

Paperback Series Discussion Group Report

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Charge: Identify materials in browsing collections that users commonly request and/or search for by series title ; develop a classification/spine label system that will allow easy access and retrieval of these materials when they are transitioned to regular collections.

The Paperback Series Discussion Group met on February 8, February 16, and February 22, 2017.

Background and History

Library staff and users have historically wanted mass market paperback materials to be part of the cataloged collection, instead of as a separate browsing collection. Since the migration to CarlX, the desire has intensified since members are able to see browsing collection titles in the catalog, but not place holds on them.

The library system's local processing committee recommended that the browsing collections be discontinued and the materials integrated into "regular" collections. Before this occurs, several questions need to be addressed in order to make sure that the cataloging best benefits library members.

Process

The Paperback Series Discussion Group was formed in February 2017 and consisted of staff members from Cataloging and various MLS libraries. The group's stated goal was to draft a classification/labeling system for mass market materials that addressed the issue of titles in series.

Library managers were asked to recommend staff members to participate in the group. The group met on February 8, 16, and 22, with e-mail communication between and after meetings.

The group followed a discussion group format. Individual members were asked to bring information and feedback to each meeting, based on the previous week's discussion.

Considerations

The group's initial discussions focused on defining the scope of the project. Members provided input based on their experiences and knowledge. Topics discussed included:

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- Ways that MLS members locate materials in browsing collections.
 - Most members go to or ask for titles in a particular series.
 - Younger members (juvenile or tween users) are most likely to request specific materials rather than a series.
 - Members who use browsing collections tend to be loyal to their favorite series.

- The meaning of the term “series”.
 - To most members, a series is:
 - * any group of materials that have features in common. Such features may include being tied to a specific television program, film, product, etc.;
 - * materials may or may not be by the same author or from the same publisher;
 - * may or may not feature the same characters; when they feature the same characters, not all characters may appear in all titles.
 - Cataloging definitions:
 - * A **series** is a group of separately published works related by subject, content, and/or form, issued in succession (numbered or unnumbered). The individual works or parts may or may not share the same author or editor, nor is it necessary for them to be published at regular intervals.
 - * A **character series** is a *series* in which all works feature the same character(s), even though the works may be written by one or more authors. Example: James Bond novels, which have been written by one of six different authors (so far).
 - * An **author series** is a *series* that was begun by one author, and later taken over by one or more others. The original author’s name is part of the *series title*. Examples: Tom Clancy’s Op-Center, Robert Ludlum’s Bourne series.
 - * A **publisher’s series** is a *series* that is associated with the name of the publisher, regardless of author and/or title.
- Makeup of fiction call numbers.
 - Call numbers for fiction materials are made up of two elements:
 - * Classification, a word or words designating type of fiction (FICTION, MYSTERY, etc.)
 - * Author mark, the first three letters of the author’s last name or the title if no author is named
 - The call number may include a format designation such as COMPACT DISC or LARGE PRINT.
- Limitations imposed by label printing software.
 - For spine labels, the limitations include:
 - * No more than 5 lines of print per label.
 - * No more than 10 characters per line on the label.
 - * No more than 32 total characters per label.
 - * No spaces within any line on the label. Terms may be separated by hyphens, slashes, or other marks of punctuation.
 - For titles on barcode labels, the limitations include:
 - * No more than 30 total characters and spaces per title.
 - * Titles are truncated by word, not by character; the title will truncate at the last full word **before** the word that contains the 31st character.
 - * It is important that enough of the title appears on the label to allow Processors to make sure to attach the label to the correct item.

Ideas and Recommendations

The group agreed early on that it would likely not be possible to address all series carried in the mass market collections. We evaluated a significant number of series in an effort to identify those that might require special attention. We eliminated some series from further consideration based on specific criteria. For examples of series meeting each criterion, see *Additional Information* at end.

1. Mass market titles in series which are already part of the cataloged collection, and for which series cataloging standards are already established, will be cataloged using those standards. Classification, title formatting, and series access will remain the same.
2. Mass market titles in series in which all titles are written by the same author will be cataloged using established cataloging standards for classification, author, title formatting, and series access.
3. Mass market series in which all series titles are similar, especially if they begin with the same wording, will be cataloged by title rather than author. The author mark in the call number will represent the title, although the author's name will still appear on the barcode label. This is the system that has been put into place for materials in graphic format.

We then discussed ways of bringing together series materials that are not likely to be brought together by author and/or title, and which are frequently requested by members. There are a number of such series, among them Star trek ; Star wars ; Lego ; American girls ; superheroes (Superman, Batman, Squirrel Girl, etc.) ; Harlequin publications ; and cartoon characters (Smurfs, Pokemon, etc.).

The committee's limited time schedule did not allow us to address all these series. We selected four for this project: Harlequin Publishing series ; Star trek related materials ; Star wars related materials ; Lego related materials. This gave us a sizable and varied selection of materials to work with.

Ideas and Discussion

Some factors considered in selecting series for the project included the number of titles available; popularity among members; age level (we wanted to work with materials at multiple levels); and accessibility. Cataloging will explore improving access to other series at a later date. For examples of series not selected, and reasons why, see *Additional Information* at end.

We considered a variety of options, including:

- Inserting a line containing all or part of the series name above the call number;
- Inserting a line containing all or part of the series name at the bottom of the call number;
- Replacing the classification (FICTION, etc.) with all or part of the name of the series;
- Replacing the author mark (3 letters below the classification) with a mark for the name of the series;
- Inserting the series name in front of the title on the barcode label, without changing the classification nor author mark.

We decided against including all or part of the series above or below the call number because it would essentially create a special collection. The group members felt that it is important that mass market fiction titles be intershelved with other fiction materials, rather than being placed in a special area. Placing these materials in a special area defeats the purpose of doing away with the browsing collections, as it continues to require that members and staff check multiple locations for materials. We decided against using all or part of the series name as a classification for the same reasons.

We discussed the idea of replacing the author mark with a mark for the series at length. One concern was that titles in a series could be still be separated on shelves. Titles in fiction collections are shelved first by call number, then by author, then by title. If titles dealing with Star trek have the call number SCIENCE FICTION STA, they would be intershelved with titles written by authors whose names begin with “Sta”. While any given author’s works would likely stay together, this would not achieve the goal of keeping Star trek titles together. We were also concerned that this shelving scheme would require staff to spend additional time shelving and searching for materials; and that it would prove confusing for members.

We also looked at the formats that various series titles are issued in, and how those formats impact call numbers. For example, many Harlequin titles are issued in regular print and larger print; a number of Star trek titles are issued in audio as well as print format. Including format designations in call numbers reduces the number of characters available for classification, author mark, etc.

Format designations have become more essential with the move to the Ebsco discovery platform, because the formats displayed beneath cover images are generic (Book, Audiobook, Video recording, etc.). The format designations within the call number may help users to identify a specific format.

Recommendations

The group ultimately recommended two changes to apply across the board to the selected series. For additional information about how these changes apply to specific series, see following pages.

Special author marks of up to 7 characters, made up of three characters, an underscore, and three additional characters. The exact characters use depend on the series. The underscore character is required because the existing spine label printing software does not allow for a space within a line on the spine label.

The idea of using more than three characters for author marks has been brought up multiple times over the years. It has not been implemented because of issues with titles issued in more than one format and the limitations of the spine label. For example, the spine label for a YA science fiction novel on Playaway would begin with YSCIENCE FICTION and end with AUDIO PLAYER. The four words take up four lines and 29 characters of the allowed 32 characters; it is not possible to add an author mark of more than three characters. It may be appropriate to reconsider the entire concept of call numbers and spine labels, but it is beyond the scope of this discussion group.

Addition of series title information to appear before the title in the catalog record and on the barcode label.

As with the call number, the group considered the number of characters per title that are permitted by the label printing software. The specific character limit is 32, but many titles print with fewer characters because the software does not allow truncating in the middle of a word. While library staff are able to shelve easily even when information is not printed on the label, it does take a few extra seconds per item. We hope to reduce this extra time to a minimum by abbreviating or shortening series titles wherever it seems logical.

It was important to the committee that the classification/labeling fit within existing spine label guidelines. This allows library staff to shelve materials without additional training and without spending significant extra time figuring out location. The recommended shelving allows members to go directly to the area(s) where favorite series are shelved together.

For specific information about applying these recommendations, see the *Paperback Series Implementation* document.

Additional Information

Questions

Q: What will be the location code for mass market paperbacks?

A: The same location codes that are used for other materials will be used. Mass market titles will primarily be in fiction locations, such as F, MYS, SF, and W; some will be nonfiction.

Q: How will “larger print” mass market paperbacks be handled?

A: These will be cataloged for addition to the large print collections.

Q: Will the BRD location code still be available? Some libraries like to check circulation statistics relating to board books in CarlX. Currently, this is possible because the location code of the items is BRD.

A: No, BRD will no longer be used as a location code. BRD will be used as a media type, which will allow statistics to be gathered.

Q: Will the AP, YP, and JP location codes still be available?

A: The location codes will still exist, at least for a while. They should only be used for ephemeral items such as tax instructions. No decision has been made about the location code for holiday issues of magazines.

Q: How will YA classic paperbacks be handled?

A: They will need to be cataloged, just as everything else is. It’s possible that in the future, these materials will be housed in the Collection Anywhere Center and sent to libraries as needed?

Q: Is it possible to get Accelerated Reader (AR) levels included in records?

A: This is not feasible because different school districts use different AR lists. There is no one standard source for determining AR levels, and not all materials have the level listed on them. Libraries are encouraged to acquire the AR lists from their local school districts, so that staff may guide users to appropriate materials.

Additional Information

Series Evaluated

Currently cataloged series with single author

Series	Author
A to Z mysteries	Roy, Ron
Absolutely Lucy	Cooper, Ilene
Alien in my pocket	Ball, Nate
Bailey School kids	Dadey, Debbie
Ballpark mysteries	Kelly, David A.
Battle bugs	Patton, Jack
Boxcar children	Warner, Gertrude
Buddy files	Butler, Dori.
Calendar mysteries	Roy, Ron
Capital mysteries	Roy, Ron
Captain Awesome	Kirby, Stan
Critter club	Barkley, Callie
Encyclopedia Brown	Sobol, Donald.
Franny K. Stein	Benton, Jim.
Galaxy Zack	O'Ryan, Ray.
The Gecko & Sticky	Van Draanen, Wendelin
Geronimo Stilton	Stilton, Geronimo
Goddess girls	Holub, Joan.
Golden hamster saga	Reiche, Dielof
Guardians of Ga'hoole	Lasky, Kathryn.
Kane chronicles	Riordan, Rick.
Little rhino	Howard, Ryan
Magic tree house	Osborne, Mary Pope.
Milo and Jazz	Montgomery, Lewis.
My weird school	Gutman, Dan
Percy Jackson	Riordan, Rick.
Princess academy	Hale, Shannon
Rainbow street shelter	Orr, Wendy
Recipe for adventure	De Laurentiis, Giada
Sam and friends	Labatt, Mary
Septimus Heap	Sage, Angie
Star fighters	Chase, Max
Zigzag kids	Giff, Patricia Reilly.

Currently cataloged series, with multiple authors

Series	Notes
American girls	Accessible by individual character
Baby-sitters club	Series title in main title
Club CSI	Accessible by series
Faith girlz	Accessible by individual character

Additional Information

Series Evaluated

Series not currently cataloged, with single author

Series	Author
Animorphs	Applegate, K. A.
Beast quest	Blade, Adam.
Candy fairies	Perelman, Helen
Canterwood crest	Burkhart, Jessica
Cupcake diaries	Simon, Coco
Dog diaries	Klimo, Kate
Dr. Kitty Cat	Clarke, Jane
Fairy tale fairies	Meadows, Daisy
George Brown class clown	Krulik, Nancy
Glimmer girls	Grant, Natalie
Magic bone	Krulik, Nancy
Ninja meerkats	Jones, Gareth.
Piper Morgan	Faris, Stephanie
Pony whisperer	Rising, Janet
Puppy place	Miles, Ellen
Rainbow magic fairies	Meadows, Daisy
Scream street	Donvaband, Tori
Secret agent Jack Stalwart	Hunt, Elizabeth
Sew Zoey	Taylor, Chloe
Sleepover girls	Jones, Jen
Spooksville	Pike, Christopher
Underworlds	Abbott, Tony

Series not currently cataloged, with multiple authors

Series
Dear dumb diary
Executioner
Scooby-Doo

Additional Data
Series Evaluated, Not Selected

American Girls

Not all titles form a single series; each character is featured in her/his own series of titles. Titles featuring each specific character are easily accessible in the catalog by series.

Superheroes

Graphic format titles featuring many superheroes are already being identified by title on spine labels. The group recommends following the same approach for text materials.

Cartoon characters

It may be possible to use title identification for these materials. Many fall into the graphic format category and may already be cataloged by title.

Choose your own adventure

This series covers several genres and age levels, making it difficult to evaluate. Many of the titles begin with the same wording, even though authors are different. Cataloging staff will evaluate on a case by case basis.

Disney fairies

It's unclear from existing minimal records whether this series has a single author. If so, it may make evaluation unnecessary. Cataloging staff will evaluate as received.