Local Holdings Maintenance Quick Reference

Overview

OCLC Local Holdings helps you maintain accurate, current holdings information. This information supports interlibrary loan by providing your library's holdings for materials in any format, including serials. By making all aspects of the collection known, it also supports collection development.

Maintaining Local Holdings Records (LHR) provides information about your item-specific holdings as well as lending and reproduction policies. This allows other institutions to target resource sharing requests to institutions that can fill them.

Local Holdings in Connexion browser

Action	Procedure
Log on	**1** Point your browser to **http://connexion.oclc.org** **2** Type your authorization and password and click **Logon** or press <Enter>.
Start local holdings maintenance	Click the Cataloging tab or press <Alt><C>. The Search WorldCat screen appears.
Go to the Search WorldCat screen from any screen	On the Cataloging tab, click **Search** or select **WorldCat** from the Search Options list. Or press <Ctrl><Shift><W> or <Alt><C>.
Log off	Click **Logoff** (top right) or press <Alt><L>.

Searching WorldCat
For instructions on WorldCat searching, see the *Connexion: Searching WorldCat Quick Reference*, available on the OCLC Web site at:
<http://www.oclc.org/support/documentation/worldcat/searching/refcard/>.

Using Connexion browser
For more information on editing and other activities, see the *Connexion Browser Cataloging Quick Reference*, available on the OCLC Web site at:
<http://www.oclc.org/support/documentation/connexion/browser/cataloging/cnx_br_cat_quick_ref/>.

Find local holdings records

Search WorldCat for local holdings

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	On the Search WorldCat screen, in the Command Line Search area, type a search in the **Search for** box. **Tips:** • 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	**(Optional)** To add a holdings limit, type **and**, the index label , and then a symbol for an institution or group. • Institution Holdings **li:[institution symbol]** • My Local Holdings **l4:[your institution symbol]** • Group Holdings **zu:[group symbol]** • Group Local Holdings **l5:[group symbol]** **Examples** **in:0190-8286 and l4:ocl** **no:1775222 and li:ser** **in:0190-8286 and zu:nepu** **085109130x and l5:abcd**
3	Click **Search**.

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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. • **Institution Holdings.** In the **Institutions** box, type an institution symbol. • **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.
3	Click **Search**.

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.
3	Click **Search**.

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	**From the bibliographic record** On the View list, click **Display Local Holdings** or press **<Alt><K><\>** (backslash).

	Action
2	In the **Local holdings type** list, select the display to view: For **Institution Holdings** or **Group Holdings**, type the institution or group symbol in the text box. Or select **State Holdings**, **Region Holdings**, **Default Holdings**, or **All Holdings**.
3	Click **Display Local Holdings**.
4	In the Holdings Display window, click the link to the holdings summary for the institution you want.

Local holdings search results

Results screen	Local holdings indicator
Brief or truncated list	**LH** link appears next to the item number for records with your local holdings attached. Click the link to view an LHR or your institution summary. **GR** link appears next to the item number for records with group local holdings. 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 [symbol] holdings** appears at the top of the record. To view your local holdings, on the Action list click **Edit Local Holdings**.

LH and GR links in search results

GR	11.	People's journal
GR	12.	Siberian mathematical journal
LH GR	13.	South African journal of laboratory and clinical medicine.
GR	14.	United States Armed Forces medical journal
GR	15.	Journal of the Central University for Nationalities

Navigation tool	How to use
Buttons. Search Results, Bib Record, Group Summary, Inst Summary	Top/bottom of screen. Click to move to search results, bibliographic record, group summary, or institution summary.

Navigation tool	How to use
Jump bars & boxes. View List, View Record, View Group, View Inst	Top/bottom of screen. Use arrow buttons to view next/previous screen, record, institution, or LHR. Type item number in box and press <Enter> to view a specific record, institution, or LHR.
Search Options list. Cataloging tab, below the Search button	Click **down arrow** to open the list. Under **WorldCat**, select Search Results, LH Group Summary, or LH Inst Summary.

Edit local holdings records

Editing capabilities for local holdings records

- You need a Full-level Connexion authorization to create, edit, replace, or delete an LHR.
  — With a Full-level authorization , you can edit LHRs that belong to your institution. Your own records open in edit mode so you can begin entering data immediately.
  — You cannot edit LHRs that belong to another institution. Other libraries' LHRs open in display mode (view only). You can derive a new LHR from a record in display mode and then complete the record for your use.
- A holdings agent (when logged in using an Agent authorization) can create, edit, replace, and delete LHRs for a client institution.
  — When logged in as an agent, you cannot maintain your own LHRs, unless your institution is profiled as a client.
  — If your institution is not a client, log in with an individual authorization to maintain your own LHRs.

Required LHR fields

- At a minimum, the following fields must be present and complete for a local holdings record to pass validation:
  — Leader
  — 007 - Physical Description
  — 008 - Fixed-length Data Elements
  — 852 - Location
- In edit mode, required LHR fields are marked with an asterisk *****. Asterisks appear to the left of the plus sign (**+**) buttons used to expand fields.

Edit fixed-length fields (Leader, 007, 008)

You cannot edit these fields directly. Expand the field and then select from lists of valid values.

Action	Procedure
Expand field	Click the **Plus (+)** button at the left.
Collapse field and cancel changes	Click **Cancel**.

Action	Procedure
Collapse field and apply changes	Click **Apply**. **Result.** Content in the main text box reflects changes made using guided entry.
Select value for an element	Click the **down-arrow** button to open the list. Then click the value you want.
View MFHD help	In the **expanded** field, click the hyperlinked label for an element. In the **unexpanded** field, on the Functions list, click **Help**. Or, in the MARC Help box (top or bottom of record), type the tag number. Then click **MARC Help**.

Edit other LHR fields (variable-length fields)

If you are familiar with the MARC holdings format, you can edit LHR fields (except the Leader, 007, and 008) directly, without expanding the field. Or expand the field and use lists and text boxes to define indicator values and subfield content.

Action	Procedure
Enter or edit content directly	In the text box for the field, define indicators and enter or edit appropriate subfields.
Expand field	Click the **Plus (+)** button at the left.
Collapse field and cancel changes	Click **Cancel**.
Collapse field and apply changes	Click **Apply**. **Result.** Content in the main text box reflects changes made using guided entry.
Select indicator value or subfield value	Click the **down-arrow** button to open the list of values for the indicator or subfield. Then click the value you want.
View MFHD help	In the **expanded** field, click the hyperlinked label for an indicator or subfield. In the **unexpanded** field, on the Functions list, click **Help**. Or, in the MARC Help box (top or bottom of record), type the tag number. Then click **MARC Help**.
Add a subfield (expanded field)	1 In the Action list for the subfield above the position for the new subfield, click **Add Below**. 2 In the list of available subfields, select the subfield to add.

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Action	Procedure
Delete a subfield (expanded field)	In the Action list for the subfield to delete, click **Delete**.
Move a subfield (expanded field)	In the Action list for the subfield you want to move, select the position. Options depend on the current position of the subfield.

Expanded LHR field: 008

Use command shortcuts: keystrokes for actions

Action	Procedure
Show Command Shortcuts box	Press <Alt><K>.
Hide Command Shortcuts; show Edit, Action, View lists	Press <Alt><J>.

Actions for editing an LHR

Use the Edit, Action, and View lists to take these actions, or use the keystroke for the action.

Action	Procedure
Cancel Changes (Discard all changes made since you began editing the record. Do not continue editing.)	**1** On the Edit list click **Cancel Changes** or press <Alt><K> and then <2>. **2** Click **OK** to cancel edits. Or click **Cancel** to keep your changes and continue editing. **Existing LHR.** The record appears as retrieved, in display mode. **New LHR.** The system removes the record and returns you to Search WorldCat screen.
Unedit Record (existing LHR only) Reverse changes; continue editing	On the Edit list click Unedit Record or press <Alt><K> and then <Z>. The record appears as retrieved, in edit mode.

Action	Procedure
Complete editing and preserve changes	Take a final action on the local holdings record. Final actions are: Replace Record (for an updated LHR) and Add Record (to attach a new LHR to a bibliographic record).
Reformat Record	On the Edit list, click **Reformat Record** or press <Alt><K> and then <R>. Arranges fields in tag number order and removes empty fields.
Validate Record	On the Edit list, click **Validate Record** or press <Alt><K>, <V>. If the record contains **errors**, the system reports the number of errors. For each error, a message that identifies the problem(s) appears directly above the field. The message remains until you correct the error and the corrected record passes validation. **Tip:** Read all error messages before making corrections.

Create local holdings records

Derive local holdings record from another LH record

	Action
1	Retrieve your own LHR (edit mode) or another institution's LHR (display mode).
2	On the Edit list click **Derive New Record** or press <Alt><K> and then <D>.
3	Edit the record to reflect your own holdings. If appropriate, apply local holdings constant data to the new record.
4	Edit the Summary field of the new LHR, if necessary, to reflect your institution's overall holdings for the item.
5	On the Action list click **Add Record** or press <Alt><K> and then <N>. **Results** • Connexion validates the record. If errors exist, correct them and then try again to add the record. • When the record is valid, Connexion links it to the bibliographic record in WorldCat. • When you add your first LHR to a record, Connexion sets your institution-level holdings, if not already set.

Create a local holdings record using a workform

Use **Create Local Holdings** from an LHR, a bibliographic record, or an institution or group summary.

	Action
	Action
1	**Bibliographic record or LHR** On the Action list click **Create Local Holdings** or press <Alt><K> and then <+> (plus sign). **Group Summary or Institution Summary** On the Action/Sort list click **Create Local Holdings**.
2	Edit the record to reflect your own holdings. If appropriate, apply local holdings constant data to the new record.
3	Edit the Summary field of the new LHR, if necessary, to reflect your institution's overall holdings for the item.
4	On the Action list click **Add Record** or press <Alt><K> and then <N>. **Results** - Connexion validates the record. If errors exist, correct them and then try again to add the record. - When the record is valid, Connexion links it to the bibliographic record in WorldCat - When you add your first LHR to a record, Connexion sets your institution-level holdings, if not already set.

Edit and replace a local holdings record

	Action
	Action
1	Retrieve an LHR you need to revise and replace in WorldCat.
2	Edit the record as necessary. If appropriate, apply local holdings constant data to the record.
3	If your revisions affect your institution's overall holdings for the item, edit the Summary to reflect the changes.
4	**Replace record.** On the Action list click **Replace Record** or press <Alt><K> and then <A> .
5	Click **OK** to replace the record. Or click **Cancel** to resume editing the record. **Results** - Connexion validates the record. If errors exist, correct them and then try again to replace the record. - When the record is valid, Connexion replaces it in WorldCat.

Create and apply LH constant data

Constant data (CD) is information you add when creating or editing a local holdings record. LH CD records are stored in an online file shared by users at your library. Use LH constant data to:

- Avoid rekeying standard data when you create or edit LHRs.
- Reduce errors and improve consistency.
- Add specific fields, subfields, or codes to multiple LHRs.
- For agents, who make the same change to multiple LHRs, constant data can be especially useful.

Create local holdings constant data

Action	Procedure
Create LH CD from a workform	1 On the Cataloging tab, under Create Options, click **LH Constant Data**. 2 Complete the new LH CD record. 3 On the Action list click **Save Constant Data Record** or press <Alt><K>, <S>. Type a CD name (required). Then click **Yes** or press <Enter>.
Derive LH CD from an LHR or an LH CD record	1 Open the LHR or LH CD record to derive from. 2 On the Edit list click **Derive New Constant Data Record** or press <Alt><K>, <4>. 3 Complete the new LH CD record. 4 On the Action list click **Save Constant Data Record** or press <Alt><K>, <S>. Type a CD name (required). Then click **Yes** or press <Enter>.

Apply LH CD to local holdings records

Command	Procedure
Apply CD By Name	1 On the Edit list, click **Apply CD By Name** or press <Alt><K> and then <5>. 2 In the **Specific CD Name** box, type the name of the LH CD record to apply. 3 Click **Apply CD** or press <Enter>.
Apply CD From List	1 On the Edit list, click **Apply CD From List** or press <Alt><K> and then <6> . 2 In the list, click the name of the LH CD record to apply.
Apply Default CD (Not available unless you have set an LH CD record as default LH CD.)	On the Edit list, click **Apply Default CD** or press <Alt><K> and then <C>. The system merges your default LH CD record with the record you are editing.

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Select codes to apply for Leader, 007, and 008

By default, the Summary, Leader, 007, and 008 in LH constant data **overwrite** corresponding fields in an LHR. Although you cannot delete these required fields from the LH CD, you can choose not to apply them, or to apply specific codes only.

Action	Procedure
Do not apply Summary, Leader, 007, or 008 from LH CD	In the Functions list for the CD field, click **Delete Text** to remove all text from the field. The empty field remains in the CD record, but is not applied to an LHR.
Select specific elements to apply from Leader, 007, or 008. (Avoid applying other elements.)	1 Expand the field in the CD record. 2 For each element you **do not** want to apply to an LHR, select (*** - Protected**) in the list of values. 3 To **avoid applying** a text-entry element such as a date, type an asterisk (*) as the first character in the text box. 4 For elements **to be applied**, specify the values you want for the LHRs.
Do not apply other CD fields	In the Functions list for the CD field, click **Delete Field** to remove the field from the CD record.

Delete local holdings records

Delete LHRs and your holdings symbol

- **Delete Holdings.** From a bibliographic record, use **Delete Holdings** to remove your institution's symbol.
  — If you have linked LHRs, Connexion asks if you want to delete both the LHRs and your institution's symbol.
  — Respond **Yes** to delete the LHRs and your holdings symbol, or **No** to cancel the action. Connexion cannot remove your symbol while an LHR remains.
- Use **Delete Local Holdings** to delete an LHR you are viewing.
  — When the LHR is the your last for the item, Connexion asks if you want to delete your institution's symbol as well.
  — Respond **Yes** to remove your symbol, or **No** to keep your symbol attached to the record.

Delete a local holdings record

	Action
1	Retrieve the LHR to delete.
2	On the Action list click **Delete Local Holdings** or press <Alt><K> and then <X>.

	Action
3	Click **OK** to delete the LHR. Click **Cancel** to keep the LHR. **Results** • **Not the last LHR.** Connexion deletes the record. • **Last LHR.** Connexion deletes the record and then asks whether to remove your institution's symbol. Click **Yes** to remove your symbol, or **No** to retain your symbol.

Delete all local holdings

	Action
1	**Bibliographic record** On the Action list click **Delete All Local Holdings** or press <Alt><K> and then <-> (hyphen). **Group Summary or Institution Summary** On the Action/Sort list click **Delete All Local Holdings**.
2	Confirm or cancel the action: • Delete all LHRs and your holdings symbol. Select **Remove your institution's symbol from bibliographic record** and then click **Delete Local Holdings**. • Delete LHRs, retain your symbol. Clear (uncheck) the **Remove your institution's symbol from bibliographic record** check box and click **Delete Local Holdings**. • Retain both all LHRs and holdings symbol. Click **Cancel**.

Local holdings and resource sharing

Local holdings can be used to supply system-suggested lender strings as part of the custom holdings process via WorldCat Resource Sharing. WCRS chooses lenders from a custom holdings display -- when the request is created -- based on volume and year data from the local holdings record.

Lending and reproduction policy data in local holdings records (field 008, bytes 20 and 21) can be used to deflect WorldCat Resource Sharing requests for items you cannot loan and/or copy. Deflection occurs after the request is placed.

Local holdings record fields: definitions and guidelines

Record element	Rule, description, and guideline
Summary	**Rule.** Must be present. **Description.** Describes institution-level (overall) holdings for the item. Summary is entered when the institution's first LHR is linked to a bibliographic record or system-supplied for batchloaded holdings records. The same Summary appears in all your institution's LHRs linked to the same bibliographic record. **Guideline.** When you edit or add an LHR, update the Summary as necessary to reflect changes in the institution's total holdings for the item, across all copies. For new LHRs, the system may supply a default Summary, "Local holdings available." Replace the default text with a description of your institution's overall holdings.
Leader **Always requires editing in an LHR workform**	**Rule.** Must be present. **Description.** Coded information on the basic properties of the LHR and information used in processing. **Guideline.** Verify Type of Record (Leader/06) and Encoding Level (Leader/17). The value for Encoding Level indicates the level of detail provided for the holdings data in the record. Both Type and Encoding Level may affect which other fields are required for validation and/or what values are valid in certain fields. **LHR workform: set Encoding Level.** In a new LHR created using a workform, Encoding Level (Leader/17) is set to a fill character |. You must select a valid code. or the record will fail validation.
007	**Rule.** Must be present. **Description.** Physical description coded field. Purpose and format are identical to those of the 007 field in bibliographic records. **Guideline.** System supplies default values from a bibliographic record. 007 rarely needs editing when updating an LHR. For a new LHR or LH constant data record, edit as needed. Verify the Category of Resource (007/00). The Category of Resource determines the other 007 elements to be specified and may determine options for coded holdings in 853/863 fields.
008	**Rule.** Must be present. **Description.** Coded information on acquisition, retention, completeness, lending policy, and reproduction policy. **Guideline.** Check and update the values for **Lending Policy** (008/20) and **Reproduction Policy** (008/21) to reflect current policies. The WorldCat Resource Sharing service can use these codes to deflect ILL requests.
852	**Rule.** Must be present. System supplies your institution symbol in $a and holding library code (Sublocation) in $b. **Description.** Location and sublocation. **Guideline.** Check the holding library code in $b and edit as needed. If appropriate, add subfields to provide details on the item. Use $z for general holdings notes.
853/854/855	**Rule.** When present, must be paired with and linked to corresponding 863/864/865 field. **Description.** Captions and publication patterns, for basic bibliographic units (853), supplements (854), and indexes (855). **Guideline.** Enter and update details on publication: enumeration levels, chronology, frequency, numbering schemes, etc. Verify coding of linking subfield $8 to ensure linking to the correct 863, 864, or 865 field.
863/864/865	**Rule.** When present, must be paired with and linked to corresponding 853/854/855 field. **Description.** Enumeration and chronology, for basic bibliographic units (863), supplements (864), and indexes (865). **Guideline.** Enter and update details on your holdings for the item, including beginning-ending dates and breaks in coverage. Subfields for enumeration, chronology, etc. correspond to subfields for the matching captions in linked 85x field. Verify coding of linking subfield $8 to ensure linking to the correct 853, 854, or 855 field.
866/867/868	**Rule.** Optional. May be included to supplement coded information on captions, patterns, enumeration, and chronology in 853-855 and 863-865. (Substituting free-text holdings data in 866/867/868 for coded holdings in 85x/86x fields is **not recommended**, but is permitted if necessary.) **Description.** Free-text holdings information for basic bibliographic units (866), supplements (867), and indexes (868). **Guideline.** Enter and update holdings information and notes. If the free-text data in 866/867/868 fields is related to coded data fields (85x/86x) in the LHR, verify that the correct linking and sequence numbers are present in subfield $8.

LHR text editing techniques

Action	Procedure
Move cursor to the 007 field	Press <Alt></> (slash).
Move to the top or bottom of the record screen	Press <Ctrl><Home> to move to the first input box on the screen. Press <Ctrl><End> to move to the last input box on the screen. Or Click the **up arrow** or **down arrow** button (right end of blue header and footer bar).
Show or hide the Functions list	Press <Alt><Y>.
Go to the Active Records screen	Press <Ctrl><Shift><9>.
Change text	In the text box for the field, use standard editing keys (<Insert>, <Backspace>, <Delete>, arrow keys) to move the insertion point and remove or add characters.
Delete text	In the Functions list click **Delete Text**. Text is deleted; tag and indicators remain. **Empty fields removed.** The empty field is removed if you reformat the record or take a final action.
Undo last text change	To reverse the most recent text change, use the standard Windows **undo** keystroke: <Ctrl><Z>.
Add a field or multiple fields	1 Move to the field below which you want to add field(s). 2 In the Functions list click **Add Single Field Below** or **Add Multiple Fields**. 3 **Multiple fields** In the dialog box, type the number of fields to add (1-10). Click **OK**. Inserted fields duplicate the MARC tag of the preceding field. Change the tags and supply indicators as appropriate.
Delete field	In the Functions list click **Delete Field**.
Copy field	1 In the Functions list click **Copy Field**. 2 Move to the field below which you want to insert the copied field. 3 In the Functions list click **Paste Field**.
Move field (cut and paste)	1 In the Functions list click **Cut Field**. 2 Move to the field below which you want to insert the moved field. 3 In the Functions list click **Paste Field**.

Action	Procedure
Enter subfield delimiter	Type a single **dollar sign** ($). Press <Shift><4> to create the **$**. Connexion shows the dollar sign as a subfield delimiter (‡) in display mode.
Dollar sign as currency symbol	To enter a **dollar sign** as a currency symbol (not to represent a subfield delimiter): Type **2** dollar signs (**$$**). Do not type a space between the 2 dollar signs.

Support, documentation and training

How to get assistance

- Contact your OCLC regional service provider, listed on the OCLC Web site at:
  <http://www.oclc.org/contacts/regional/>
- Contact OCLC (support in English, Spanish and Portuguese). Hours: 7:00 am—9:00 pm U.S. Eastern time, Monday-Friday.
- Open an e-mail support request from within Connexion browser: In the top right corner of the screen, click **Contact**.

Contact options

USA: 1-800-848-5800
International: 1-614-793-8682
Fax: 1-614-764-2694
E-mail: connexion-support@oclc.org
Web: <https://www3.oclc.org/app/contac/>

System alerts and known problems

System Alerts page (all OCLC services):
<http://www.oclc.org/support/systemalerts/>

Known problems page (Connexion browser):
<http://www.oclc.org/connexion/support/browser_known_problems.htm>

Documentation and training

- Local Holdings Maintenance documentation
  <http://www.oclc.org/support/documentation/localholdings/>
- Local Holdings Maintenance training
  <http://www.oclc.org/support/training/localholdings/>
- Connexion Browser documentation at: <http://www.oclc.org/support/documentation/connexion/browser/>
- Connexion browser tutorials at: <http://www.oclc.org/support/training/connexion/browser/tutorial/>

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