



The State University of New York

# New MD Editor Series: Holdings Records

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# New MD Editor Series: Holdings Records

In this session will cover:

1. Opening and releasing holdings records
2. View Versions
3. Suppressing/Unsuppressing holdings records
4. Creating new holdings records
  - Adding relevant MARC fields/subfields for:
    - Monograph
    - Serials
5. Editing holdings records
6. Deleting holdings records
7. Relinking holdings to a Different Record



# Holdings Records - Roles

One of the following roles is required to work with holdings records:

- Cataloger
- Catalog Manager
- Catalog Administrator



# Holdings Records - Basics

- Holdings records contain:
  - Location
  - Call number (if applicable)
  - Items
  - Publication pattern (serials)
  - Copy (if applicable)
  - Notes
- Holdings records are local and therefore do not use local extensions (local fields)
- Holdings records are linked to associated physical bib records
  - Items records are linked to holdings record
- The following fields are required in a holdings record:
  - LDR
  - 008
  - 005
  - 852



# Holdings Records - Basics

- Holdings records are created in Alma using holdings templates
  - POLs use the default holdings template
  - In the MD Editor, holdings templates can be selected
- Holding records are typically created when a POL is created for One-Time and Continuous physical orders
  - Standing order holding records are created in the MD Editor upon receipt of a new title
- Do not change the holdings location in the MD Editor
  - Best practice is to change the item location from the Physical Item Editor by selection “**Edit**” from the ellipses of the item record
    - Using “**Change Location**” from the List of items will put the item into a work order

**Note:** Templates will not be available in the new MD Editor until January 2021



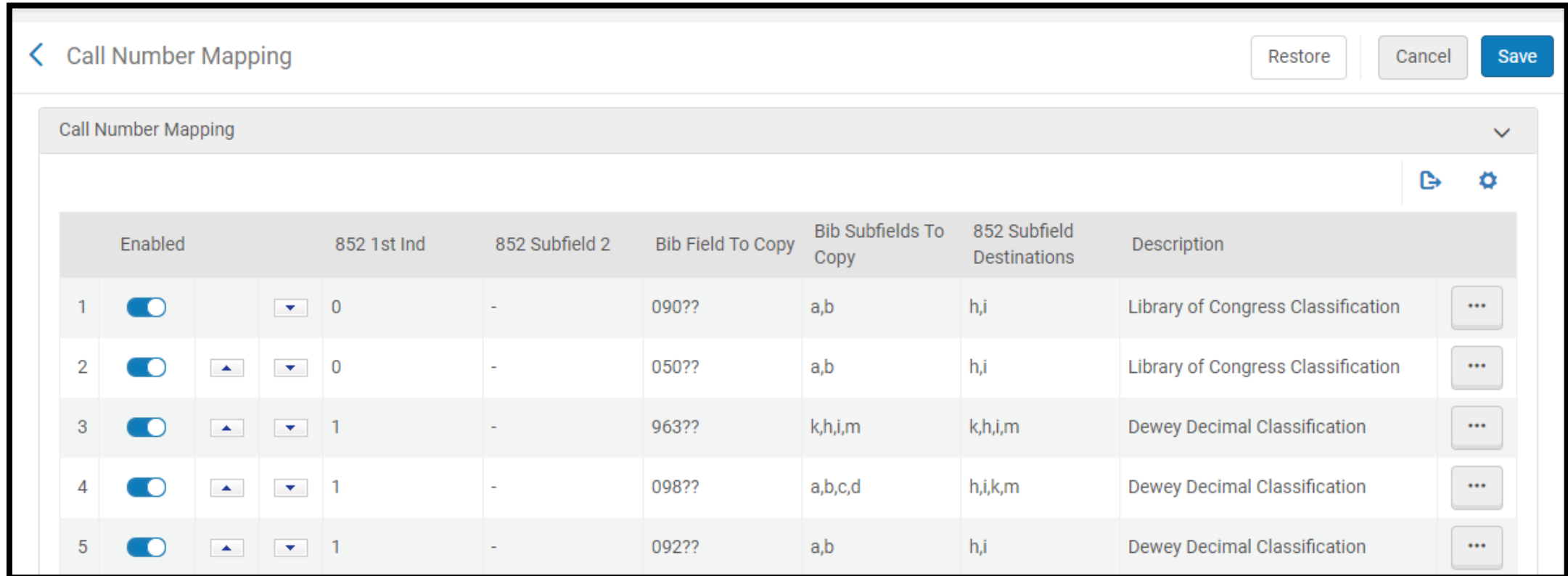
# Holdings – Call Number Mapping

- The Call Number Mapping table maps call number information maps from the bibliographic record to the holdings record
- Call Number Mapping will determine the call number schema default that is used in holdings records when:
  - Saving a new holdings record in the MD Editor
  - Selecting “**Update from Bibliographic**” in the MD Editor to update the holdings information for a new or modified holdings record
  - Running an import profile job that creates inventory
  - Using the “**Change Holding Information**” job
- The first matching row in the table (uses a rota) will be used to define which defined Call Number Mapping will be used when creating a new holdings record



# Holdings – Call Number Mapping

- To view how call number mapping is configured at your institution, go to **Configuration>Resources>Other>Call Number Mapping**



	Enabled		852 1st Ind	852 Subfield 2	Bib Field To Copy	Bib Subfields To Copy	852 Subfield Destinations	Description	
1	<input checked="" type="checkbox"/>		0	-	090??	a,b	h,i	Library of Congress Classification	...
2	<input checked="" type="checkbox"/>	▲	0	-	050??	a,b	h,i	Library of Congress Classification	...
3	<input checked="" type="checkbox"/>	▲	1	-	963??	k,h,i,m	k,h,i,m	Dewey Decimal Classification	...
4	<input checked="" type="checkbox"/>	▲	1	-	098??	a,b,c,d	h,i,k,m	Dewey Decimal Classification	...
5	<input checked="" type="checkbox"/>	▲	1	-	092??	a,b	h,i	Dewey Decimal Classification	...



# Holdings – Call Number Schema

- MARC 852 first indicator determines what call number schema is used for the holdings record
- First indicator of MARC 852 can be edited in the MD Editor to change the call number schema being used in the holdings record
- Holdings templates can be use pre-define the call number schema to be used when creating a new holdings record

First Indicator	Call Number Schema
1	Dewey Decimal Classification
0	Library of Congress Classification
2	National Library of Medicine Classification
#	No Information Provided
8	Other Schema
6	Shelved Separately
4	Shelving Control Number
7	Source Specified in Subfield \$2
3	Superintendent of Documents Classification
5	Title



# Opening Holdings Records from a Repository Search

1. Perform a repository search
2. Click **Holdings** from the ellipses
3. Click **Edit**
  - One holdings – **Edit** will be at the top of the screen
  - Multiple holdings – **Edit** will be in the list of actions in the ellipses of the holdings record
  - **NOTE:** Holdings can be Pushed to MDE

Record View

Push to MDE Edit Back Relink

Dog / written by Juliet Clutton-Brock.

MMS ID 2250197360004844  
Suppress from publishing No  
Brief level -  
Record Format marc21\_holding  
Suppress from external search No

LDR 00156nx a22000611i 4500  
005 20201015110809.0  
008 1801302u 8 4001uueng0000000  
852 0\_ |a NNepSU |b NEWMN |c JUVY |h SF426.5 |i .C58 1991

1 - 2 of 2 Call number

0 rows selected Push Selected to MDE Delete Holdings Add new Holdings

Filter: All Library: All Location: All

ID	Suppressed	Library	Location	Call Number	Copy Id	Access Number	No. of Items	Available	PO Line
1 2282008650004...		Sojourner Truth Library	Stacks	DG416 .A84 2020	-	-	1	1	-
2 2282721840004...		Sojourner Truth Library	Super Oversize	DG416 .A84 2020	-	-	1		

Note with multiple holdings you can Add new holdings from the List of Holdings

View Edit Push to MDE Relink View items Associate a PO Line



# Opening Holdings Records in the MD Editor

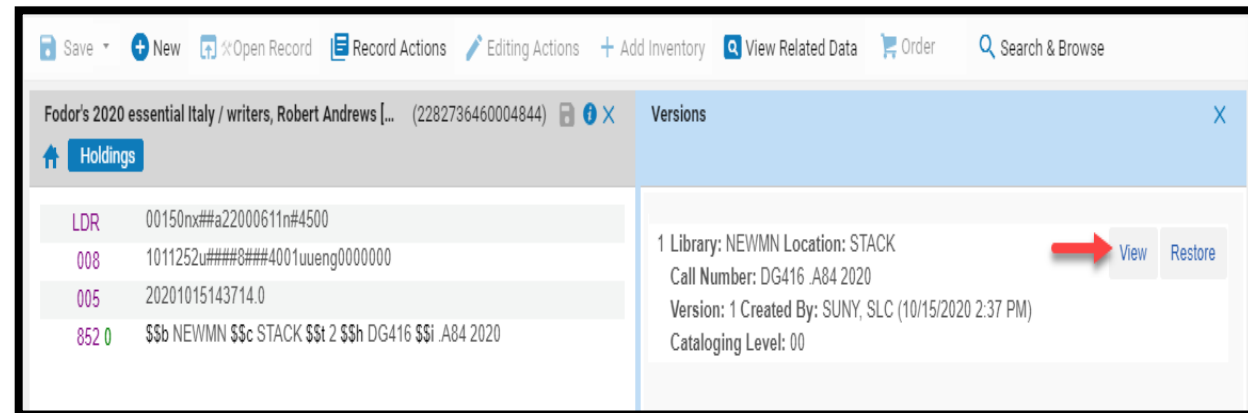
1. Open a bib record in the MD Editor
2. Click **View Related Data>View Inventory**
  - The holdings record(s) will display on the right-side of the split screen editor
3. Click **View** or **Edit**
  1. View – to view the holdings record without it being open in the MD Editor
    - Click on “Back to results” or
    - Click the “X” to close the inventory view
  2. Edit – opens the holdings record in the MD Editor and it can be edited

The image shows two overlapping screenshots of the MD Editor interface. The top screenshot displays the 'Inventory' window with tabs for 'Holdings(1)', 'Portfolio(0)', 'Representation(0)', and 'Electronic Collection(0)'. It shows a single library record for 'Sojourner Truth Library' with call number 'B132.Y6 W592 1973' and 2 items available. The bottom screenshot shows a detailed 'Holdings' record for 'Yoga / Ernest Wood' with call number 'NEWMN B1...'. It lists three holdings: LDR (00156nx##a22000611i#4500), 005 (20200905135959.0), and 008 (1906232u####8###4001uueng0000000). The 852 field is highlighted, showing '\$\$a NNepSU \$\$b NEWMN \$\$c STACK \$\$h B132.Y6 W592 1973'.

# Holdings Records - Viewing Versions

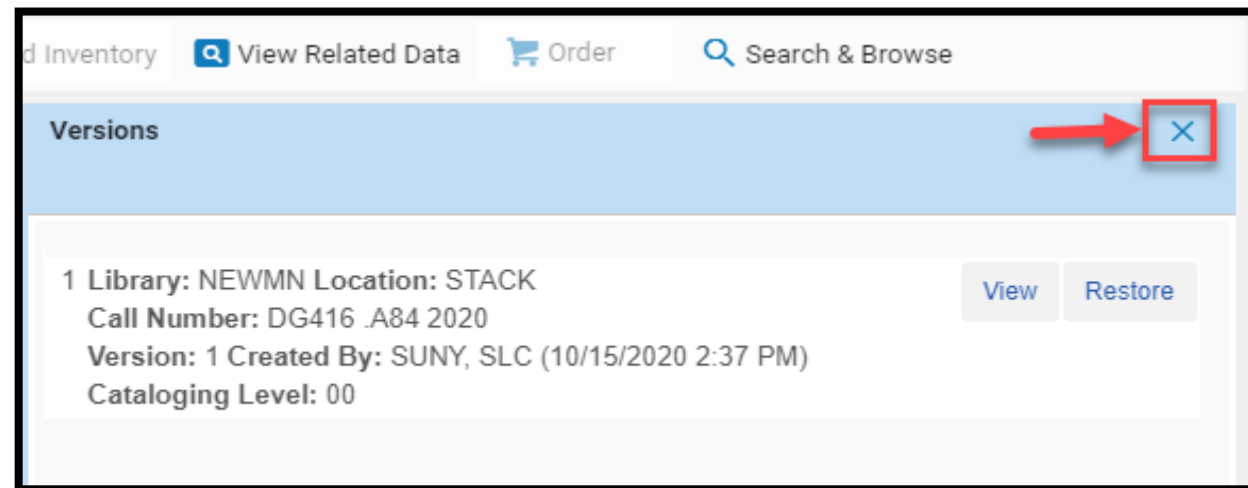
To view versions:

1. Open the holdings record in the MD Editor
2. Click **View Related Data>View Versions**
  - The versions will display on the right-side of the split screen editor if they exist
3. Click **View**



To close versions:

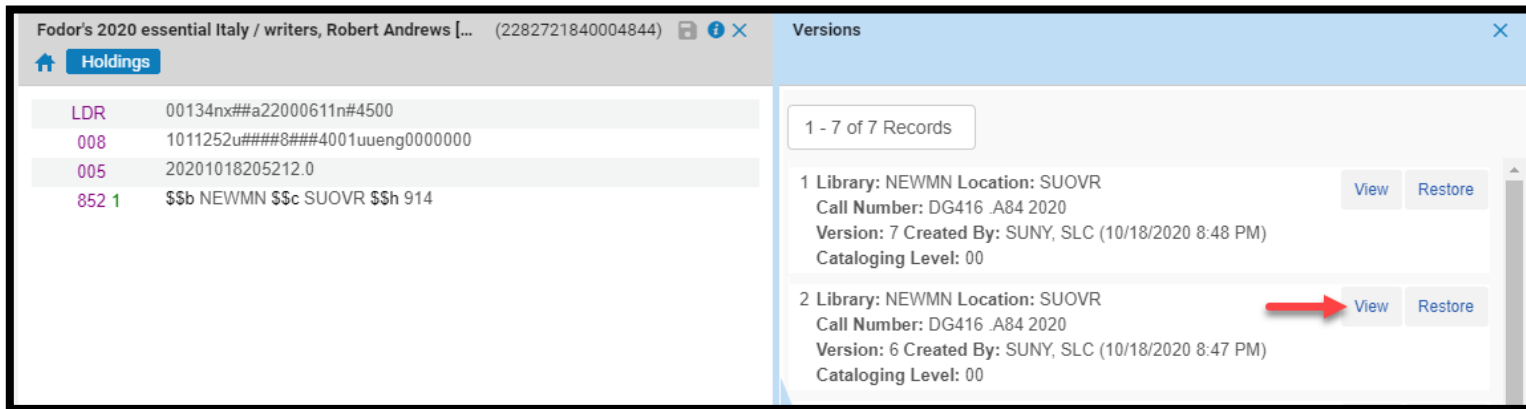
1. Click the “X” in the upper right corner of the right-side of the split screen editor



# Holdings Records - Viewing Versions

To restore a version:

1. Open the holdings record in the MD Editor
2. Click **View Related Data>View Versions**
  - The versions will display on the right-side of the split screen editor if they exist
3. Click **View**
4. Click **Restore**
5. Click **Save>Save and Release Record (Ctrl+Alt+R)**



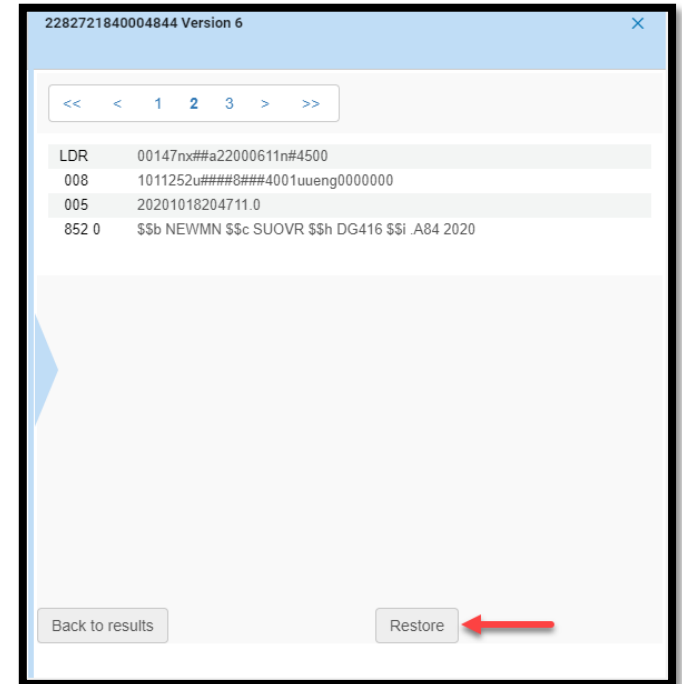
The screenshot shows a split-screen interface. On the left, the 'Holdings' tab is active, displaying a table with the following data:

LDR	00134nx##a22000611n#4500
008	1011252u###8###4001uueng0000000
005	20201018205212.0
852 1	\$\$b NEWMN \$\$c SUOVR \$\$h 914

On the right, the 'Versions' tab is active, showing a list of two records:

- 1 Library: NEWMN Location: SUOVR  
Call Number: DG416 .A84 2020  
Version: 7 Created By: SUNY, SLC (10/18/2020 8:48 PM)  
Cataloging Level: 00
- 2 Library: NEWMN Location: SUOVR  
Call Number: DG416 .A84 2020  
Version: 6 Created By: SUNY, SLC (10/18/2020 8:47 PM)  
Cataloging Level: 00

Red arrows point to the 'View' button for the second record in the 'Versions' list.



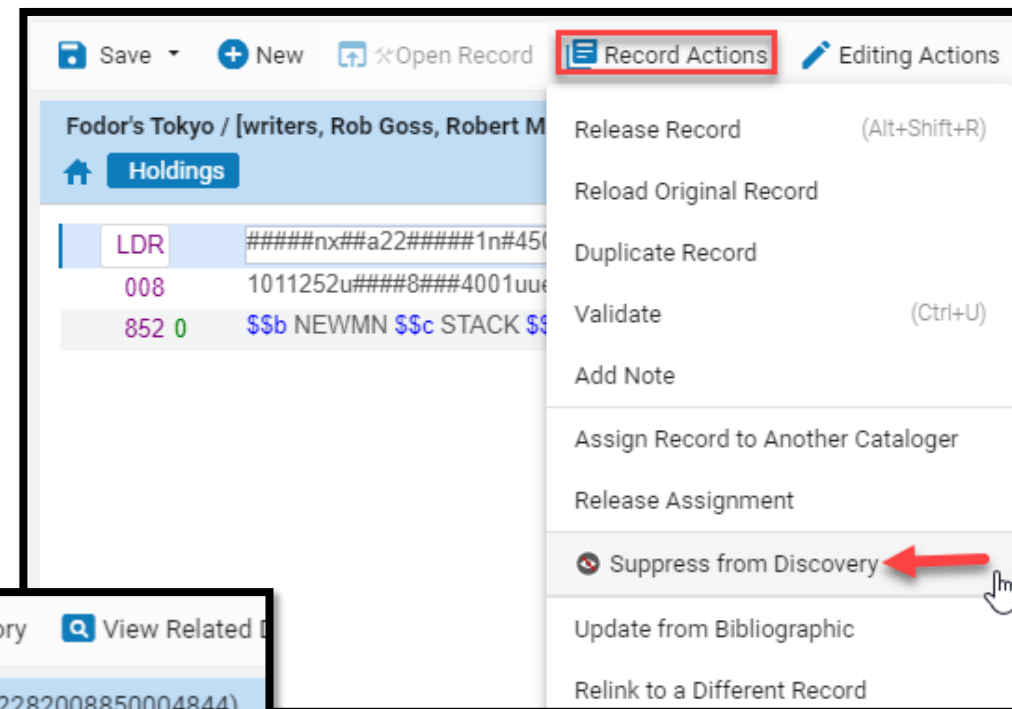
The screenshot shows a dialog box titled '2282721840004844 Version 6'. It contains a table with the following data:

LDR	00147nx##a22000611n#4500
008	1011252u###8###4001uueng0000000
005	20201018204711.0
852 0	\$\$b NEWMN \$\$c SUOVR \$\$h DG416 \$\$i .A84 2020

At the bottom of the dialog, there are two buttons: 'Back to results' and 'Restore'. A red arrow points to the 'Restore' button.

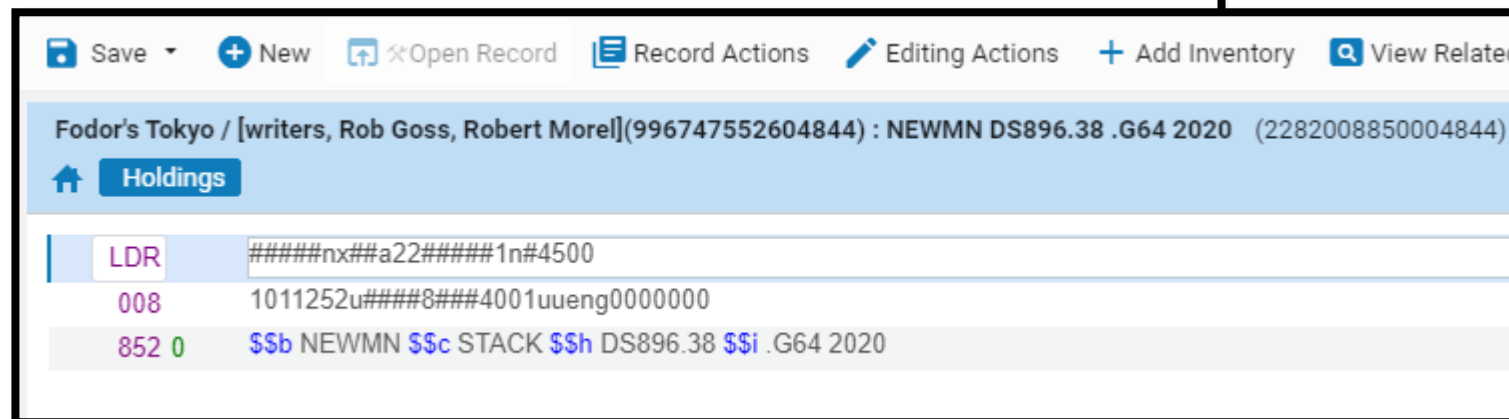
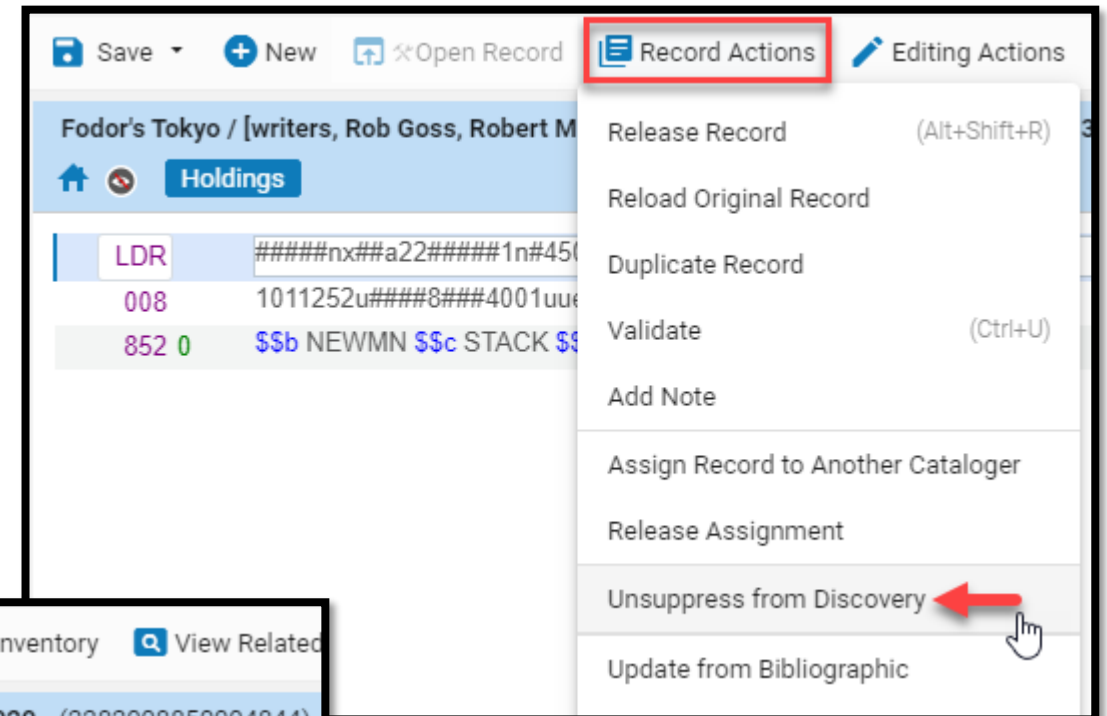
# Suppressing a Holdings Record

- Suppressing a holdings record will only suppress the holdings record and associated items in PrimoVE and not the bib record
- To suppress a holdings record:
  1. Open the holdings record in the MD Editor
  2. Click **Record Actions>Suppress from Discovery**
  3. Click **Save>Save and Release Record** (Ctrl+Alt+R)



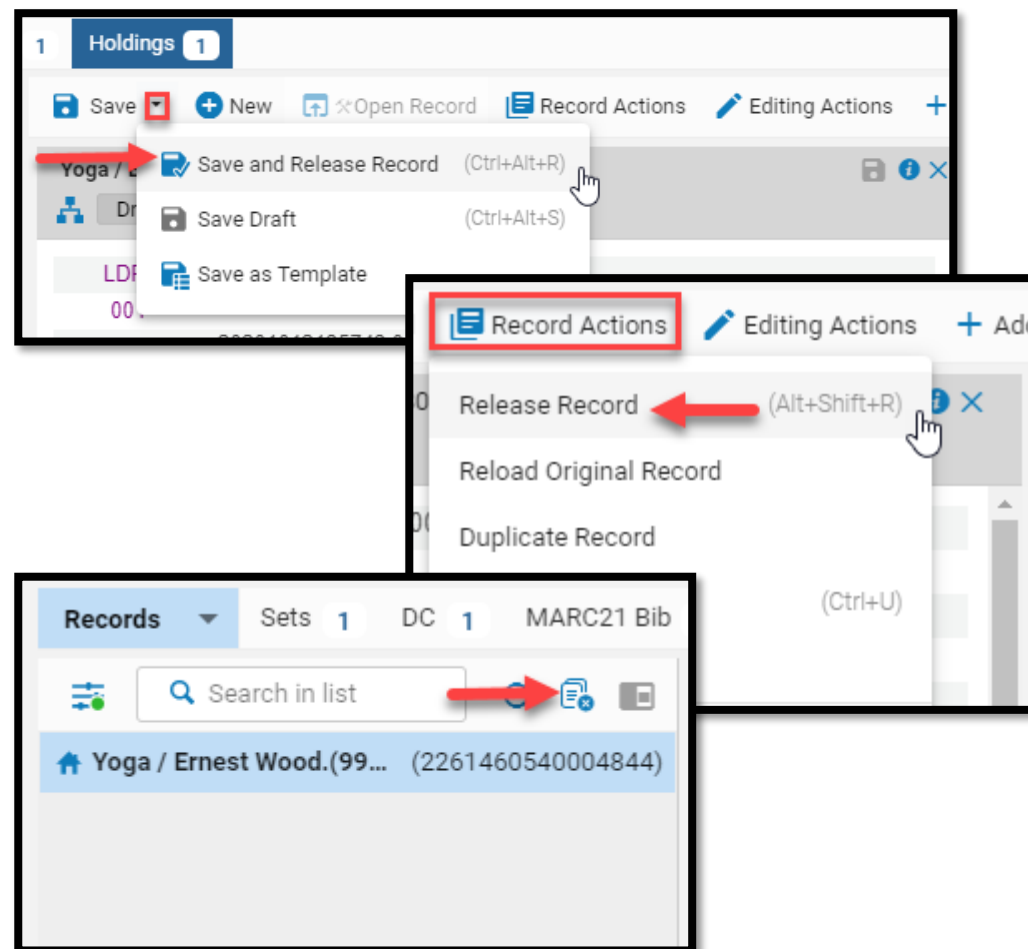
# Unsuppressing a Holdings Record

- Unsuppressing a holdings record will allow the holdings and associated items to be discoverable in PrimoVE
- To unsuppress a holdings record
  1. Open the holdings record in the MD Editor
  2. Click **Record Actions>Unsuppress from Discovery**
  3. Click **Save>Save and Release Record**



# Releasing Holdings Records in the MD Editor

- Holdings records need to be released once they have been opened in the editing portion of the MD Editor. To release holdings record perform of the following actions:
  - Click **Save>Save and Release Records** (Ctrl+Alt+R)
    - Use when changes have been made to the holdings record
  - Click **Record Actions>Release Records**
    - Use when no changes have been made to the holdings record
  - Click on the “**Release Displayed Records List**” icon
    - Use when you forget to release holdings records from the MD Editor



# Creating New Holdings Records

- Holdings records are automatically created when a physical title is ordered in Alma for:
  1. One-Time (Monographs)
  2. Continuous (Serials)
- Use cases for creating a new holdings records:
  1. Standing Order titles
  2. Adding a missing item to the repository
  3. Libraries not using acquisitions in Alma (not creating POLs)





# Creating New Holdings Records – Monographs

1. Open a bib record in the MD Editor
2. Click **New**
3. Click on the appropriate **MARC21 Holdings template**
  - The holdings record will open on the right-side of the split screen editor
4. Click into field **MARC 852**
5. Click **Editing Actions>Open Form Editor** (Ctrl+F)
  - Or type directly in the MARC subfields
6. Fill in the subfields: [Minimal fields]
  1. Location (a) – [Optional]
  2. Sublocation or Collection (b) – [Select the owning library]
  3. Shelving Location (c) – [Select the location where the item will be shelved]
7. Copy (t) is optional and only used if you want to have separate holdings records in the same location
  - Add the copy number to Copy (t) in MARC 852
8. Click **Editing Actions>Close Form Editor** (ESC)
  - Can also click into another MARC field to close the form editor
9. Click **Save** or **Save>Save and Release Record**
  - The call number will populate based on first call number schema it matches on



# Creating New Holdings Records - Monographs

Save New Open Record Record Actions Editing Actions Add Inventory View Related Data Order Search & Browse

Fodor's 2020 essential Italy / writers, Robert Andrews [and 8 others].(996747551404844) : NEWMN (2282736460004844)

New Holdings

LDR #####nx##a22#####1n#4500  
008 1011252u####8###4001uueng0000000

852 # #	Location( a )	Sublocation or collection( b )	NEWMN Sojourner Truth Library
	Shelving location( c )	Former shelving location( d )	
	Address( e )	Coded location qualifier( f )	
	Non-coded location qualifier( g )	Classification part( h )	
	Item part( i )	Shelving control number( j )	
	Call number prefix( k )	Shelving form of title( l )	
	Call number suffix( m )	Country code( n )	
	Piece designation( p )	Piece physical condition( q )	
	Copyright article-fee code( s )	Copy number( t )	2 Optional
	Uniform Resource Identifier( u )	Nonpublic note( x )	
	Public note( z )	Source of classification or shelving scheme( 2 )	
	Materials specified( 3 )	Linkage( 6 )	
	Sequence number( 8 )		



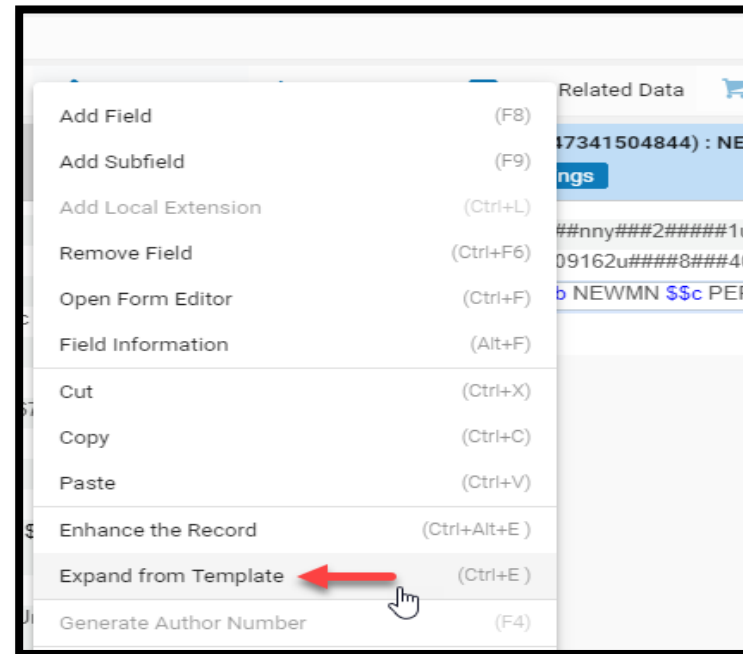
# Creating New Holdings Records – Serials

1. Open a bib record in the MD Editor
2. Click **New**
3. Click on the appropriate **MARC21 Holdings template**
  - The holdings record will open on the right-side of the split screen editor
4. Click into the first indicator in **MARC 852** and change it to the appropriate call number schema (or skip and it will default to the first call number mapping)
  - 1 = Dewey Decimal Classification
  - 0 = Library of Congress (LOC) Classification
  - 2 = National Library of Medicine (NLM) Classification
  - 5 = Title (call number field will be blank)
5. Click **Editing Actions>Open Form Editor** (Ctrl+F)
  - Or type directly in the MARC subfields
6. Fill in the subfields: [Minimal fields]
  1. Location (a) – [Optional]
  2. Sublocation or Collection (b) – [Select the owning library]
  3. Shelving Location (c) – [Select the location where the item will be shelved]



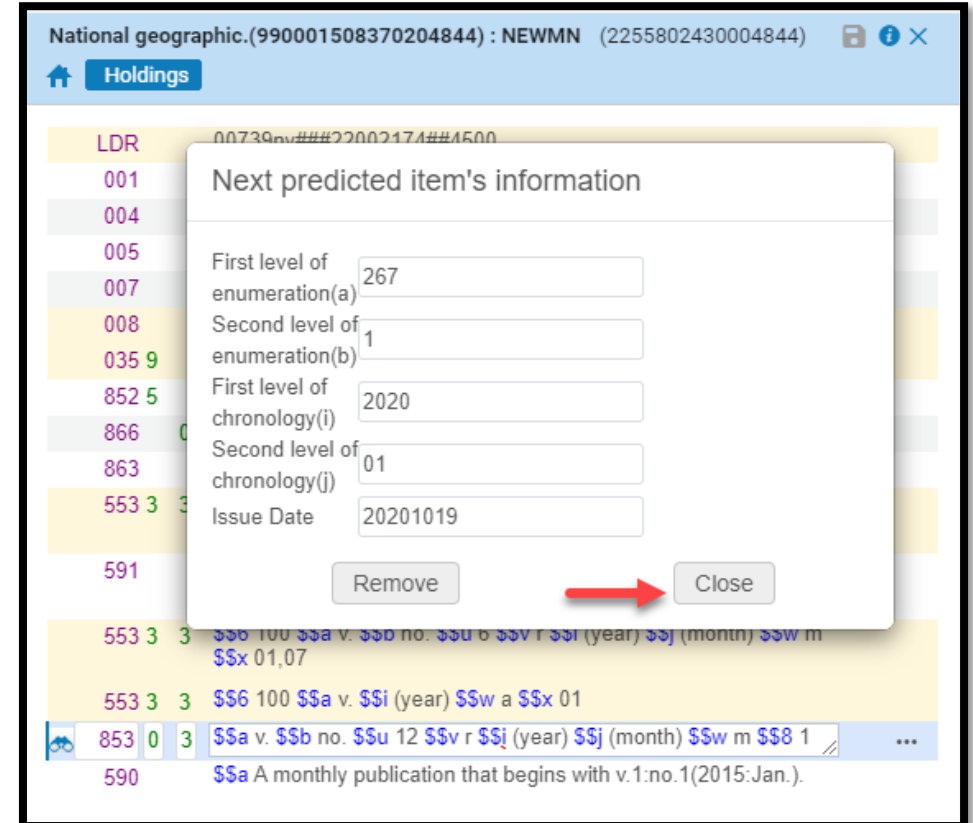
# Creating New Holdings Records - Serials

7. Hit the **Esc** key to close the form editor
8. Click **Editing Actions>Expand from Template**
  1. Choose Template: [Select the appropriate Serials Template]
9. Click **Ok**
  1. MARC 853 and 590 will be created based on the template
10. Edit MARC 853 and/or 590 if necessary
11. Add 863 or 866 MARC
  - These fields tell users what holdings you have for the serial title
  - 863 - Enumeration and Chronology - Basic Bibliographic Unit
  - 866 - Textual Holdings - Basic Bibliographic Unit



# Creating New Holdings Records - Serials

12. Click **Save** or **Save>Save and Release Record**
  - To create a prediction pattern move on to step 12
13. Create a prediction pattern (not mandatory)
  1. Click into MARC 852
  2. Click Editing Actions>Expand from Template
  3. The Expand from Template screen opens
    1. Choose the appropriate template
    2. Click “**Ok**”
  4. Click into MARC 853
  5. Click **Record Actions>Next predicted Item’s information**
  6. Fill in the enum/chron
    - Enum/Chron are configured under Description Templates in Configuration
  7. Click **Close**




# Creating New Holdings Records - Serials

13. Create a prediction pattern (not mandatory)
  8. Click **Record Actions>Open predicted Items**
  9. Click **Save**
  10. Click **Save>Save and Release Record**

Predicted Items

	Description	Status	Expected Arrival Date
1	v.267:no.1(2020:Jan.)	Item not in place	2020-11-18
2	v.267:no.2(2020:Feb.)	Item not in place	2020-12-19
3	v.267:no.3(2020:Mar.)	Item not in place	2021-01-18
4	v.267:no.4(2020:Apr.)	Item not in place	2021-02-18
5	v.267:no.5(2020:May)	Item not in place	2021-03-21
6	v.267:no.6(2020:June)	Item not in place	2021-04-18
7	v.267:no.7(2020:July)	Item not in place	2021-05-19
8	v.267:no.8(2020:Aug.)	Item not in place	2021-06-18
9	v.267:no.9(2020:Sep.)	Item not in place	2021-07-19
10	v.267:no.10(2020:Oct.)	Item not in place	2021-08-18
11	v.267:no.11(2020:Nov.)	Item not in place	2021-09-18

Discard  Save

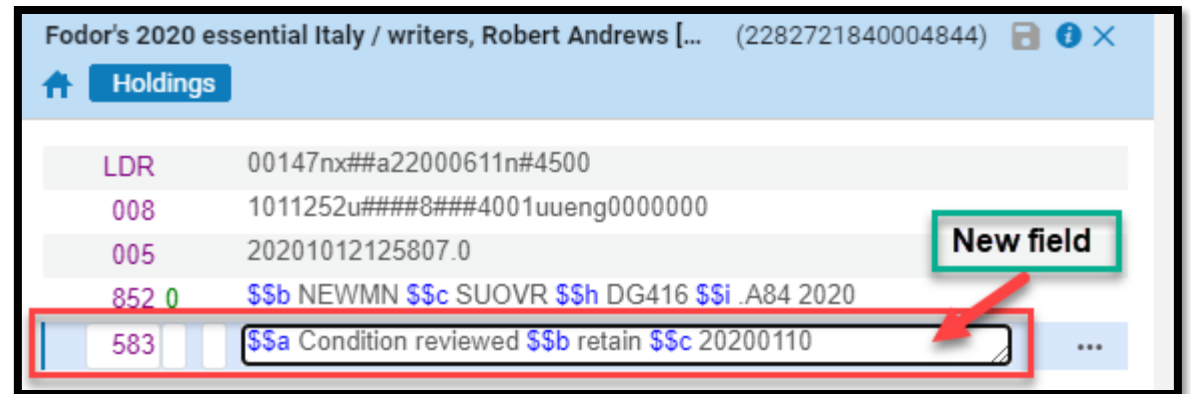
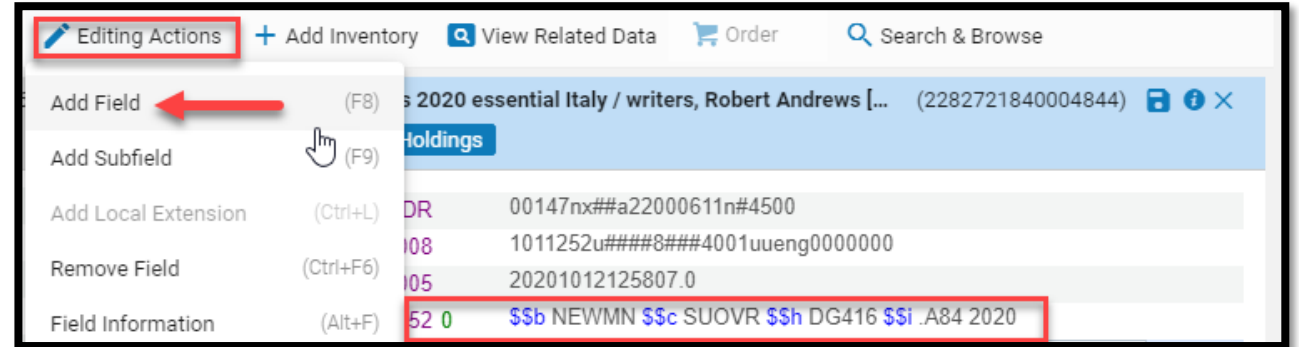
# Editing Holdings Records

Holdings record can be edited to:

1. Add new fields
2. Delete existing fields/subfield
3. Edit existing fields
4. Edit the call number

To add a new field:

1. Open the holding record in the MD Editor
2. Click into the MARC holdings field above (or any MARC field)
3. Click **Editing Actions>Add Field** (F8)
4. Type in the MARC field/indicators/subfields
5. Click **Save>Save and Release Record**



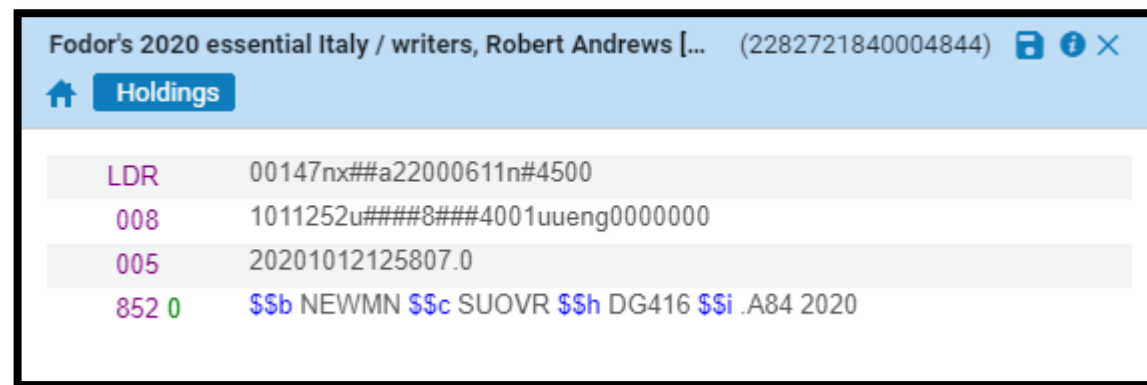
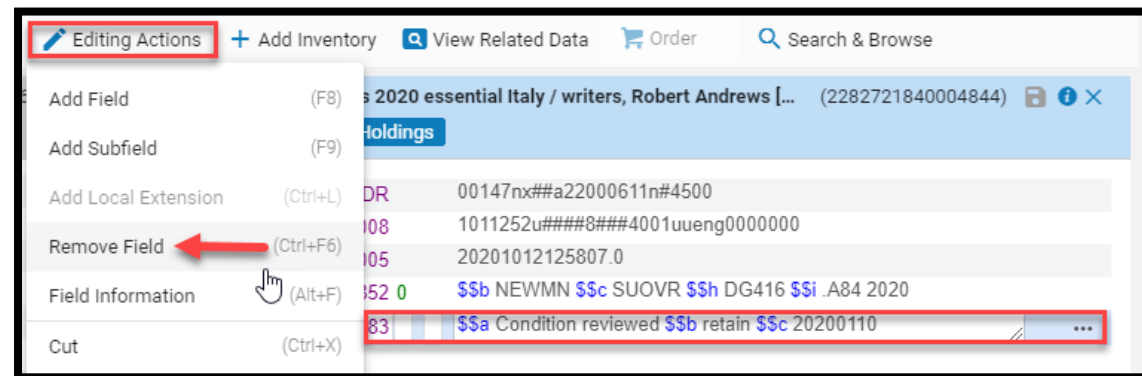
# Editing Holdings Records

Use cases when holdings records should be deleted:

1. Holdings records migrated without associated items
2. Holdings record was not deleted when the last item was withdrawn

To delete an existing MARC field:

1. Open the holding record in the MD Editor
2. Click into the MARC holdings field to be deleted
3. Click **Editing Actions>Remove Field** (Ctrl+F6)
4. Click **Save>Save and Release Record**

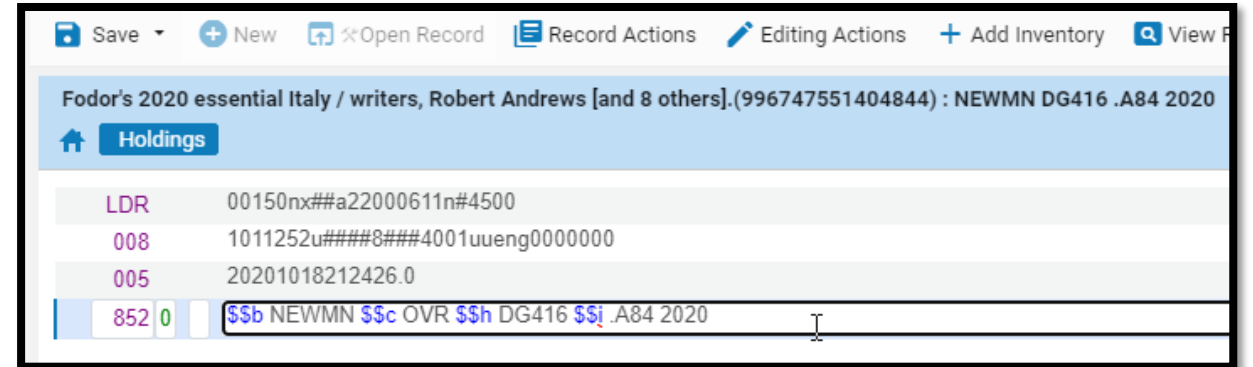




# Editing Holdings Records

To edit existing MARC holdings subfields:

1. Open the holdings record in the MD Editor
2. Click into MARC field to be edited
  - Open the form editor for appropriate MARC holdings fields
3. Add, editor, or delete the subfield to be edited
4. Click **Save>Save and Release record** (Ctrl+Alt+R)



Save New Open Record Record Actions Editing Actions Add Inventory View

Fodor's 2020 essential Italy / writers, Robert Andrews [and 8 others].(996747551404844) : NEWMN DG416 .A84 2020

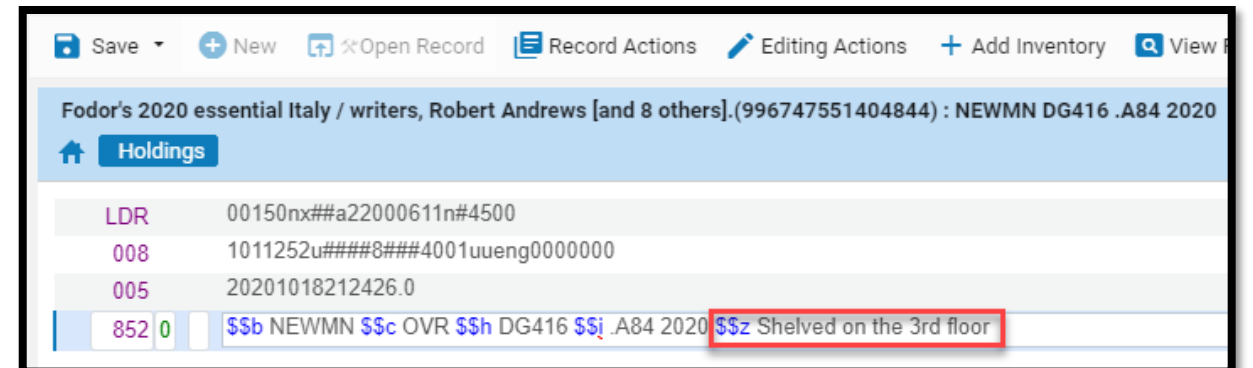
Holdings

LDR 00150nx##a22000611n#4500

008 1011252u####8###4001uueng0000000

005 20201018212426.0

852 0 \$b NEWMN \$c OVR \$h DG416 \$j .A84 2020



Save New Open Record Record Actions Editing Actions Add Inventory View

Fodor's 2020 essential Italy / writers, Robert Andrews [and 8 others].(996747551404844) : NEWMN DG416 .A84 2020

Holdings

LDR 00150nx##a22000611n#4500

008 1011252u####8###4001uueng0000000

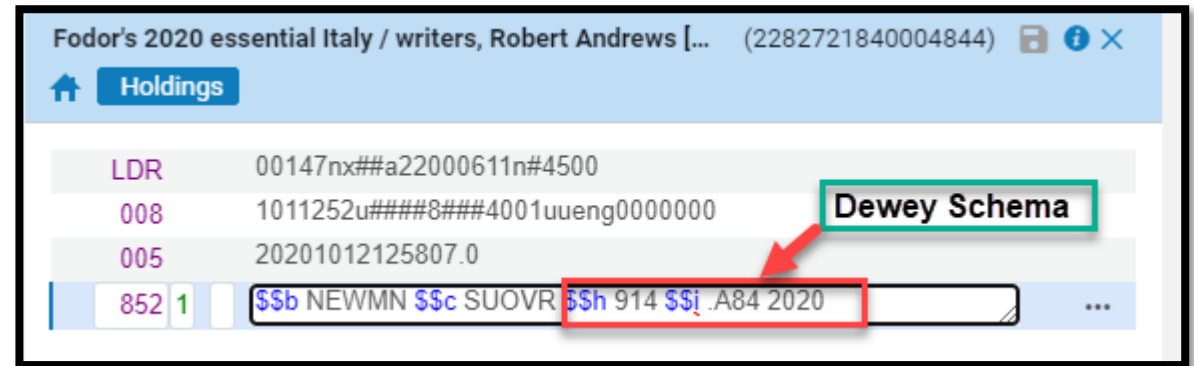
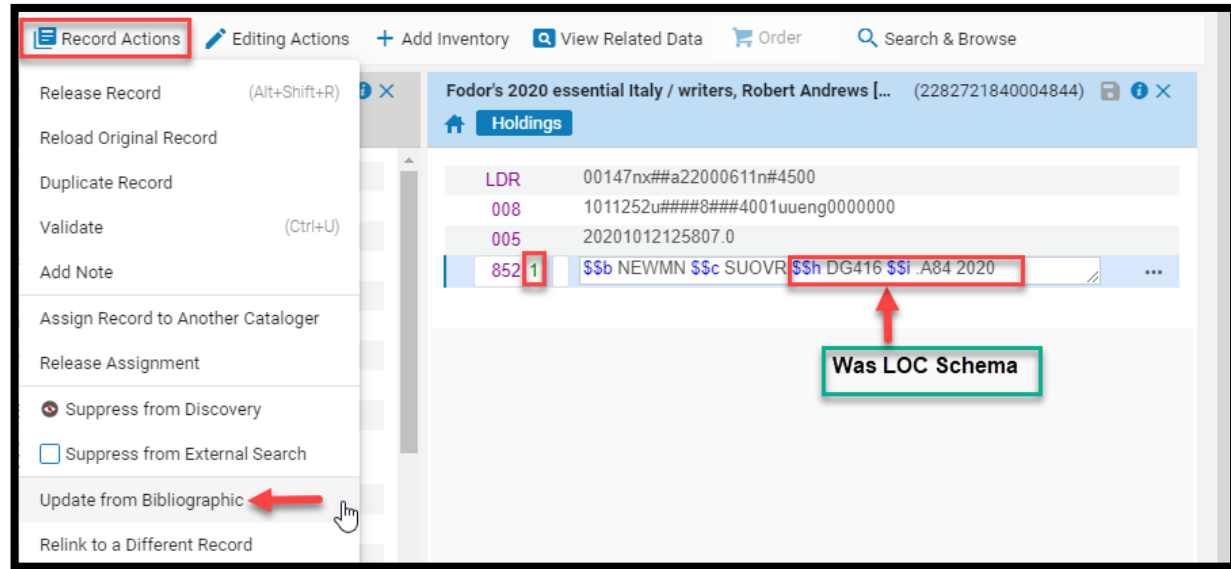
005 20201018212426.0

852 0 \$b NEWMN \$c OVR \$h DG416 \$j .A84 2020 \$z Shelved on the 3rd floor

# Editing Holdings Records

To edit MARC holdings call numbers:

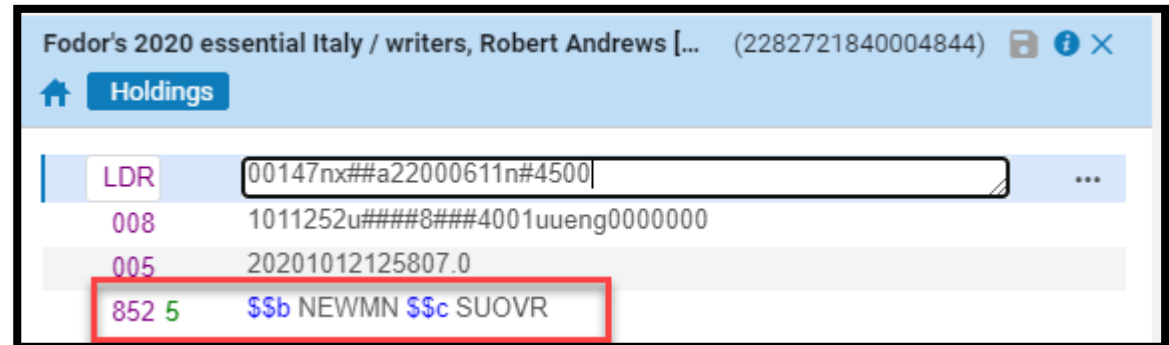
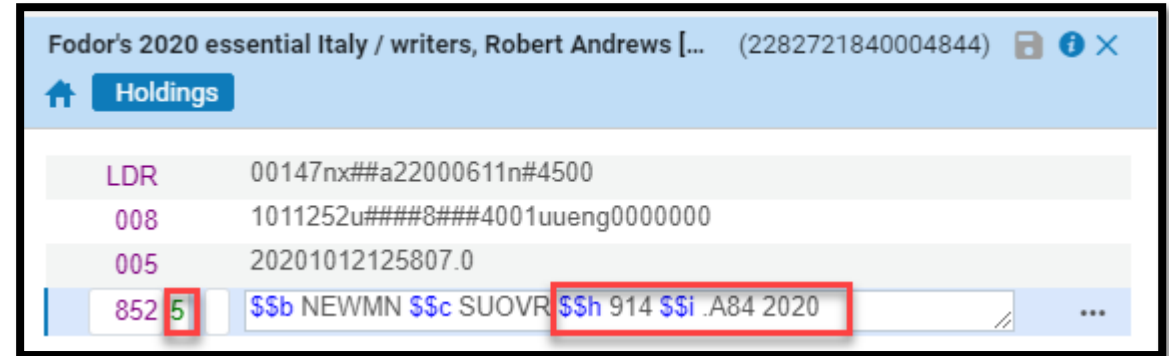
1. Open the holdings record in the MD Editor
2. Click into the first indicator for MARC 852 and change it to the appropriate call number schema
3. Click **Record Actions**>**Update from Bibliographic** (Alt+U)
4. Click **Save**>**Save and Release Record** (Ctrl+Alt+R)



# Editing Holdings Records

To change the call number schema to use Title:

1. Open the holdings record in the MD Editor
2. Click into the first indicator for MARC 852 and change the first indicator to 5
3. Delete \$\$h and \$\$i
4. Click the **Save>Save and Release Record** (Ctrl+Alt+R)



# Deleting Holdings Records

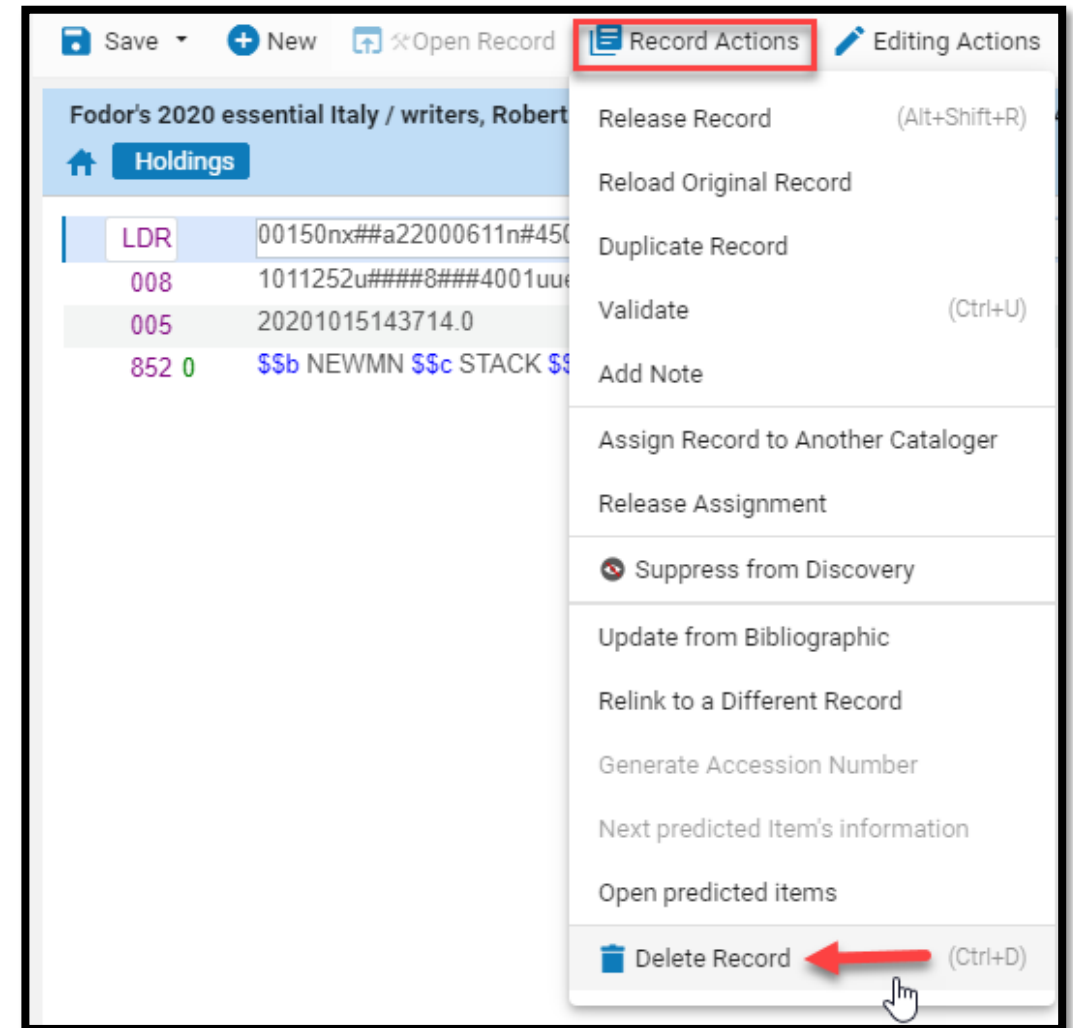
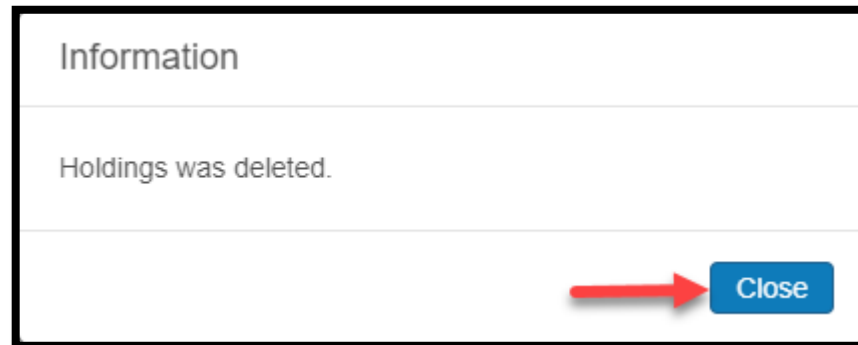
- A holdings record (s) can be deleted from:
  - The MD Editor
  - The List of Holdings when there are multiple holdings records on a title
- Only holdings records without associated inventory can be deleted from:
  - The MD Editor
  - The List of Holdings screen
- When the last holdings record is deleted in the MD Editor you will be asked: **“Delete bibliographic record (unless other holdings are present”**
  - Answer **“Yes”** if it is the last holdings record



# Deleting Holdings Records in the MD Editor

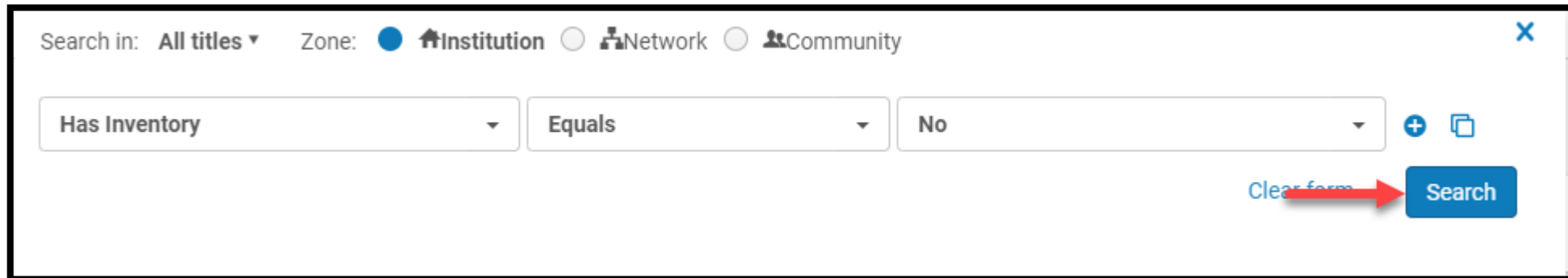
To delete holdings records in the MD Editor:

1. Open the holdings record in the MD Editor
2. Click **Records Actions>Delete Record**
3. Click “**Yes**” from the Confirmation message
4. Click “**Close**” from the Information message



# Relink Holdings Records to a Different Record

- Relinking holdings records will move the holdings record and associated POLS from one bib record to another
- The bib record will remain in the repository if the last holdings record for a title is relinked to another bib record
  - The record without holdings will need to be deleted from the repository
  - NZ linked bib records will need to be unlinked from the NZ before deleting
- The following advanced All Titles repository search can be used to find bib records without associated holdings records: All Titles: Has Inventory: Equals: No



Search in: All titles ▾ Zone:  Institution  Network  Community

Has Inventory ▾ Equals ▾ No ▾ + 📄

Clear form → Search

# Relink Holdings Records to a Different Record

To relink holdings to another record:

1. Open the Holdings record in the MD Editor
2. Click **Record Actions>Relink to a Different Record**
  1. The “Relink Holdings – Search Bibliographic Record screen open on the right-side of the split screen editor
3. Type in the search criteria for the record the holding will be linked to
4. Click **View**
5. Select **Restore**
6. Click **Execute**
7. **Save>Save and Release Record** (Ctrl+Alt+R)

The screenshot shows the 'Relink Holdings - Search Bibliographic Records' window. The search results for 'Fodor's 2020 essential Italy / writers, Robert Andrews [and 8 others]' are displayed. A red arrow points to the 'View' button. Below the search results, the 'Fodor's 2020 essential Italy / writers, Robert Andrews [an...' window is open, showing a list of holdings. A red arrow points to the 'Execute' button at the bottom right of this window.

Relink Holdings - Search Bibliographic Records

Internal(1)

1 Fodor's 2020 essential Italy / writers, Robert Andrews [and 8 others]. (996747551404844) View Relink

By Andrews, Robert, (Book Fodor's Travel., [New York] :, 2020)  
ISBN: 1640971807  
Record Source: YDX  
Subjects: Guidebooks., Italy., Italy--  
Other System Number: (OCoLC)on1076509786 (OCoLC)1076509786

Fodor's 2020 essential Italy / writers, Robert Andrews [an...

LDR	02557cam#a2200541i#4500
001	991060300718204801
005	20201012152446.0
008	181130t20202020nyuab#####001#0#eng#d
010	\$\$a ##2018907409
020	\$\$a 1640971807 \$\$q (paperback)
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100 1	\$\$a Andrews, Robert, \$\$e author.
245 1 0	\$\$a Fodor's 2020 essential Italy / \$\$c writers, Robert Andrews [and 8 others].
246 3 8	\$\$a Fodor's essential Italy 2020
246 3 4	\$\$a Fodor's travel essential Italy 2020

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# Supporting Documentation

The image features a solid blue background. A large, faint, light blue arrow points from the left towards the right, positioned behind the text. A circular outline, also in a light blue shade, is centered on the page, partially overlapping the arrow and the text.



# Supporting Documentation

## SUNY:

- SLSS Libguide: [Working with Holdings Records](#)

## Ex Libris:

- [Working with Holdings Records](#)
- [Mapping Call Number to Holdings](#)

## Library of Congress (LOC):

- [Understanding Holdings records](#)

