

Collecting and Managing Samples from the Stacks

Purpose:

To gather books or other items that are part of the random samples included in the Assessment Project.

To keep track of these items while they are in the Preservation Department

To build a master review file in Millennium of all items begin assessed for each collection/location.

Procedure:

1) Gathering items from the stacks for assessment:

- a. You will need a cart, pencil, some Shelving Problem forms, and a supply of notepaper.
- b. Use the “pull list” (see example below) to retrieve items from the stacks and bring them to Preservation.
 - i. The list of items to be retrieved is sorted by call number.
 - ii. If there is more than one volume with the call number listed and no volume number is provided, use the barcode to determine which volume is needed.
- c. Gather about 40-50 items at a time in order to avoid keeping large numbers of items out of circulation.
- d. Check off each item as you find it. Confirm that the barcode (or the last 6 digits of the barcode) match the item on the pull list.
- e. If you do not immediately find the item, check the books in the immediate vicinity of where the item ought to be shelved. It is possible the book was shelved incorrectly. Another place to look is on the sorting shelves. If you still do not find the book, make a note on the pull list: “NOS” along with the date.
- f. If the book is [poorly shelved](#) or shelved on its spine or fore-edge, check the appropriate boxes on the [Shelving Problem Form](#) and insert it in the book.
- g. If the book contains loose papers, post-its etc. please leave them in the book.

2) Keeping track of Items:

- a. In Millennium, check out the items to PRESERVATION-Assessment

(bassess1). (see [Checking Out Items](#) procedure).

- b. Notify Christine that you have checked out more books so that she can update the Review File. Leave her a note if she is not at her desk
- c. Shelve books on the shelves near the West entrance to M150 [Label: TO BE ASSESSED].

3) Start Assessment:

- a. Take books from the TO BE ASSESSED shelves.
- b. If possible, do direct data entry.
- c. If no computer is available, use the barcode machine to duplicate each item's barcode. If the book has OCR (#s) instead of a barcode, give it to technician for conversion to barcode.
 - i. Attach the duplicate barcode to the top of page 1 of the form (SF1, etc.)
 - ii. Complete the form and insert it in the book.
- d. Items with questions: Make a note of any questions on a particular item (in Section D of the form or on a separate piece of paper). Place items you have questions about on the QUESTIONS shelf.
- e. Once the assessment is completed, sort books by action needed (C1, C2, or C3).

4) Distributing assessed items.

- a. Place C1 and C2 books on the appropriate shelves [Labeled C1 or C2]. Staff will spot-check these items for accuracy. After spot-checking, completed items will be placed on a cart to be checked in and returned to the stacks. Any survey forms will be removed from the books and place in the data entry "to do" bin.
- b. Secondary Review.
 - i. Start a [Referred Items Form](#) for each C3 book by attaching a duplicate barcode in the upper right hand corner of the form.
 - 1. Check the appropriate box under C.3 and insert the form in the book.
 - 2. Place items needing secondary (staff) review on the SECONDARY REVIEW shelves.
 - ii. Once the secondary review is completed, staff will move items to a cart for check-in and return to the stacks. The completed Referred Items form will be placed in the data entry "to do" bin.

5) Checking in completed items.

- a. Open Millennium in Circulation mode. If you are already familiar with checking in items using text-based Chinook, you can continue to use that system.
- b. Select "Check-in."
- c. Scan in the barcode for each item on the cart labeled "TO BE CHECKED IN."
- d. After you check in each item, check it for tattle tape (security tape). If you find items that do not have tattle tape inserted, give them to the Marking Unit for insertion of tape.
- e. All other items will be distributed as follows:
 - i. Items that belong in the stacks (SCI, NOR, ART, etc.) will be placed on carts (grouped by call numbers) in or near the location to which they belong.
 - ii. Items that belong to "closed" collections such as Special Collections: to be determined.

EXAMPLE OF PULL LIST:

Location: Juvenile

| <u>no.</u> | <u>Comments/Notes</u> | <u>Call Number</u> | <u>Title</u> | <u>barcode</u> <u>(last 6 digits)</u> |
|------------|-----------------------|--------------------|----------------------|--|
| 1 | | B128.C8 F73 2002 | Confucius : the Gold | 309610 |
| 2 | | B305.D44 A54 | Diogenes: the story | 374568 |
| 3 | | BJ1857.C5 J598 c.2 | What do you do, dear | 147752 |