

Find Local Holdings Records

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1 Find local holdings records in WorldCat

About searching for local holdings records (LHRs)

- Search for holdings records when you need to maintain your institution's local holdings for items in your collection.
- Holdings maintenance usually begins with searching WorldCat, whether you are creating local holdings for new materials, adding local holdings records for new copies, updating existing local holdings records, or deleting local holdings records.

Find local holdings records (LHRs)

You can retrieve the bibliographic record for the title you want and then edit existing local holdings records or create new LHRs.

Or, use holdings search limits to retrieve only bibliographic records linked to the holdings information you need. The holdings limits are:

- Institution Holdings (index label **li:**) - Retrieves bibliographic records for titles held by a specified institution. Does not require the presence of local holdings records.
- My Local Holdings (index label **l4:**) - Retrieves bibliographic records with local holdings records added by your institution.
- Group Holdings (index label **zu:**) - Retrieves bibliographic records for titles held by any institution that belongs to a specified group. Does not require the presence of local holdings records.
- Group Local Holdings (index label **l5:**) - Retrieves bibliographic records for titles with local holdings for any institution that belongs to a specified group.

Command line search

	Action
1	<p>On the Search WorldCat screen, in the Command Line Search area, type a search in the Search for box.</p> <p>Tips:</p> <ul style="list-style-type: none"> • Use a number search (ISBN, ISSN, OCLC control number) to retrieve a single record. • ISSN: Use index label in: • OCLC Control Number: Use index label (no:) or asterisk (*) or number sign (#). • ISBN: index label (bn:) optional if ISBN is first term.
2	<p>(Optional) To add a holdings limit, type and, the index label , and then a symbol for an institution or group.</p> <ul style="list-style-type: none"> • Institution Holdings li:[institution symbol]. Multiple institutions: To limit to holdings for 2 or more specific institutions, use parentheses and an OR operator in the search statement. Example: and (li:abc or li:xyz) • My Local Holdings I4:[your institution symbol] • Group Holdings zu:[group symbol] • Group Local Holdings I5:[group symbol] • Multiple groups: To limit to holdings for 2 or more specific groups, use parentheses and an OR operator in the search statement. Example: and (I5:abcd or I5:wxyz) <p>Examples in:0190-8286 and I4:ocl no:1775222 and li:ser no:1775222 and (li:ser or li:zyz) in:0190-8286 and zu:nepu 085109130x and I5:abcd 085109130x and (I5:abcd or I5:wxyz)</p>
3	<p>Optional Below the search entry box, select (check) the Show Local Holdings if Single Record Found check box.</p>
4	<p>Click Search.</p>

Guided search (Keyword/Numeric search area)

	Action
1	At the Search WorldCat screen, in the Keyword/Numeric Search area, type a search in any Search for box and select an index from the list next to that box. Tip: Use a number search (ISSN, ISBN, OCLC control number) to retrieve a single record.
2	(Optional) Select the holdings limit you want from the Holdings list. <ul style="list-style-type: none"> • Institution Holdings. In the Institutions box, type an institution symbol. Multiple institutions: To limit to holdings for 2 or more specific institutions, separate the symbols with a space or a comma. Example: abc xyz or abc,xyz • My Local Holdings. Automatically searches for your institution symbol. • Group Holdings. In the Group box, type a group symbol. • Group Local Holdings. In the Group box, type a group symbol. • Multiple groups: To limit to holdings for 2 or more specific groups, separate the symbols with a space. Example: abcd wxyz or abcd,wxyz
3	Optional Below the search entry box, select (check) the Show Local Holdings if Single Record Found check box.
4	Click Search .

Holdings search limits: details

To retrieve	Specify this limit	Notes
Local holdings for a specified institution or multiple institutions	Keyword/Numeric search Select Institution Holdings and type an institution symbol in the box. Separate multiple symbols with spaces or commas. Command line Type and li:[institution symbol] . To specify multiple institutions, use parentheses and the or operator.	Command line examples One institution no:4567321 and li:ser Multiple institutions no:4567321 and (li:ser or li:zyz)
Local holdings for your institution	Keyword/Numeric search Select My Local Holdings Command line Type and l4:[your institution symbol] .	Command line example 085109130x and l4:abc
Institution holdings for institutions in a specified group or multiple groups	Keyword/Numeric search Select Group Holdings and type group symbol in the box. Separate multiple symbols with spaces or commas. Command line Type and zu:[group symbol] . To specify multiple groups, use parentheses and the or operator.	Command line examples One group in:1234-4321 and zu:nepu Multiple groups in:1234-4321 and (zu:bcdf or zu:nepu)

Find Local Holdings Records

To retrieve	Specify this limit	Notes
Local holdings for institutions in a specified group or multiple groups	<p>Keyword/Numeric search Select Group Local Holdings and type group symbol in the box. Separate multiple symbols with spaces or commas.</p> <p>Command line Type and I5:[group symbol]. To specify multiple groups, use parentheses and the or operator.</p>	<p>Command line examples One group 085109130x and I5:nepu Multiple groups 085109130x and (I5:abcd or i5:wxyz)</p>

Option: Show local holdings for a single bibliographic record

- To go directly to local holdings when you retrieve a single record (rather than to the bibliographic record), select **Show Local Holdings if Single Record Found** on the Search WorldCat screen.
- Whether or not you limit to My Local Holdings, Connexion displays your local holdings record or institution summary.
- **Multiple bibliographic records.** For multiple records, the truncated list or brief list shows **LH** links to your LHRs. If you limited the search to a single group's local holdings, results show **GR** links to the group's local holdings.

	Action
1	Enter your search in either the command line or the guided search area. Include a holdings limit if you wish.
2	Select the Show Local Holdings if Single Record Found check box.

Find Local Holdings Records

	Action
3	Click Search .
4	<p>Result</p> <p>Single bibliographic record</p> <ul style="list-style-type: none"> • No holdings limit Either a local holdings record or an institution summary list (for multiple LHRs) for your institution • Holdings limit to your local holdings Either a local holdings record or an institution summary list (for multiple LHRs) for your institution • Holdings limit to a specified institution Either a local holdings record or an institution summary list (for multiple LHRs) for specified institution • Holdings limit to a group's holdings Bibliographic record • Holdings limit to a group's local holdings Group holdings summary listing institutions in the group that have LHRs linked to the record. <p>Multiple bibliographic records Depending on which holdings limit you specified, the WorldCat truncated list or brief list may show links to local holdings:</p> <ul style="list-style-type: none"> • No limit or limit to your local holdings. Records with attached local holdings for your institution have an LH link next to the record number. Click LH to view local holdings. • Holdings limit to a specified institution ??? for specified institution. If you specified multiple institutions, no LH links to local holdings appear. • Holdings limit to a group's holdings Bibliographic record • Holdings limit to a group's local holdings Records with attached local holdings for at least one institution in the group have a GR link next to the record number. Click GR to view local holdings (LHR or group summary). If you specified multiple groups, no GR links to group local holdings appear.

Display local holdings by institution, group, state, or region

Use **Display Local Holdings** to view LHRs created by another library or by libraries in a group, a state, or a region.

	Action
1	Open the bibliographic record for which you want to view local holdings records.
2	<p>From the bibliographic record</p> <p>On the View list, click Display Local Holdings or press <Alt><K><\> (backslash) (or <Alt><J> and then <\>).</p>
3	<p>In the Local holdings type list, select the display to view:</p> <p>For Institution Holdings or Group Holdings, type the institution or group symbol in the text box.</p> <p>Or select State Holdings, Region Holdings, Default Holdings, or All Holdings.</p>

Find Local Holdings Records

	Action
4	Click Display Local Holdings. Results Connexion opens a Holdings Display window that lists summary local holdings for an institution or group, or for institutions in the category you selected (state, region, default, all). Or if no institutions with local holdings were found, the window indicates that there are no holdings to display.
5	In the Holdings Display window, under Local Holdings Information, click the link to the holdings summary for the institution you want. Connexion closes the Holdings Display window and displays local holdings for the institution you selected, either an LHR or an institution summary.

- About holdings agents**
- An agent can maintain holdings for specific client institutions. Typically, client libraries do not have direct access to Connexion.
 - Profiling for an Agent authorization identifies the institution symbols of clients. When logged on using an Agent authorization, a user can edit, add, and delete holdings for client institutions linked to that authorization.
 - Agents use the same procedures as users maintaining holdings for their own institution.
 - Agent activity is usually done by staff at a processing center or other networking agency.

2 View and Use WorldCat search results

Search results displays

Any WorldCat search results in one of the following displays:

Number of records	Default display
101 - 1,500	Group list. Lists groups of records by type of material and year. Note: All retrieved records in one material type category and with the same date (including no date) are placed in a single group. Such a group may contain more than 100 records.
6 - 100	Truncated list. Presents a 1-line entry for each record. Index searched determines the sort order and the information extracted for display. If the index specified for the first search term contains additional terms from the record, additional fields appear in a popup screen tip when you place the mouse pointer on the item.
2 - 5	Brief list. Lists brief entries containing 2-5 lines of information from descriptive fields in the record. Sort order: Ascending order by main entry (100 field), then by the (245 field), then by publication date (Date1), and finally by OCLC control number (001 field) in descending order.
1	Full record. Full record appears in edit mode and in the default view.

Select brief or truncated list view

- If you prefer that all search results (regardless of result set size) be presented as a brief list or a truncated list, you can choose your preferred list type for all search results. You can select a list type before viewing search results; you can also change the type while viewing results. Your selected list type remains in effect until you change it.
- **Search WorldCat screen or Group Results** Use the list box at the top of the screen (Search WorldCat screen -- next to Search History button; Group Results -- below jump bar) to specify a list type. The choices are:
 - Display default list based on result set size (initial default setting)
 - Display brief list on next request
 - Display truncated list on next request
- **On Search Results** At a Search Results screen, a similar list box appears below the jump bar. The box shows the current list type. To change it, open the list and select one of these options:
 - Switch to brief list now
 - Switch to truncated list now

Find Local Holdings Records

Local holdings indicators in search results (LH or GR link)

- **LH link.** When your search results include a record to which your institution has attached a local holdings record (LHR), an **LH** link appears next to the item number on the brief or truncated list. Click the link to view the LHR or institution summary (if you have multiple LHRs linked to the record).
- **GR link.** When you limit the search to group local holdings, and results include records with LHRs for institution(s) in the specified group, a **GR** link appears next to the item number. Click the link to view the holdings display (group summary, institution summary or LHR).
Note: If you search for local holdings for multiple groups, the **GR** link does not appear in the search results.
- See the following table for details.

Search results screen	View local holdings
Group list	No local holdings indicator on group list
Brief list or Truncated list	The LH or GR link appears to the left of the item number for any record with local holdings attached. Display local holdings LH. Click the link to view either an LHR or an institution LHR summary. GR Click the link to view a group summary, an institution summary, or an LHR.
Bibliographic record	If your institution has local holdings records for the item, the text Holdings in [Inst symbol/Local [Inst] Holdings] appears at the top of the record. To view your local holdings, on the Action list click Edit Local Holdings . If you do not hold the item, the text No holdings in [institution symbol] appears at the top of the record. To view local holdings for another institution, use Display Local Holdings . Display local holdings 1. On the View list, click Display Local Holdings or press <Alt><K><\> (backslash). 2. In the Local Holdings Type list, select Institution Holdings , type an institution symbol in the text box, and click Display Local Holdings . 3. In the Holdings Display window, under Local Holdings Information, click the link to the holdings summary for the institution you want.

Customize results displays (Cataloging Options)

- On the Cataloging Options screen, you can set two options that affect WorldCat search results. **Note:** Changing these settings is optional; the system-supplied default settings work well for most users.
- The **WorldCat Results** option determines whether search results present multiple screens of 10 records per screen or a scrollable list of 25 or 100 records. This option applies to search results, whether you view the records as a truncated list or a brief list. It does not affect group lists. **Default setting:** 100 Records.

- The **Truncated List Details** option lets you choose whether to view a popup list of all indexed fields for the term in the first column of a truncated list. With this function **On**, when you place the mouse pointer on an item in the list, a yellow screen tip appears showing additional record fields from the record. **Default setting:** On - Show using optimized screen tips
- To view or change the settings, on the General tab, under Admin Options, click **Preferences**. At the Preferences screen, click **Cataloging Options**.
- Truncated list columns and order vary with the type of search.
- The following table lists columns that can appear in a truncated list.

Truncated list columns

Column	Description
Main Entry	Field 1xx if present in record
Name	Personal, corporate, or conference name or uniform title (for name/title search) that matched search key (fields 1xx, 7xx, or 240)
Title	Title from field 245; for numeric search, field 130, 2xx, 440, 7xx, or 840
Government Document Number	086 Ꞥa or 086 Ꞥz or 074 Ꞥa
Publisher Number	028 Ꞥa or 262 Ꞥc
Name or 245	If matching field is 245 , system displays 1xx if present or the column is blank for that record If matching field is 130 , system displays 245 If matching field is neither 245 nor 130 , system displays 1xx if present or the column is blank for that record
Publisher	260 Ꞥb, 261 Ꞥa or 262 Ꞥb
Date	Fixed field Date 1

Column	Description
L	<p>One-character code identifying a designated library or program:</p> <p>D = Library of Congress (DLC) P = Program for Cooperative Cataloging (PCC) M = National Library of Medicine (NLM) G = U. S. Government Printing Office (GPO) A = National Agricultural Library (NAL) B = British Library (UKM) C = Library and Archives Canada (NLC) T = National Central Library of Taiwan (CYT)</p> <p>Notes: If a designated library creates a record, the system selects the appropriate letter from the preceding list. If two or more designated libraries or PCC participants create a record, or if the record contains an 042 field with a PCC code, the system displays only the first applicable letter that appears in the hierarchy of the preceding list.</p> <p>Examples: If NLM issues a record that contains pcc in field 042, the system displays P If NLM issues a record that contains lcd in field 042, the system displays D If NLM issues a record that does not contain field 042, the system displays M</p>

Move through group results or search results (View List and View Record jump bar)

- The **View List** jump bar appears at the top and bottom of each screen of the results list.
- The **View Record** jump bar appears at the top and bottom of each screen of the results list.

Action	How to
Select a group from group list	Click the hyperlinked type of material for the group you want. Or Type the group number in the View Group box and press <Enter>.
Move to next or previous group in search results	Click the right arrow button (right of View Group box) or click the left arrow button (left of View Group box). Note: If the selected term retrieves 100 or fewer records, no View Group box appears.
Move to next or previous screen in search results	Click the right arrow button (right of View List box) or click the left arrow button (left of View List box). Note: If all entries appear on a single screen, the View List box and arrow buttons are not active.
View entries beginning with specific entry	Type an entry number in the View List box and press <Enter>. Note: If all entries appear on a single screen, the View List box is not active. Note: For search results retrieved by selecting an item from group results, entries are numbered sequentially from the first record in the first group.

Find Local Holdings Records

Action	How to
View a specific record	Click the hyperlinked entry number for the record you want to view. Or Type an entry number in the View Record box and press <Enter>. Note: For search results retrieved by selecting an item from group results, entries are numbered sequentially from the first record in the first group.

Move between records (View Record jump bar)

- The **View Record** jump bar appears at the top and bottom of each record screen.
- The record position indicator (**Record _ of _**) appears at the top and bottom of each record screen. As you move through the records, the indicator changes to reflect your current position in the results list.

Action	How to
View next record in list	Click the right arrow button (right of View Record box).
View previous record in list	Click the left arrow button (left of View Record box).
View a specific record	Type an entry number in the View Record box and press <Enter>. Note: For search results retrieved by selecting an item from group results, entries are numbered sequentially from the first record in the first group.
Return to results	Click the Search Results or Group Results or Browse Results button at the top or bottom of the record screen.

Quick search from browse results, group results, search results, or record view

- **Quick Search.** You can enter any command line search using the WorldCat Quick Search box. At a record view, browse results, group results, or search results, if Quick Search is not visible, press <Alt><Q>.
- **Search History.** Searches performed via Quick Search are included in the Search History list. To view, repeat, or revise previous searches, click **Search History** or press <Alt><=>.

Return to browse results or group results or search results

Action
<p>Keyword, numeric or derived search:</p> <ul style="list-style-type: none"> • Click the Search Results or Group Results button at the top or bottom of the record screen. Or • On the Cataloging tab, under Search Options, WorldCat, click Group Results or Search Results. <p>Browse (index scan)</p> <ul style="list-style-type: none"> • Click the Browse Results or Group Results or Search Results button at the top or bottom of the record screen. Or • On the Cataloging tab, under Browse Options, click Browse Results. To return to a group list or brief list, under Search Options, WorldCat, click Group Results or Search Results. Or • If you entered a browse query (index scan) from the Search WorldCat screen and the Browse button and Browse Options list are hidden, On the Cataloging tab, under Search Options, click Browse Results.

Print screen of results list

	Action
1	If the list includes multiple screens, jump to the screen you want to print.
2	Click once in the frame that contains the record list.
3	In your browser, on the File menu, click Print or on the toolbar click the Print button.
4	In the Print dialog box, click OK or press <Enter>.

3 Local Holdings Group Summary

About the group summary

- Lists the institutions within a group that have at least one local holdings record (LHR) linked to a single bibliographic record.
- Presents summary holdings data for each institution.
- The system displays a group summary when you
 - Click a GR link for an item in WorldCat search results.
 - Take the Display Local Holdings action from the View list on a bibliographic record and select Group Holdings.
 - Take the Request Group Summary action from the Action/Sort list on a Group Summary or an Institution Summary.

Group summary screen content

Element	Description
Search results message	Appears on the top line of the screen. Shows the local holdings search query that produced the Group Summary. If your results are unexpected, you can use this feedback to verify that you entered the search correctly.
Jump bar (Navigation tools, at top and bottom of the screen)	<p>View Record box The box shows the entry number of the first entry on the screen. Box is active when the screen is first displayed; press <Enter> to view the first entry. To view another entry, type the number in the box and press <Enter>.</p> <p>View List box and arrow buttons Use to move through a multi-screen Group Summary. To view a section of the list beginning with a specific entry, type the entry number in the box and press <Enter>. To move to the next or previous screen of the Group Summary, click the right arrow button or the left arrow button next to the View List box.</p> <p>Note: If all entries appear on a single screen, the View List box and arrow buttons are not active.</p> <p>Bib Record button Click Bib Record to view the bibliographic record to which the listed institutions have linked holdings records.</p>
Action/Sort list	<p>Lists the actions you can take from the Group Summary screen.</p> <p>Open the list and select the action you want.</p> <p>Create Local Holdings. Attach a new local holdings record (LHR) for your institution to the bibliographic record. When you select this action, the system displays a local holdings workflow.</p> <p>Delete All Local Holdings. Remove your institution's local holdings records (LHRs) linked to this bibliographic record. You can also choose to delete your institution's OCLC symbol from the record.</p> <p>Request Group Summary. View local holdings for another group.</p>

Find Local Holdings Records

Element	Description
Header	Bibliographic information Title (245 a,b), OCLC control number (001), ISSN (022) or ISBN (020), Frequency (008, Freq), Dates (008, Date1, Date2)
Record column	Entry number for each institution listed in the Group Summary. Click the hyperlinked entry number to view holdings for an institution. When you click the entry number, the system displays either a local holdings record or (if the institution has more than one LHR) an Institution Summary.
Institution column	OCLC institution symbol Hover the mouse pointer over a symbol to view the institution name.
Data column Shows summary holdings for listed institutions	Summary holdings data for each institution, provided in the Summary field in an institution summary record.

Move within group summary screen

Move to	Procedure
Top or bottom of the Group Summary screen	Press <PageDown> or <PageUp>. Or Click the down arrow or the up arrow (right end of the blue bar at the top and bottom of the list).
Next or previous screen of Group Summary	Use the View List box and arrow buttons to move through a multi-screen Group Summary. To view a section of the list beginning with a specific entry, type the entry number in the box and press <Enter>. To move to the next or previous screen of the Group Summary, click the right arrow button or the left arrow button next to the View List box.
Bibliographic record to which the group holdings are linked	Click the Bib Record button.
Institution local holdings (LHR or Institution Summary)	Click the hyperlinked entry number for the institution. Or Type an entry number in the View Record box and press <Enter>.

Move among local holdings screens

From	To	Procedure
Any local holdings screen	Associated bibliographic record	Click the Bib Record button.

Find Local Holdings Records

From	To	Procedure
	WorldCat search results	On the navigation bar, open the Search Options list and click Search Results .
Group Summary	Institution Summary or LHR	Click the entry number for an institution or type the number in the View Record box and press <Enter>.
Institution Summary	Group Summary	Click the Group Summary button. Or On the navigation bar, open the Search Options list and click LH Group Summary .
	LHR	Click the entry number for the record or type the number in the View Record box and press <Enter>.
LHR	Institution Summary	Click the Inst Summary button. Or On the navigation bar, open the Search Options list and click LH Inst Summary .
	Group Summary	Click the Group Summary button. Or On the navigation bar, open the Search Options list and click LH Group Summary .
Bibliographic record	Institution Summary	Click the Inst Summary button. Or On the navigation bar, open the Search Options list and click LH Inst Summary .
	Group Summary	Click the Group Summary button. Or On the navigation bar, open the Search Options list and click LH Group Summary .

From	To	Procedure
	LHR	<p>Return to the Institution Summary or the Group Summary and select the LHR.</p> <p>Or</p> <p>If your institution holds the item, the text Holdings in [Inst symbol/Local [Inst] Holdings] appears at the top of the record. To view your local holdings, on the Action list click Edit Local Holdings.</p> <p>If you do not hold the item, the text No holdings in [institution symbol] appears at the top of the record. To view local holdings for another institution, use Display Local Holdings.</p> <p>Display local holdings:</p> <ol style="list-style-type: none"> 1. On the View list, click Display Local Holdings or press <Alt><K>< > (backslash). 2. In the Local holdings type list, select Institution Holdings, type an institution symbol in the text box, and click Display Local Holdings. 3. In the Holdings Display window, under Local Holdings Information, click the link to the holdings summary for the institution you want.

Take actions on group summary

You can take the following actions using the Action/Sort list on a Group Summary screen.

Action	Procedure
Create a new local holdings record for your institution	<p>On the Action/Sort list, select Create Local Holdings. The system displays a local holdings workform that contains information from the bibliographic record and default data for your institution. Complete the LHR. Add the record to WorldCat and link it to the bibliographic record. While viewing the completed LHR, on the Action list click Add Record or press <Alt><K>, <N>.</p>

Find Local Holdings Records

Action	Procedure
Delete your institution's local holdings records from the bibliographic record	<p>On the Action/Sort list, select Delete All Local Holdings. Immediately above the screen title, the system displays a box you can use to confirm or cancel the action.</p> <p>To delete all your LHRs and your OCLC institution symbol from the record, click Delete Local Holdings.</p> <p>To delete LHRs but keep your OCLC institution symbol linked to the record, clear (uncheck) the check box labeled Remove your institution's symbol from bibliographic record. Then click Delete Local Holdings.</p> <p>To cancel deleting local holdings from the record, click Cancel.</p>
View a Group Summary for a different group	<p>On the Action/Sort list, select Request Group Summary. Immediately above the screen title, the system displays a box you can use to specify the group for which you want to view a Group Summary.</p> <p>In the text box, type the group symbol for the group you want. Then click Display Summary.</p> <p>To cancel the action, click Cancel.</p>

4 Local Holdings Institution Summary

About the institution summary

- Lists two or more local holdings records (LHRs) for an institution that are linked to a single bibliographic record.
- Presents detailed holdings data for each copy, extracted from field 863 in the local holdings record.
- The system displays an institution summary when you
 - Click an LH link for an item in WorldCat search results. If your institution has more than one LHR linked to the record, the system displays an institution summary.
 - Click a hyperlinked item number for an institution on a group summary. If the institution has more than one LHR linked to the record, the system displays an institution summary.
 - Take the Display Local Holdings action from the View list on a bibliographic record and select Institution Holdings.

Institution summary screen content

Element	Description
Search results message	Appears on the top line of the screen. Shows the local holdings search query that produced the institution summary. If your results are unexpected, you can use this feedback to verify that you entered the search correctly.

Element	Description
<p>Jump bar (Navigation tools, at top and bottom of the screen)</p>	<p>View Group box and arrow buttons Appears only if you viewed the Institution Summary from a Group Summary. The box shows the entry number for the institution you are viewing. To move to items for other institutions listed in a Group Summary, type an entry number in the box and press <Enter>. To move to the next or previous item within the Group Summary, click the right arrow button or the left arrow button next to the View Group box.</p> <p>View Record box The box shows the entry number of the first entry on the screen. Box is active when the screen is first displayed; press <Enter> to view the first entry. To view another entry, type the number in the box and press <Enter>.</p> <p>View List box and arrow buttons Use to move through a multi-screen Institution Summary. To view a section of the list beginning with a specific entry, type the entry number in the box and press <Enter>. To move to the next or previous screen of the Institution Summary, click the right arrow button or the left arrow button next to the View List box. Note: If all entries appear on a single screen, the View List box and arrow buttons are not active.</p> <p>Bib Record button Click Bib Record to view the bibliographic record to which the listed institution has linked holdings records.</p>
<p>Action/Sort list</p>	<p>Lists the actions you can take from the Institution Summary screen. Open the list and select the action you want. Create Local Holdings. Attach a new local holdings record (LHR) for your institution to the bibliographic record. When you select this action, the system displays a local holdings workflow. Delete All Local Holdings. Remove your institution's local holdings records (LHRs) linked to this bibliographic record. You can also choose to delete your institution's OCLC symbol from the record. Request Group Summary. View local holdings for a specific group.</p>
<p>Header</p>	<p>Bibliographic information Title (245 a,b), OCLC control number (001), ISSN (022) or ISBN (020), Frequency (008, Freq), Dates (008, Date1, Date2)</p>
<p>Summary</p>	<p>Shows summary holdings data from the Summary field of the first LHR for this institution.</p>

Find Local Holdings Records

Element	Description
Record column	Entry number for each institution listed in the Group Summary. Click the hyperlinked entry number to view holdings for an institution. When you click the entry number, the system displays either a local holdings record or (if the institution has more than one LHR) an Institution Summary.
Location column	Holding library code for each location within the institution.
Copy column	Copy number for the copy of the item held at each location (if available).
Data column Shows holdings data from each LHR for the institutions	Holdings data for each location, from field 863 in the local holdings record (LHR) for that location. Hover the mouse pointer over the data for one location to view all content of field 863 in the LHR, OCLC# of the bibliographic record, and holding library code.

Move within institution summary screen

Move to	Procedure
Top or bottom of the Institution Summary screen	Press <PageDown> or <PageUp>. Or Click the down arrow or the up arrow (right end of the blue bar at the top and bottom of the list).
Next or previous screen of Institution Summary	Use the View List box and arrow buttons to move through a multi-screen Institution Summary. To view a section of the list beginning with a specific entry, type the entry number in the box and press <Enter>. To move to the next or previous screen of the Institution Summary, click the right arrow button or the left arrow button next to the View List box.
Bibliographic record to which the institution holdings are linked	Click the Bib Record button.
Local holdings record (LHR)	Click the hyperlinked entry number for the location/copy. Or Type an entry number in the View Record box and press <Enter>.

Move among local holdings screens

From	To	Procedure
Any local holdings screen	Associated bibliographic record	Click the Bib Record button.

Find Local Holdings Records

From	To	Procedure
	WorldCat search results	On the navigation bar, open the Search Options list and click Search Results .
Group Summary	Institution Summary or LHR	Click the entry number for an institution or type the number in the View Record box and press <Enter>.
Institution Summary	Group Summary	Click the Group Summary button. Or On the navigation bar, open the Search Options list and click LH Group Summary .
	LHR	Click the entry number for the record or type the number in the View Record box and press <Enter>.
LHR	Institution Summary	Click the Inst Summary button. Or On the navigation bar, open the Search Options list and click LH Inst Summary .
	Group Summary	Click the Group Summary button. Or On the navigation bar, open the Search Options list and click LH Group Summary .
Bibliographic record	Institution Summary	Click the Inst Summary button. Or On the navigation bar, open the Search Options list and click LH Inst Summary .
	Group Summary	Click the Group Summary button. Or On the navigation bar, open the Search Options list and click LH Group Summary .

From	To	Procedure
	LHR	<p>Return to the Institution Summary or the Group Summary and select the LHR.</p> <p>Or</p> <p>If your institution has local holdings records for the item, the text Holdings in [Inst symbol/Local [Inst] Holdings] appears at the top of the record. To view your local holdings, on the Action list click Edit Local Holdings.</p> <p>If you do not hold the item, the text No holdings in [institution symbol] appears at the top of the record. To view local holdings for another institution, use Display Local Holdings.</p> <p>Display local holdings:</p> <ol style="list-style-type: none"> 1. On the View list, click Display Local Holdings or press <Alt><K>< > (backslash). 2. In the Local holdings type list, select Institution Holdings, type an institution symbol in the text box, and click Display Local Holdings. 3. In the Holdings Display window, under Local Holdings Information, click the link to the holdings summary for the institution you want.

Take actions on institution summary

You can take the following actions using the Action/Sort list on an Institution Summary screen.

Action	Procedure
Create a new local holdings record for your institution	<p>On the Action/Sort list, select Create Local Holdings. The system displays a local holdings workform that contains information from the bibliographic record and default data for your institution. Complete the LHR. Add the record to WorldCat and link it to the bibliographic record. While viewing the completed LHR, on the Action list click Add Record or press <Alt><K>, <N>.</p>

Find Local Holdings Records

Action	Procedure
Delete your institution's local holdings records from the bibliographic record	<p>On the Action/Sort list, select Delete All Local Holdings. Immediately above the screen title, the system displays a box you can use to confirm or cancel the action.</p> <p>To delete all your LHRs and your OCLC institution symbol from the record, click Delete Local Holdings.</p> <p>To delete LHRs but keep your OCLC institution symbol linked to the record, clear (uncheck) the check box labeled Remove your institution's symbol from bibliographic record. Then click Delete Local Holdings.</p> <p>To cancel deleting local holdings from the record, click Cancel.</p>
View a Group Summary for a different group	<p>On the Action/Sort list, select Request Group Summary. Immediately above the screen title, the system displays a box you can use to specify the group for which you want to view a Group Summary.</p> <p>In the text box, type the group symbol for the group you want. Then click Display Summary.</p> <p>To cancel the action, click Cancel.</p>