

Stock Rotation

The Stock Rotation module allows library staff to create rotas and add items to these rotas. The rotation management will then cycle these items round the specified libraries on this rota, moving them to the next at the appropriate period of time and will send the libraries emails providing a list of items on shelf to be moved.

This brief chapter provides an overview of how the stock rotation process works.

a) Tools - Stock Rotation

Rotas are managed from the Tools page.

Check outCheck inRenewSearch the catalog

Home > Tools

Patrons and circulation

Patron lists

Manage lists of patrons.

Comments

Moderate patron comments.

Import patrons

Import patron data

Notices & slips

Define notices (print and email notification messages for overdue, etc.)

Overdue notice/status triggers

Set notice/status triggers for overdue items

Patron card creator

Create printable patron cards

Batch patron deletion/anonymization

Batch delete patrons and delete patron circulation history

Batch patron modification

Modify patrons in batch

Tags

Moderate patron tags

Upload patron images

Upload patron images in a batch or one at a time

Stock rotation

Manage Stock rotation rotas, rota stages and rota items

Catalog

Batch item deletion

Delete a batch of items

Batch item modification

Modify items in a batch

Batch record deletion

Delete a batch of records (bibliographic or authority)

Batch record modification

Modify a batch of records (biblios or authorities)

Automatic item modifications by age

Define rules to modify items by age

Export data

Export bibliographic, holdings, and authority records

Inventory

Perform inventory 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

Rotating collections

Manage rotating collections

MARC modification templates

Manage templates for modifying MARC records during import.

Stage MARC records for import

Stage MARC records into the example

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

Task scheduler

Schedule tasks to run

Edit quotes for QOTD feature

Quote editor for Quote-of-the-day feature in OPAC

Upload

Upload any type of file, manage uploads

The **Stock Rotation** tool provides access to your rota information. From this page you can see all currently configured rotas and choose to edit them as relevant and you may also create new rotas.

Stock rotation

+ New rota

Manage existing rotas

Name	Cyclical	Active	Description	Number of items			
vgfhlecga	Yes	Yes		1	Edit	Manage ▾	Deactivate
uia	Yes	Yes		0	Edit	Manage ▾	Deactivate

Name This is the name of the rota. It should be something meaningful to staff

Cyclical You have the option to specify whether or not the rota should be cyclical or not. If set to Yes then the item(s) continue to rotate without ever coming to a stop unless they are removed from a rota. If set to No then the item will finish its rotation when it reaches the last library in that rota. It will then remain at that library.

Active Is this an active rota? If so then items may be added to it. A rota may be deactivated at any time.

Description This is an optional field where you can expand on the use of this rota.

Number of items You can see at a glance of the screen how many items are attached to that rota at that time.

There are three buttons displaying to the right hand side of each rota:

Edit Simply allows you to edit any rota information - e.g. the name or description

Manage Allows you to manage the rota stages and the items within this rota. More information below.

Deactivate If the button reads 'deactivate' then it means that it is currently active and you can deactivate it by clicking on the button.

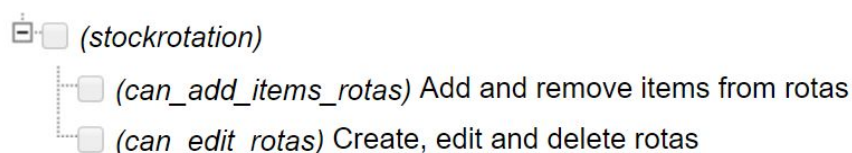
b) Permissions

There are two separate permissions associated with the Stock Rotation tool.

can_add_items_rotas if your login has this permission set then you can add or remove item records from individual rotas.

can_edit_rotas if your login has this permission set then you may create new rotas or edit those that already exist

As with all Koha permissions, these may be individually set or you can set the permissions at the group level. For example, system administrators may want to control who has the authority to work with the rotas but branch staff are allowed to add the items to the rotas.



c) Create New Rota

It is very straightforward to add rotas on to the system and this can be done at any time providing you have the correct permissions.

Stock rotation

Create new rota

Name:

Required

Cyclical:

Active:

Description:

[Cancel](#)

The rota name should be meaningful to all staff as this will display in the Rota tab in the catalogue record. Staff need to be able to identify that they are adding items to the correct rota so a good naming convention is recommended.

Only the Name is required but the Cyclical and Active options do have a default value. You may only select Yes / No from the drop down menu.

d) Manage Stages





Once a rota has been created, you will see a Manage button. From here you can Manage the stages or the items.

The stages allow you to set up the list of libraries on that rota and the duration period that each item should stay at that library.

Stock rotation

+ New rota

Manage existing rotas

Name	Cyclical	Active	Description	Number of items	
vgfhlecga	Yes	Yes		1	 Edit Manage ▼  Deactivate
uia	Yes	Yes		0	 Edit Manage ▼  Deactivate









When you select Stages from the Manage menu you are presented with a screen similar to this:

Stock rotation

+ New stage

Manage stages

Stages can be re-ordered by using the  handle to drag and drop them to their new position

Branch	Duration (days)	
 Centerville	12	 Edit  Delete
 Midway	4576	 Edit  Delete
 Institut Protestant de Théologie	14	 Edit  Delete

[Return to rotas](#)

When creating a new stage, all you need to enter is the library and the duration. This duration period dictates the number of days that the item should stay at that library before it is moved on to the next. The duration period may be edited at any time.

The order of the libraries on the rota is determined simply by the order they are added. If you need to move any of them up or down the rota you may do so by using the drag icon to the left of the stage.

e) Manage Items

The Manage Items screen is split into two halves. The first half allows you to add items to a rota whilst the second half displays the items that are already on the rota and allows you to manipulate them.

Stock rotation

+ New rota

Edit rota

Add item to "vgfhlecga"

Barcode:

Use a barcode file

Barcode file: No file chosen

Submit

Manage items assigned to "vgfhlecga"

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

Barcode	Title	Author	Shelfmark	In transit	Stages & duration in days (current stage highlighted)	
124	uiaecule			No	<div>Centerville (12) »</div> <div>Midway (4576) »</div> <div>Institut Protestant de Théologie (14)</div> <div>» START</div>	<div>→ Move to next stage</div> <div>Add "In demand"</div> <div>Remove from rota</div>

Showing 1 to 1 of 1 First Previous Next Last

[Return to rota](#)

The barcode of the item and the Title, Author etc are all hyperlinks so you would be able to go straight to this record if required.

In transit Shows the current status of this item - is it in transit or not?

Stages You can see the libraries and the duration period configured in that stage and the current stage is highlighted. In the example above, we can see that the item is at Centerville library and it should stay there for 12 days before moving on to Midway where it will stay for 4576 days. It is possible to miss a stage out by manually moving the item on to the next stage.

f) Adding Items to Rotas

There are 3 methods of adding items to rotas:

1. From Manage Items screen, you can simply enter the item(s) barcode(s) into the box.
2. From Manage Items screen, you can upload a file of barcodes. This is a quick way to batch update a number of items to put them all onto rotas.
3. From the Item / Holdings information - see an example of this screen below.

g) Rota menu option

When viewing the catalogue record, you can now see a new menu option on the left hand side called Rotas. This allows library staff to see the rotation activity of the item at a glance.

Home » Catalog » Stock rotation details for uiaecue

Stock rotation details for uiaecue

Normal	Barcode	Shelfmark	Rota	Rota status	In transit	Stages & duration in days (current stage highlighted)	
MARC	123				No		vgfhlecga ▾ + Add to rota
ISBD	124		vgfhlecga	Active	No	Centerville (12) » Midway (4576) » Institut Protestant de Théologie (14) » START	→ Move to next stage Add "In demand" Remove from rota
Items	125				No		vgfhlecga ▾ + Add to rota
Holds (0)	126				No		vgfhlecga ▾ + Add to rota
Checkout history	127				No		vgfhlecga ▾ + Add to rota
Modification log	128				No		vgfhlecga ▾ + Add to rota
Rota	129				No		vgfhlecga ▾ + Add to rota
	130				No		vgfhlecga ▾ + Add to rota
	131				No		vgfhlecga ▾ + Add to rota
	132				No		vgfhlecga ▾ + Add to rota
	133				No		vgfhlecga ▾ + Add to rota

In this example, there are a number of items attached to the bibliographic record but only one of these is currently on a rota (barcode 124). As we saw from the Manage Items page it is possible to move items on to the next stage manually and you may also remove an item from a rota if required.

Items can easily be added to rotas from this screen - a list of configured rotas will appear in the drop down menu on the right hand side. Staff simply need to select the rota from the list and then click the 'Add to rota' button.

h) Rotation of items

Once items have been put on stock rotation, Koha will automatically move them to the next library in the stage after the duration period has been reached. A cron job will run on a daily basis to trap all items that should move.

If the items are on loan at the time they should move, an alert will display when they are returned prompting staff to put the item in-transit to the next branch.

An email will be generated and sent to each branch that will list all items that are currently sitting on the shelf that should be moved on rotation. Staff would then pull these items off the shelf and scan them through 'Check in' to see where they should be sent to.