

## Inventory with Director's Station

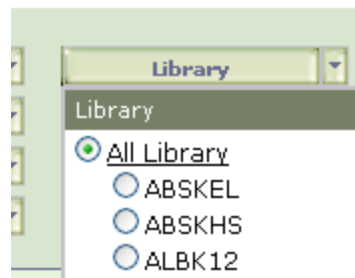
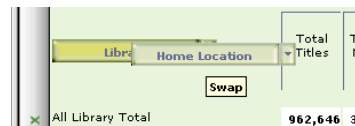
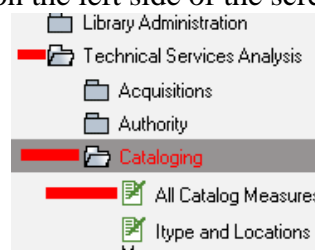
This is meant as an alternative to running the List Inventory by Item Number Report. The report is very lengthy and takes quite a while to run, and the Director's Station report can be exported into Excel and edited.

\*Generally it is easiest to do inventory by sections. You may want to do it by Item Type or Home Location or even some other way that makes sense for your library, including your whole collection. The directions will say Home Location, but feel free to adapt that to whatever system works best for you and your staff.

1. Email the MSC System Administrator to run the Set Inventory Date Report. This sets an inventory date on items that are checked out. If you prefer to inventory currently checked out items when they are returned, then do not have this report run. (You can have them run this report for your entire collection or limit it to specific sections)
2. If you have already done inventory in MSC, and do not want the number of times inventoried to accumulate, you may want to consider having a System Administrator set number of times inventoried to 0 and last date inventoried to NEVER.
3. Perform the inventory by scanning barcodes into the Inventory Item Wizard
4. After you have completed the inventory on a section, you will need to wait overnight for Director's Station to update.

\* Once you have performed the following steps once, you can save the report in Director's Station and access it through "My Folder". Then you can skip directly to step # 20

5. Log in to Director's Station. Click the Grey Bar on the left side of the screen to open the Menu.
6. Click on Collection Analysis.
7. Click on Technical Services Analysis.
8. Click on Cataloging.
9. Click on All Catalog Measures.
10. Click the Grey Bar again to minimize the menu.
11. In the pool, click and drag the bar labeled Home Location down to where the bar that says Library. Hover directly over the Library bar until you see the word Swap and release the mouse button.
12. In the pool, find the bar labeled Library. Click the down arrow on the right side of the bar and select the button next to your library. Click the Accept Button.



13. In the pool, next to the Library bar, it should have your library's name out to the right.
14. Below, where the Home Location bar is, click the down arrow on the right side of the bar.
15. The screen that opens up has a list of all the home locations the MSC uses. Uncheck the box that is next to All Home Locations. Click the Accept Button.
16. The list of Home Locations that your library uses will appear. This sometimes takes a few minutes to load.
17. Once it has loaded, in the pool find the Date Copy Inventoried bar and pull it down to the Home Location bar. Hover near the bottom of the Library bar until you see the words Insert Below and release the mouse button.
18. On the Date Copy Inventoried bar, click the down arrow on the right side of the bar.
19. Uncheck the box next to All Date Copy Inventoried. Click the Accept Button. Again, this will probably take a while to load.
20. Once it has loaded, at the very top of the screen, click Save As. This allows you to name this report and save it in your "My Folder" in Director's Station. Now that it is saved, you can skip steps 5 – 19. Also, saved reports seem to load more quickly in Director's Station.



	Total Titles	Total Call Numbers
AUDRECFC	301	302
BIOGRAPHY	363	365
BOARD-BOOK	242	246



\*If you already have saved this report and have loaded it in Director's Station, start here!

21. Scroll to the Home Location that you have just inventoried. If you do not reset your inventory dates, you might have several years worth of dates. If you do reset, you will probably only see the current year and NEVER. (If you do inventory more than once a year or need to limit it to more specific dates you can use the down arrow on the Date Copy Inventoried and expand the sections until you're displaying the date ranges you need)
22. The current year indicates the items that you just inventoried. Any past years or the word Never are the items that have not been inventoried in your latest round. This is the report you need.
23. Click and drag to select the sections you want to see. They will be highlighted in yellow. Release the mouse button and click one of the List Copies by... menu items in the pop up. (It doesn't matter which you choose because when you export the list into excel, you will probably sort the list into the shelving order)
24. A new window will pop up with the list in it. Depending on how many items are on the list, it may take a while for the list to finish loading.
25. Click the Export button at the top left of the screen.

NEVER	28	41	41	146.43%	100.00%	0.21%
EASY-BEG						
2007	1	1	1	100.00%	100.00%	3.33%
2009	1	1	1	100.00%	100.00%	0.55%
2010	357	359	379	106.16%	105.57%	1.59%
NEVER	27	27	27	100.00%	100.00%	0.21%
EASY-CASS						
2010	41	41	42	102.44%	102.44%	0.18%
EASY-CD						
2010	22	22	22			
NEVER	7	7	7			
FICTION						
2007	2	2	2			
2009	10	10	10			
2010	6,343	6,350	6,377			
NEVER	499	499	508			
ILL						
NEVER	34	34	34			
INPROCESS						
2007						



26. You can open or save the file. At this point it is in .csv format and you will need to make some edits to get a useable print out. Then you can save the file in .xls format.
27. The most important change is to set the format for Item ID column as a number so that the whole barcode prints.
28. Other suggested edits are listed below, but you can do whatever works best for your library.
  - moving the call number column to the far left and sorting by that column
  - removing the price column
  - moving or deleting the number of checkouts column so the title is next to the call number
  - turning grid lines on in page setup

Total Chec	Title	Author	Library	Call Numb	Year	Publi	Item ID	Date Copy	Date Last	Copy	Price
11	EVERY D	O'Connor, BEL	GRAD O	CONNOR	2010	3.38E+13	5/28/2010	3/16/2011	10		
10	THIS IS M	Mayer, Me	BELGRAD	MAYER	2009	3.38E+13	2/13/2010	2/17/2011	15		
9	JUST SAV	Mayer, Me	BELGRAD	MAYER	2010	3.38E+13	7/22/2010	3/23/2011	17		
8	LITTLE CR	Mayer, Me	BELGRAD	MAYER	2009	3.38E+13	2/13/2010	3/25/2011	17		
7	LION AND	Herman, G	BELGRAD	HERMAN	1998	3.38E+13	2/25/2010	3/25/2011	4		
7	CLIFFORC	Bridwell, N	BELGRAD	BRIDWELI	2010	3.38E+13	7/21/2010	3/3/2011	5		
7	BEAR DE	Berenstain	BELGRAD	BERENST	1975	3.38E+13	8/14/2010	3/1/2011	5		
6	BERENST	Berenstain	BELGRAD	BERENST	1997	3.38E+13	7/15/2010	3/15/2011	5		
5	WHERE IS	Rabe, Tish	BELGRAD	RABE	1999	3.38E+13	#####	3/29/2011	8		
5	LITTLE RE	Ziefert, Hai	BELGRAD	ZIEFERT	2000	3.38E+13	2/25/2010	#####	5		
4	POOH GE	Gaines, Is	BELGRAD	MILNE	1998	3.38E+13	4/12/2010	8/31/2010	5		
4	UGLY DU	Ziefert, Hai	BELGRAD	ZIEFERT	1997	3.38E+13	3/4/2010	#####	5		
4	PORKY AI	Weiss, Eli	BELGRAD	WEISS	2010	3.38E+13	4/15/2010	2/3/2011	13		
4	BONES A	Adler, Davi	BELGRAD	ADLER	2010	3.38E+13	7/22/2010	1/22/2011	14		
4	ANNIE AN	Rylant, Cy	BELGRAD	RYLANT	2010	3.38E+13	7/15/2010	1/27/2011	16		
2	PRINCES	Ziefert, Hai	BELGRAD	ZIEFERT	1996	3.38E+13	2/25/2010	7/9/2010	5		
2	YOUNG C	Adler, Davi	BELGRAD	ADLER	2010	3.38E+13	7/21/2010	1/22/2011	15		
2	GEORGE	Marshall, J	BELGRAD	MARSHAL	2010	3.38E+13	7/21/2010	#####	15		
2	ANT AND	McDonald, B	BELGRAD	MCDONAL	2010	3.38E+13	7/21/2010	1/22/2011	15		
2	GHOST IN	Herman, G	BELGRAD	SCOOBY	2000	3.38E+13	9/11/2010	3/8/2011	5		
2	SCOOBY	Herman, G	BELGRAD	SCOOBY	2002	3.38E+13	9/11/2010	1/11/2011	4		
1	CAN YOU	Hudson, E	BELGRAD	SESAME	1997	3.38E+13	4/12/2010	#####	5		
1	GEORGE	Marshall, J	BELGRAD	MARSHAL	1978	3.38E+13	7/14/2010	8/3/2010	15		
1	AMELIA B	Parish, He	BELGRAD	PARISH	2005	3.38E+13	12/1/2010	3/29/2011	4		
1	BOB BOO	Maslen, Bi	BELGRAD	MASLEN	2007	3.38E+13	12/2/2010	3/18/2011	7		
1	AMANDA	Van Leeuw	BELGRAD	VANLEEUE	2008	3.38E+13	1/20/2011	2/3/2011	17		
1	AMANDA	Van Leeuw	BELGRAD	VANLEEUE	2007	3.38E+13	1/20/2011	2/3/2011	17		