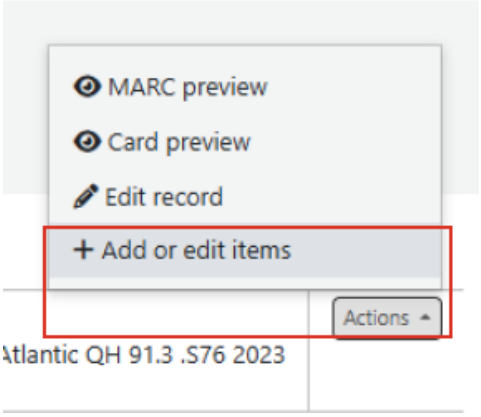
Step 5: If there are results, click on ‘Actions’ and select ‘MARC preview’ or ‘Card preview’. This will cause a pop-up window to appear so you can see the record and make sure it matches your item in hand.





Step 6: When done evaluating the record, click on the X to close the pop-up window.

Step 7: Once you have determined the record is the one you want, click on ‘Actions’ again and select ‘+Add or edit items’.

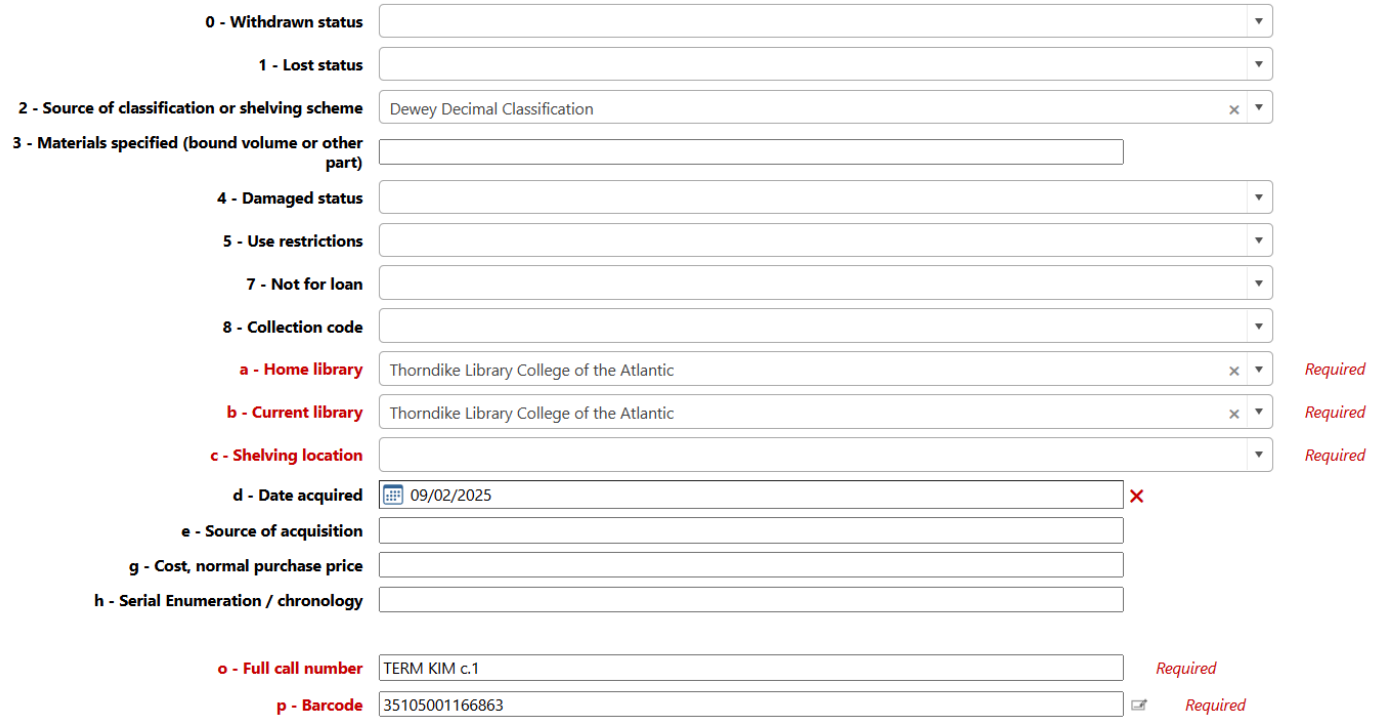


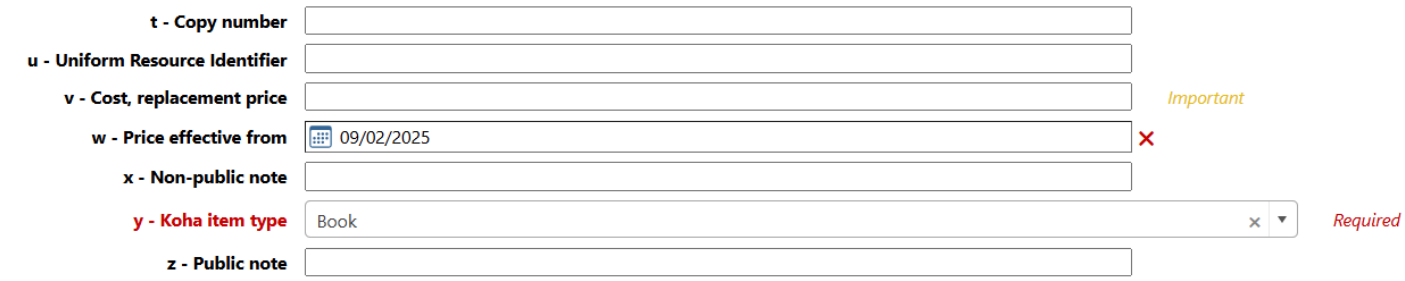
Step 8: The item form will show next. There are a number of required fields:

1. A - home library (autofilled)
2. B- current library (autofilled)
3. C - shelving location
4. O - full call number
5. P - barcode
6. Y - Koha item type - This is pre-filled with the Koha Item Type selected by the cataloger who originally imported/created the record. BUT - this can be changed - each library defines its own items. Meaning, when you see search results for a title held by multiple libraries, the Item Type column can be Book for one library and New material for another.

The only important, but not required field is:

1. V - cost, replacement price - if left blank, a default price of $15 will be automatically added for overdue and billing purposes





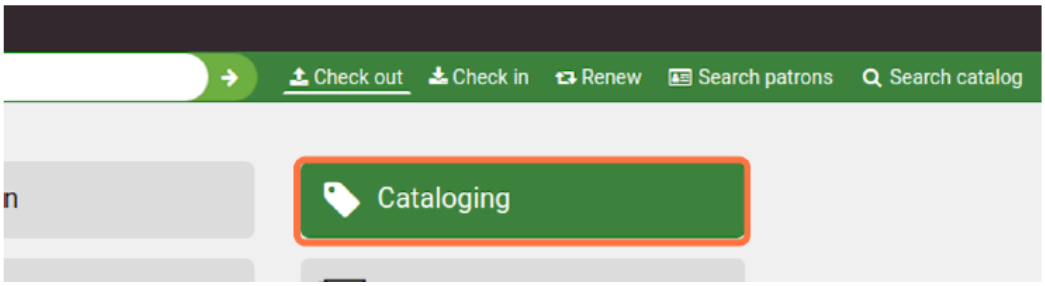
Step 9: Click on Add item to finish

Note that you should view the item in both the OPAC and staff staff to check your work and make sure the record/item is all good.

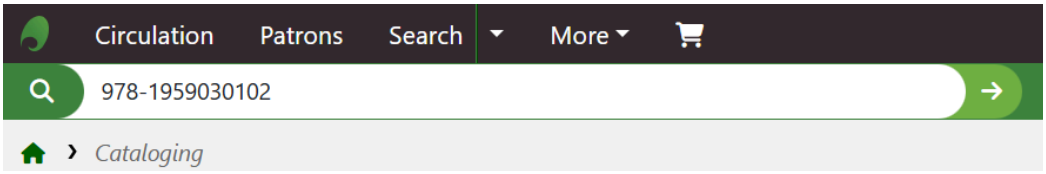
1.2 Copy Cataloging: Importing a record using Z39.50

Step 1: Go to https://staff-balsam.bywatersolutions.com/ and enter your login credentials. The homepage defaults to check out.

Step 2: Click ‘Cataloging’

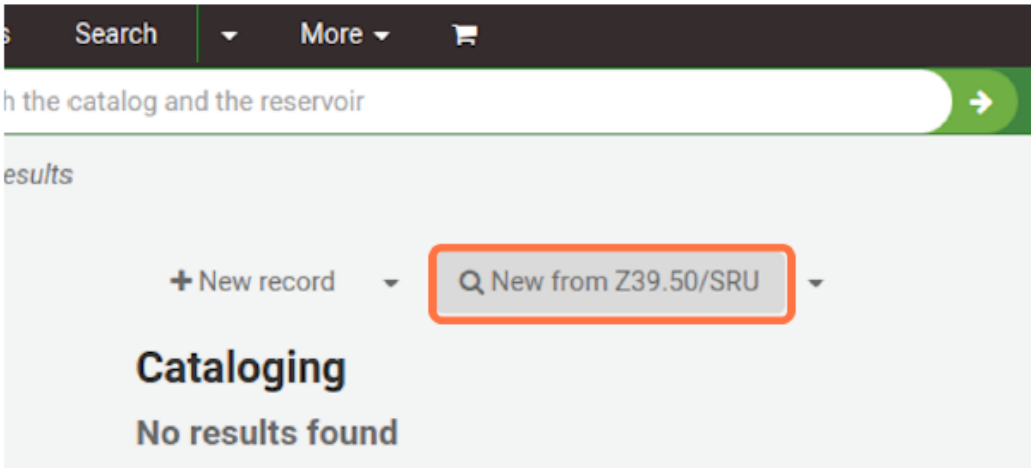


Step 3: Type in search terms like ISBN (978-1959030102) or Title (move like water).

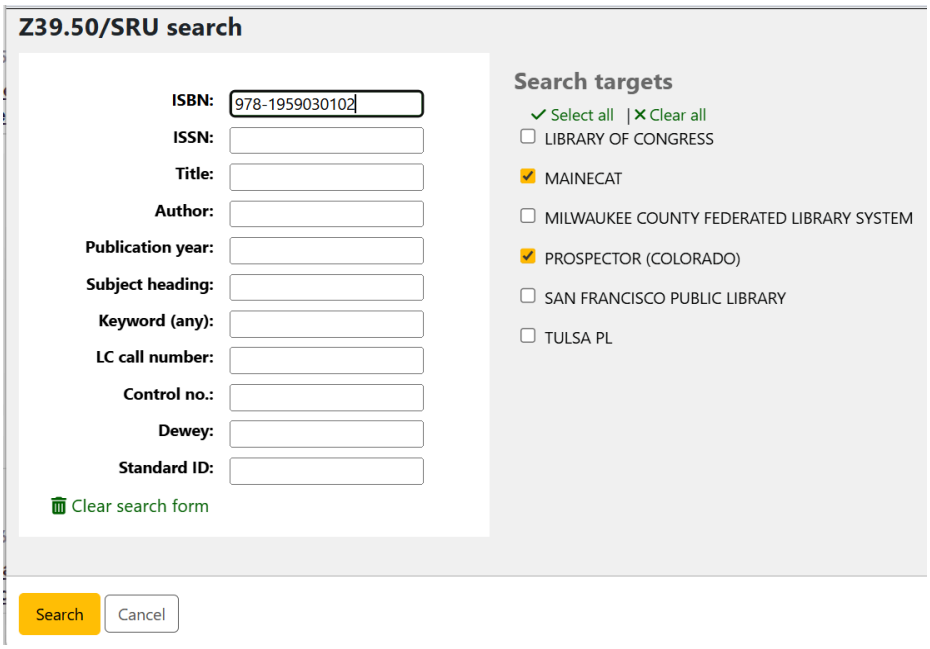


Step 4: Click the search button.

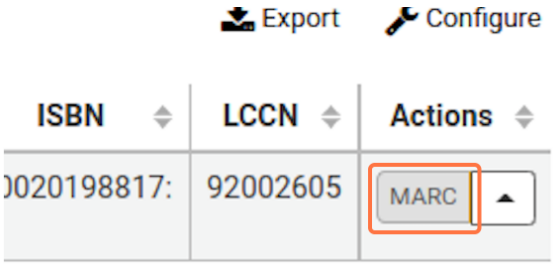
Step 5: If there are no results, click on ‘New from Z39.50/SRU’

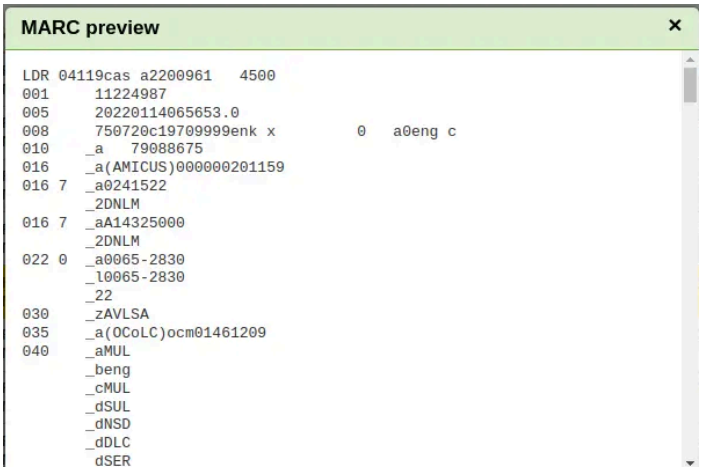


Step 6: The search form will autofill with the ISBN or search query. Fill in additional fields as needed. Mainecat & Prospector are autochecked, but you can uncheck or check any of the search targets you prefer. Click on Search.



Step 7: Evaluate the search results by clicking on ‘MARC’ and select ‘MARC preview’ or ‘Card preview’. This will cause a pop-up window to appear so you can see the record and make sure it matches your item in hand.

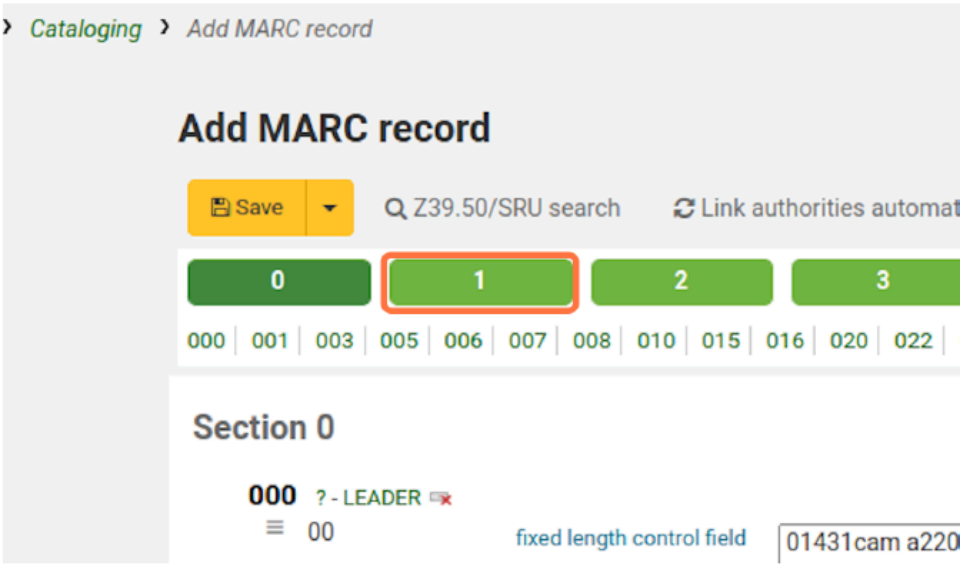




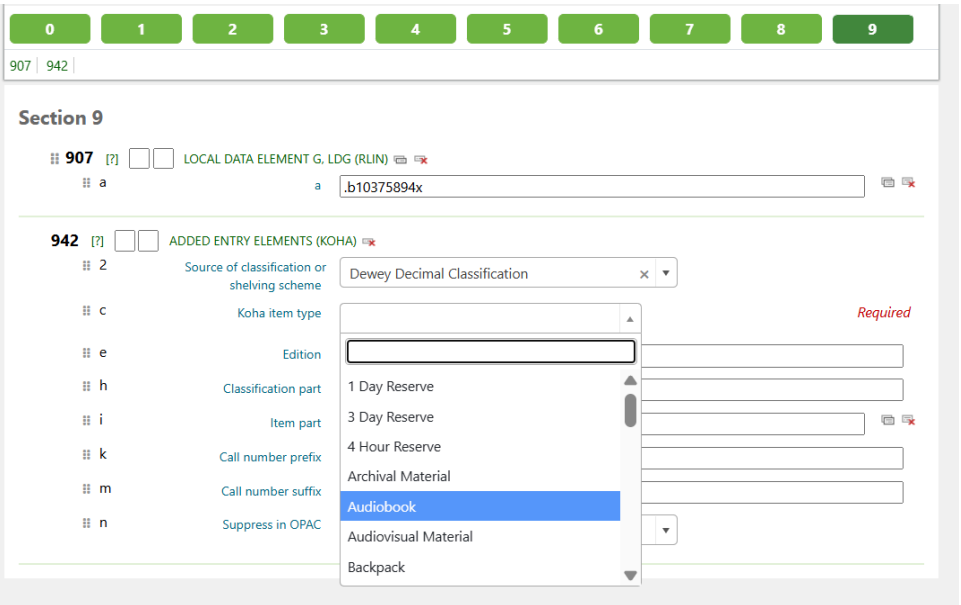
Step 8: When done evaluating the record, click on the X to close the pop-up window.

Step 9: Click on the arrow and click ‘Import’

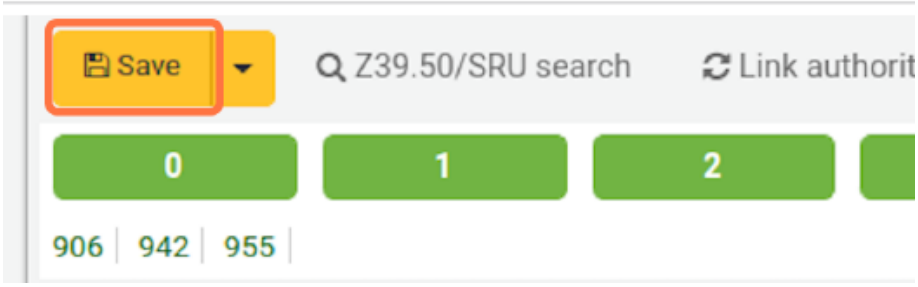
Step 10: Navigate through the tabs to check the record and edit fields as needed. For example, click on 1 to evaluate the author/contributor fields. Continue as needed to the 9 tab.



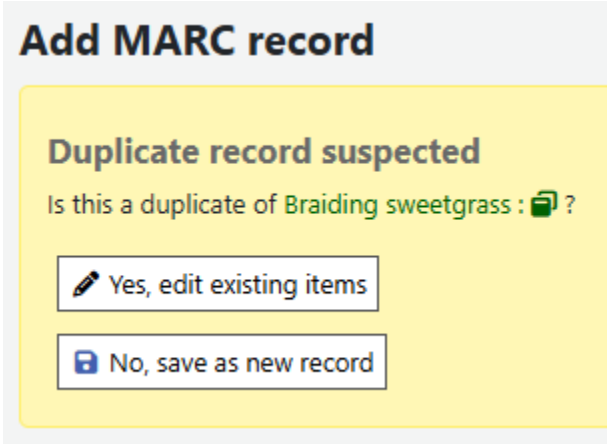
Step 11: In the 9 tab, navigate to the 942 c Koha item type field. Click on the dropdown and select the item type that best matches your item in hand.



Step 12: Click on ‘Save’.



*If the record matches an existing record in Balsam, you will get this alert:



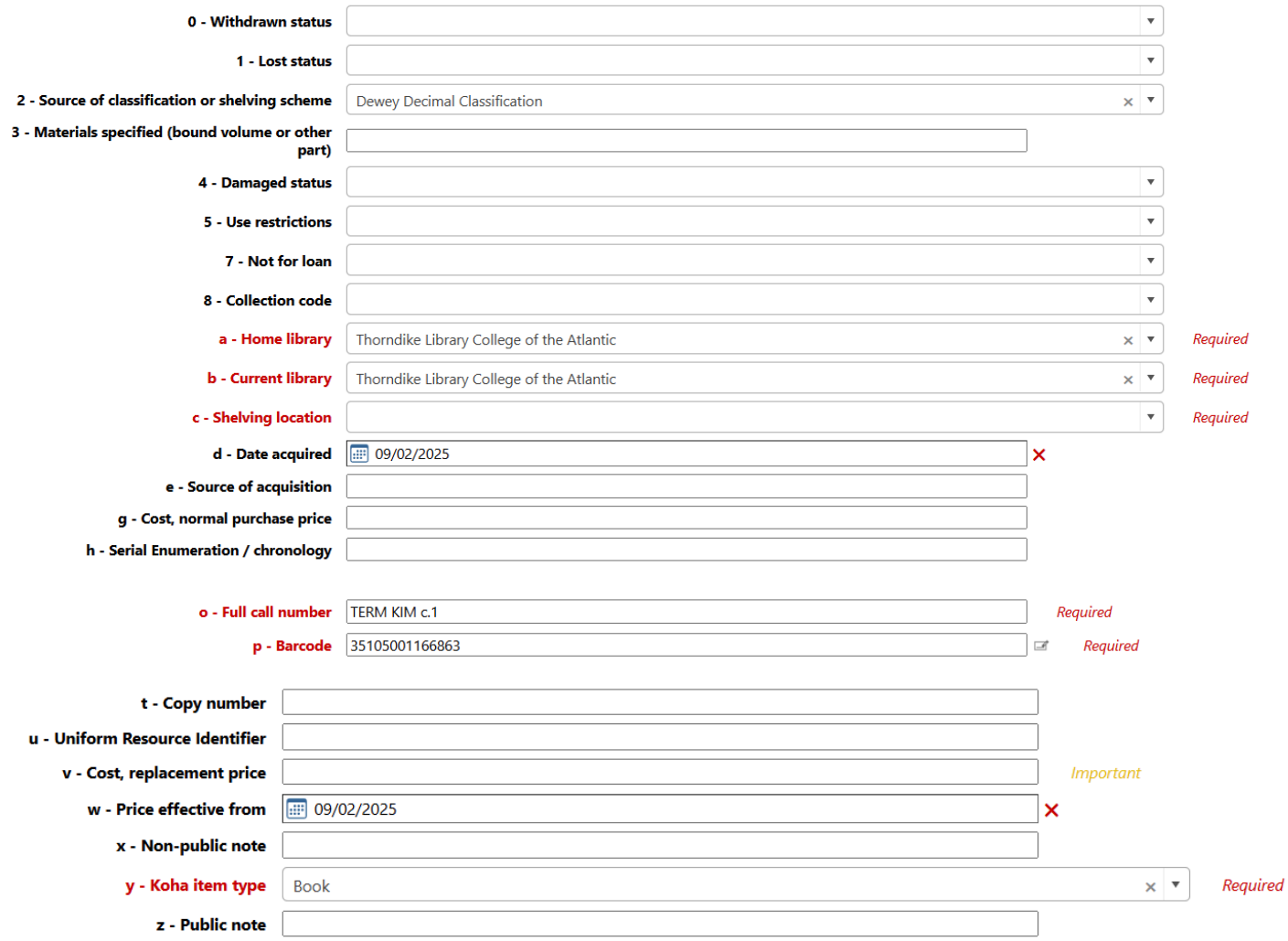
You can click the green title to view the record and decide whether or not you need to import a new record.

Step 15: The item form will show next. There are a number of required fields:

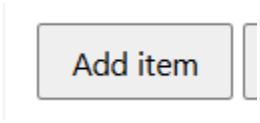
1. A - home library (autofilled)
2. B- current library (autofilled)
3. C - shelving location
4. O - full call number
5. P - barcode
6. Y - Koha item type - This is pre-filled with the Koha Item Type selected in Step 11. Just note, that even though it might be a Book item type in the record, here in the item form you can select whatever is appropriate for your library's item. For example, it might be a Book that is considered New Material, so when adding the item, choose New Material, then change back to Book once it has aged out of the New Material status.

The only important, but not required field is:

1. V - cost, replacement price - if left blank, a default price of $15 will be automatically added for overdue and billing purposes

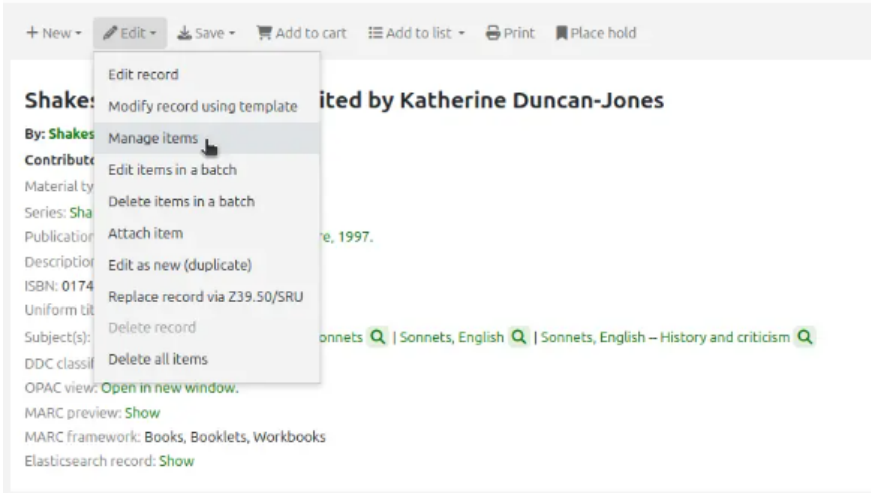


Step 16: Click on Add item to finish

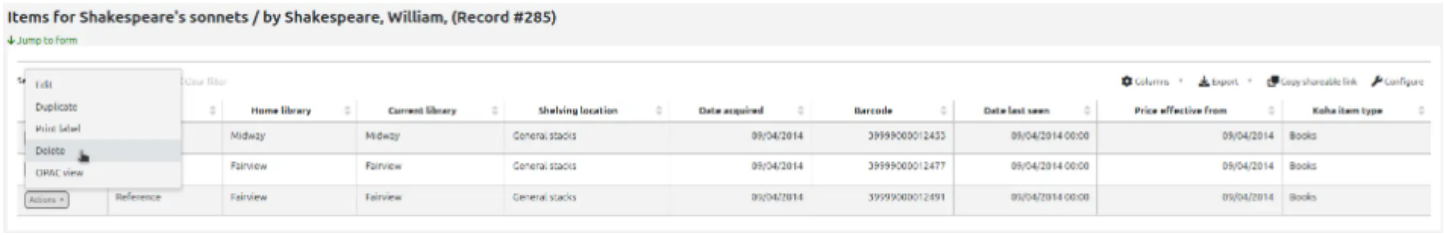


1.3 Delete A Single Item

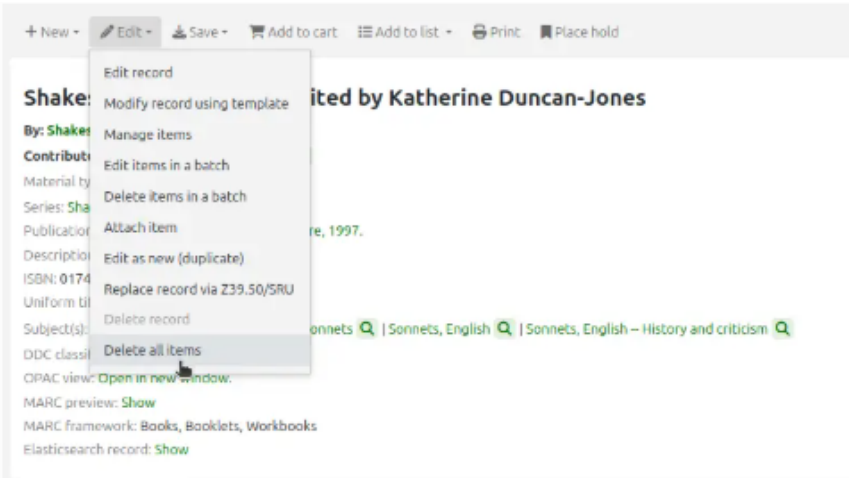
Step 1: Go to the record's details page, click the 'Edit' button at the top and choose 'Manage items'.



Step 2: Click the 'Actions' button next to the item to delete, and choose the 'Delete' option. If the item is not checked out, it will be deleted.

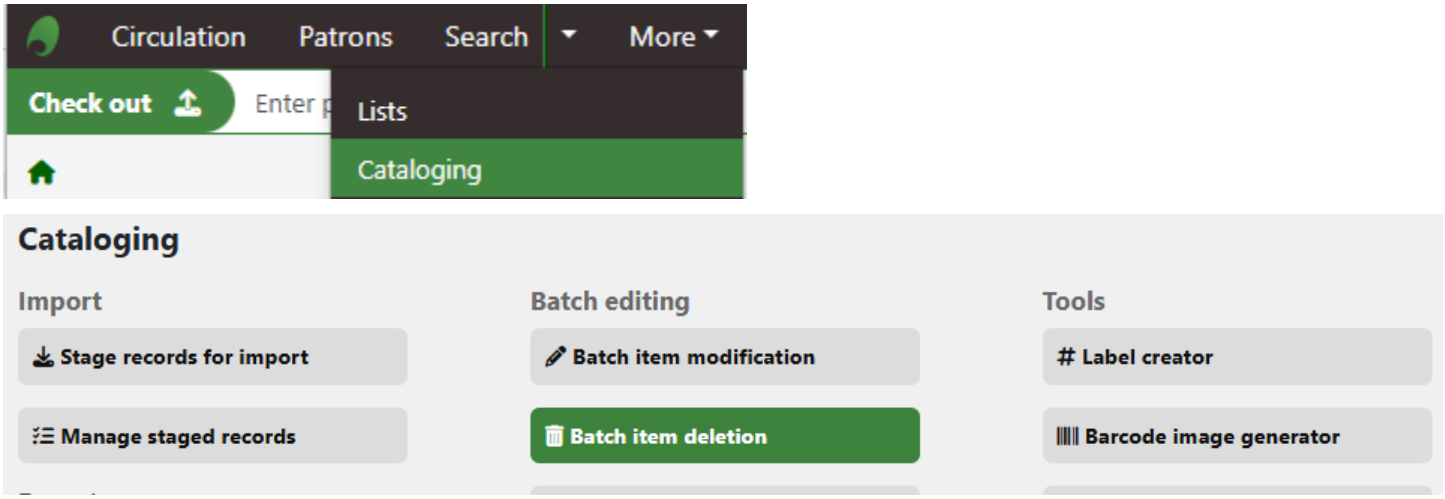


Step 3: If all the items attached to the record are not currently checked out, from the record's details page, click the 'Edit' button at the top and choose 'Delete all items'. This will delete all the items from the record.



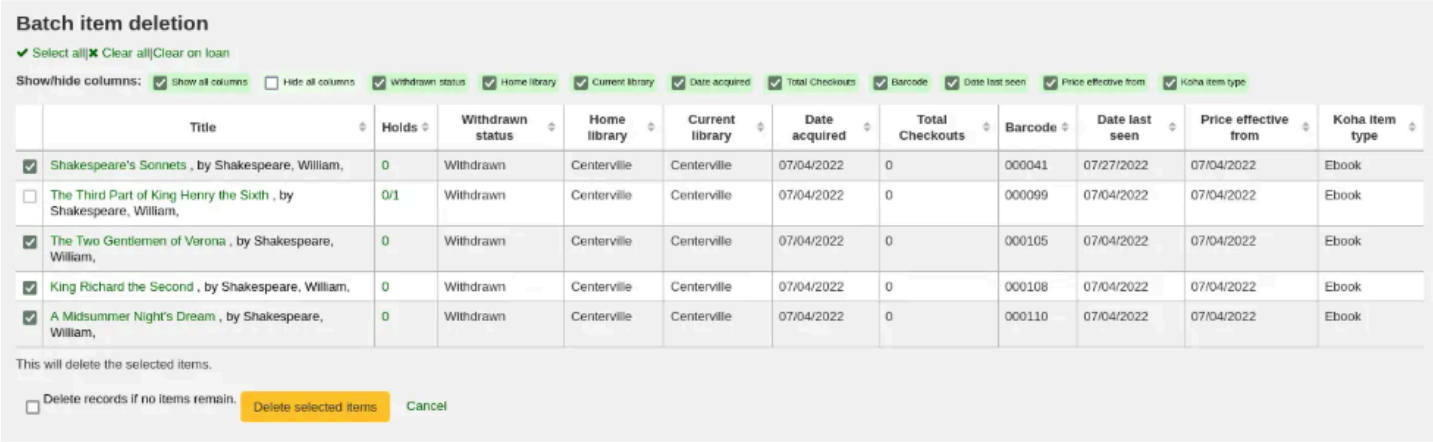
1.4 Delete Items in a Batch Using Barcodes or Item Numbers

Step 1: More > Cataloging > Batch editing > Batch item deletion



Step 2: From the tool, choose to either upload a file of barcodes or item numbers, or scan item barcodes one by one into the box below the upload tool.

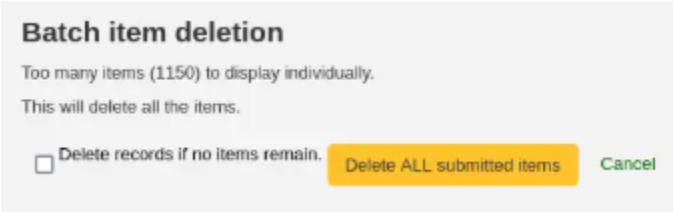
Step 3: Once the file is uploaded or the barcodes listed, click ‘Continue.’
You will be presented with a confirmation screen. From here you can uncheck the items you don’t want to delete. You can check the ‘Delete records if no items remain’ box to delete the bibliographic record if the last item is being deleted.



Note: Items that are the last item attached to a bibliographic record with one or more record-level holds will be automatically unchecked. You will need to delete the hold before deleting the item.

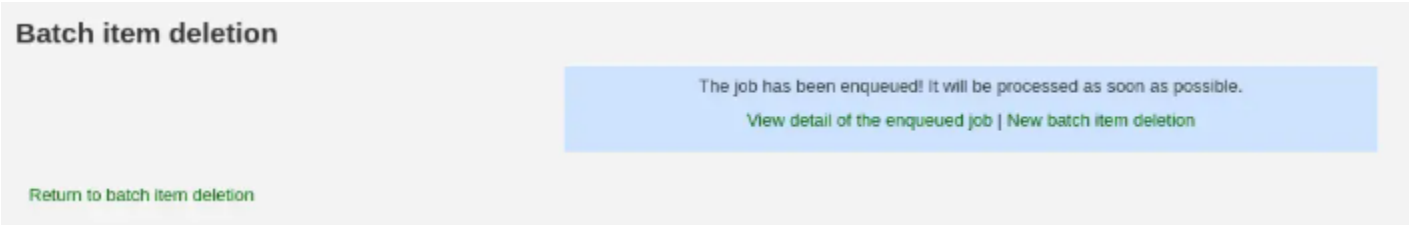
Items that are checked out will also be automatically unchecked. They will need to be checked in before they can be deleted.

Step 4: Click ‘Delete selected items.’ The deletion job will be enqueued in the background jobs.



If your file (or list of scanned barcodes) has more than 1000 barcodes, Koha will be unable to present you with a list of the items. You will still be able to delete them, but not able to choose which items specifically to delete or delete the bibliographic records.

Step 5: To see the deletion details, click ‘View detail of the enqueued job’.

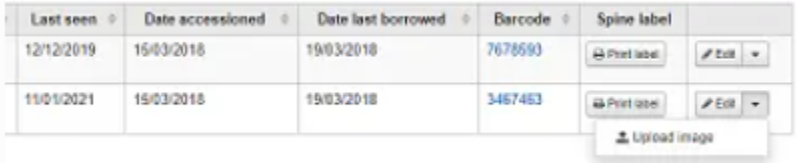


1.5 Add/Delete Item Cover Images

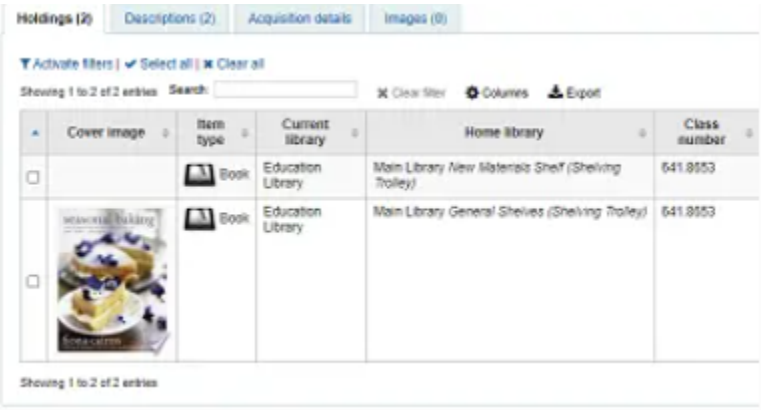
You can upload (and delete) cover images for individual item records.

To Add Cover Images

Step 1: Click the Edit button on the right of the Holdings table and click ‘Upload image’



Step 2: Click Choose file to find the image file on your computer and then Upload file.
On the next screen you are given the option to replace existing images. You can then click on Process images. The image will display in a Cover image column in the holdings display.



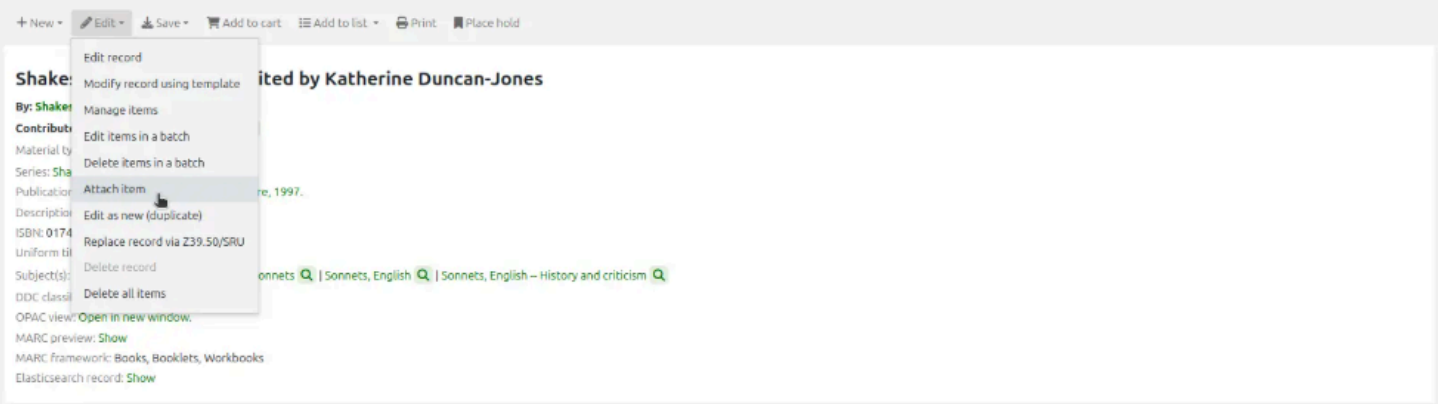
To Delete Cover Images

To delete an image, click on the image in the holdings display. You will see a grayed out copy of the image with the option to delete.

1.6 Move Item from One Record to Another Record

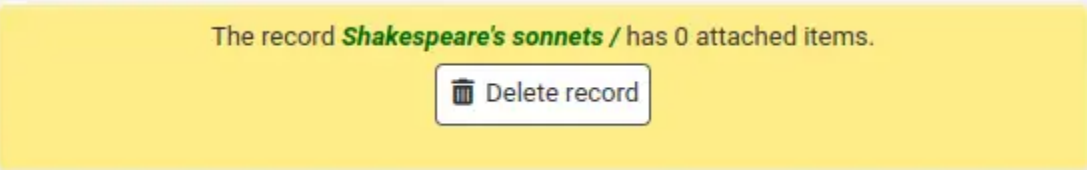
Items can be moved from one bibliographic record to another using the ‘Attach item’ option.

Step 1: Visit the bibliographic record you want to attach the item to and choose ‘Attach item’ from the ‘Edit’ menu.



Step 2: Simply enter the barcode for the item you want to move and click ‘Submit’.
If this is the last remaining item attached to a bibliographic record you will be presented with a button to delete the original host record.

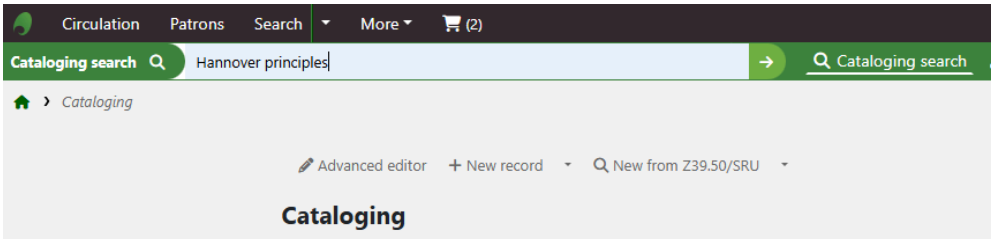
Step 3: If you want to move all items to a new record creating only one bibliographic record you can use the merge records tool instead.



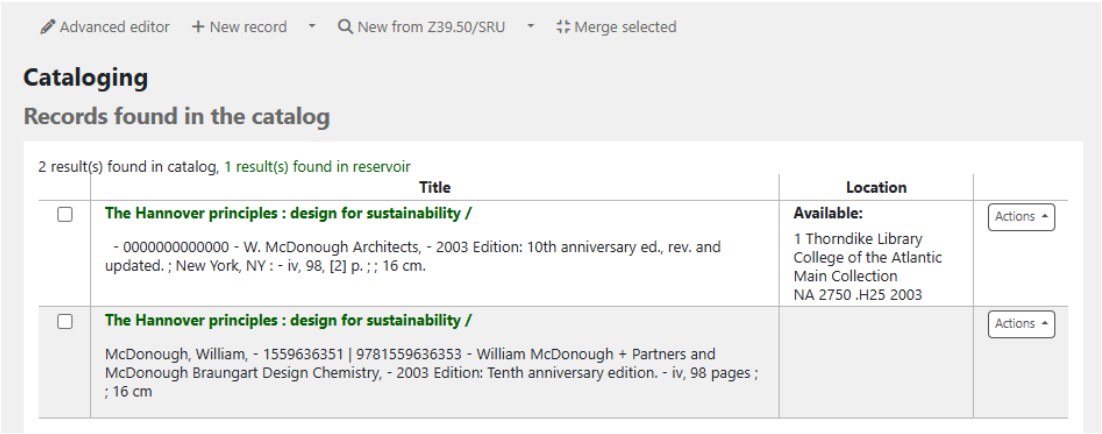
1.7 Merging Records

Step 1: Go to Koha homepage and click on ‘Cataloging’

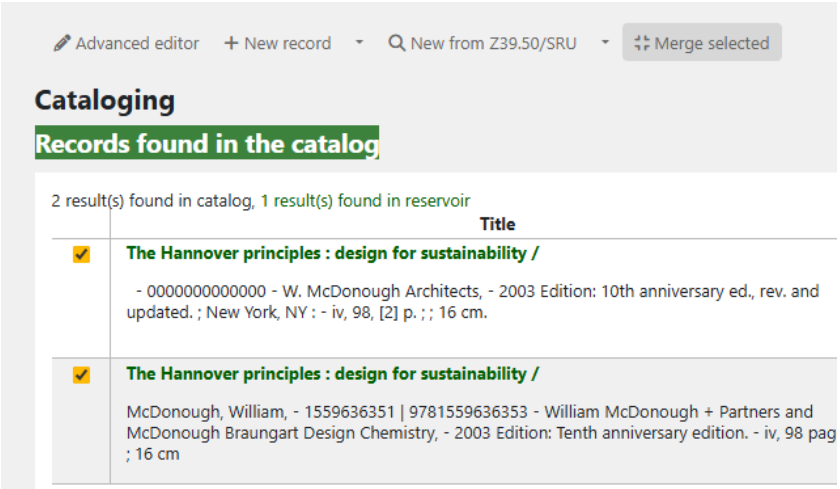
Step 2: Search for the title of the item with multiple records



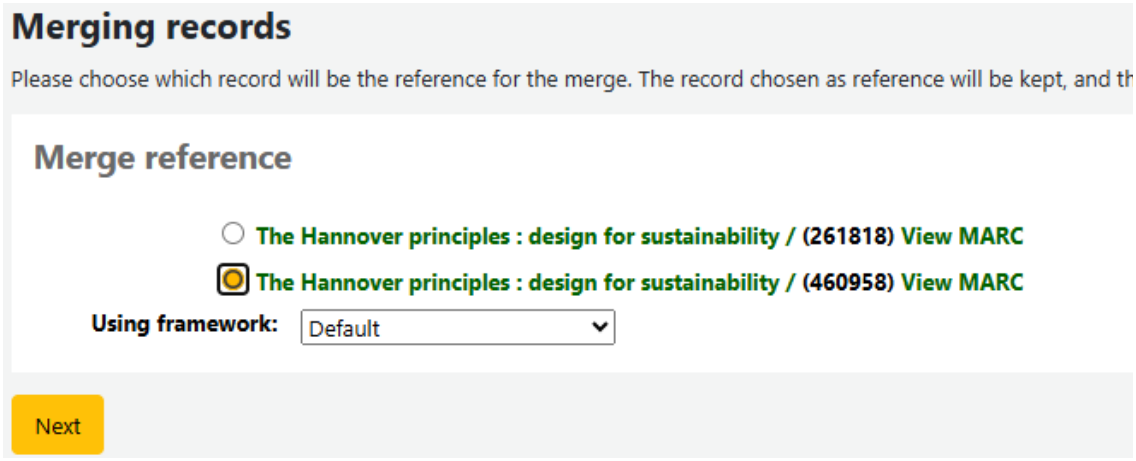
Step 3: You should see the record already in Balsam and the record without any items that you just imported.



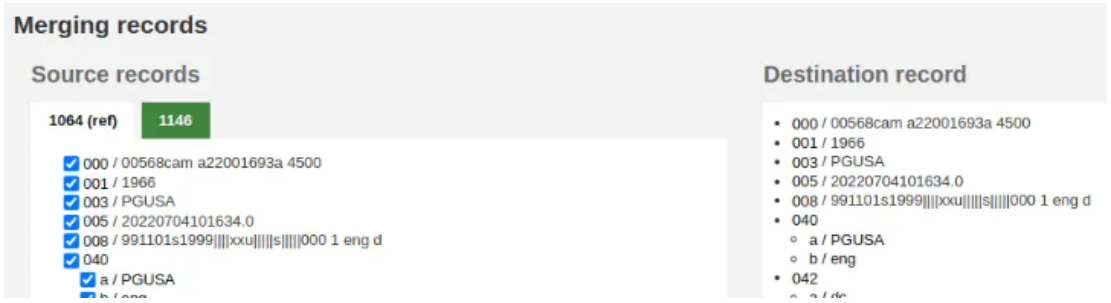
Step 4: Select the boxes next to the records to be merged and click ‘Merge Selected’



Step 5: Click the circle next to the record to be kept and click ‘Next’. If you’re not sure which record is which, you can search the record number in **(xxxxxx)** in Balsam.

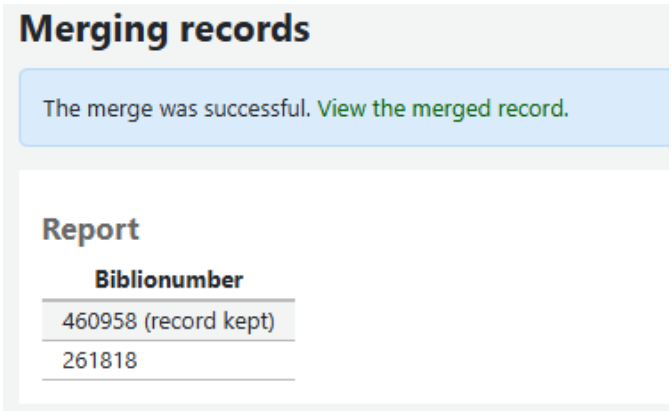


Step 6: The new record will have all fields checked to add in the final (destination) record. You can uncheck the fields you don’t want in the final (destination) record from each source records. To toggle between the records, click on the green tab with the record number.

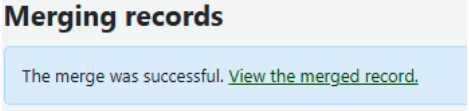


Step 7: Scroll to bottom of the page and click ‘Merge’

Once merged, you’ll see a screen like this:



Step 8: Click on ‘View the merged record’ to go to the record



1.8 Taking Inventory in Koha

Why do an inventory of your library?

- Clean up your catalog so your patrons have access to accurate holdings
- Catch items that are checked out to patrons, but are actually on the shelves
- Catch items that are marked missing, but are actually on the shelves
- Locate misshelved materials
- Find materials with issues (bad barcodes, previously weeded and somehow still on shelf, etc)
- And so much more!

Adapted from https://help.bywatersolutions.com/portal/en/kb/articles/taking-inventory-in-koha#Steps_to_load_a_barcode_file

Koha's Inventory Tool can be used in several ways. One way is to upload barcodes from a file or scan them into the barcode list. A second way is to generate a shelf list in Koha, then check the items off as you find them. There is also an interactive inventory plug-in. Each method has pros and cons, and your first step is to choose the method that is the best match for your situation.

FOR ANY INVENTORY PROJECT, work in sections of 1,000 books or less. This avoids overwhelming the system. All methods allow you to limit by shelving location and call number, so you can work in chunks. You can limit to just Nonfiction 500 AAA-599.999 ZZZ, for example. Once that is finished, you can continue with 600 AAA-699.999 ZZZ, etc.

This document contains many screenshots. The checkmarks in the screenshots are the default and do not necessarily indicate what you should fill in. Please read the options and fill in the information that best fits your library, even if it does not match the screenshots.

1.8.1 Interactive Inventory Plug-in (recommended)

This is the most seamless way to go through the complete process and keeps you informed as you go.

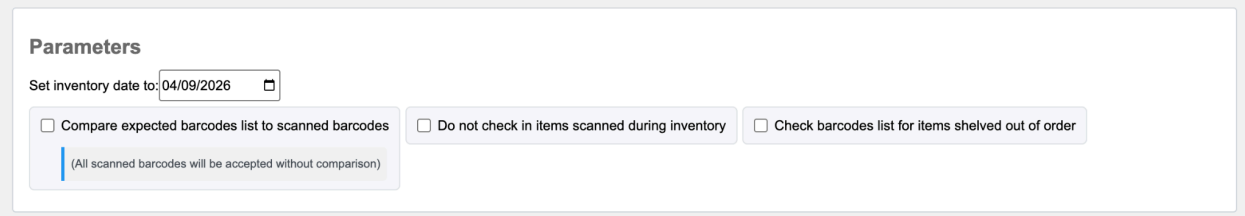
Pros and cons of using the plug-in:

- The plug-in immediately tells you if the book is mis-shelved or the barcode is not recognized.
- The plug-in shows you at any point how many books it is expecting, how many it has scanned, which books have been scanned, and what is missing.
- You need to scan a little slower for the plug-in to process as you work, similar to checking books in.
- You need to be able to see your computer screen as you scan or you will miss the information you need. There are no sound cues.
- You cannot work offline.

Go to **Tools – Additional Tools – Tool PlugIns – Interactive Inventory.**

This launches the interactive inventory plug-in.

Set up the parameters as you want them to function. Here are the options you have and what they mean:

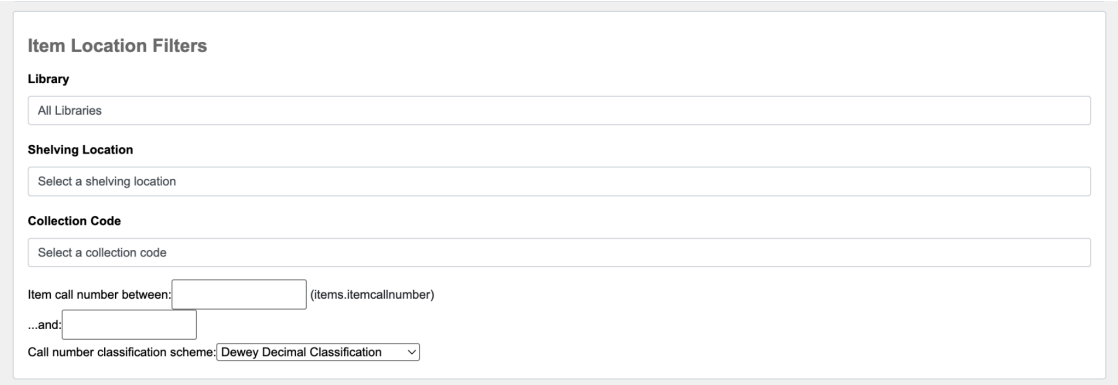


- If you want the inventory to be set at a different date, you can change that. You also can decide if you want items checked in when scanned and flagged if they are out of order.

- **Compare expected barcodes to scanned barcodes:** If you want Koha to match up the books you scanned with the books you are supposed to have, check this box. Otherwise, it will just change the date last seen, but not tell you what you are missing.

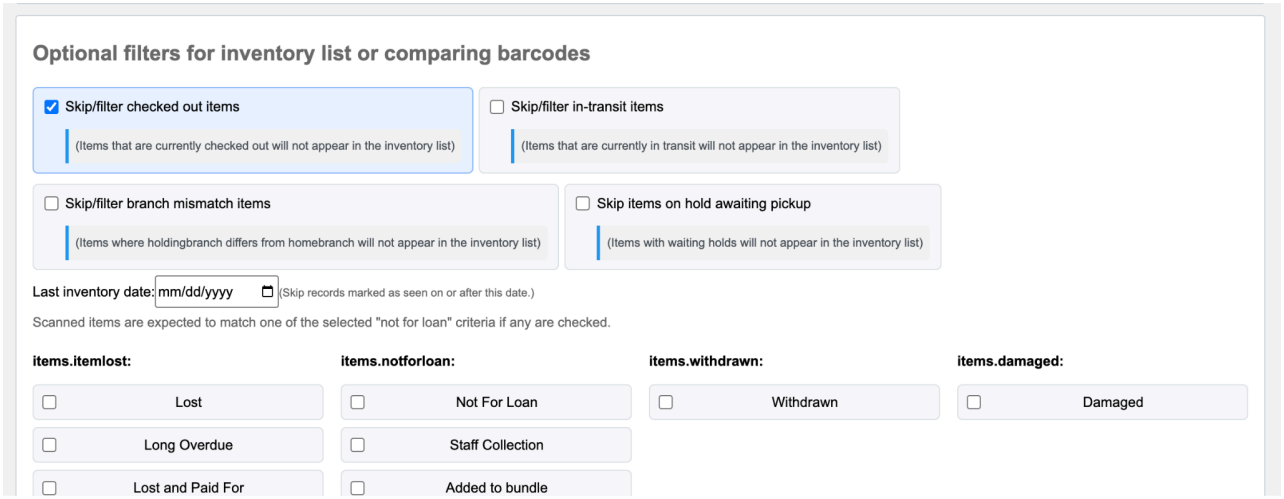
Next, you need to filter by library and location.
Choose the library, shelving location, and call numbers you are working with. For example, if I were working with Picture Books from authors A-C, I would specify my library, location Picture Books, and Item Call Number between E AAA and E CZZ. ***You definitely want to filter by your library at the very least. Remember we are limiting inventory sections to 1,000 items or less.***

Do not fill in anything you are not using. If you are working with Picture Books and want to do the whole section, for example, do not enter anything in the Item Call Number Between section. Most Balsam Libraries are not currently using Collections for inventory. If you are not using Collections, do not specify a collection.

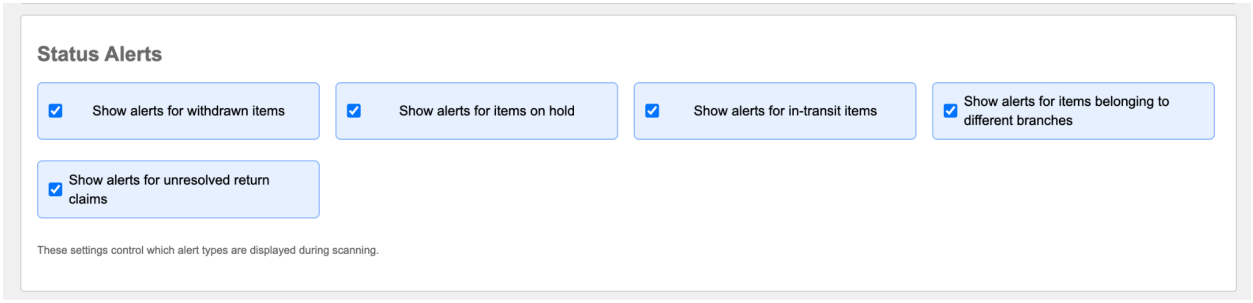


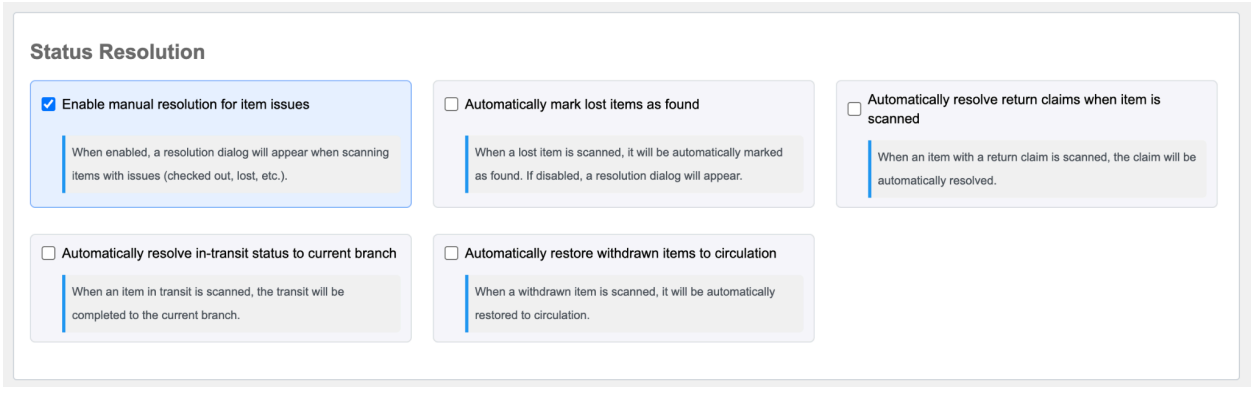
Next are **optional filters**. The optional filters section allows you to specify which statuses should be included in the inventory and which should be skipped. For instance, books that are checked out should be skipped, because they are not on the shelf but they also are not missing. Decide how you want the inventory to treat items in transit, on hold, etc. and set up the checkboxes accordingly.

Below this is a section of statuses. If you check any of these statuses, it expects the books you scan to have that status. It is very rare that you would want to check any of these boxes. For a typical inventory, do not check any boxes in this section.

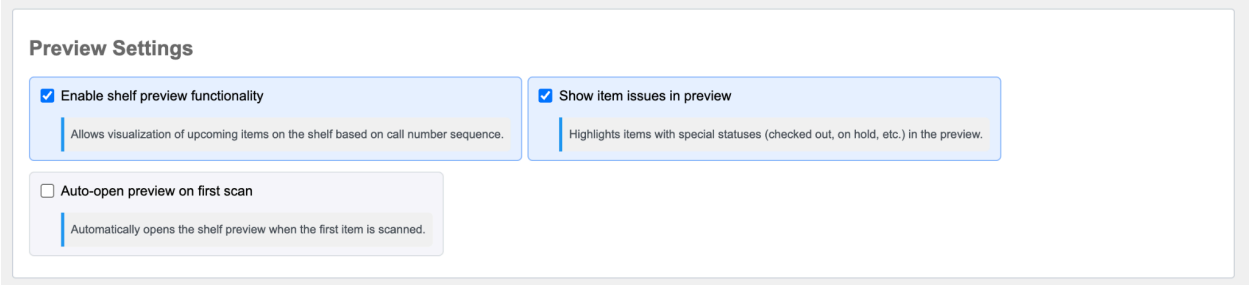


Status alerts: The plug-in will visually alert you to potential problems as you scan items. It can also automatically resolve some issues. In these sections, you specify what you would like to be alerted about (Status Alerts) and what you would like Koha to automatically take care of (Status Resolution).

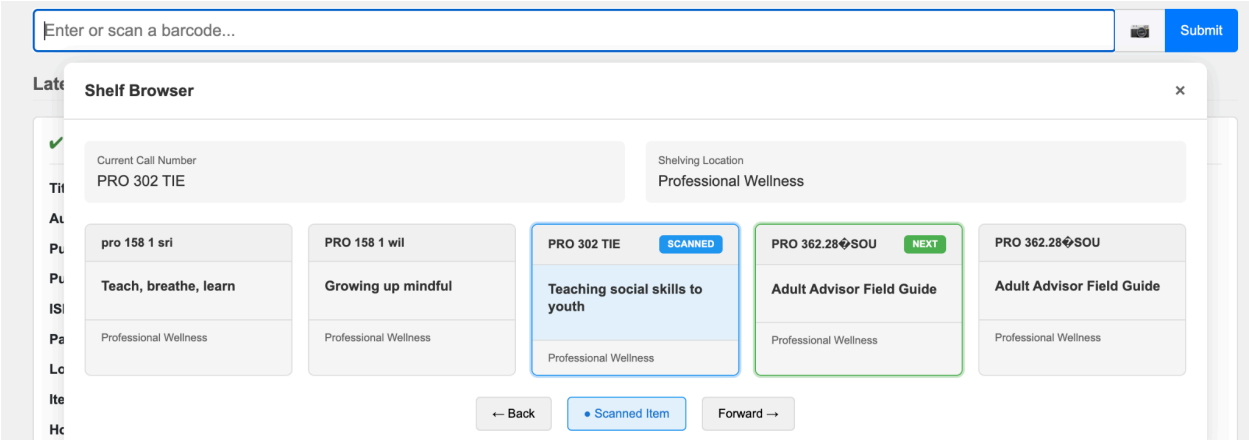




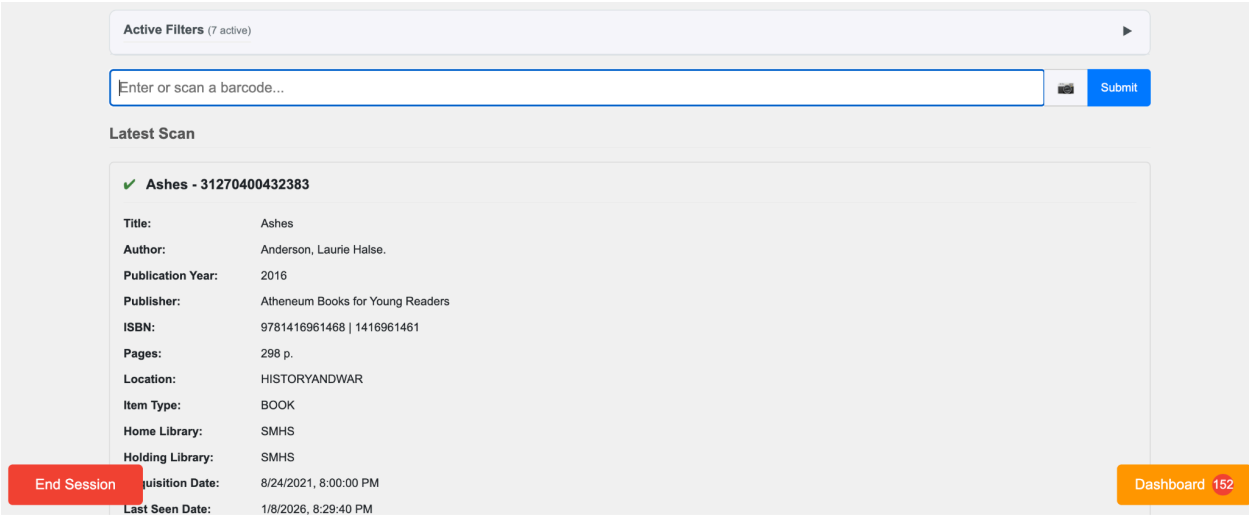
The plug-in allows a **shelf preview**, that shows you the book you scanned and the next two books before and after. This is updated as you go. If you want this feature, set the parameters for that here.



The shelf preview looks like this:



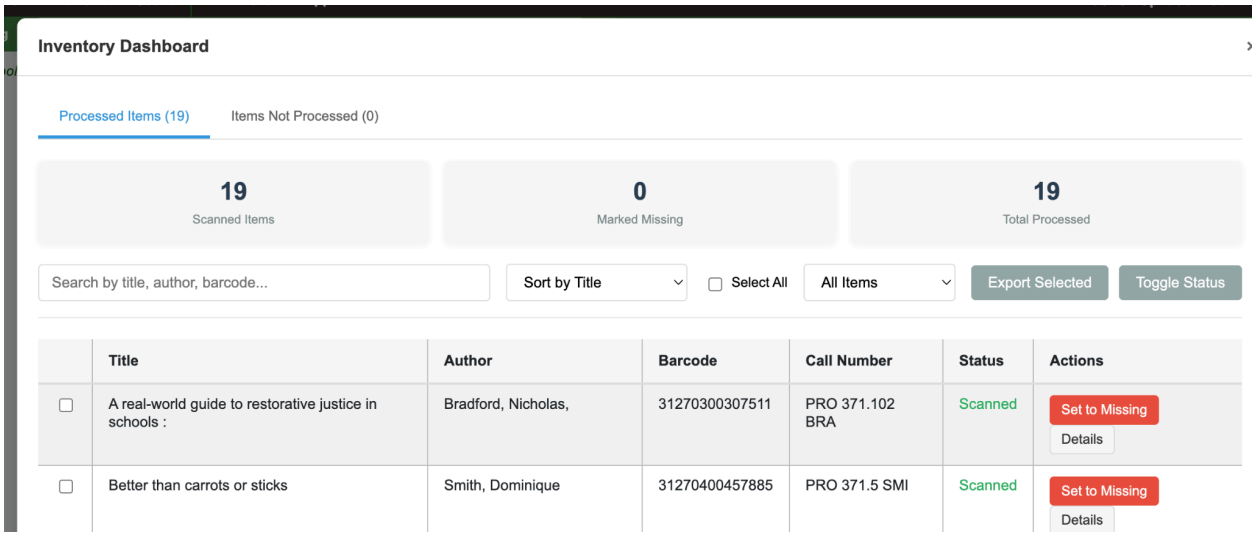
Without shelf preview enabled, it shows each book in detail as you scan, but not what books are expected around it. It looks like this:



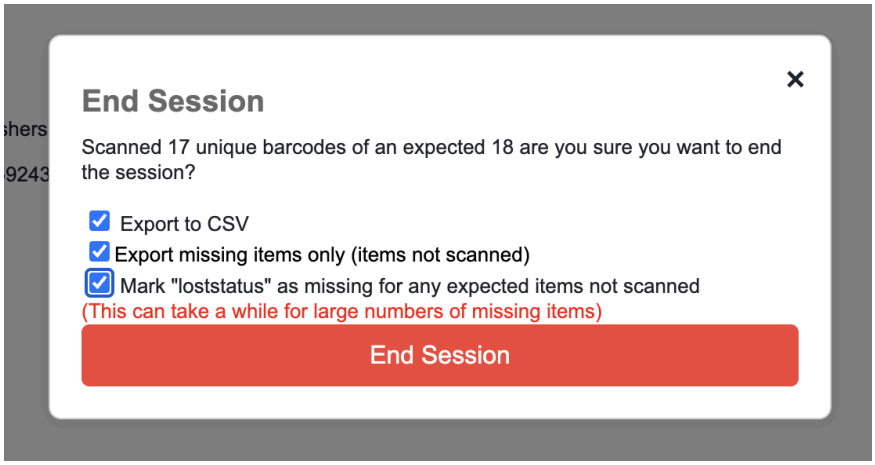
Both ways will alert you as you go of any issues, per your parameters.

Once your parameters are set up as you want them, click Submit and your session begins. Scan items in order and watch the screen for any alerts. Any alerts that need attention will be red.

At any time, you can click the yellow Dashboard button in the lower right corner. This will show you what you have scanned and what is expected to be scanned in this session. You can set items to missing and see other details on this screen. It is a good idea to check this screen before you finish and quickly resolve anything that may have been accidentally missed.



When you are finished, click End Session in the lower left corner. It will show you how many barcodes you have scanned and how many you are expecting. You will have the option to export to CSV, export missing items only, and mark any items not scanned as lost. Change the settings as you want them and click End Session. If you asked for a CSV, it will be generated at this time. If you find a lost item after the session ends, simply check it in or inventory it to update its last seen date and status.



1.8.2 Upload or Scan in a barcode file

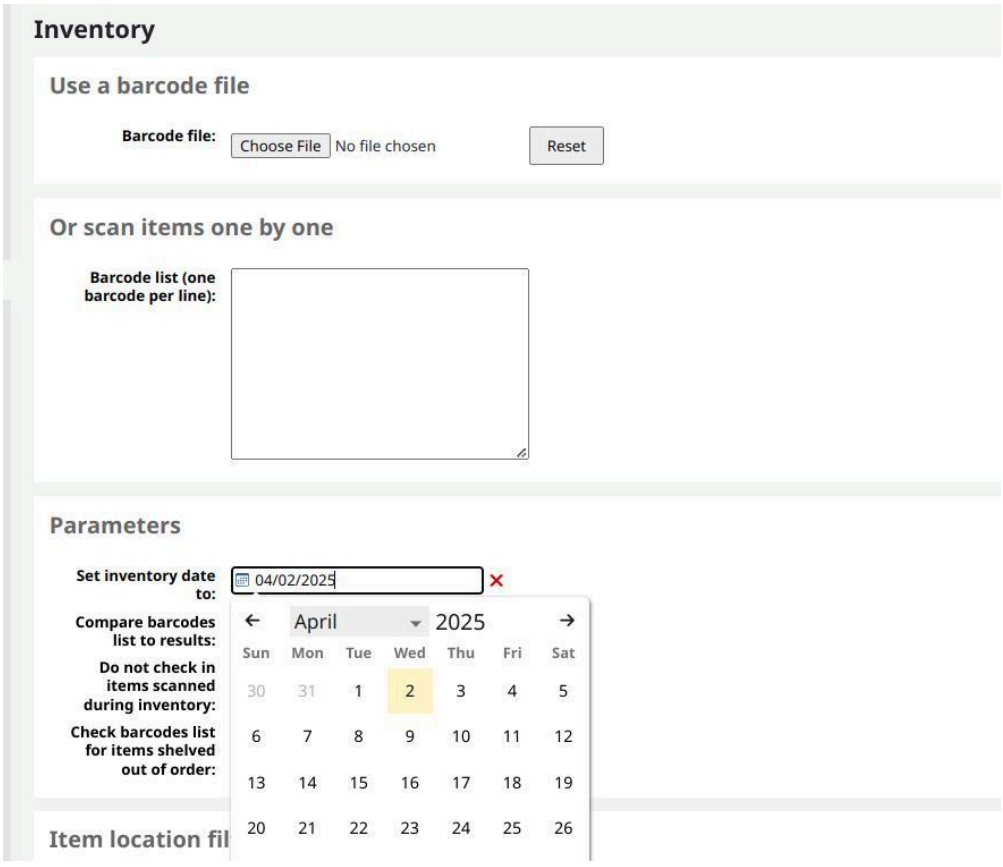
This has advantages in some situations but gives you less information than the plug-in.

Pros and cons of loading a barcode file:

- You can scan very quickly
- You can work offline by making and saving a barcode file in any word processing program. Save it as .txt
- The program generates a list of missing and wrong location books when you are finished. It does not mark them missing. There is a report you can run to help with that
- If you have books on the shelf that are not in the catalog, it will be really hard to find them afterward. It will not tell you what the book is or where it is on the shelf

If you choose to inventory with a barcode file, go to **Cataloging > Inventory**

- Decide if you want to create a text file of barcodes [Option 1] or scan directly into Koha [Option 2]. See photo below:



- [Option 1] **Use a barcode file:** Scan barcodes to a text document. Use any word processing program and scan barcodes directly onto the page. Be sure to have only one barcode per line. Save the document as a .txt file. Name it something related to the section you are working on, ex. Picture Books A-C.
    - Next, click Use a barcode file and select the button to choose the file you just made.

- [Option 2] **Scan items one by one:** Scan barcodes directly into the box called Barcode List.
    - Note: Depending on the number of barcodes you are comparing, this may take a few minutes. It is not recommended to compare lists of more than 1000 barcodes as this may cause a session timeout.

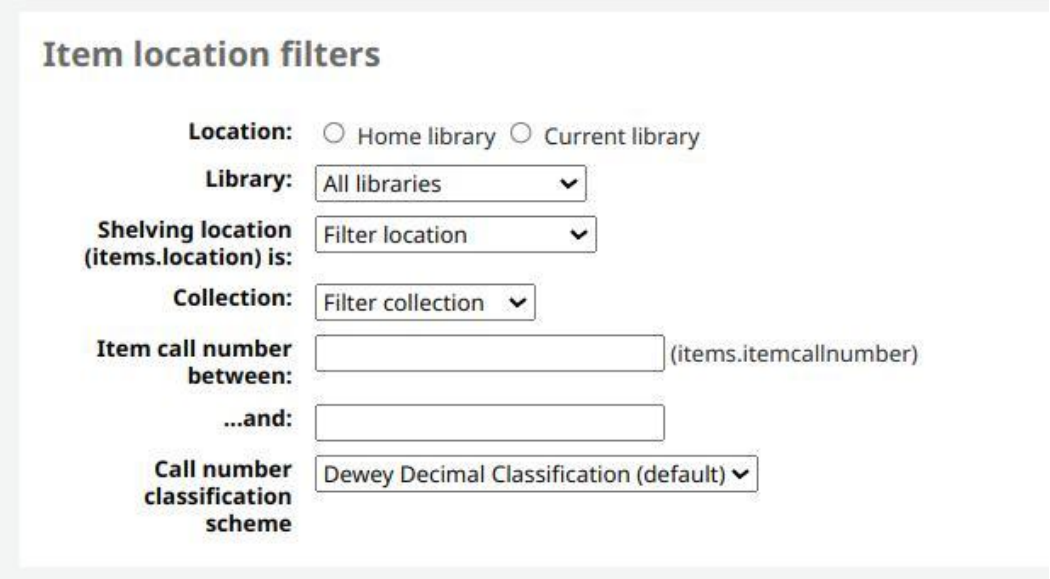
Next, you will set up the parameters to meet your needs, as follows:

- 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 any date.
- Selecting the checkbox for **Compare barcodes list to results** will compare the results you scanned to the filters you specified. This will list items that may not have been scanned in your initial attempt.
- The next checkbox to consider is **Do not check in items scanned during inventory**. Following that is a checkbox for **Check barcode list for items shelved out of order.** If you check these boxes, they will do exactly what they say.

Item location filters: Choose the library, shelving location, and call numbers you are working with. For example, if I were working with Picture Books from authors A-C, I would specify my library, location Picture Books, and Item Call Number between E AAA and E CZZ. ***You definitely want to filter by your library at the very least. Remember we are limiting inventory sections to 1,000 items or less.***

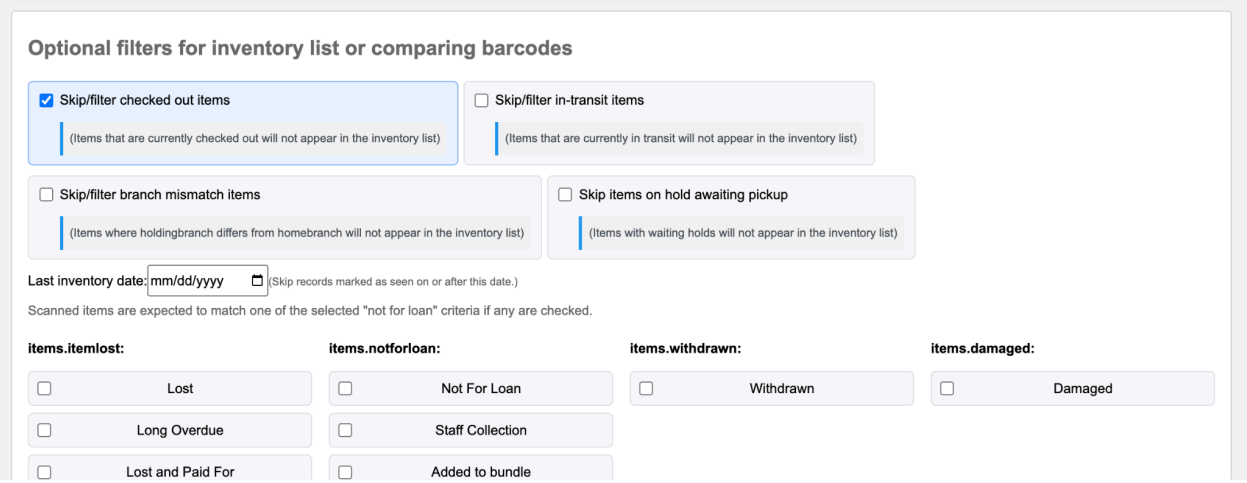
Do not fill in anything you are not using. If you are working with Picture Books and want to do the whole section, for example, do not enter anything in the Item Call Number Between section. Most Balsam Libraries are not currently using Collections for inventory. If you are not using Collections, do not specify a collection.

See the photo below:

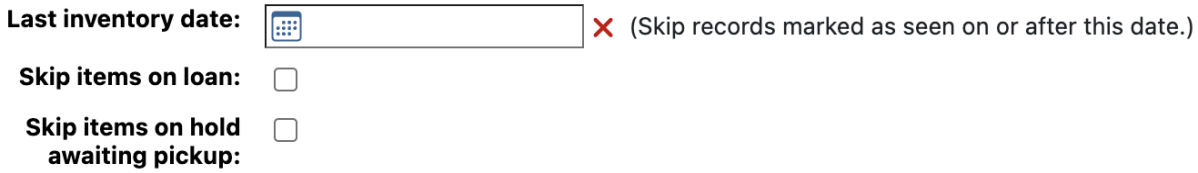


Next are **optional filters**. The optional filters section allows you to specify which statuses should be included in the inventory and which should be skipped. For instance, you probably want books that are checked out to be skipped, as they are not on the shelf but they also are not missing. Your options are much more than what is shown in the photo.

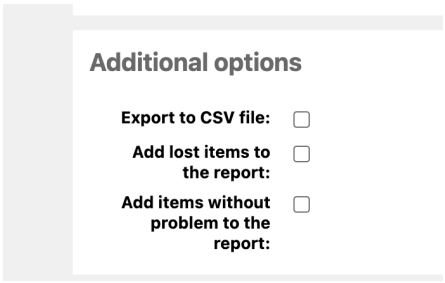
Below this is a section of statuses. If you check any of these statuses, it expects the books you scan to have that status. It is very rare that you would want to check any of these boxes. For a typical inventory, do not check any boxes in this section.



Next, consider how you want to configure this section of parameters. You probably want the inventory to skip items on loan and on hold, because they should not be on the shelf. If you want the computer to skip items recently seen, for example if you have inventoried over several days, you can set a Last Inventory Date. Anything seen since that date will not be listed on your final report.



Last, set these final options. Export to CSV will create a final report for you. If you want that list to include lost items, check that box. If you want it to include all items you scanned, even if they were in the right place and accounted for, check the box next to Items without problems. You probably do not want either of those items included, but it is an option if you do.

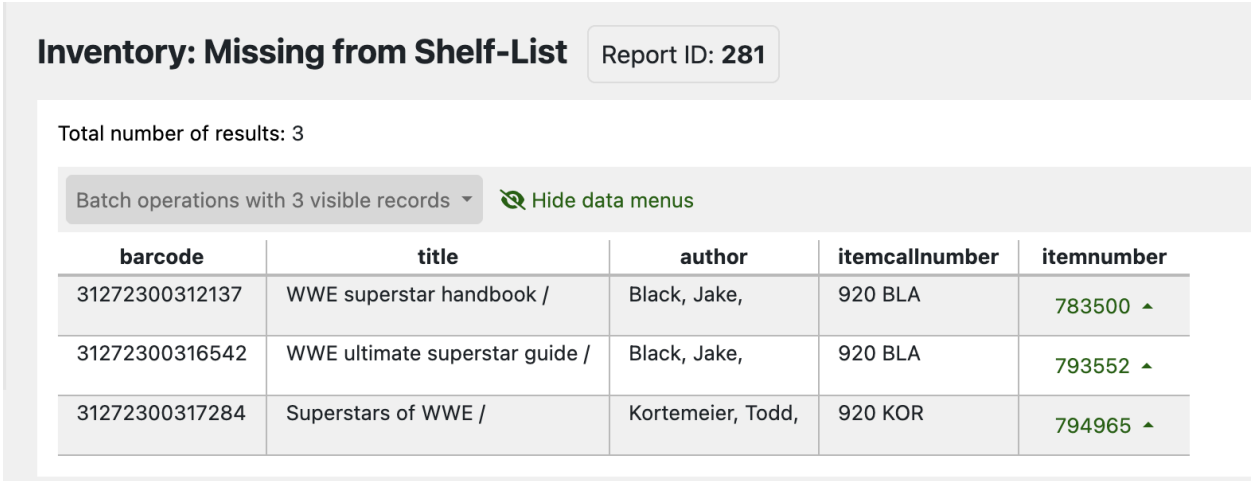


Click submit.

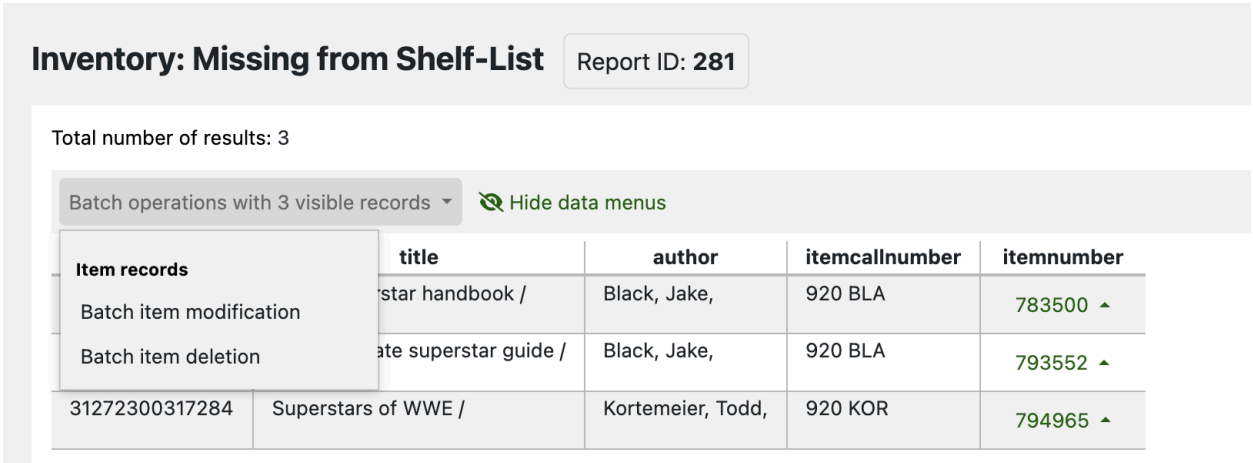
Your results will be downloaded to a spreadsheet. The information given will vary based on the parameters you set.

Look for the items that are missing. If you find them, check them in.

Go to Reports and search for Report 281: Missing from Shelf-List. Run this report. Choose the library you are in and the location you have inventoried. This report will show you all items that were not scanned.



If you want to mark these items missing or delete them, choose Batch operations. Then either batch modify their status to missing, or batch delete these items.



1.8.3 Shelf List (least recommended)

A warning that it is very labor intensive compared to the other methods.

Pros and cons of working with a shelf list:

- It is really slow because you are checking each book from the list by eye
- There is no notification of errors as you work or when you finish.
- You do not need a scanner
- You can see immediately if books are out of order, not in the catalog, or in the wrong shelving location
- You can print the list to work completely offline, or there is an online option. Remember you will still need to mark items missing in the catalog if you do a paper inventory. This can take a long time to hand-enter barcodes if you are missing a lot of items.

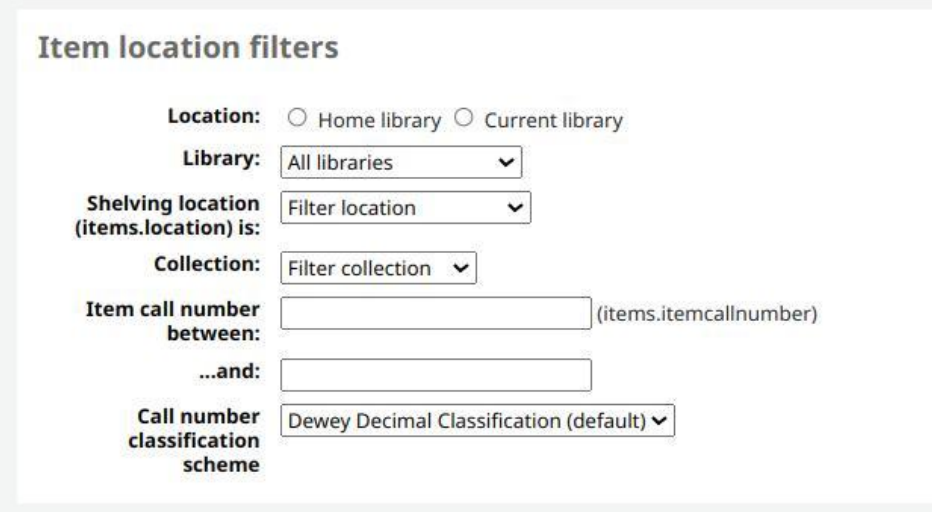
If you choose to inventory with a Shelf List, go to **Cataloging > Inventory**

Do not upload a file or scan any items. Scroll down to:

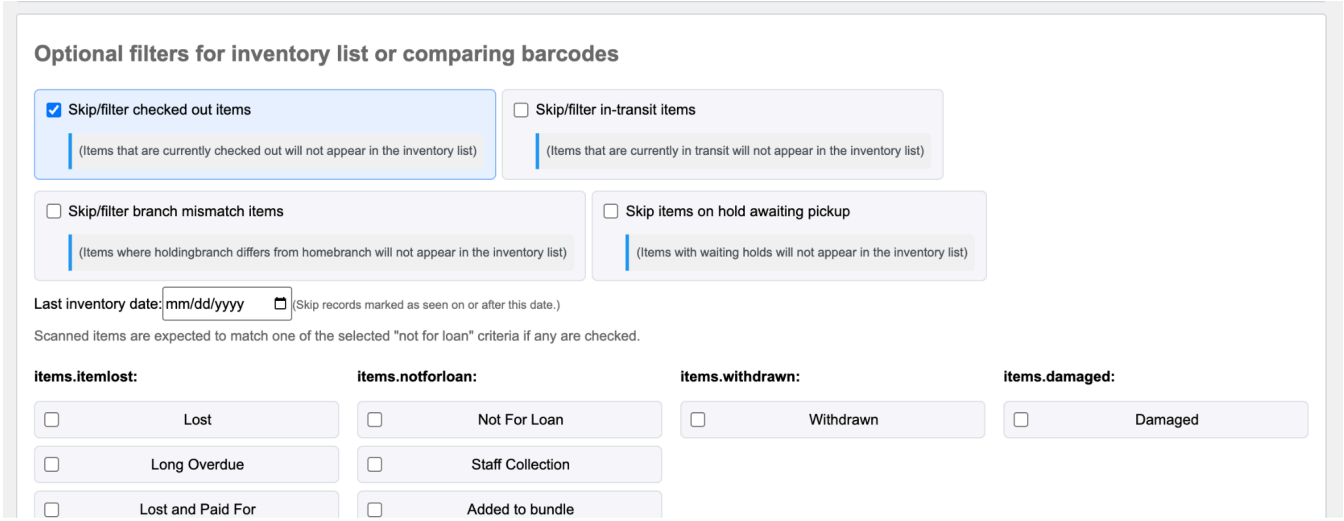
Item location filters: Choose the library, shelving location, and call numbers you are working with. For example, if I were working with Picture Books from authors A-C, I would specify my library, location Picture Books, and Item Call Number between E AAA and E CZZ. ***You definitely want to filter by your library at the very least. Remember we are limiting inventory sections to 1,000 items or less.***

Do not fill in anything you are not using. If you are working with Picture Books and want to do the whole section, for example, do not enter anything in the Item Call Number Between section. Most Balsam Libraries are not currently using Collections for inventory. If you are not using Collections, do not specify a collection.

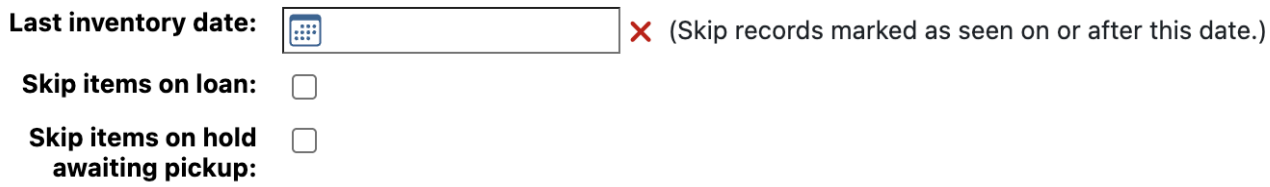
See the photo below:



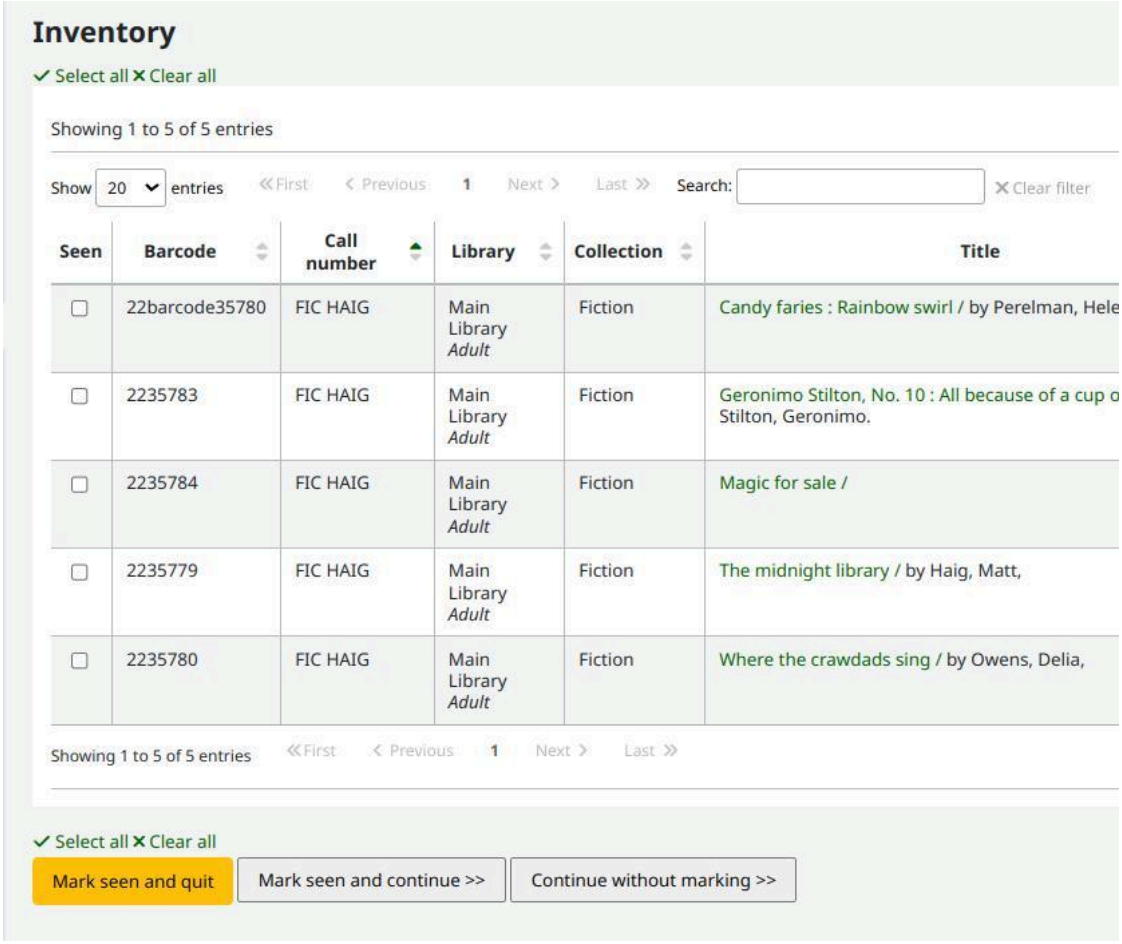
Next are **optional filters**. Photo below. The optional filters section allows you to specify which statuses should be included in the inventory and which should be skipped. For instance, you probably want books that are checked out to be skipped, as they are not on the shelf but they also are not missing.
Below this is a section of statuses that have the headings **Items.itemlost** etc. If you check any of these statuses, it expects the books you scan to have that status. It is very rare that you would want to check any of these boxes. For a typical inventory, do not check any boxes in this section.



Next, consider how you want to configure this section of parameters. You probably want the inventory to skip items on loan and on hold, because they should not be on the shelf. If you want the computer to skip items recently seen, for example if you have inventoried over several days, you can set a Last Inventory Date. Anything seen since that date will not be listed on your final report.



Click submit. The screen will look like the graphic below.



If you see the item on the shelf, click the left hand column marked seen. If you see everything in the list, you don't have to click each individual item. You can Select All at the bottom.

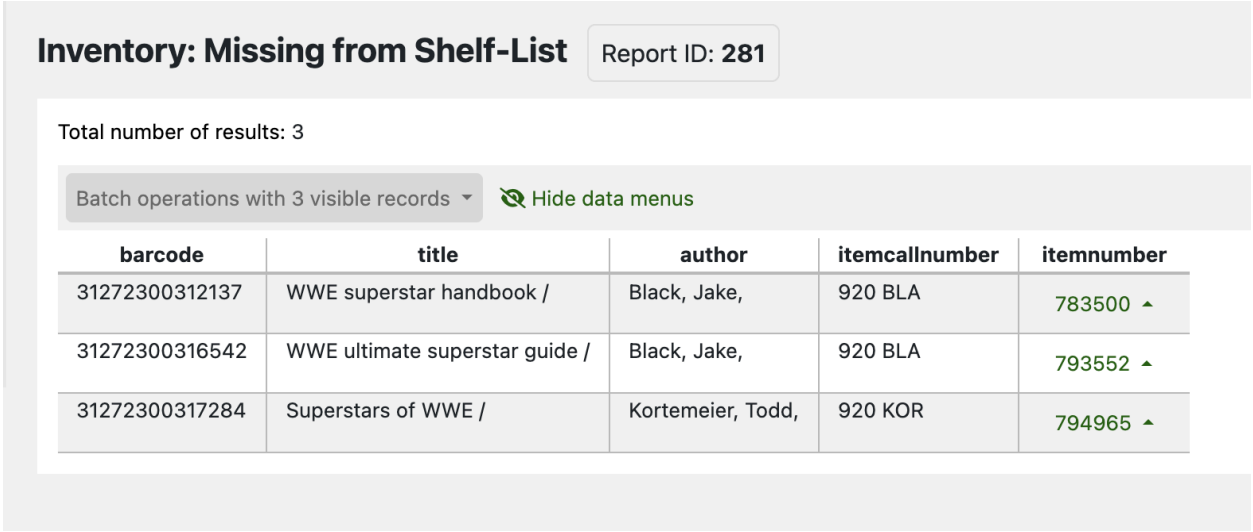
Use the 3 buttons at the bottom of the screen to confirm the submission:

Mark Seen and Quit – change the items' inventory dates and close out the inventory tool

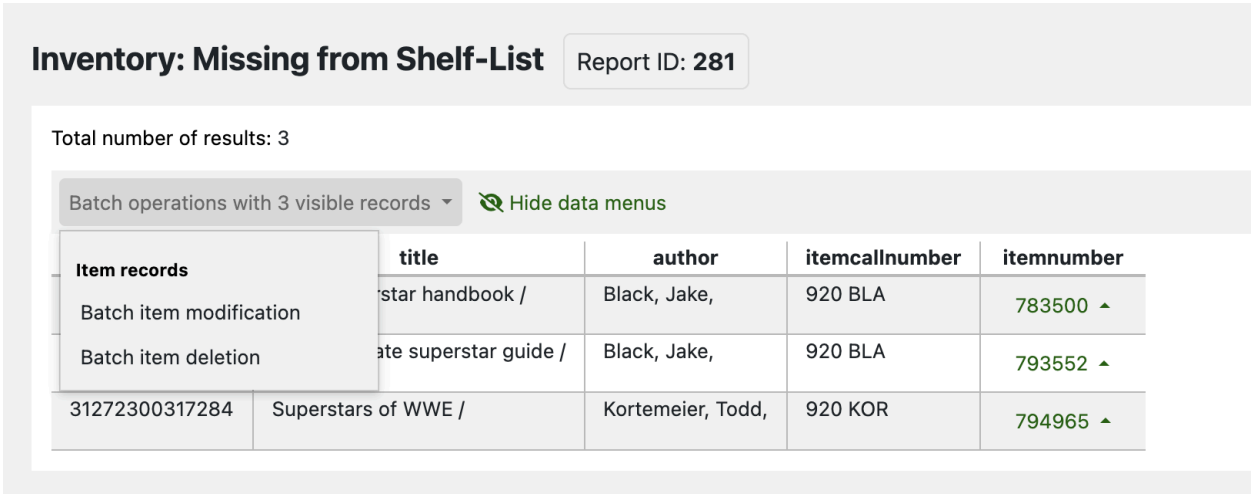
Mark Seen and Continue – change the items' inventory dates and go to the next screen / pages/ result list

Continue without Marking – You didn't find anything on the shelf and want to go to the next page of results.

Go to Reports and search for Report 281: Missing from Shelf-List. Run this report. Choose the library you are in and the location you have inventoried. This report will show you all items that were not scanned.



If you want to mark these items missing or delete them, choose Batch operations. Then either batch modify their status to missing, or batch delete these items.



If you don't want to use the computer at all to do your inventory, you can export the list and print it, then conduct your inventory on paper. If you use this method, you need to manually enter any missing items into Koha to change their status from Available to Missing.