

# Chapter 13

## Creating and assigning locations

### Overview

The locations function of the Archivists' Toolkit is for recording the shelf location(s) of the materials in an archival resource or accession. Because the accession record may not provide details on containers within the collection, the process for assigning locations to accessions is different than assigning locations to descriptions. It is possible, however, to supply multiple locations for accessions and for descriptions, and to identify specific containers within each location.

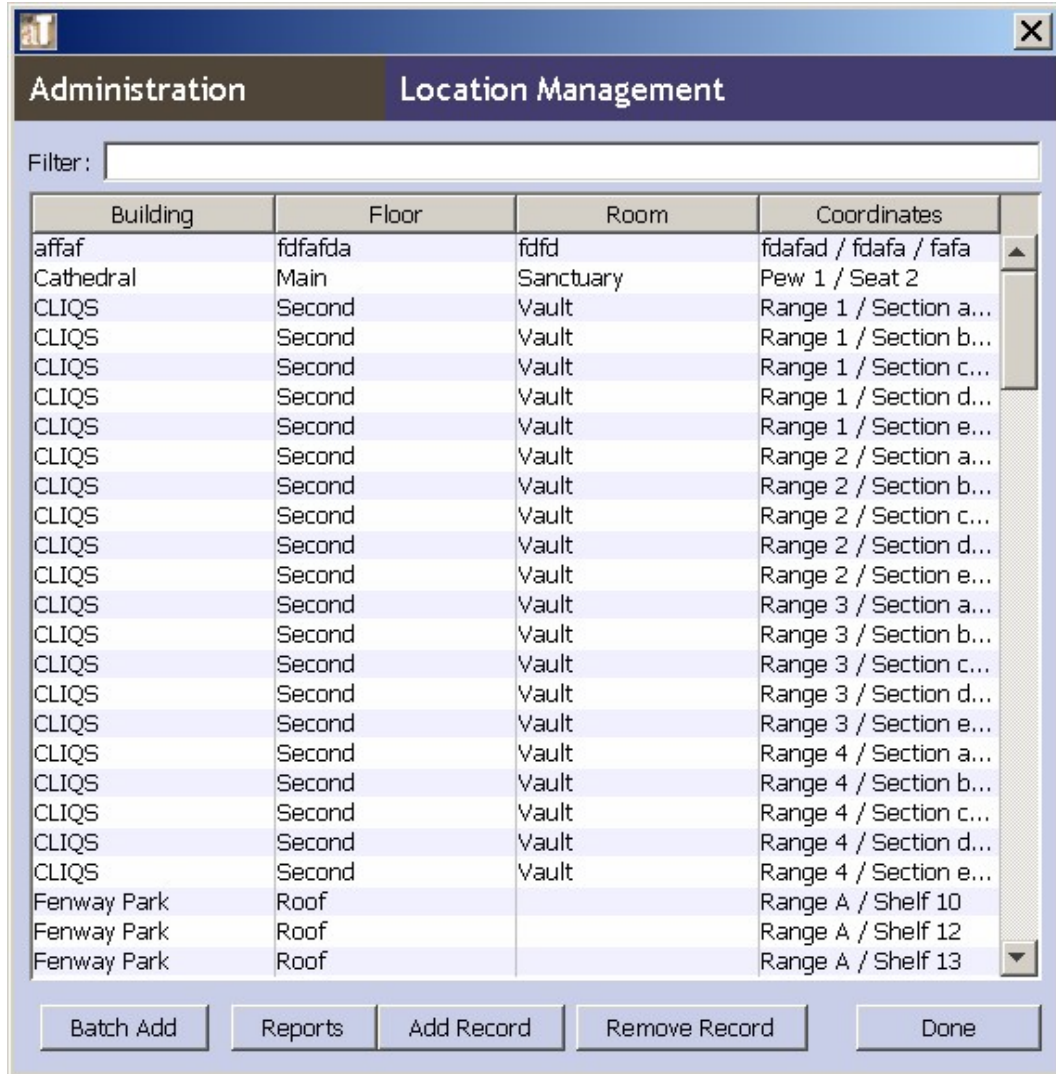
The location record is not intended to support tracking the movement of archival accessions and containers from shelf to reading room and back or from shelf to exhibition preparation area and back. It is assumed the locations linked to the accession or container are the permanent locations of the materials when they are not in use for any purpose. You can, of course, modify the location if necessary, for example if the collection is being shifted or the materials are being relocated after processing.

You may define locations in one of three ways: as space managed by your repository, as a barcode used to identify a unique location, or as a classification number used to signify location. When defining space, you may choose to be specific or general based on your needs for location management and retrieval. Elements defining space are somewhat hierarchical, in that you can define a building, floor, room, area within a room, and specific stack coordinates. But, if you have a single location in which your archival resources are housed, you may simply wish to record the building and one or two stack coordinates. If you have multiple spaces within the same building, you may wish to record more specific details about each space.

Because location records cannot be created at the time of accessioning or description, you may wish to create location records when you first configure the Archivists' Toolkit. To facilitate the process of creating container records, you may use the **Batch Add** feature described later in this chapter.

### Basic steps for creating a location record

1. From the **Admin** menu, select the option to **View/Edit Locations**.



2. Press **Add Record**.

The screenshot shows a software window titled 'at' with a 'Locations' tab. The form contains the following fields:

- Building
- Floor
- Room
- Area
- Coordinate1
- Coordinate2
- Coordinate3
- Classification Number
- Barcode
- Repository (set to AT)

At the bottom of the window, there are several buttons: First, Previous, Next, Last, Reports, Cancel, OK, and OK + 1.

3. Enter a **Building** name and **Coordinate 1**.  
*or*
4. Enter a **Barcode**.  
*or*
5. Enter a **Classification Number**.
6. Save the location record by pressing the **OK** command button at the bottom right corner of the window.

**Caution:** If the record does not include the required elements listed above, the Toolkit will indicate that the record cannot be saved because one or more of the required fields is not completed. The uncompleted fields will be indicated in the error message. The required field(s) must be completed in order to save the record.

## Location data elements

The screenshot shows a software window titled 'Administration' with a sub-tab 'Locations'. The window contains a list of input fields for location data: Building, Floor, Room, Area, Coordinate1, Coordinate2, Coordinate3, Classification Number, Barcode, and Repository. The Repository field is populated with 'AT'. Below the input fields is a row of navigation buttons: First, Previous, Next, Last, Reports, Cancel, OK, and OK + 1.

## Elements Required by the Archivists' Toolkit

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Note that *either* Building and Coordinate 1, *or* Barcode, *or* Classification number are required.

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1. **Building.** Enter the name of the building in which the location exists.

Examples:

Fales Library  
West Annex  
Five College Depository

2. **Coordinate 1.** The first of three available fields for identifying locations within the stacks or other storage units.

Examples:

Range 12  
Flat File 5  
Bin 4

3. **Barcode.** The number found on the barcode assigned to the materials.

Examples:

41822000182301

4. **Classification Number.** The classification number assigned to the materials. Used only if the classification number is a device for shelving and locating materials, rather than simply a means of uniquely identifying the materials.

Examples:

LD7093.37 .B33

LD7092.8 Adams

## Additional Elements

You can extend the location record by recording data for any of the following data elements. The choice of which location elements to record will depend on the nature of your space(s), your needs for space management, and complexities of retrieval in your repository.

1. **Floor.** The floor on which the location exists.

Examples:

Basement Level A

Floor 24

2. **Room.** A number or other identifier for the room.

Examples:

2602

Tab Filer Memorial Storage Area

3. **Area.** The location's area within the room.

Examples:

Oversize storage area

4. **Coordinate 2.** The second of three specific coordinates for identifying locations within the stacks or other storage units.

Examples:

Bay 3

Drawer 5

5. **Coordinate 3.** The third of three specific coordinates for identifying locations within the stacks or other storage units.

Examples:

Shelf 4

6. **Repository.** Select the repository name from the drop down list.

Examples:

University of Massachusetts Amherst

Scripps Institute of Oceanography Archives

## Using Batch Add to generate multiple location records

Batch Add allows you to automatically generate a number of location records by providing a range of coordinates.

1. From the **Admin** menu, select the option to **View/Edit Locations**.
2. Press **Batch Add**.

The screenshot shows a software window titled "aT" with a close button in the top right corner. The window has two tabs: "Project Management" and "Batch Location Creation". Under the "Batch Location Creation" tab, there are four text input fields labeled "Building", "Floor", "Room", and "Area". Below these fields is a table with three columns: "Label", "Start", and "End". The table contains three rows for "Coordinate 1", "Coordinate 2", and "Coordinate 3". Each row has a text input field for the label and two small input boxes for the start and end values, separated by a hyphen. At the bottom of the window, there is a "Repository" dropdown menu showing "AT" and two buttons: "Generate" and "Done".

3. Enter the **Building, Floor, Room,** and/or **Area** as appropriate. **Building** is required.

4. Enter the **Label** for **Coordinate 1** and the **Start** and **End** values for the series of records you wish to create. For example, to automatically create records for Ranges 1-12, enter the **Label** Range, the **Start** value 1, and the **End** value 12.
5. Repeat step four for **Coordinate 2** and **Coordinate 3** as needed.
6. Press the **Generate** button.
7. The Toolkit will automatically generate the appropriate records, and will return a message indicating the number of records it created. For example, if you entered data for Ranges 1-12, Bays 1-5, the Toolkit would create sixty location records.
8. Repeat the process as needed, then press **Done** to close the **Batch Add** window.

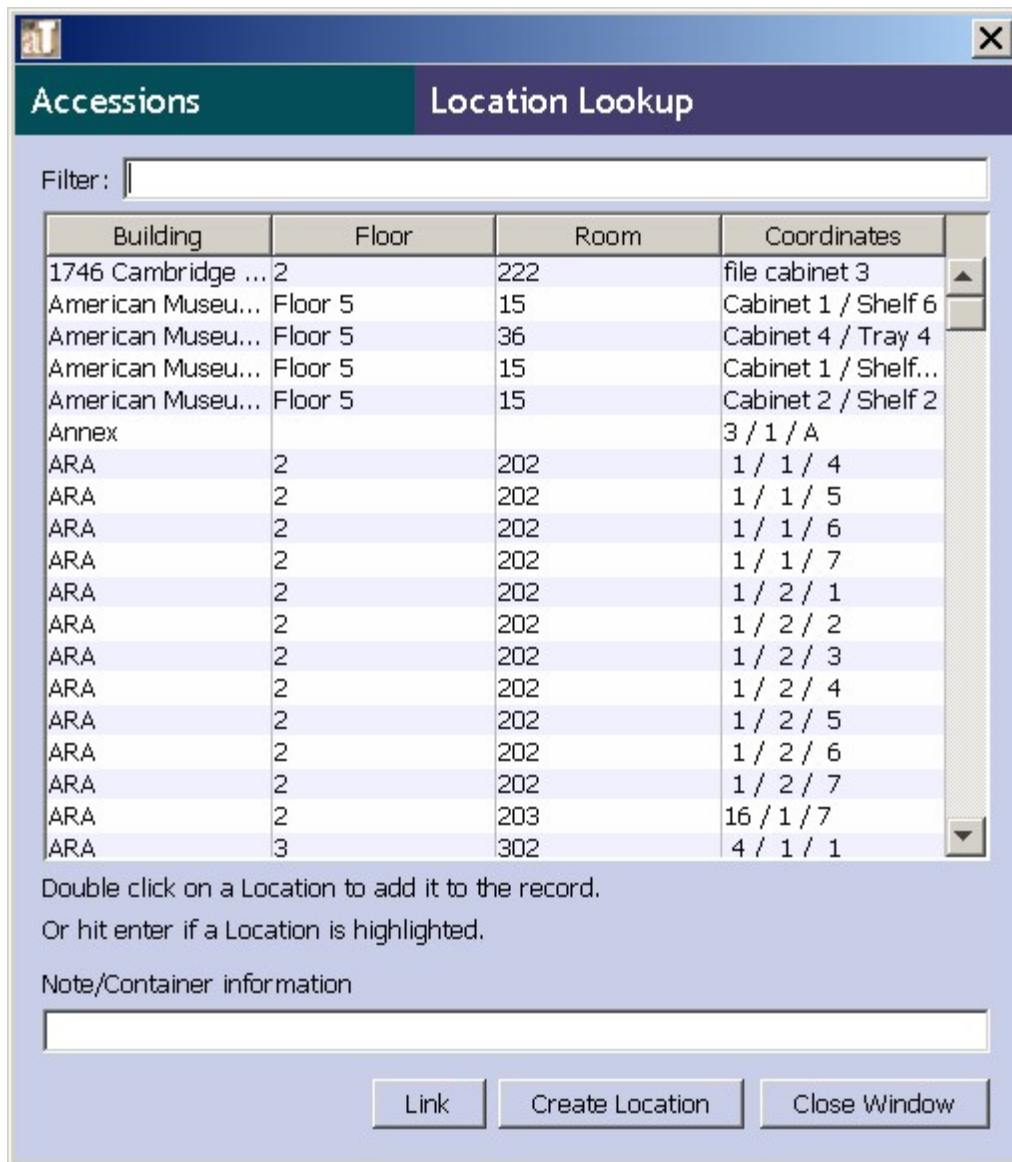
## Assigning locations

### Overview

You can assign locations to accessions or resources.

### Assigning locations to accession records

1. Open the desired accession record.
2. From the **Collection Administration** tab, press **Add Location**.
3. The Toolkit will display a window listing all locations available for your repository. Select the location to be assigned.



4. If desired, enter **Note/Container information** to help track which specific containers in the accession are housed in the location.

Examples:

Boxes 1-3

Box 4

Oversize materials

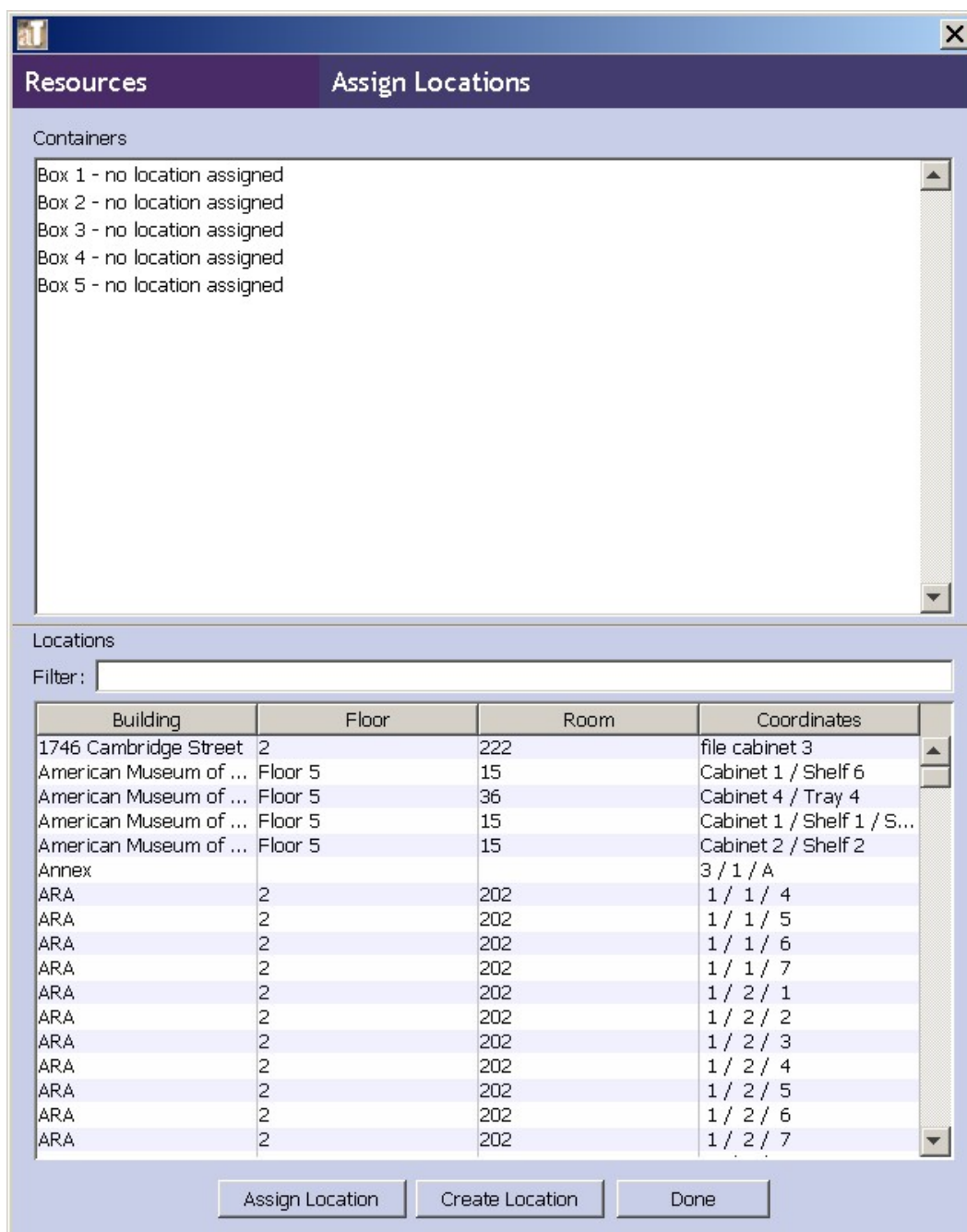
5. Press the **Link** button. You will see the location listed in the accession record.
6. Repeat the process until all locations have been assigned. You may also create a location record from this screen by pressing the **Create Location** button, which will open a new location record.



7. Once all locations have been assigned to the accession record, press **Close Window**.

### **Assigning locations to containers in described resources**

1. Open the desired resource or resource component record.
2. Press **Manage Locations**.
3. The Toolkit will display a window listing all containers recorded for the resource and all locations available for your repository. Select one or more containers.



4. Select the location to be assigned to the selected containers, and press **Assign Location**. You will see the location listed next to the container(s) in the **Containers window**.
5. Repeat the process until all locations have been assigned. You may also create a location record from this screen by pressing the **Create Location** button, which will open a new location record.

6. Once all locations have been assigned to the accession record, press **Close Window**.

## Removing locations

1. From the **Admin** menu, select the option to **View/Edit Locations**.
2. Select the desired location record and press **Remove Record**.
3. The record will no longer appear in the list of locations.

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Note: It is not possible to remove a record that is linked to accessions or containers. If the location record you wish to delete has been assigned to an accession or location record, the Toolkit will inform you that the record cannot be removed. You can use the Search tool to locate the record(s) assigned to the location, and reassign them to new locations as necessary.

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## Location reports

You can print the locations list or a shelf list by pressing the **Report** button on the **Location Management** screen. Chapter 12 provides instructions for generating reports. Examples of the following reports are available in the Appendices:

1. **Print Screen** The list of locations in table format, as displayed in the Location Management screen.
2. **Location Shelf List/Locations to Resource and Accession Record Display** Select any location or any group of locations to show records assigned to a resource record and/or accession record.