

Chapter 13

Creating and Assigning Locations

Overview

The locations function of the Toolkit is for recording shelf location(s) of the materials in an archival resource or accession record. 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 resource records. It is possible, however, to supply multiple locations for accessions and for resources, 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 area and back. It is assumed the locations linked to the accession or to the 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.

It is possible to 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 a 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. 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.

Creating location records when you first configure the Archivists' Toolkit™ is recommended. The **Batch Add** feature, used for creating many location records at once, is described later in this chapter.

Basic steps for creating a location record

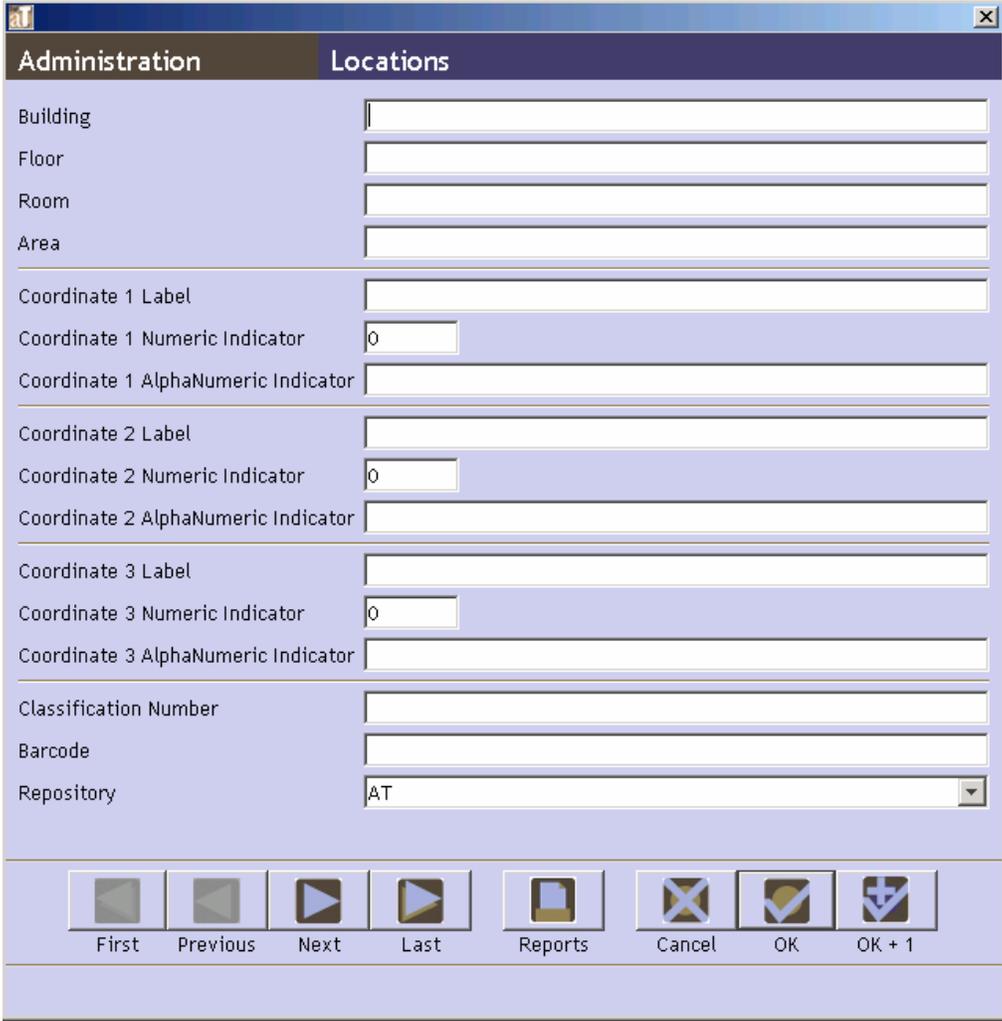
1. From the **Setup** menu, select **Locations**.

The screenshot shows a software window titled "Administration Location Management". At the top, there are two tabs: "Administration" and "Location Management", with the latter being active. Below the tabs is a "Filter:" text box. The main area contains a table with the following data:

Building	Floor	Room	Coordinates
Building G	3rd	3	SXSW
Forrester	2nd	47	Coord 1 24
Forrester	2nd	47	Coord 1 25
Forrester	2nd	47	Coord 1 26
Forrester	2nd	47	Coord 1 27
Forrester	2nd	47	Coord 1 28
Forrester	2nd	47	Coord 1 29
Forrester	2nd	47	Coord 1 30
Forrester	2nd	47	Coord 1 31
Forrester	2nd	47	Coord 1 32
Forrester	2nd	47	Coord 1 33
Forrester	2nd	47	Coord 1 34
Mandeville	Basement	1	SW 4
Mandeville	Basement	1	SW 5
Mandeville	Basement	1	SW 6
Mandeville	Basement	1	SW 7
Mandeville	Ground		New Space Created
Price Center	Ground	1	NE
Price Center	Ground	1	SW
Price Center	Ground	2	SW

At the bottom of the window, there is a row of five buttons: "Reports", "Batch Add", "Add Record", "Remove Record", and "Done". The "Remove Record" button is currently highlighted with a dashed border.

2. Press the  button.



3. Enter a **Building** name and **Coordinate 1 Label**.

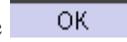
or

4. Enter a **Barcode**.

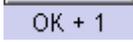
or

5. Enter a **Classification Number**.



6. Save the location record by pressing the  button at the bottom right corner of the window. If entering more than one location record, save the record by pressing the



 button. This will save the current record and open a new locations screen so a subsequent record can be entered.

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 complete. The incomplete 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 interface window titled 'Administration' with a sub-tab 'Locations'. The interface is divided into two main sections: 'Administration' and 'Locations'. The 'Locations' section contains the following fields:

- Building: [Text input field]
- Floor: [Text input field]
- Room: [Text input field]
- Area: [Text input field]
- Coordinate 1 Label: [Text input field]
- Coordinate 1 Numeric Indicator: [Text input field containing '0']
- Coordinate 1 AlphaNumeric Indicator: [Text input field]
- Coordinate 2 Label: [Text input field]
- Coordinate 2 Numeric Indicator: [Text input field containing '0']
- Coordinate 2 AlphaNumeric Indicator: [Text input field]
- Coordinate 3 Label: [Text input field]
- Coordinate 3 Numeric Indicator: [Text input field containing '0']
- Coordinate 3 AlphaNumeric Indicator: [Text input field]
- Classification Number: [Text input field]
- Barcode: [Text input field]
- Repository: [Dropdown menu showing 'AT']

At the bottom of the window, there is a navigation bar with the following buttons: First, Previous, Next, Last, Reports, Cancel, OK, and OK + 1.

Elements Required by the Archivists' Toolkit™

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

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

Examples:

Fales Library
 West Annex
 Five Colleges Depository

2. **Coordinate 1 Label.** The first of three available fields for identifying locations within the stacks or other storage units. The **Coordinate 1 Label** field is designed to describe either a **Coordinate 1 Numeric Indicator** or a **Coordinate 1 AlphaNumeric Indicator**. In the examples below, the first term (i.e. Range, Flat File, Bin) serves as the **Coordinate 1 Label**, and the second as the **Coordinate 1 Numeric Indicator**. If an alphanumeric indicator is used, the **Coordinate 1 AlphaNumeric Indicator** field should be used.

Examples:

Range 12
 Flat File 5
 Bin 4c

3. **Barcode.** The number of the barcode assigned to the materials.

Examples:

41822000182301

4. **Classification Number.** The classification number assigned to the materials. This is 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

The location record can be extended by recording data for any of the following data elements. The choice of which location elements to record will depend on the nature of the space(s), the need 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 coordinate labels for identifying locations within the stacks or other storage units. The **Coordinate 2 Label** field is designed to describe either a **Coordinate 2 Numeric Indicator** or a **Coordinate 2 AlphaNumeric Indicator**. In the examples below, the first term (i.e. Bay, Drawer) serves as the **Coordinate 2 Label**, and the second as the **Coordinate 2 Numeric Indicator**. If an alphanumeric indicator is used, the **Coordinate 2 AlphaNumeric Indicator** field should be used.

Examples:

Bay 3

Drawer 5a

5. **Coordinate 3.** The third of three specific coordinate labels for identifying locations within the stacks or other storage units. The **Coordinate 3 Label** field is designed to describe either a **Coordinate 3 Numeric Indicator** or a **Coordinate 3 Alpha Num Indicator**. In the example below, the first term (i.e. Shelf) serves as the **Coordinate 3 Label**, and the second as the **Coordinate 3 Numeric Indicator**. If an alphanumeric indicator is used, the **Coordinate 3 Alpha Num Indicator** field should be used.

Examples:

Shelf 4

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

Examples:

University of Massachusetts Amherst

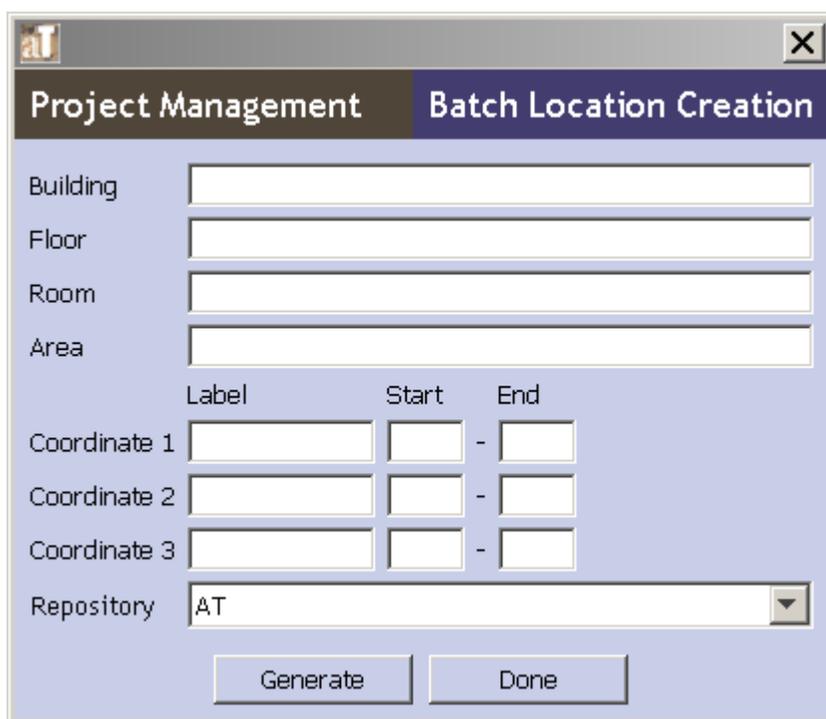
Scripps Institution of Oceanography Archives

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 **Setup** menu, select **Locations**.

- Press the  button.



- Enter the **Building**, **Floor**, **Room**, and/or **Area** as appropriate. **Building** is required.
- 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. The data values must be either numeric *or* alphabetical when expressing a range for a location coordinate. Alphanumeric numbers must be entered individually.
- Repeat step four for **Coordinate 2** and **Coordinate 3** as needed.
- Press the  button.
- 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.
- Repeat the process as needed, then press the  button to close the **Batch Add** window.

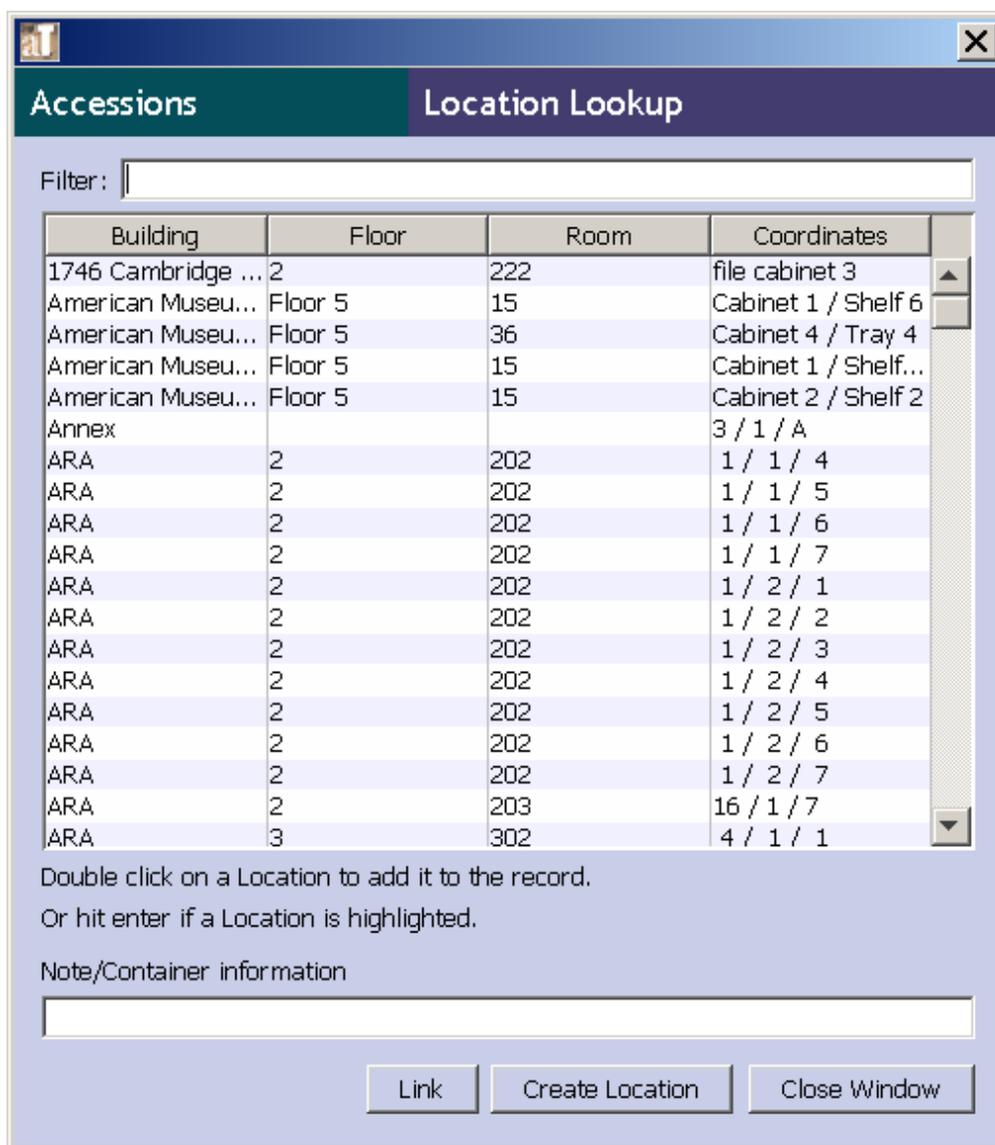
Assigning locations

Overview

You can assign locations to accessions or resources.

Assigning locations to accession records

1. Open the desired accession record.
2. From the **Basic Information** tab, press the  button.
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.

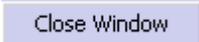
Examples:

Boxes 1-3

Box 4

Oversize materials

5. Press the  button. You will see the location listed in the accession record.

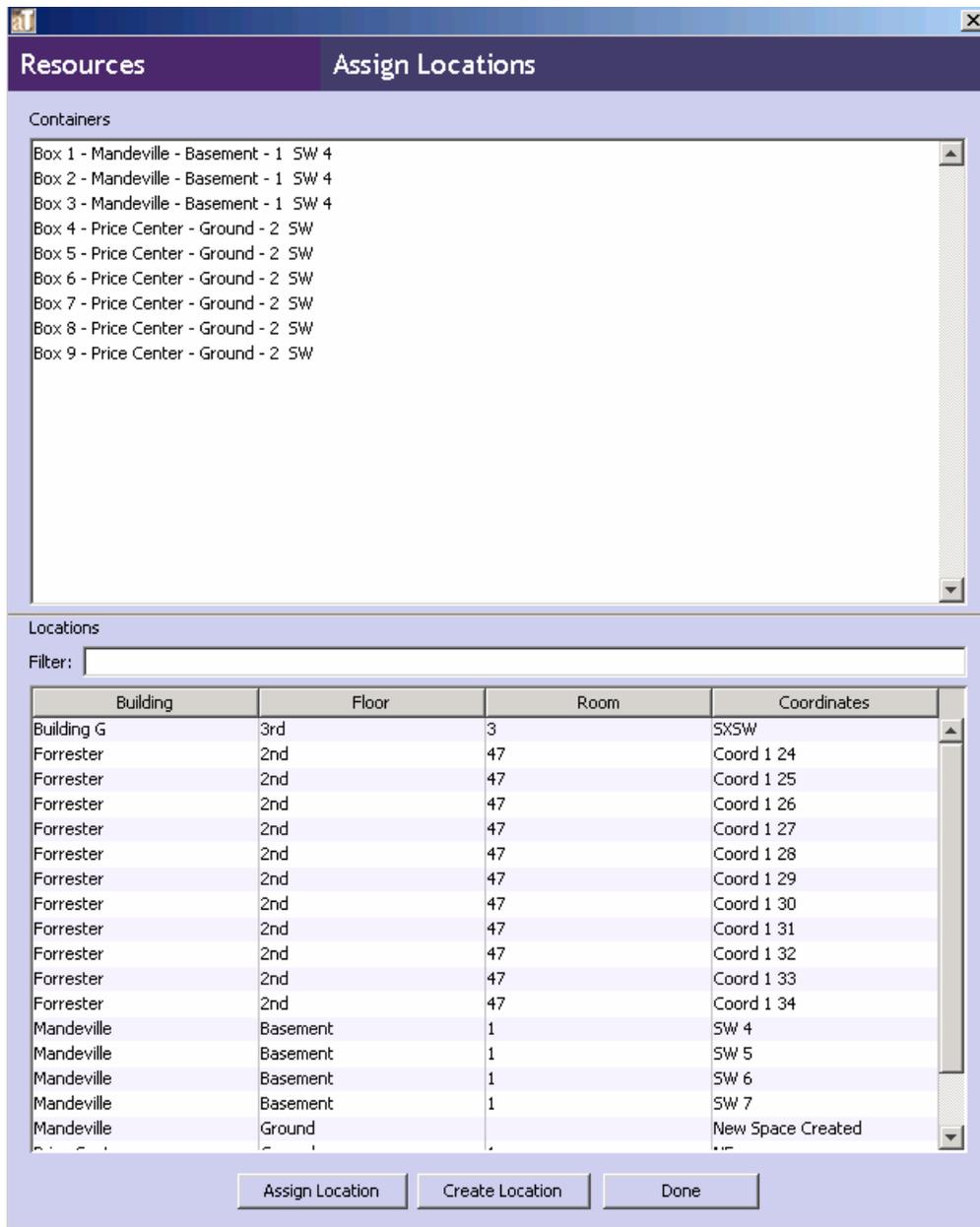
6. Repeat the process until all locations have been assigned. You may also create a location record from this screen by pressing the  button, which will open a new location record.
7. Once all locations have been assigned to the accession record, press  button.

Assigning locations to containers in described resources

1. Open the desired resource or resource component record.

2. Press  button.

3. The Toolkit will display a window listing all containers recorded for the resource and all locations available for the repository. Select one or more containers.



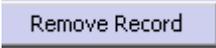
4. Select the location to be assigned to the selected containers, and press the  button. You will see the location listed next to the container(s) in the **Containers window**.

Note: Locations cannot be batch added through this screen. Batch additions must be done through the **Locations** option available through the **Setup** menu.

5. Once all locations have been assigned to the resource record, press the  button.

Removing locations

1. From the **Setup** menu, select **Locations**.

2. Select the desired location record and press the  button.
3. The record will no longer appear in the list of locations.

Note: It is not possible to delete a location 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.

Location reports

You can print the locations list or a shelf list by pressing the  button at the bottom of the **Location Management** screen. Chapter 14 provides instructions for generating reports. Examples of the following report is available in the appendices:

Location shelf list/locations with resource or accession record(s). Displays a list of locations, indicating any accessions or resources assigned to defined locations.