



Harvard not YOUR style?
No high bay?
No problem.

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**This presentation is dedicated to the memory of
Annex Supervisor, James Keyzer-Andre.
1971-2017**



Penn State University Libraries are One Library Geographically





Cato Park - 1





Inventory Management System (before)



Cato 2

Inventory Management System (after)



Annex Inventory “Plan B” Pilot

- New Spatial Identifier
- 99990101001
- **99990101001** = The Locator (building, range and section)
- 99990**101**001 = Shelf and tray (0100 – 1516)
- 99990101**001** = Item number in tray (001-999)
-
- * This new spatial identifier supersedes the existing ItemID in the Call Number/Item Record.



Catalog record

- We added policies to the Item Cat2 – Item Cat5 fields in Workflows CallNumber/Item records.
- Item Cat2: Item Locator
- Item Cat3: Shelf and Tray
- Item Cat4: Item number in Tray
- Item Cat5: Measurement of item thickness in inches (entered only when an item permanently leaves the Annex)
- To ingest items, Annex staff will parse data from the new item identifier across fields Item Cat2 – Item Cat4 via the following operation(s): Workflows ☐ Cataloging ☐ Global Item Modification

Common Tasks

- Call Number and Item Main...
- Label Designer
- SmartPort
- Item Search and Display
- Check Item Status
- Help
- Print

Global Item Modification

Item ID: 000012345678 TEST - NOT REAL

Item Values to Modify

Item type: »Will not be modified	Home location: CATO-2	Item category 1: »Will not be modified
Item category 2: 9999	Item category 3: 0101	Item category 4: 001
Item category 5: »Will not be modified	Item library: UP-ANNEX	Shadowed: »Will not be modified
Permanent: »Will not be modified	Circulate: »Will not be modified	Price: \$

Interactive Planograph



Planograph cells

1	Cato-2 Planograph Test (Excel) Locators 9989 -9999									
2										Open Space (in.)
3		9989	9990	9991	9992	9993	9994	9995		
4		0.00	0.00	0.00	0.00	0	0	0		
5										
6										

	A	B	C	D	E
1	Locator 9998				
2	Top				
3	Call Number	Title	Library	Item ID	
4	PA3612.D5 v.1	LIVES OF EMINENT P	UP-ANNEX	99980101001	
5	PA3612.D5 v.1	LIVES OF EMINENT P	UP-ANNEX	99980101002	
6	PA3612.D5 v.2	LIVES OF EMINENT P	UP-ANNEX	99980101003	
7	PA3612.D5 v.2	LIVES OF EMINENT P	UP-ANNEX	99980101004	
8	PA3612.D53 v.1	ROMAN ANTIQUITIES	UP-ANNEX	99980101005	
9	PA3612.D53 v.1	ROMAN ANTIQUITIES	UP-ANNEX	99980101006	
10	PA3612.D53 v.2	CRITICAL ESSAYS	UP-ANNEX	99980101007	
11	PA3612.D53 v.2	ROMAN ANTIQUITIES	UP-ANNEX	99980101008	
12	PA3612.D53 v.2	ROMAN ANTIQUITIES	UP-ANNEX	99980101009	
13	PA3612.D53 v.3	ROMAN ANTIQUITIES	UP-ANNEX	99980101010	
14	PA3612.D53 v.4	ROMAN ANTIQUITIES	UP-ANNEX	99980101011	
15	PA3612.D53 v.4	ROMAN ANTIQUITIES	UP-ANNEX	99980101012	

A Closer Look at the Planograph

Locator 6002							
Size	Shelf/Tray					Open Space	
A2	1201	1202				70	
A2	1101	1102	1103	1104	1105	87.5	A2
A2	1001	1002	1003	1004	1005	87.5	
A2	0901	0902	0903	0904	0905	87.5	
A2	0801	0802	0803	0804	0805	87.5	
A2	0701	0702	0703	0704	0705	87.5	
A2	0601	0602	0603	0604	0605	0	
A2	0501	0502	0503	0504	0505	0	
A2	0401	0402				0	
A2	0301	0302	0303	0304	0305	0	
A2	0201	0202	0203	0204	0205	0	
A2	0101	0102				0	
						507.5	Open Space
	Back						

0601							
ItemID	Title	Call Number	Item Type	Item Cat5			
60020601001	The Revolutionary frontier, 1763-1783 /	E179.5.S68	BOOK	0			
60020601002	The frontier in American history /	E179.5.T956 196	BOOK	0			
60020601003	Society in America /	E165.M393 1966	BOOK	0			
60020601004	The birth of modern America, 1820-1850 /	E165.M62	BOOK	0			
60020601005	Society in America /	E165.M393 1966	BOOK	0			
60020601006	Freedom's ferment : phases of American social history from the col	E165.T8 1962	BOOK	0			
60020601007	The image; or, What happened to the American dream.	E169.1.B752	BOOK	0			
60020601008	The image : a guide to Pseudo-Events in America /	E169.1.B752 197	BOOK	0			
60020601009	The American mind : an interpretation of American thought and ch	E169.1.C673	BOOK	0			
60020601010	American character and culture : some twentieth century perspecti	E169.1.H138	BOOK	0			
60020601011	The American people : a study in national character.	E169.1.G67 1966	BOOK	0			
60020601012	The machine in the garden : technology and the pastoral ideal in Ar	E169.1.M35	BOOK	0			
60020601013	And keep your powder dry : an anthropologist looks at America.	E169.1.M5 1965	BOOK	0			
60020601014	The power elite.	E169.1.M64 195	BOOK	0			
60020601015	Wilderness and the American mind /	E169.1.N37 198	BOOK	0			
60020601016	The unfinished war : Vietnam and the American conscience /	E169.12.C27 199	BOOK	0			
				0	Open Space		

Inventory System Initial Implementation

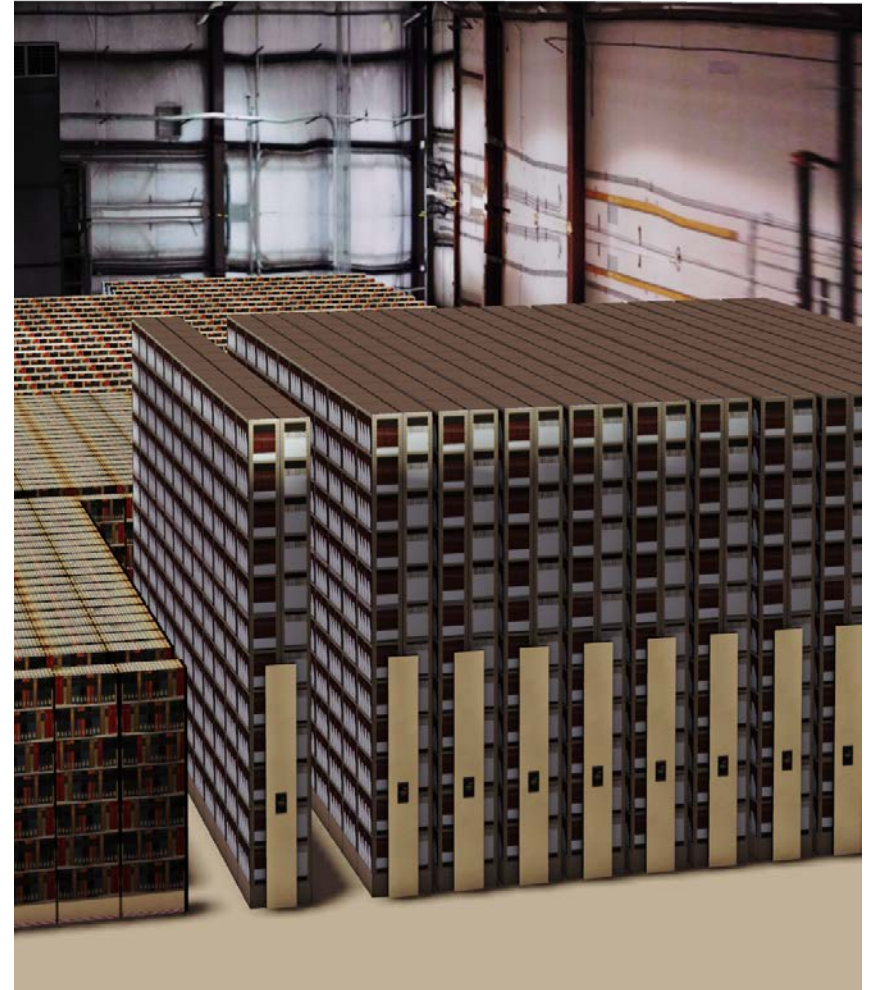
- Starting small!
- Updating the Planograph
- Optimizing processes & procedures
- Running reports



Cato Park - 1 Room 120



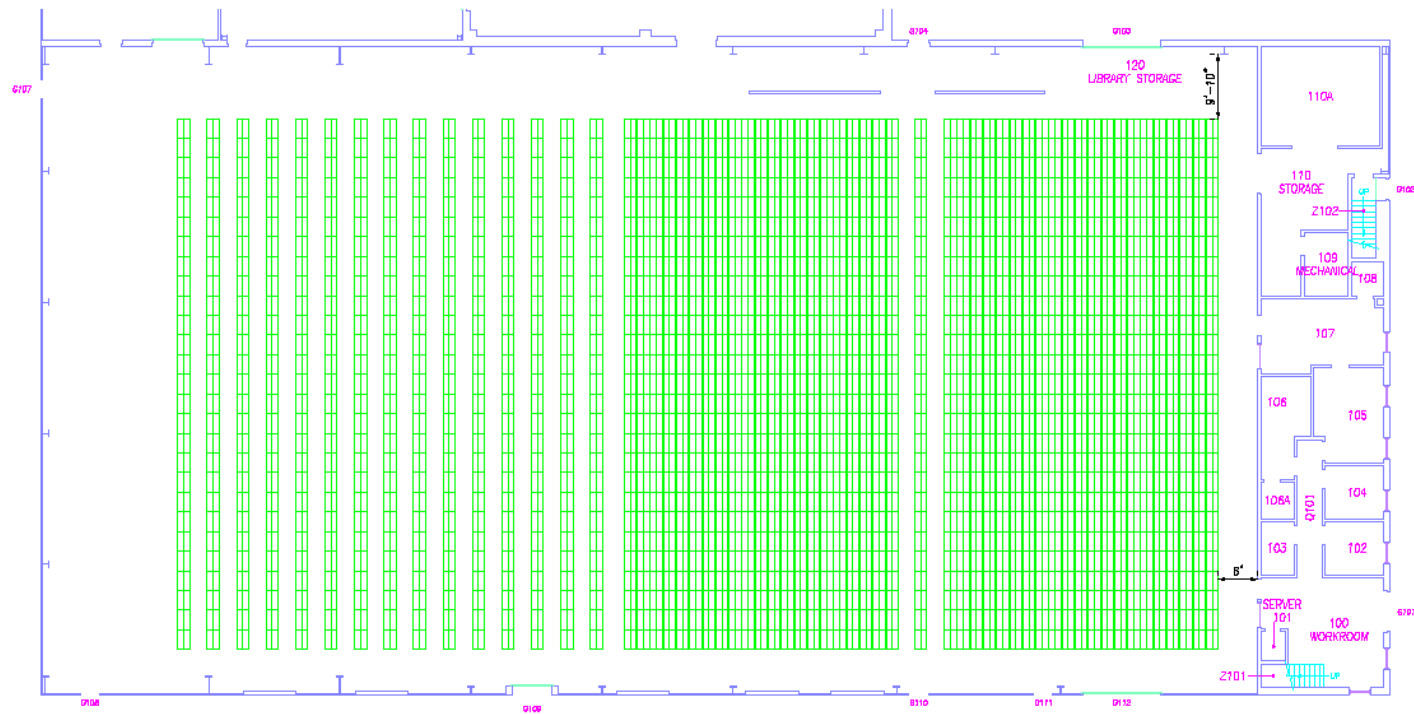
Future Plans

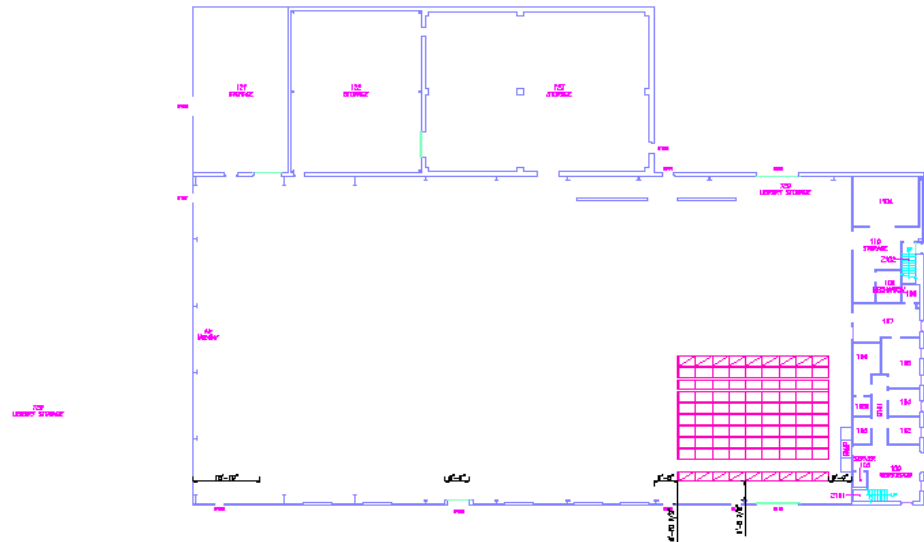


Options



Old shelving layout



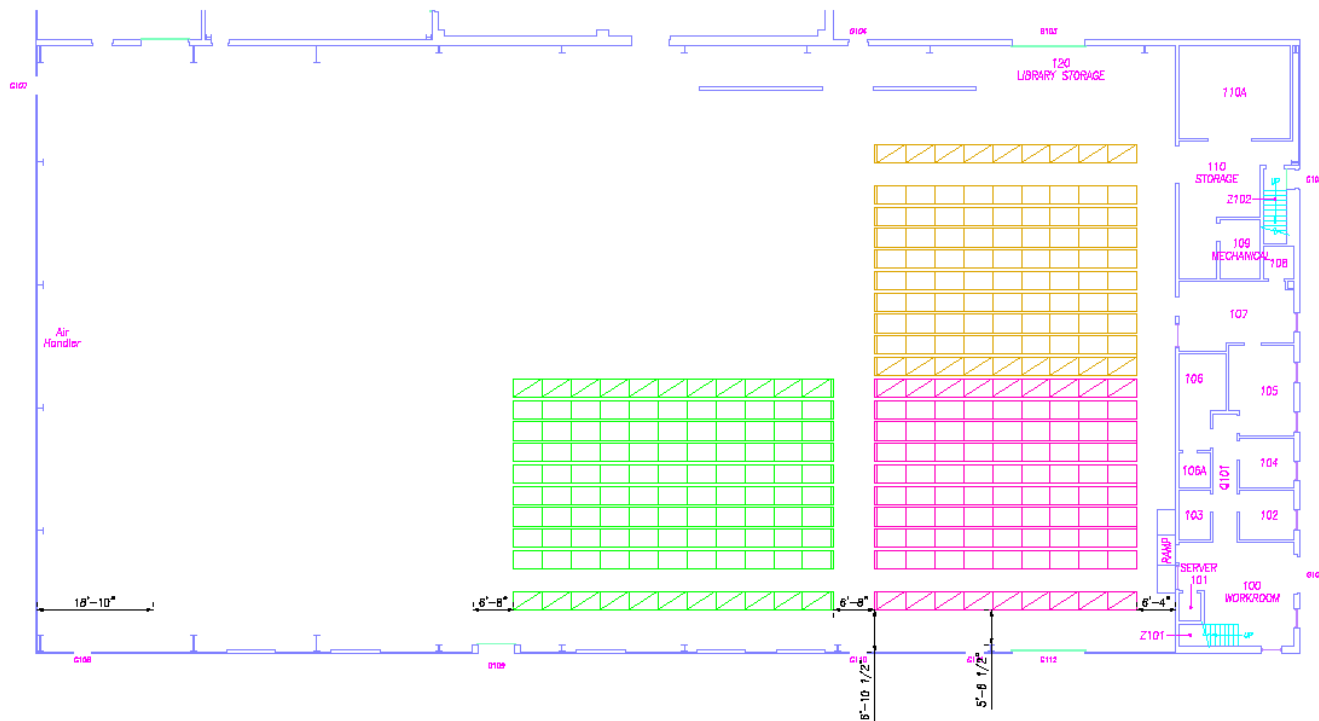


Future Capacity vs. Today Capacity

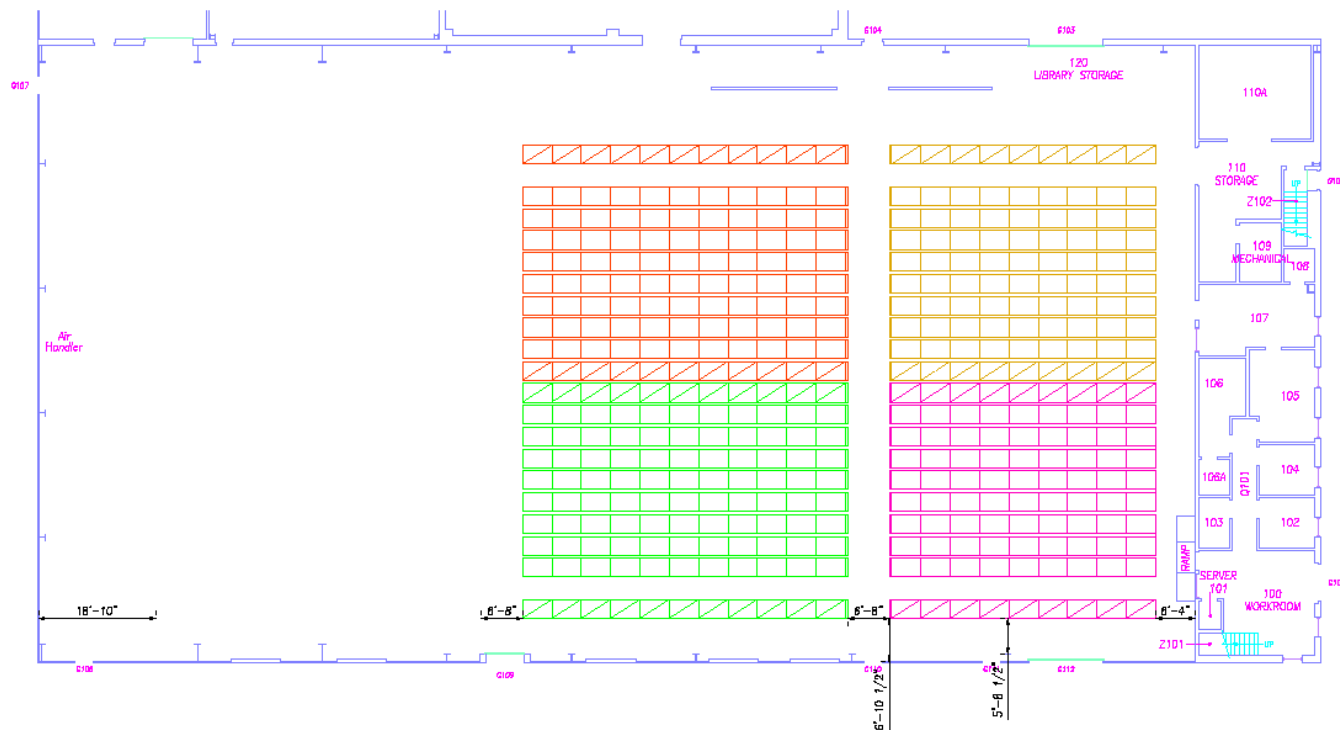
- This shelving plan also is being built for the future
- Capacities will be lower today, but expandable when needed



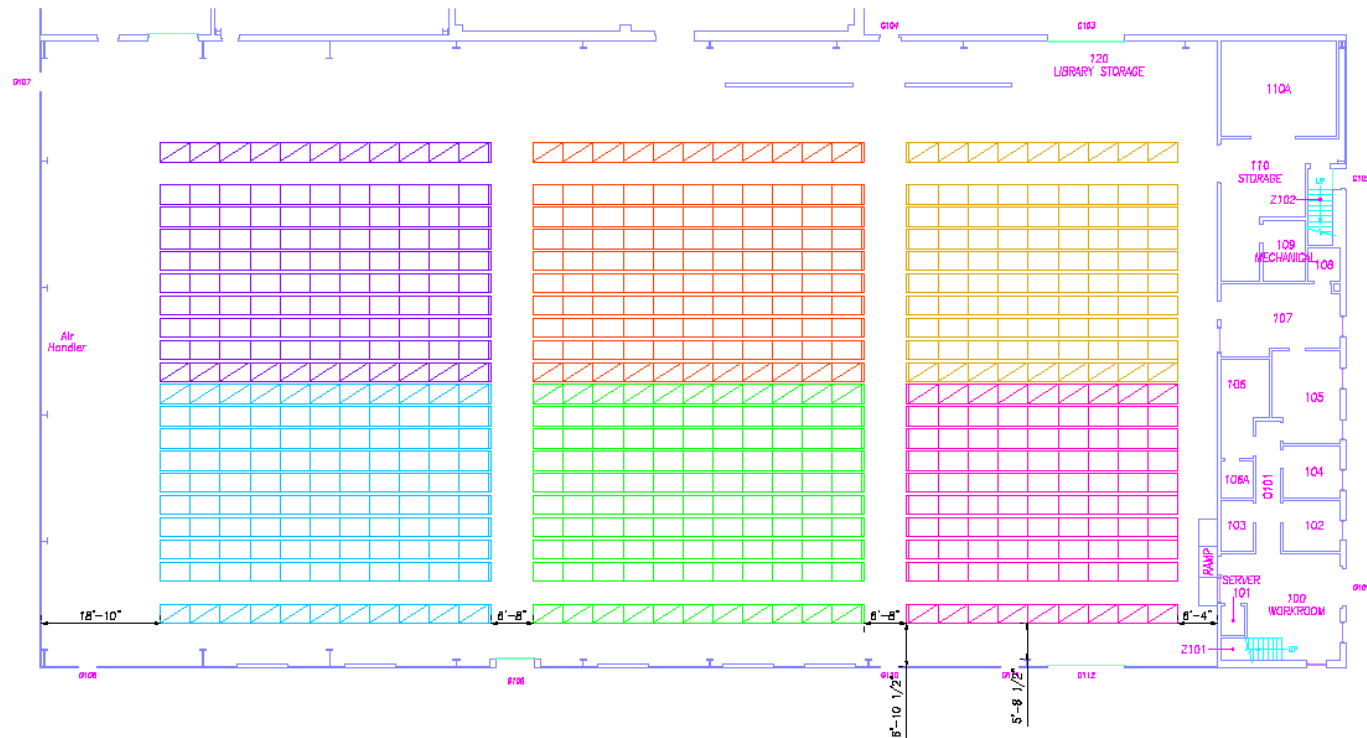
Step 3: 242,536 volume capacity



Step 4: 242,536 volume capacity



Step 6: 242,536 volume capacity



Grand Totals Steps 1-6

- Total Storage Capacity in Inches 1,708,420
- Total Storage Capacity in Volumes 1,366,736
- Total Inches Gained 941,080
- **Total Volumes Gained 752,864**
- Years Growth 26.88
- Estimated Cost \$3,442,357.00

Cost Savings

- This plan utilizing the existing Cato Park -1 facility would hold an estimated 1.35 million volumes at an estimated cost of \$3.4 million dollars spread out over several fiscal budget years. An alternative that a lot of academic libraries have taken is a new Harvard style high bay facility starting with one module capable of holding approximately 1.2 to 1.5 million volumes that has an estimated cost of \$20 plus million dollars thus saving Penn State University Libraries an estimated \$16.6 million dollars.

Flexible Implementation

- Steps 1-4 are an aggressive yet flexible plan through 2025 to replace the compact shelving that will outdate in 2018 costing the libraries \$2,202,357.00 but we will significantly increase storage capacity and have a shelving capacity that will last 14.85 years.

Summary

- Steps 5 and 6 can be planned and built as space is needed and funds are identified.
- 6 step plan
- Off-site General Collection storage
- 26.88 years.

Result: Happy Nittany Lions for years to come



Current Status

- Awaiting Funding





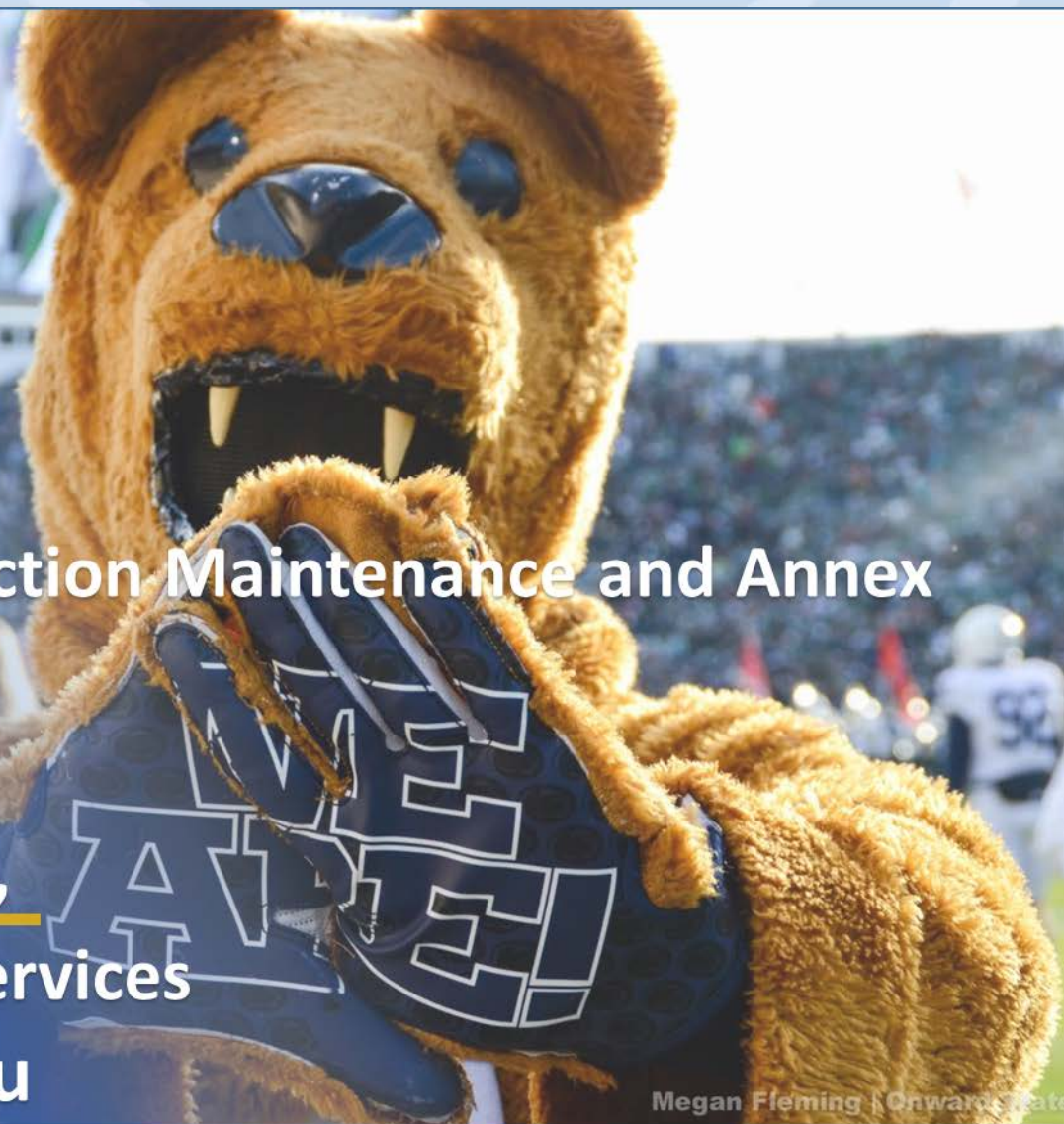
Contact

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Questions?



More about the Penn State Annex

Snowman, A. M., *The Penn State Annex: The Life and Times of an Off-Site Storage Facility*, Ann MacKay Snowman (2005) *Collection Management*, 30:1, 45-53, DOI: 10.1300/J105v30n01_05

Henshaw, R, & Swinton, C. *The Penn State Annex: A Model for Implementing a Successful Collection Storage Program* (1990) *Technical Services Quarterly*, 7:4, 11-19, DOI: 10.1300/J124v07n04_02