Using the Native Features of our ILS to Create an Inventory Management System

Chris Herlein : Pennsylvania State University Libraries

The Penn State Universities Libraries’ off-site storage facility, the Annex, drawing near to 100% capacity, decided to store material in trays using its existing shelving, which would create empty shelf space for the collection to grow.

An inventory management system was needed to track material. To that end, several vendors were invited to present their products. Unconvinced, we decided to create our own inventory management system using the native features of our ILS, Sirsidynix Symphony. This is how we developed that system entirely in-house, using the available resources.

### Cato-Park II Facility

- **Ranges of Compact Shelving:** 19
- **Ranges of Static Shelving:** 10
- **Shelves:** 34.5 inches wide by 9 inches deep

Without high bays we adapted our conventional shelving to hold trays.

### Barcoding Material in Trays

Materials are sized into trays using a sizing template, pictured left. Each shelving section contains one size and its shelves are adjusted for maximum shelf space.

Structural barriers prevent the first and fourth shelves from holding trays, but even with that limitation, 3.5 single sided sections of regularly shelved A1 material will occupy only one double sided section with trays.

### Recording Location Information

Our ILS: SirsiDynix Symphony

We use the software Macro Express to enter information into the record. It does this by parsing the Annex barcode into the Item Category 2, 3, and 4 fields. Each item in a tray requires only three steps to have its record updated:

1) Scan the old barcode
2) Activate the macro via a "hot key"
3) Scan the Annex barcode

After updating the fields, the macro saves the record and returns to the search screen ready for the next book to be scanned.

### Keeping Track of Open Space

The item cats’ recorded here as 0125, telling us that this book left 1.25 inches of open space in the tray.

When we permanently withdraw a trayed item from our collection, it leaves an open space in the tray equal to the width of the spine. We record that width in the item cats. We also change the Item ID back to its original barcode, so that the Annex barcode can be used again.

### Structural Barriers

* Structural barriers prevent the first and fourth shelves from holding trays.
* 3.5 single sided sections of regularly shelved A1 material occupy only one double sided section with trays.

### Barcoding Material

**60000603004**

- **6000** = The locator designating a column of shelving
- **06** = The 6th shelf of that locator
- **03** = The 3rd tray on that shelf
- **004** = The 4th book in that tray

### Vendors

Several vendors were invited to present their products. Unconvinced, we decided to create our own inventory management system using the native features of our ILS, Sirsidynix Symphony.