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 therefor 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

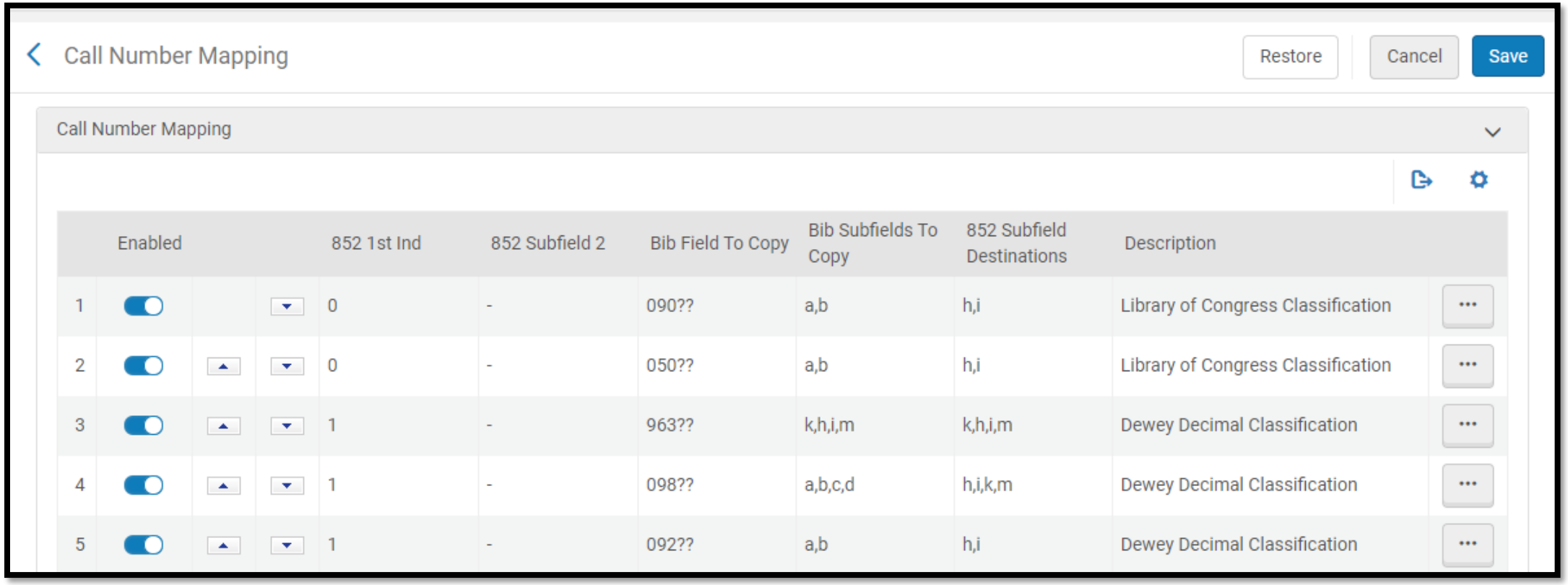
Note: Templates will not be available in the new MD Editor until January 2021

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		0	-	090??	a,b	h,i	Library of Congress Classification
2		0	-	050??	a,b	h,i	Library of Congress Classification
3		1	-	963??	k,h,i,m	k,h,i,m	Dewey Decimal Classification
4		1	-	098??	a,b,c,d	h,i,k,m	Dewey Decimal Classification
5		1	-	092??	a,b	h,i	Dewey Decimal Classification

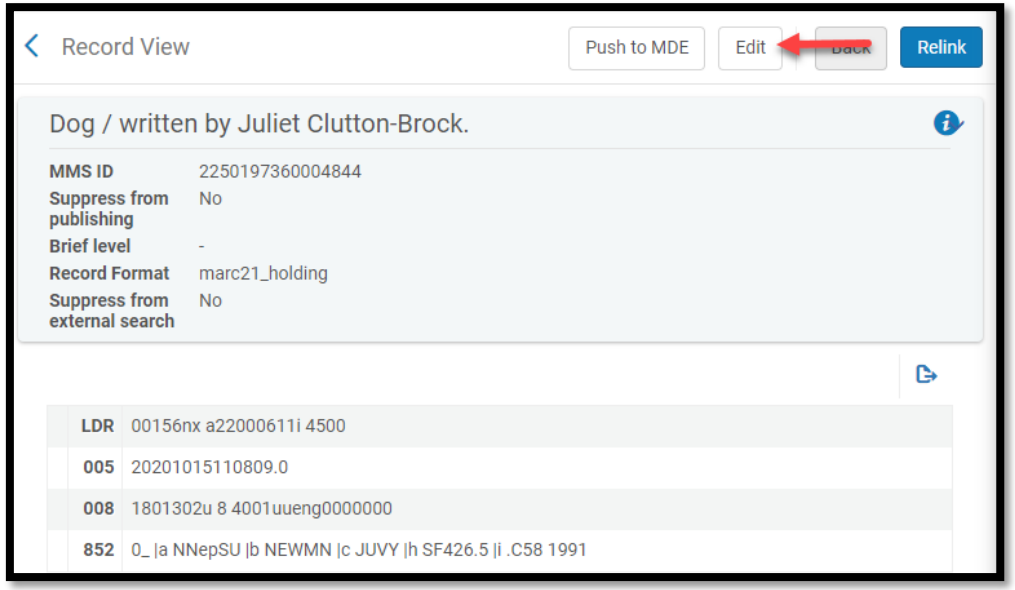
Holdings – Call Number Schema

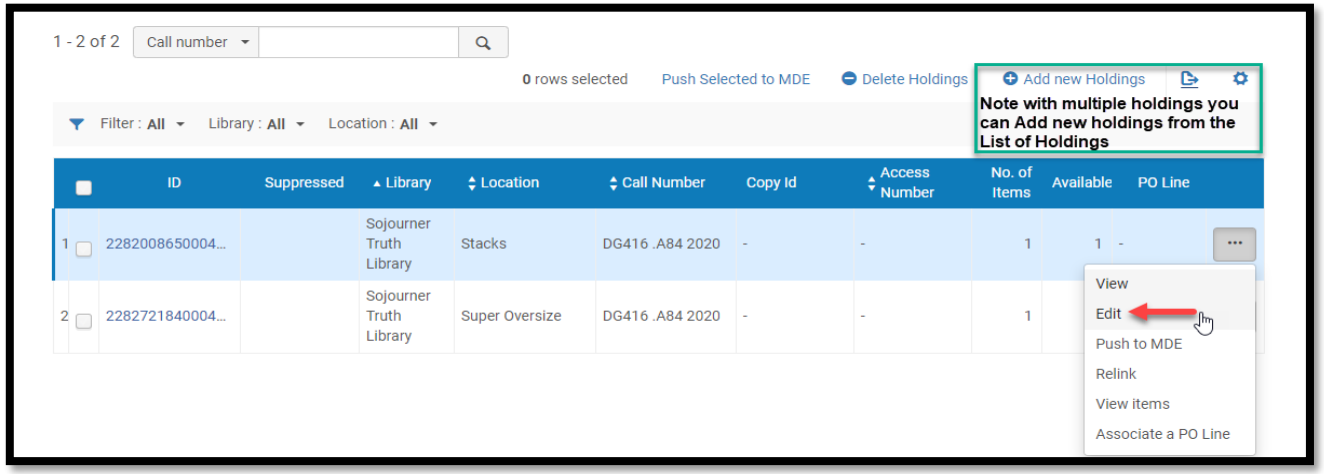
- MARC 852 first indicator determines what call number schema is used for the holdings record
- First indicator of MARC 852 can be edited in the MD Editor to change the call number schema being used in the holdings record
- Holdings templates can be use pre-define the call number schema to be used when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

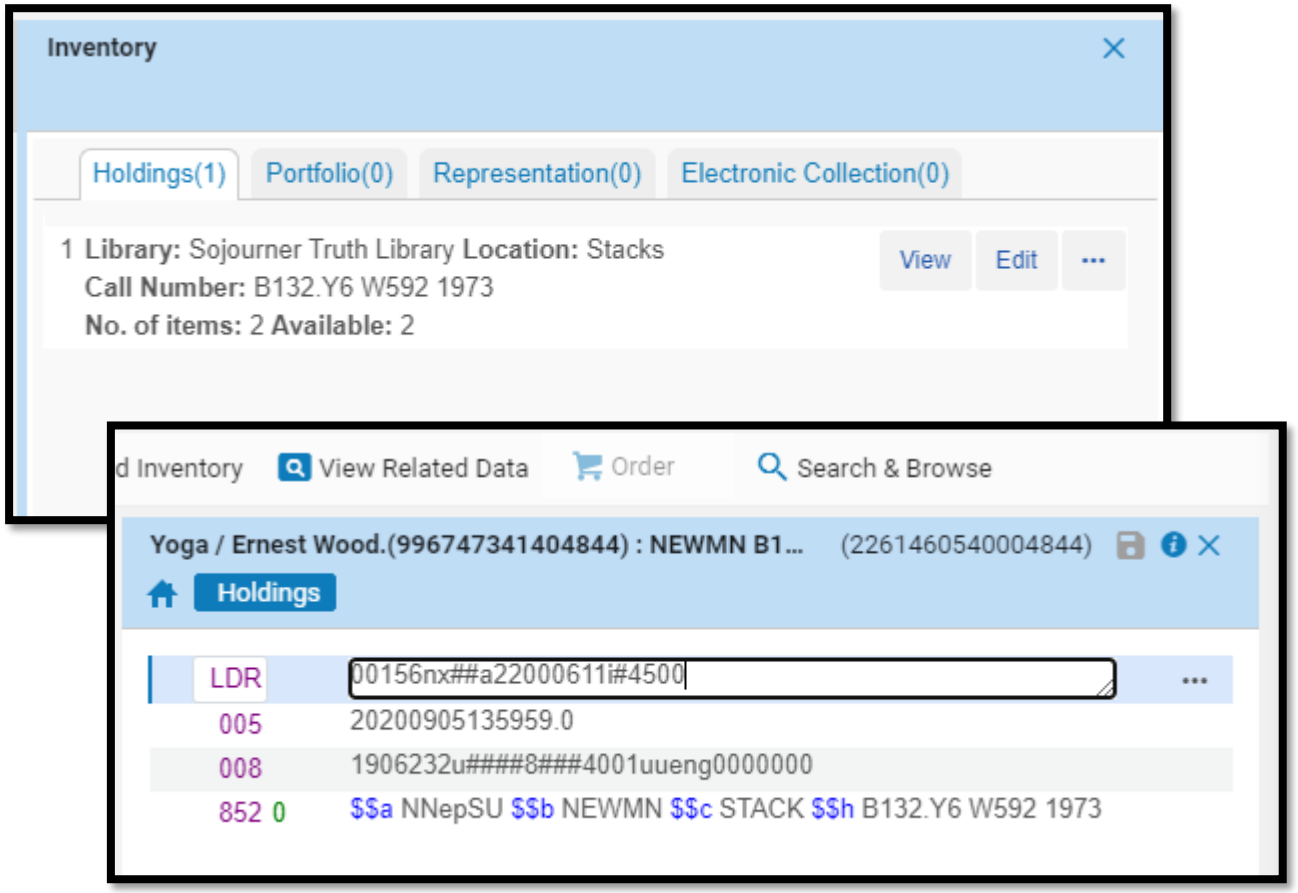
1. Perform a repository search
2. Click ***Holdings*** from the ellipses
3. Click ***Edit***
   - One holdings – **Edit** will be at the top of the screen
   - Multiple holdings – **Edit** will be in the list of actions in the ellipses of the holdings record
   - **NOTE**: Holdings can be Pushed to MDE





Opening Holdings Records in the MD Editor

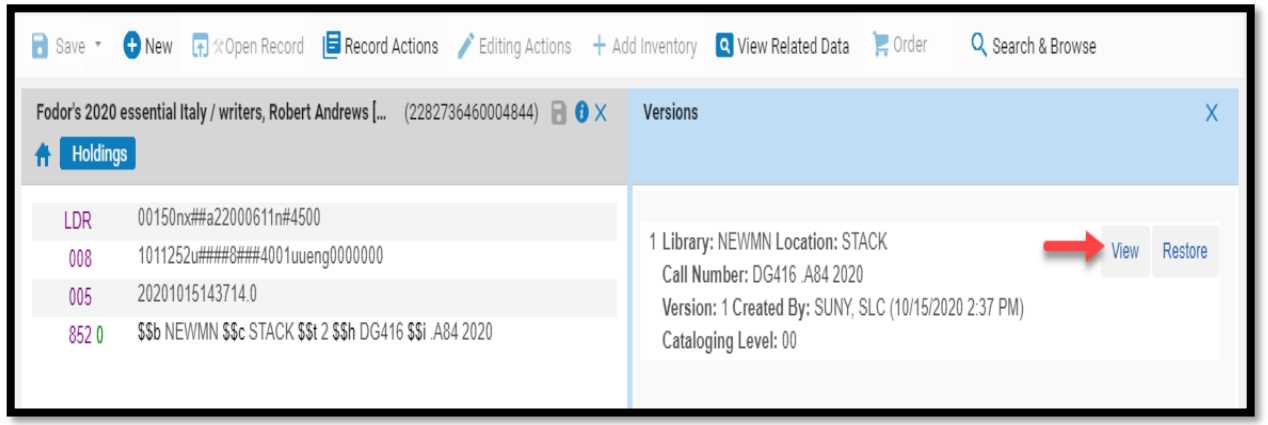
1. Open a bib record in the MD Editor
2. Click ***View Related Data>View Inventory***
   - The holdings record(s)will display on the right-side of the split screen editor
3. Click ***View*** or ***Edit***
   1. View – to view the holdings record without it being open in the MD Editor
      - Click on "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



Holdings Records - Viewing Versions

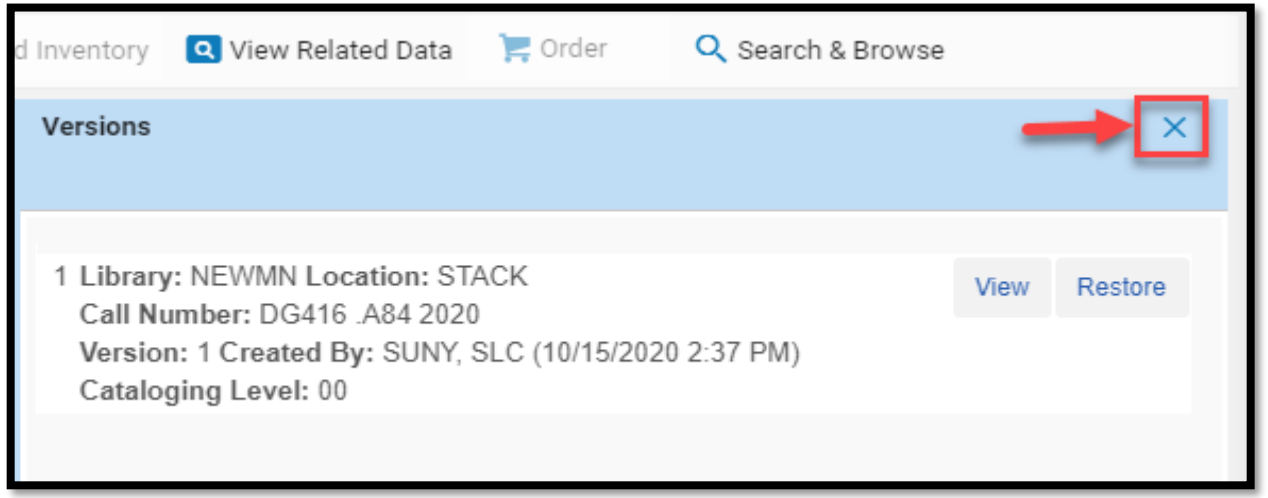
To view versions:

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 exists
3. Click ***View***



To close versions:

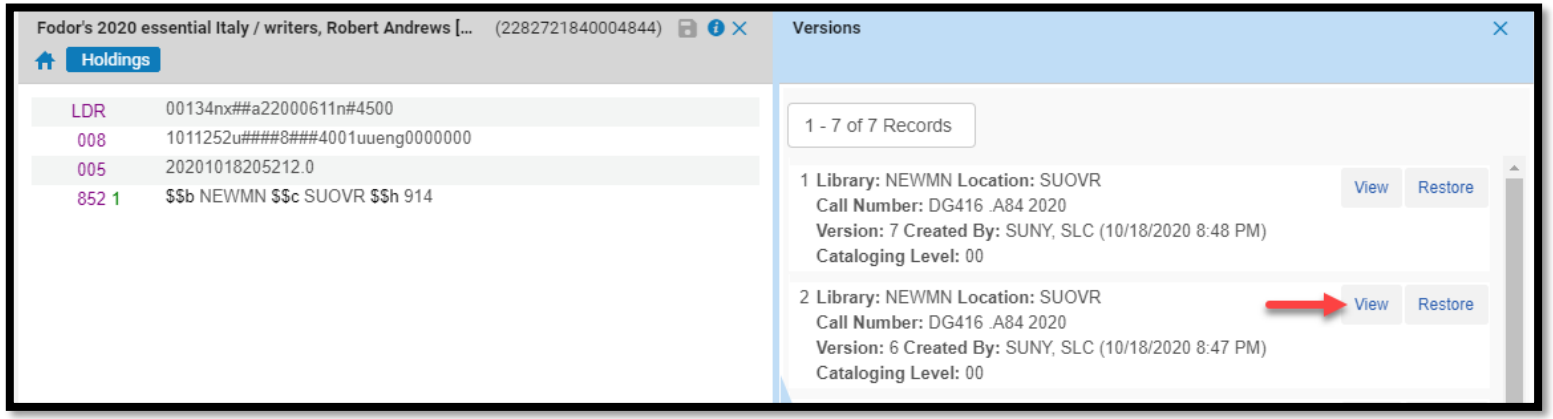
1. Click the "***X***" in the upper right corner of the right-side of the split screen editor

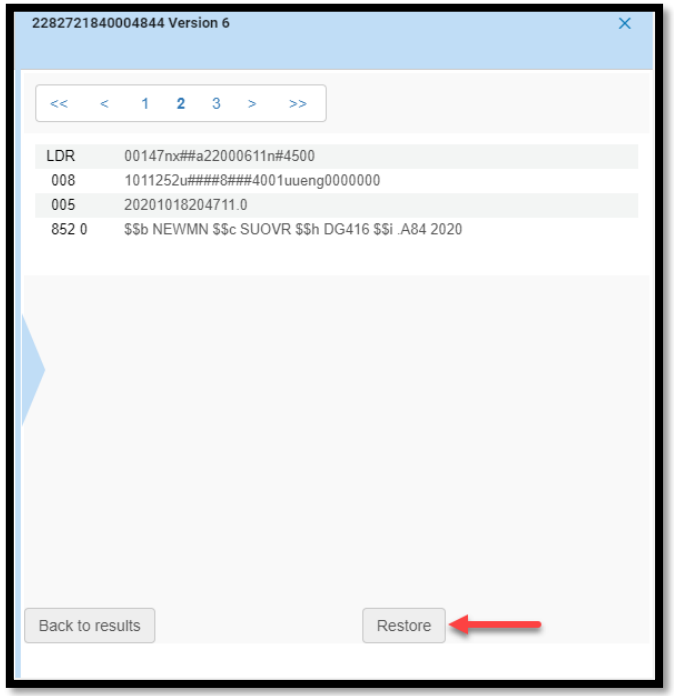


Holdings Records - Viewing Versions

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 exists
3. Click ***View***
4. Click ***Restore***
5. Click ***Save>Save and Release Record*** (Ctrl+Alt+R)

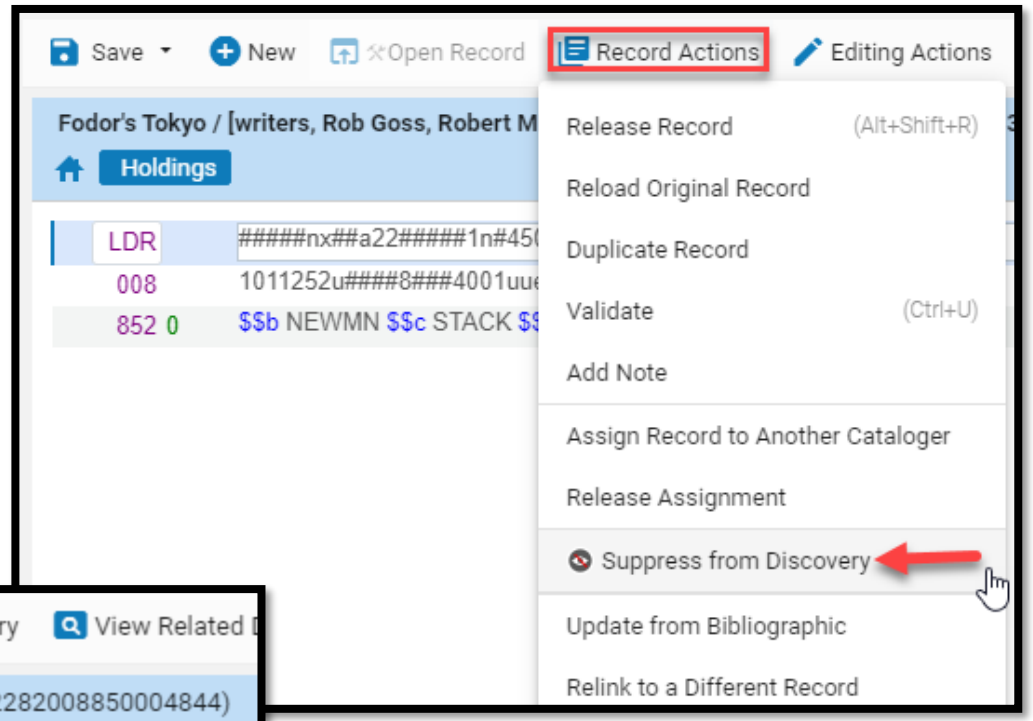


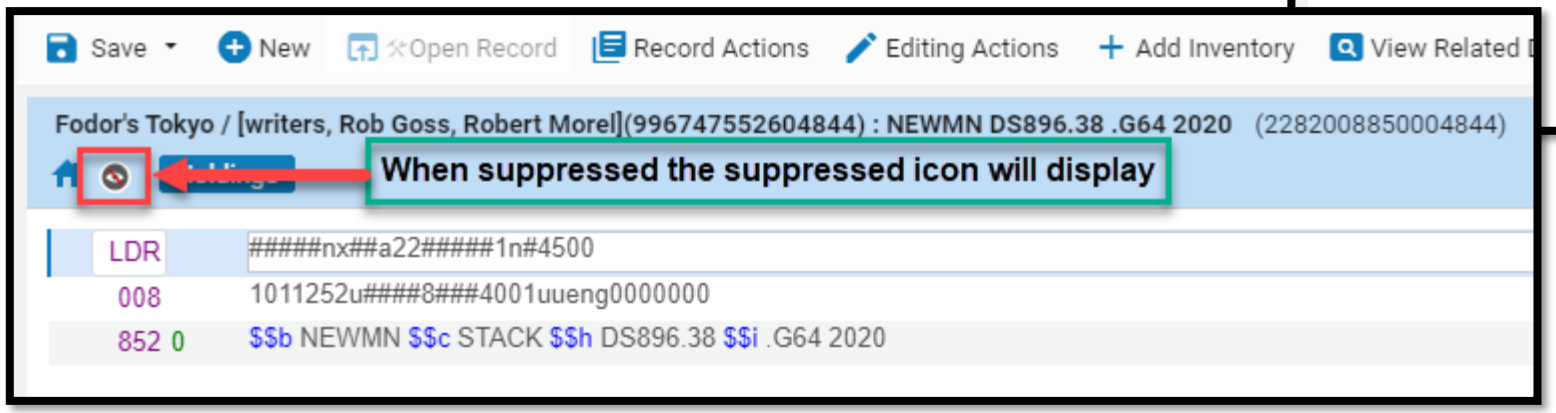


Suppressing a Holdings Record

- 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)

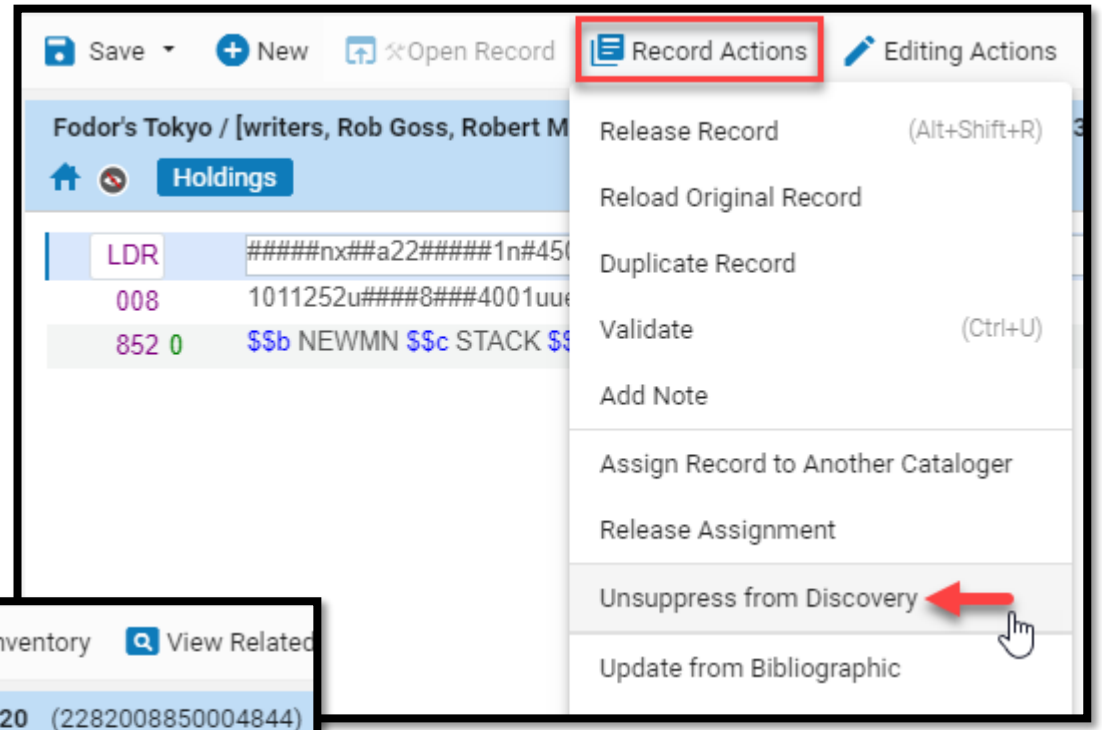


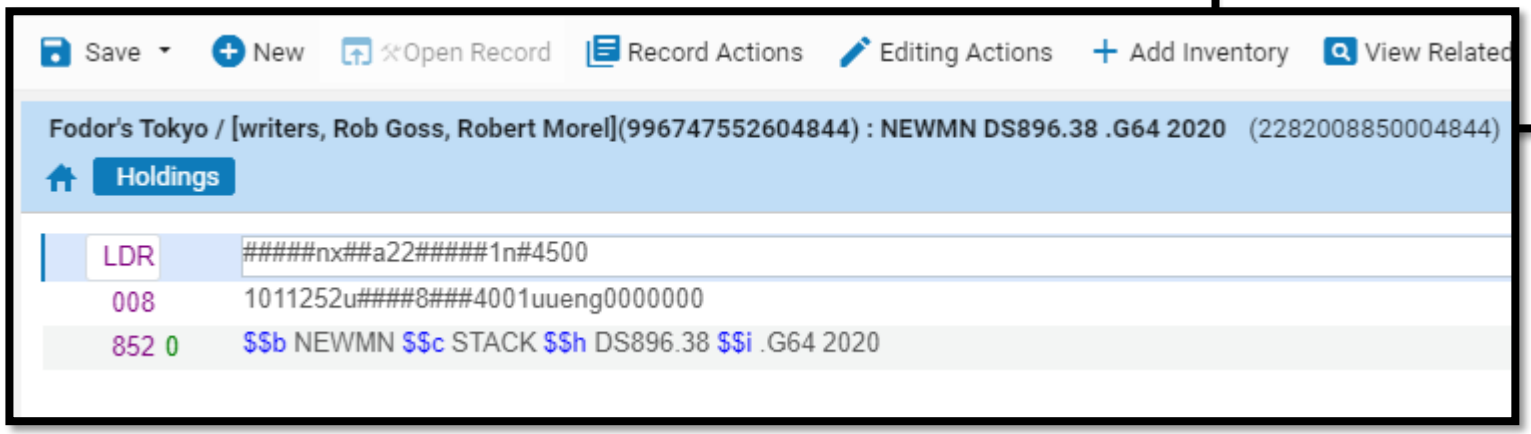


Unsuppressing a Holdings Record

- Unsuppressing a holdings record will allow the holdings and associated items to be discoverable in PrimoVE

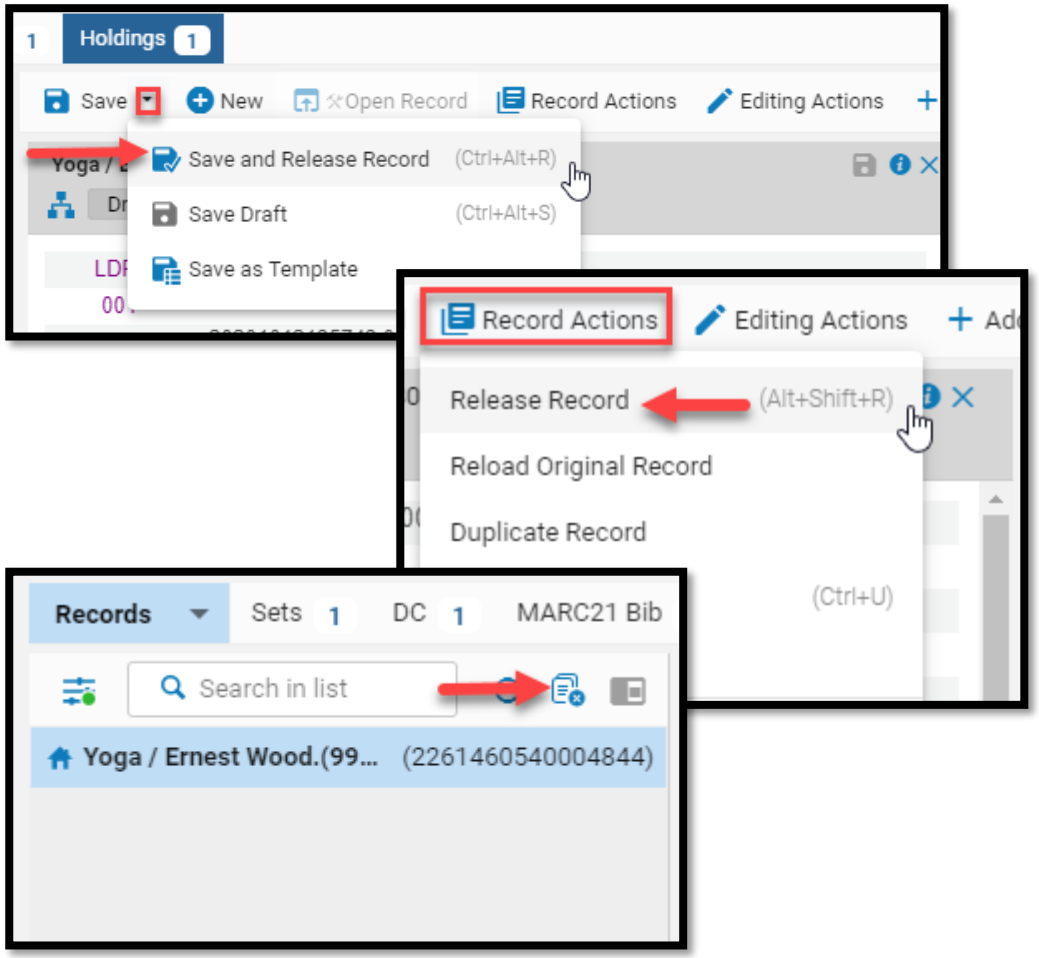
- To unsuppress a holdings record
  1. Open the holdings record in the MD Editor
  2. Click ***Record Actions>Unsuppress from Discovery***
  3. Click ***Save>Save and Release Record***





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

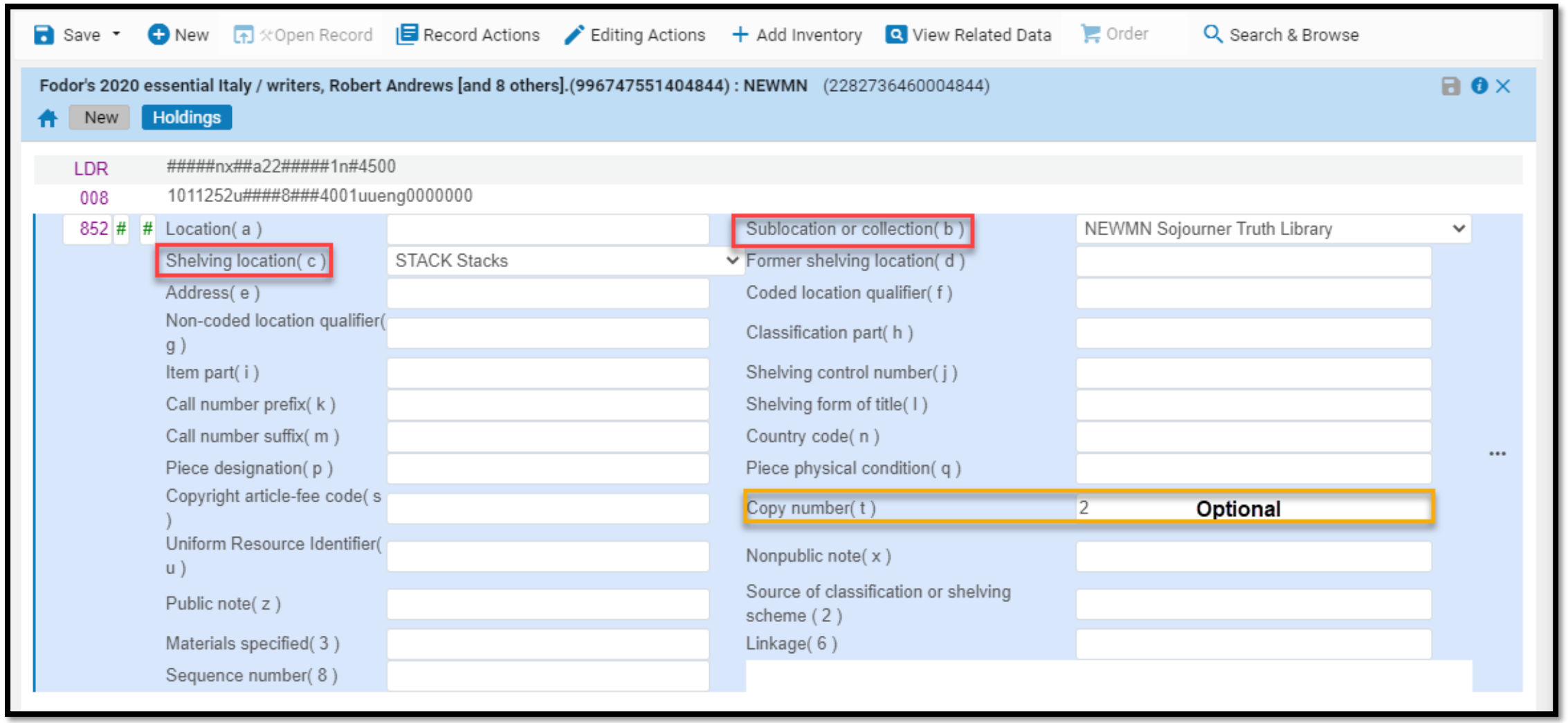
- Holdings records are automatically created when a physical title is ordered in Alma for:
  1. One-Time (Monographs)
  2. Continuous (Serials)

- 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

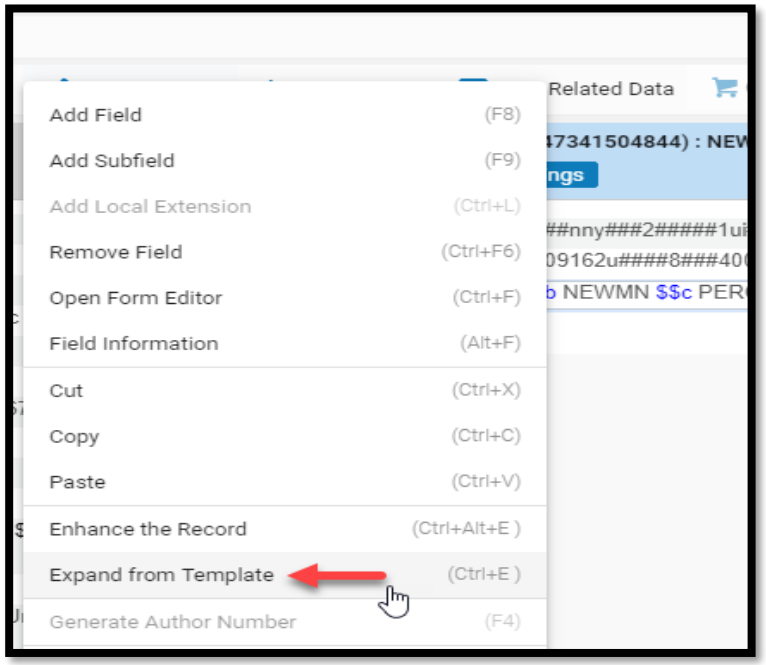


Creating New Holdings Records – Serials

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]

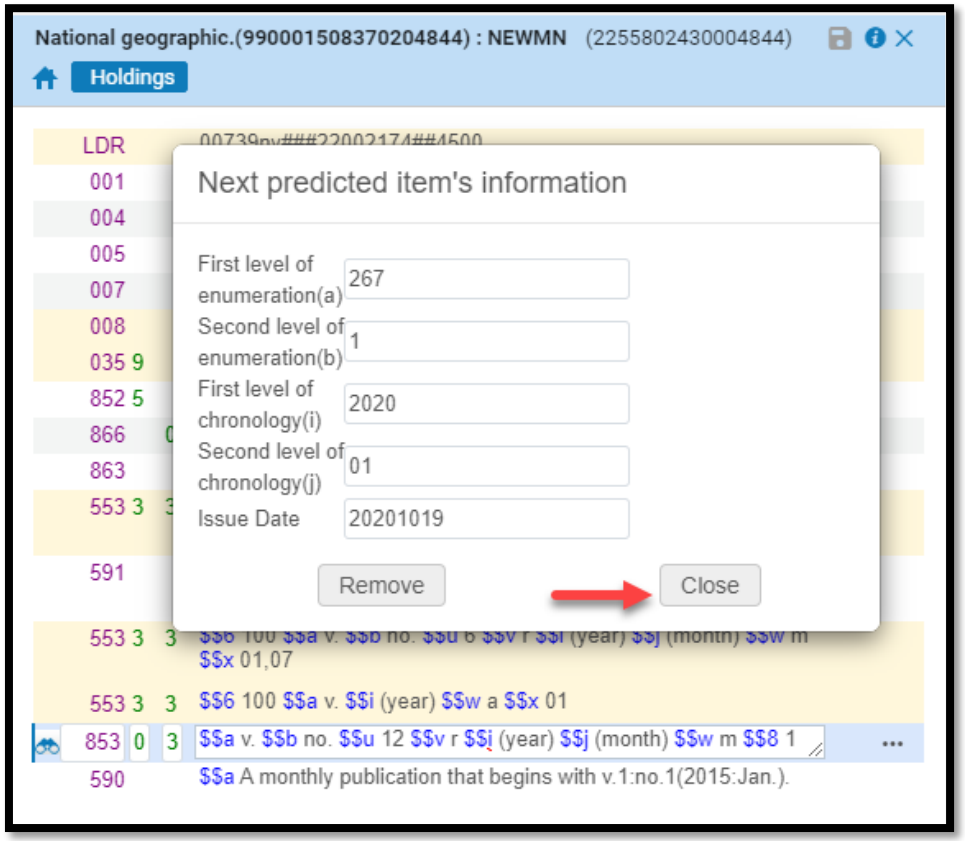
Creating New Holdings Records - Serials

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 your have for the serial title
    - 863 - Enumeration and Chronology - Basic Bibliographic Unit
    - 866 - Textual Holdings - Basic Bibliographic Unit



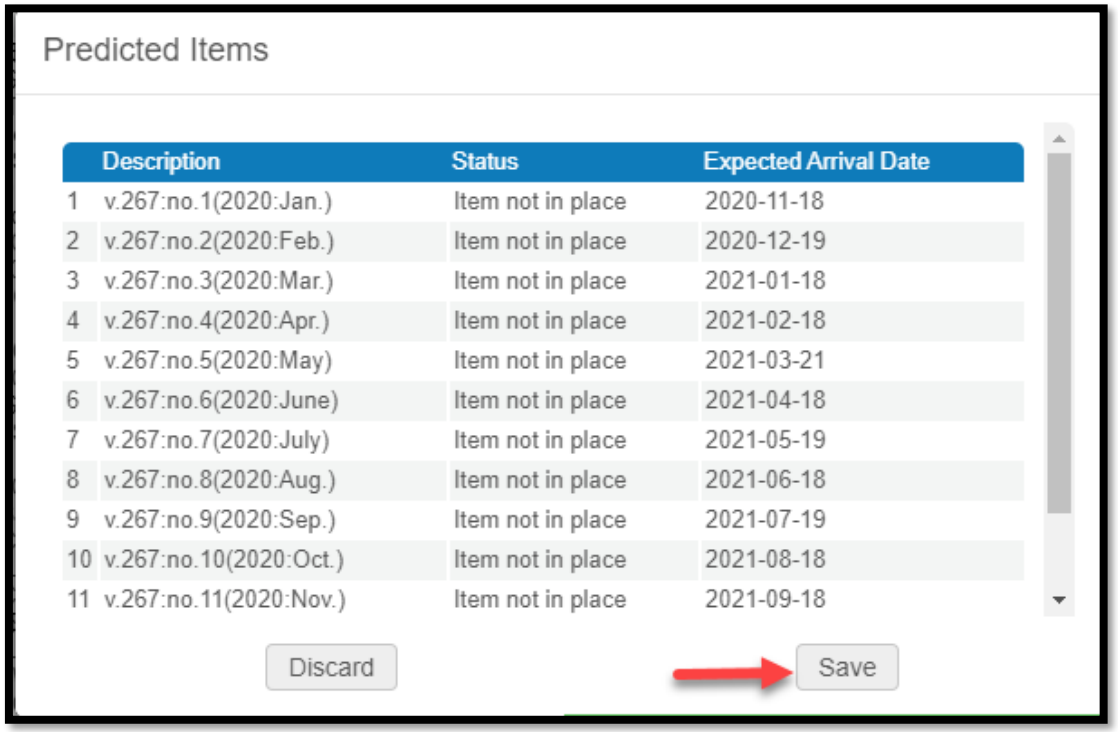
Creating New Holdings Records - Serials

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

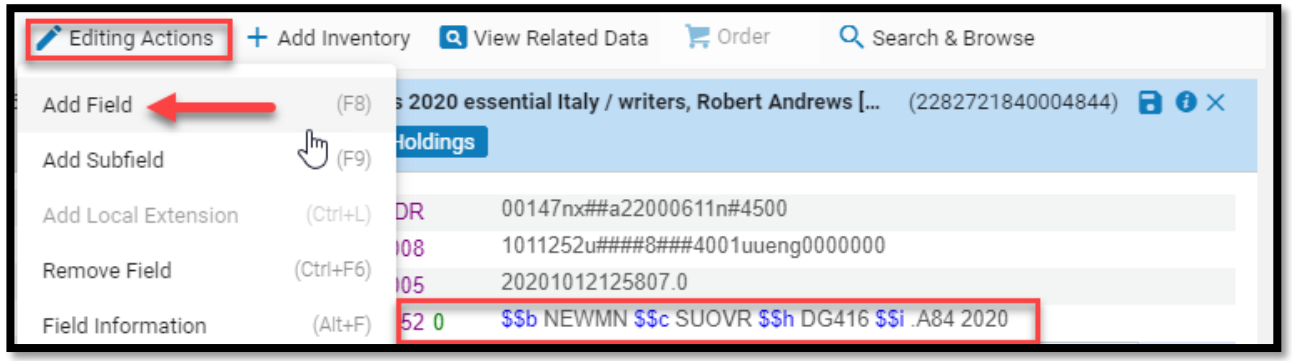
13. Create a prediction pattern (not mandatory)
    8. Click ***Record Actions>Open predicted Items***
    9. Click ***Save***
    10. Click ***Save>Save and Release Record***



Editing Holdings Records

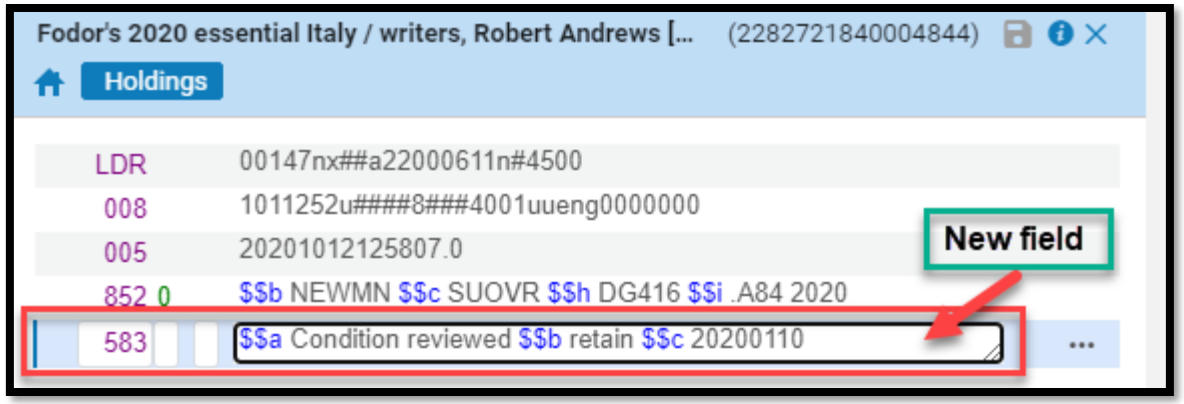
Holdings record can be edited to:

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***



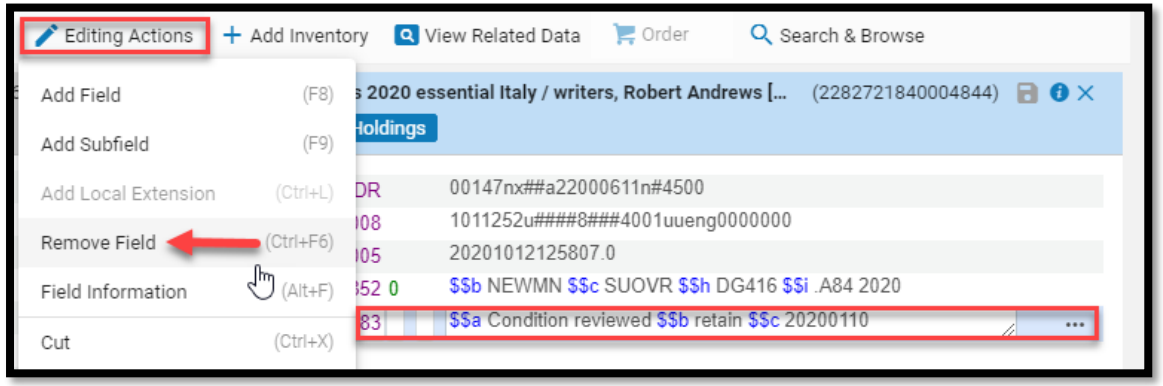
Editing Holdings Records

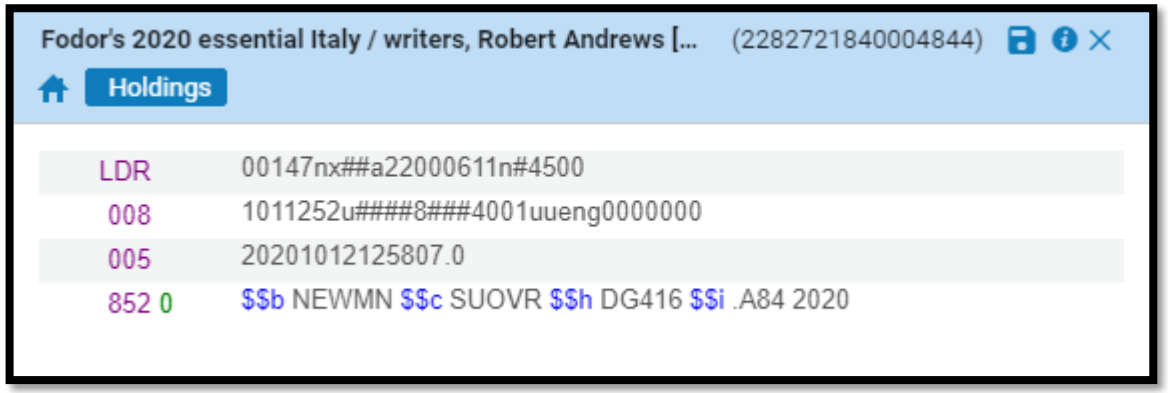
Use cases when holdings records should be deleted:

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***

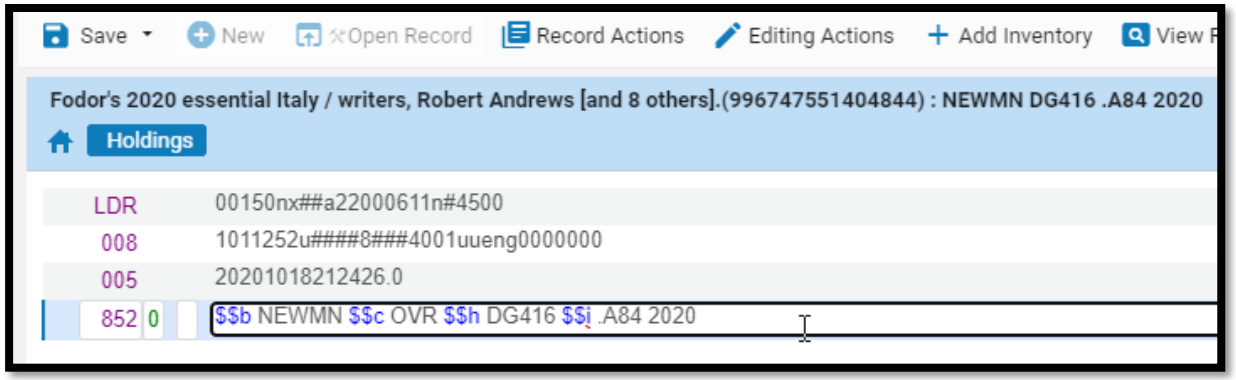


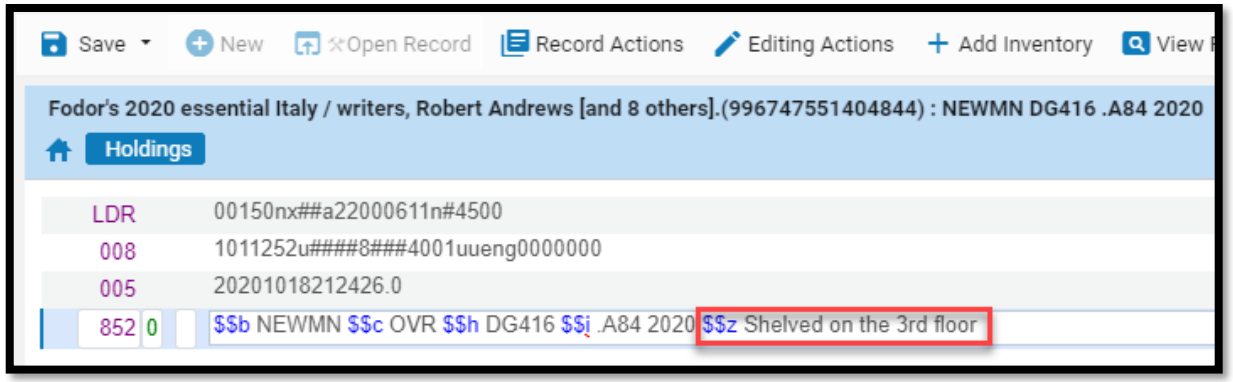


Editing Holdings Records

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)

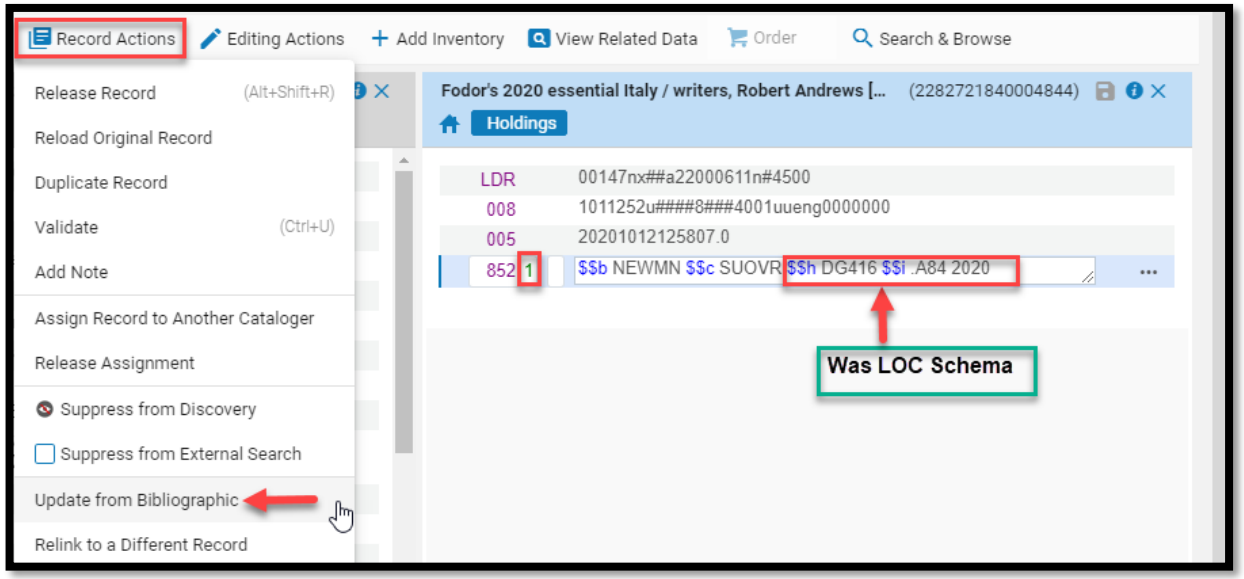


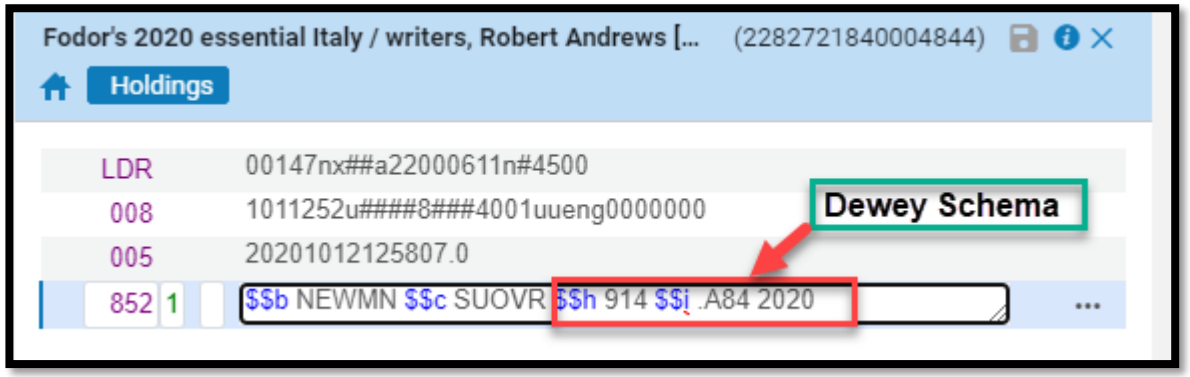


Editing Holdings Records

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)

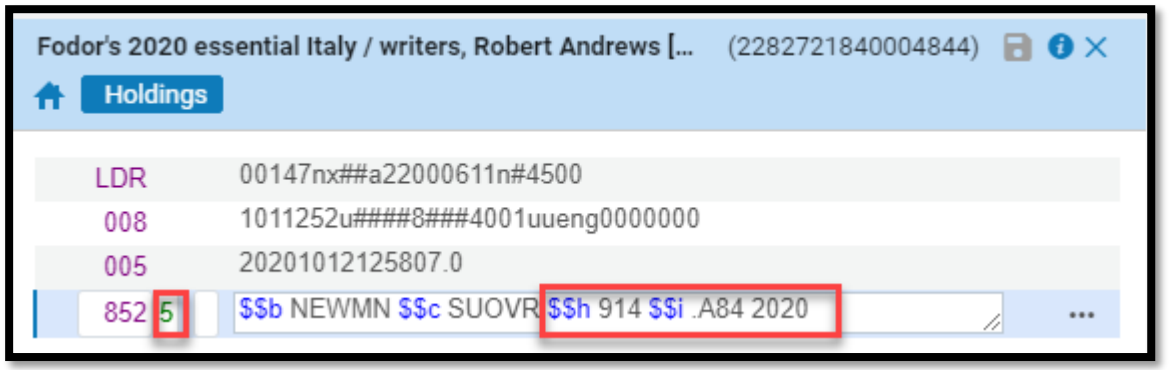


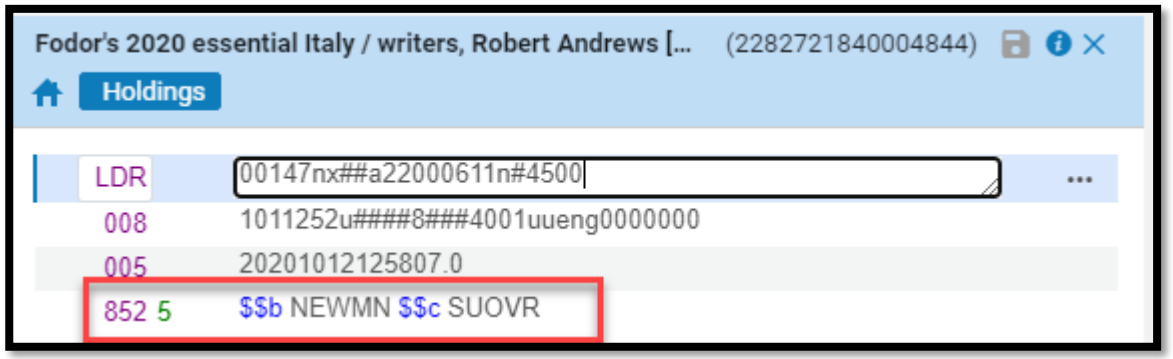


Editing Holdings Records

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

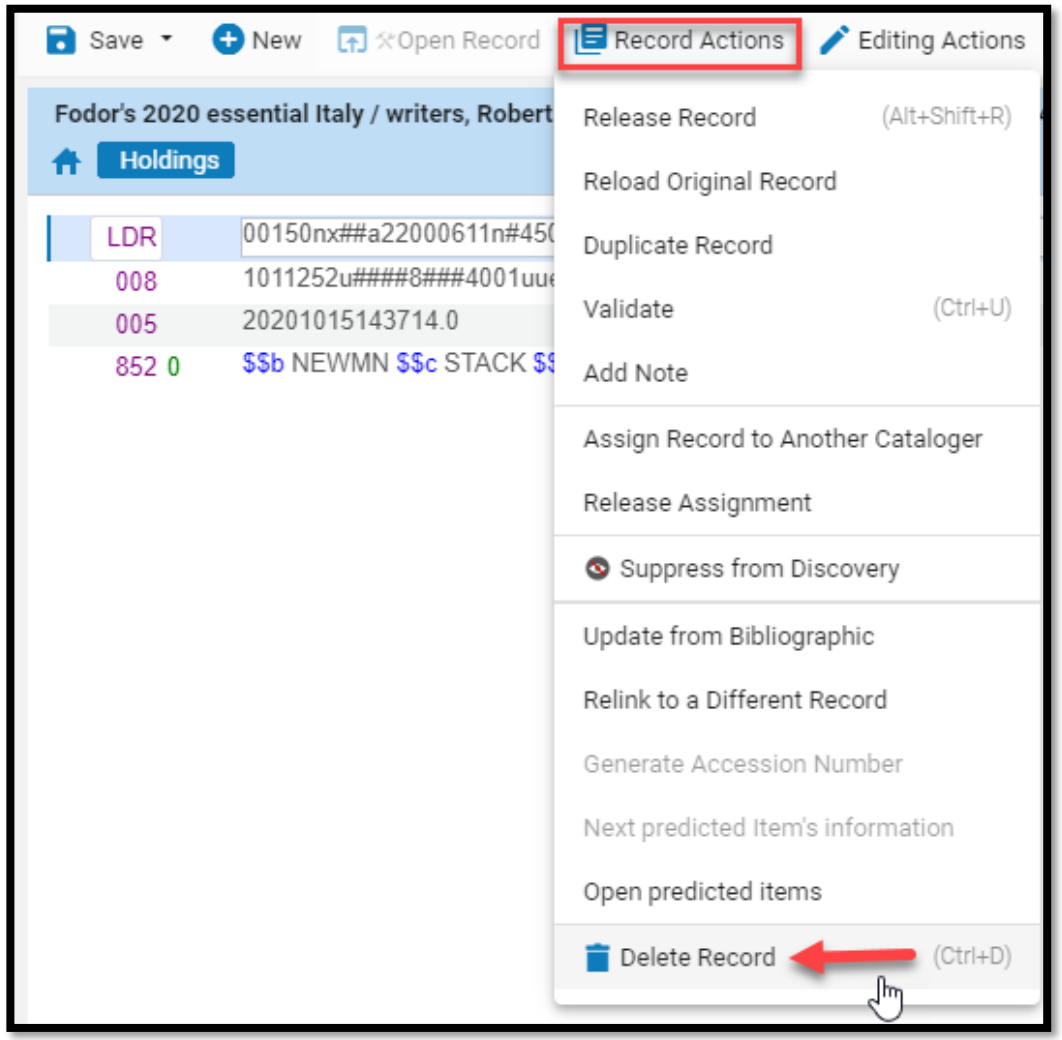
- Only holdings records without associated inventory can be deleted from:
  - The MD Editor
  - The List of Holdings screen

- 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

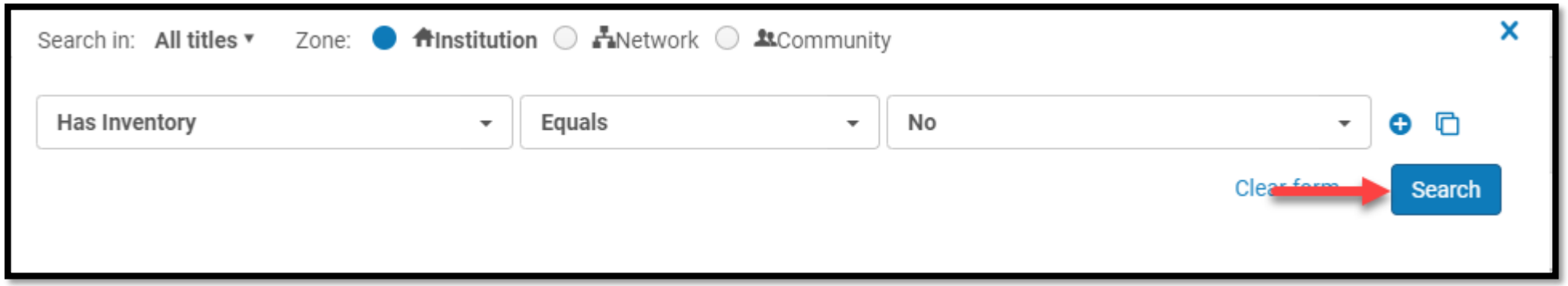
To delete holdings records in the MD Editor:

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

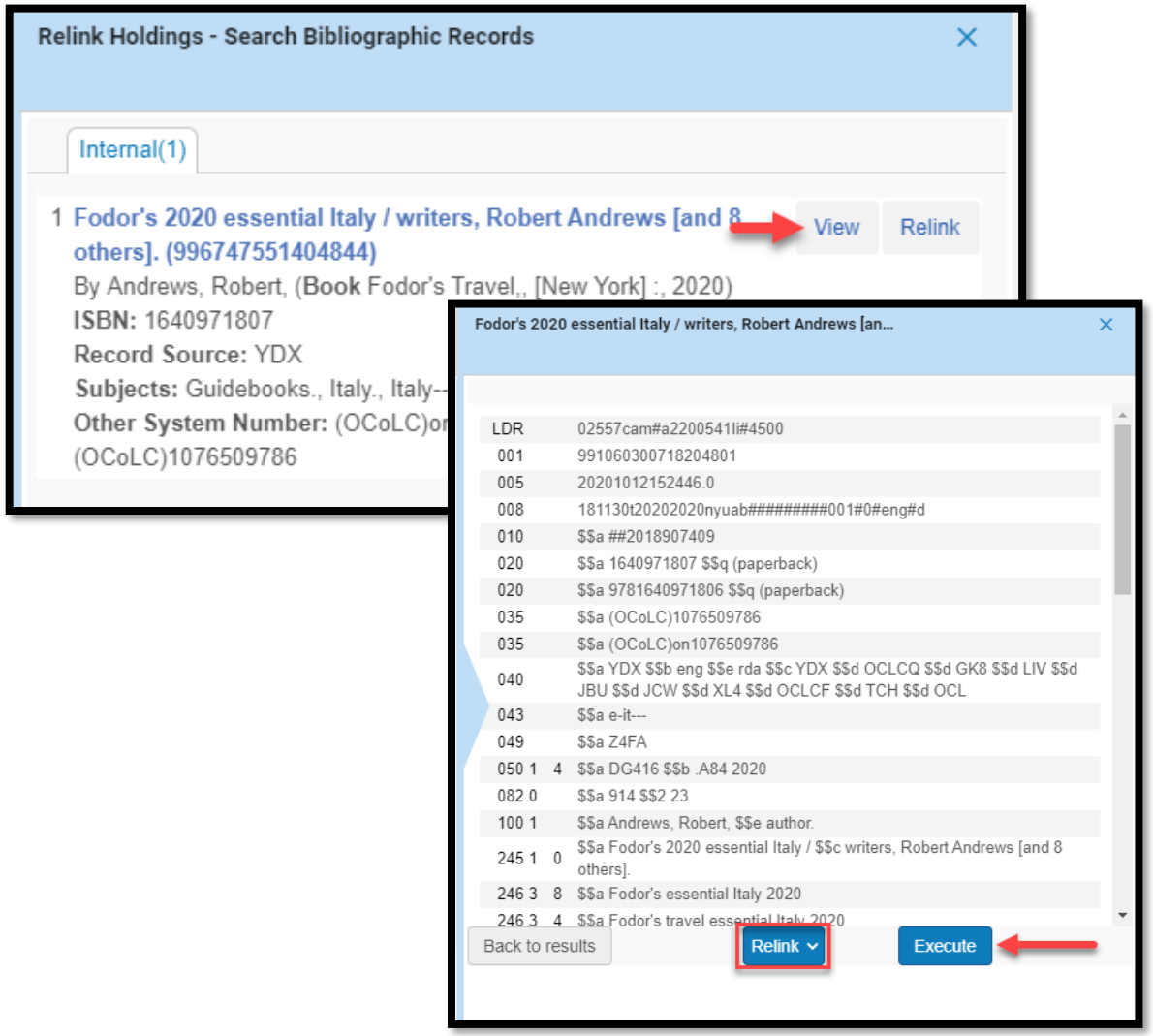
- Relinking holdings records will move the holdings record and associated POLS from one bib record to another
- The bib record will remain in the repository if the last holdings record for a title is relinked to another bib record
  - The record without holdings will need to be deleted from the repository
  - 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



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)



Supporting Documentation

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