Status and Location Code Workgroup

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Purpose: To identify which of the following location codes and statuses are currently being used, which libraries are using them, how they are being used, and best practices going forward:
- Awards – JAW, SEQ, YAA, YAS
- Backroom – BKR (while also On Shelf)
- Displays – D 1-5, Display Status, In Process Status, Alternate On Shelf Display Status
- Minicats – AP, JP, YP
- Old Codes – 999/Misc, FAM, JNB, JOB, NBK, SEA, VF, YNB
- Special Nonfiction – BPR, JNF, JRF, JSC, OVZ, OVR, SC, YNF

General findings:
1. The primary use of location codes and statuses is to help staff and customers know where to find materials (**location**), to identify an intended age group or audience (**audience**), and to know whether materials are available for checkout (**status**).
2. Additionally, consistent use of location codes and statuses will aid in having a more accurate collection inventory by:
   a. Allowing libraries to complete inventory lists by location code and status on an annual basis
   b. Assisting Collection Development in having an accurate picture of what is currently in each library's collection
   c. Assisting Access Services/IT in correctly identifying which materials are safe to remove from the database after a period agreed on with Collection Development
3. After presenting initial recommendations to Library Managers and Access Managers, a poll was provided to the same group to register their library's preference on any options that were listed. This report incorporates the results of that poll and discussion from the Access Manager meeting in August.

Findings and recommendations by category:

Awards

Findings:
Most branches separate the past and current Sequoyah winners into their own sections and house them separately from other JAWs. Actual JAW sections at branches consist of Newberry, Caldecott, Pura Belpre, and Coretta Scott King award winners. All other items that come in with award winner stickers that don't fall into these categories are shelved regularly.

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Recommendations
When materials are physically separated, utilize the location codes to indicate the following awards:

- JAW Juvenile Award Winner - Caldecott, Newberry, Pure Belpre, and Coretta Scott King awards
- SEQ Sequoyah
  - Current and past Children's level Sequoyah award winners and current masterlist.
  - Libraries will have discretion on where to place Intermediate Sequoyah materials. This designation will always hold Children's materials and MAY hold Intermediate materials if they are co-located with Children's.
- YAA Young Adult Award - Intermediate and Senior level Young Reader's Choice Award (or any non-Sequoyah Senior/teen level award purchased in the future.)
- YAS Young Adult Sequoyah
  - Current and past high school level Sequoyah award winners and current masterlist
  - Libraries will have discretion on where to place Intermediate Sequoyah materials. This designation will always hold High School materials and MAY hold Intermediate materials if they are co-located with YA materials.

Backroom

Findings:
This location code is being actively used by most locations.

Current uses include:
- Items needing review by a supervisor for condition (status)
- Items needing review by a supervisor for problems within CARL.X (status)
- Prevent triggering a hold with a problem item (does not help with Hold Pending items) (status – unavailable for hold)
- Items for demonstration purposes, such as damaged material (location)
- Items sent to MTC for pest baking (location, status)
- Items that are damaged for customers to review (location)
- Items missing pieces that have not been sent to CD (location, status)

Recommendations:
- BKR will be used for temporary purposes only to indicate items that need staff review or that have problems in CARL.X.
- Staff will return items to the original location code and appropriate status within 30 days unless there extenuating circumstances. If materials routinely need a temporary code for longer than 30 days, this issue will be brought to the Access Manager group for further discussion.

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Displays

Findings:
- Display location codes (D-1, D-2, etc.) – this location code indicates to staff and customers that the item is not in its normal location. These show as "Display One," "Display Two," etc. in the catalog. Though it does not specify the exact geography of where to find it, staff may keep a local listing of where the item could be found based on the code. Many libraries have more than 5 display locations, but each location could define the areas that each number refers to. Materials can be updated using Quick Maintenance and searched for using Items by Status. Materials must be updated by staff before placing on display and after the display ends. Location codes can be updated even while customers have materials checked out.
- Display Status – this status hides the item from the public catalog, which makes it of limited use when displayed within the library. However, it could be very useful when taking materials offsite for displaying or merchandising at an engagement event. It updates to On Shelf after the material is returned. Items with this status can be found using Items by Status.
- Alternate PAC Status – this is a new feature in CARL.X and CARL.Connect. Materials can be manually updated through Item Edit or Quick Maintenance to have a custom status displayed in the View All Copies screen of the OPAC. Staff need permission in the Admin client granted to edit this field. Currently, these items cannot be located using Items by Status; they can only be found using Global Item Update, to which only the Manager of Access currently has access.
- In Process Status – this status is heavily used (8,700 items had this code on 5/16/18). ILL has the most in this status with 2,630 items, mainly indicating old materials that could not be borrowed. Materials with a new creation date reflect materials at the Service Center that are being processed for circulation (status). Materials also have this status when they have missing pieces and are located in (or are being sent to) Collection Development. Materials are also coded this when transferred between libraries for customer requests that cannot be handled by the Holds process.

Recommendations:
- Display location codes will be used to indicate temporary local display locations (location). Staff will return items to the original location code within 30 days.
- Display status will be used to indicate materials that are being utilized for Engagement activities where they are currently unavailable for holds or for general usage within the library (status). Staff will return items to the appropriate status within 30 days.
- For temporary codes and statuses, staff will return items to the original location code and appropriate status within 30 days unless there are extenuating circumstances. If materials routinely need a temporary code for longer than 30 days, this issue will be brought to the Access Manager group for further discussion.

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- Alternate PAC Status is not recommended for use at this time due to the difficulty in locating them to update them after the display is over.
- In Process Status will be used to reflect materials that have been received and are In Process at the Service Center. This status will automatically update when materials are sent to the libraries.
- Materials being sent to Cataloging will be checked out to the Cataloging library account.
- Custom Status 1 will be used to reflect materials that have missing pieces and are located in (or are being sent to) Collection Development and are not currently on a customer's account.
- When transferring requested material that cannot be placed on hold:
  - Check the material out to the receiving library's account. It would need to be kept at the desk, and staff could check it out without checking it back in (it would generate a charge on charge exception).

Minicats

Findings:
- Libraries report that they are currently withdrawing the old minicats or plan to in the future.
- AP Adult Paperback – most of these are adult fiction materials including Westerns, Harlequins, Mysteries, and Star Trek books. Annual tax preparation manuals also use this code as well as holiday magazines.
- JP Juvenile Paperback – most of the remaining minicats exist in this area. Both regular children's reading materials have this code as well as some juvenile magazines. Many of these items are current and being used by customers.
- YP Young Adult Paperback – fewer libraries have any remaining in this category, but most of the items have current circulations indicating active usage. Classic literature is often retained in this category.

Recommendations:
- AP Adult Paperback – after a minicat purge in the fall of 2018, this location code will indicate locally printed tax preparation manuals and holiday magazines.
- JP Juvenile Paperback - after a minicat purge in the fall of 2018, this location code will become obsolete. Juvenile magazines will use the MZ location code instead.
- YP Young Adult Paperback - after a minicat purge in the fall of 2018, this location code will become obsolete. Collection Development may review the current classics in this category to order replacements for the minicats.

Old Codes

Findings:
- After asking each library if the following codes were still in use at their location, only one library answered positively. One library is using the NBK location code. All other location codes listed are no longer actively used by libraries.

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- o 999/Miscellaneous
- o FAM Family Talk
- o JNB Juvenile New Book
- o JOB Career Guidance
- o NBK New Book
- o SEA Seasonal Storage
- o VF Vertical File
- o YNB Young Adult New Book

Recommendations:
- All the following location codes will become obsolete:
  - o <u>FAM Family Talk</u>
  - o <u>JNB Juvenile New Book</u>
  - o <u>JOB Career Guidance</u>
  - o <u>NBK New Book</u>
  - o <u>SEA Seasonal Storage</u>
  - o <u>VF Vertical File</u>
  - o <u>YNB Young Adult New Book</u>
- <u>999/Miscellaneous</u> will be reserved for use by Cataloging

<u>Special Nonfiction</u>

Findings:

- <u>BPR:</u> 6 libraries are still using this. The libraries with items on the list are looking at their lists and cleaning them up.
- <u>JNF</u> is universally used, even if they are still interfiled with ANF.
- <u>JRF</u> is used at DN for their World Books in the Children's area.
- <u>JSC</u> is being used at MC as a code for Graphic Novels.
- <u>OVR</u> is being used at 5 libraries; libraries say they can make theirs circulating or just discontinue using.
- <u>OVZ</u> is being used at most locations (one location says they aren't using it), some have a separate section, but most are coding items that are lying flat on the bottom shelf, as they don't fit on the above shelves, in ANF as OVZ. Some libraries are using this location code for Graphic Novels.
- <u>YNF</u> is being used at most locations (one location says they aren't using it).

Recommendations:

- Once there are location codes dedicated to graphic novels, all graphic novel materials with codes in this category will be recoded to the appropriate location code.
- <u>BPR Branch Professional Reference</u>
  - Create programming library accounts to check out materials for library programming (status) and make BPR obsolete

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- <u>JNF Juvenile Nonfiction</u> – utilize to indicate materials that have a juvenile nonfiction call number; these may be shelved separately (location) and/or indicate audience level.
- <u>JRF Juvenile Reference</u>
  - Make children's reference circulating and make this location code obsolete
- <u>JSC Juvenile Special Collection</u> – this code will be reserved for use by Special Collections (DN)
- <u>OVR Oversize Reference</u> – utilize to indicate non-circulating materials that cannot fit on regular shelving in their collection area and are therefore shelved in a separate area or on shelves above/below the regular area.
- <u>OVZ Oversize</u> – utilize to indicate circulating materials that cannot fit on regular shelving in their collection area and are therefore shelved in a separate area or on shelves above/below the regular area (location).
- <u>SC Special Collection</u> – this code will be reserved for use by Special Collections (DN)
- <u>YNF</u>
  - Libraries will have discretion on the use of this code based on the physical layout and space availability.
    - Utilize to indicate all materials that have a Young Adult nonfiction call number even if interfiled (audience and sometimes location)
    - Utilize to only indicate materials that are physically housed in a separate YNF collection area (audience and always location)

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Next Actions:

1. Though libraries could work ahead of this proposed schedule, the expectation is that libraries will achieve these actions by the timeline listed below.
2. Final recommendations will be brought to the September Access Manager meeting on September 18 for approval.
3. Beginning October 1, libraries will use the approved guidelines when making new changes to statuses and location codes at their library.
4. Beginning in October and ending no later than the end of December 2018, libraries will review and recode active materials at their locations with the statuses and location codes that will become obsolete or reserved for uses not at their location.
   a. The Manager of Access will coordinate recoding old materials so that obsolete codes can be deleted by the end of June 2019.
5. Libraries will update any local procedures on assigning collections from which to pull holds to include new location codes (graphic novels, display areas, etc.).
6. By the end of June 2019, all libraries will have completed an inventory of their collections to ensure materials have the correct statuses and location codes.
7. An annual inventory is recommended to continue so that these guidelines can continue to be enforced, correcting human mistakes along the way.
8. CollectionAnywhere will set a timeline to review materials in the In Process status to ensure they reflect active usage by their departments.
9. Codes that are rendered obsolete will require old materials to either be deleted or recoded if the obsolete codes will be removed from the available location codes. If old materials are not deleted or recoded, the possibility of accidentally coding something with an obsolete code remains.

Location Code Recommendation Summary

* - Indicates a code that will become obsolete

% - Indicates temporary codes and statuses - staff will return items to the original location code and appropriate status within 30 days unless there are extenuating circumstances. If materials routinely need a temporary code for longer than 30 days, this issue will be brought to the Access Manager group for further discussion.

- **999/Misc Miscellaneous**
  - This location code will become used solely by Cataloging.
- **AP Adult Paperback**
  - After a minicat purge in the fall of 2018, this location code will indicate locally printed tax preparation manuals and holiday magazines.
- **BKR Backroom** %
  - BKR will be used for temporary purposes only.
- **BPR Branch Professional Reference ***
  - Create programming library accounts to check out materials for library programming (status) and make BPR obsolete
- **D-1, D-2, etc. Display Locations** %
  - Utilize to indicate temporary local display locations (location).
  - Staff will return items to the original location code within 30 days.
- **FAM Family Talk ***
  - This location code will become obsolete.
- **JAW Juvenile Award Winner**
  - Indicates Caldecott, Newberry, Pure Belpre, and Coretta Scott King awards <u>when shelved separately</u> (location)
- **JNB Juvenile New Book ***
  - This location code will become obsolete.
- **JNF Juvenile Nonfiction**
  - Utilize to indicate materials that have a juvenile nonfiction call number; these may be shelved separately (location) and/or indicate audience level.
- **JOB Career Guidance ***
  - This location code will become obsolete.
- **JP Juvenile Paperback ***
  - After a minicat purge in the fall of 2018, this location code will become obsolete. Juvenile magazines will use the MZ location code instead.
- **JRF Juvenile Reference ***
  - Children's reference will become circulating and make this location code obsolete
- **JSC Juvenile Special Collection**
  - This code will be reserved for use by Special Collections (DN)
- **NBK New Book ***

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- o This location code will become obsolete.
- **OVR Oversize Reference**
  - o Utilize to indicate non-circulating materials that cannot fit on regular shelving in their collection area and are therefore shelved in a separate area or on shelves above/below the regular area (location).
- **OVZ Oversize**
  - o Utilize to indicate circulating materials that cannot fit on regular shelving in their collection area and are therefore shelved in a separate area or on shelves above/below the regular area (location).
- **SC Special Collection**
  - o This code will be reserved for use by Special Collections (DN)
- **SEA Seasonal Storage ***
  - o This location code will become obsolete
- **SEQ Sequoyah**
  - o Current and past Children's level Sequoyah award winners and current masterlist.
  - o Libraries will have discretion on where to place Intermediate Sequoyah materials. This designation will always hold Children's materials and MAY hold Intermediate materials if they are co-located with Children's.
- **VF Vertical File ***
  - o This location code will become obsolete unless utilized by Special Collections.
- **YAA Young Adult Award**
  - o Indicates Intermediate and Senior level Young Reader's Choice Award (or any non-Sequoyah Senior/teen level award purchased in the future) when shelved separately (location)
- **YAS Young Adult Sequoyah**
  - o Current and past high school level Sequoyah award winners and current masterlist
  - o Libraries will have discretion on where to place Intermediate Sequoyah materials. This designation will always hold High School materials and MAY hold Intermediate materials if they are co-located with YA materials.
- **YNB Young Adult New Book ***
  - o This location code will become obsolete.
- **YNF Young Adult Nonfiction**
  - o Libraries will have discretion on the use of this code based on the physical layout and space availability.
    - o Utilize to indicate all materials that have a Young Adult nonfiction call number even if interfiled (audience and sometimes location)
    - o Utilize to only indicate materials that are physically housed in a separate YNF collection area (audience and always location)

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- **YP Young Adult Paperback ***
  - After a minicat purge in the fall of 2018, this location code will become obsolete. Collection Development may review the current classics in this category to order replacements for the minicats.

Status Recommendation Summary

- **Alternate PAC Status ***
  - Alternate PAC Status is not recommended for use at this time due to the difficulty in locating them to update them after the display is over.
- **Custom Status 1**
  - Custom Status 1 reflects materials that have missing pieces and are located in (or are being sent to) Collection Development and are not currently on a customer's account. Items with this status are hidden from the public catalog (status and location).
- **Display Status %**
  - Display status will be used to indicate materials that are being utilized for Engagement activities where they are currently unavailable for holds or for general usage within the library (status).
  - Staff will return items to the appropriate status within 30 days.
- **In Process Status**
  - In Process Status will be used to reflect materials that have been received and are In Process at the Service Center (status and location). This status will automatically update when materials are sent to the libraries.
  - Materials being sent to Cataloging will be checked out to the Cataloging library account.

Special Library Accounts
- Materials for **pest baking** will be checked out to a MTC library account and returned via the sorter/regular mail to check them in.
- Materials that **cannot be placed on hold** will be checked out to the receiving library's account. Material will be held at the desk for customer pickup. It will create a charge on charge exception, but materials do not need to be checked in until sent back to the owning library.

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