Chapter 5 -- Adding Holdings

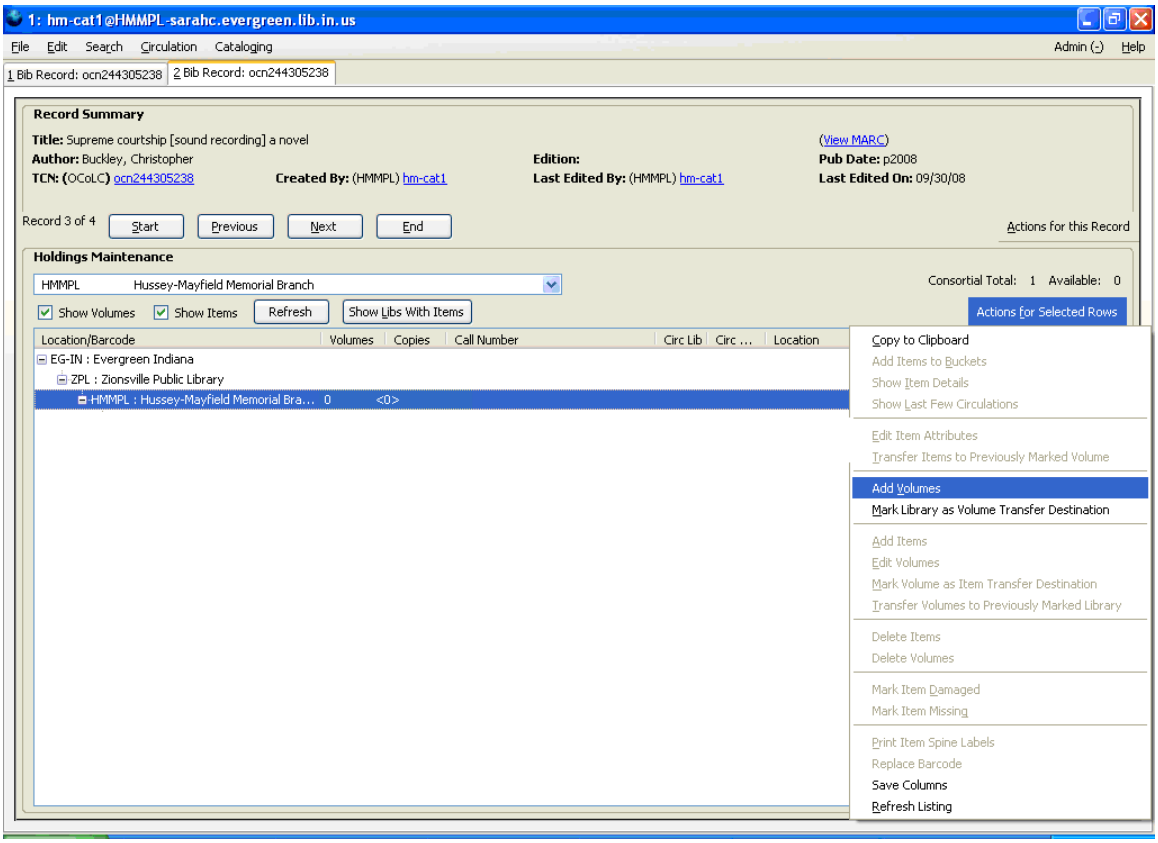
When cataloging in Evergreen, it is always important that thorough searching be done to find a matching title in the catalog before importing a new record via Z39.50. When a match is found in Evergreen, a new record should not be imported. Please attach your holdings to the existing record. If an existing record does not meet Evergreen Indiana standards, please edit or overlay the record. See ***Chapter 15 – Using the MARC Editor***, or ***Chapter 14 – Overlaying Records***, if needed.

Adding Volumes

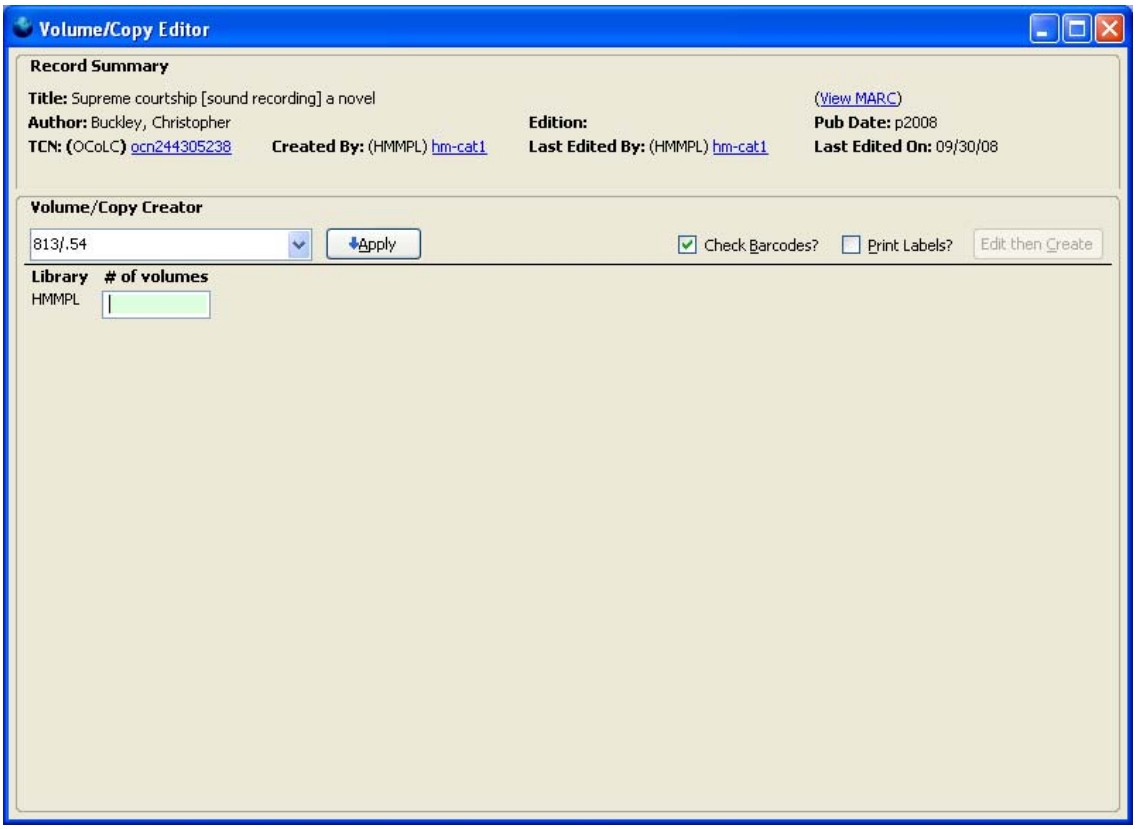
Search for your item in Evergreen. When you find a match, click on the title to view the record. If you are not in the **Holdings Maintenance** view, switch to it by clicking on **Actions for this Record (Alt + R)** at the upper right. Select **Holdings Maintenance (Alt + H)** from the drop down list.

Click on the name of the Branch where you wish to add the Holdings to highlight the branch line. If the call number you need is already attached to this record for your library, see ***Adding Items/Copies*** on page 5.14.

Click on **Actions for Selected Rows (Alt + F).**
Select **Add volumes (Alt + V)** from the drop-down list**:**



The **Volume/Copy Editor** screen appears:

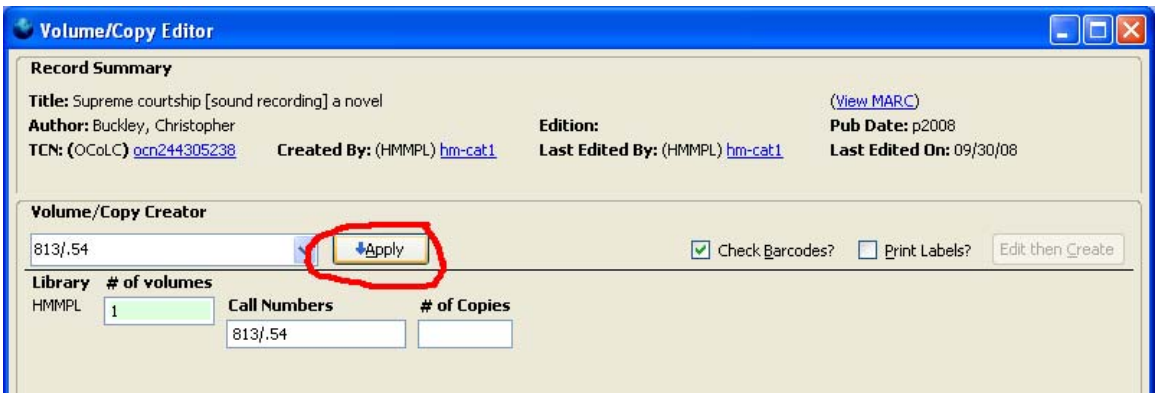


Type the number of volumes (call numbers) in the box labeled **"# of volumes**" hit **Enter**. Examples of different volumes: Volumes 1 and 2 of a two volume set, 2 copies of the same book going into different collections with different call numbers, different discs from a DVD set that will circulate separately.

The Call number and Copy number boxes will appear:

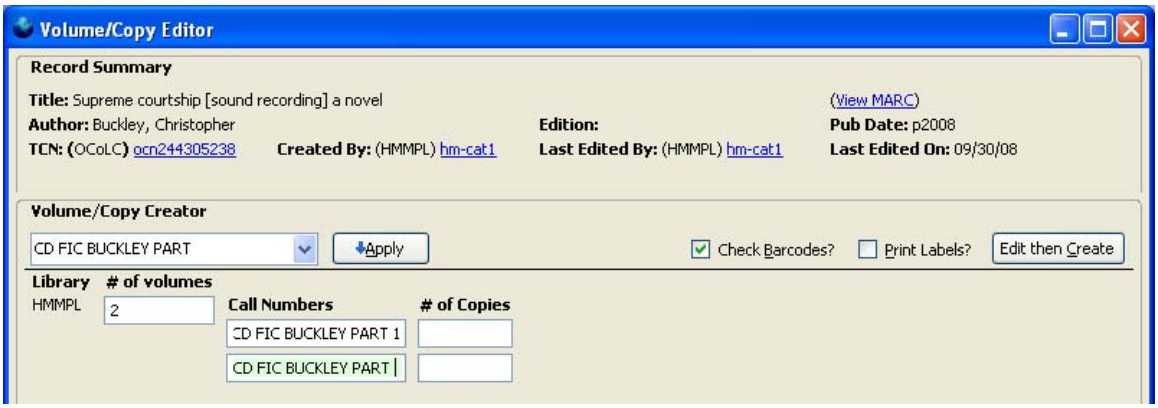
Type your call number into the box labeled **Call Numbers**.

Note the information in the box under the Volume/Copy Creator is the call number information taken directly from the MARC record. If there is nothing in the box, there was no call number on the MARC record. There may be multiple call numbers supplied, and you can select the one you like by clicking the blue box to see the options. If there is a call number in the box you'd like to use, you can click the **Apply** button and it will automatically fill in the Call Number field for you.



You can edit the call number supplied by the MARC record if you wanted to remove a slash mark or some of the digits, for instance. If you are adding

multiple volumes with similar call numbers, you could type the call number into the box and apply it to all of your volumes:



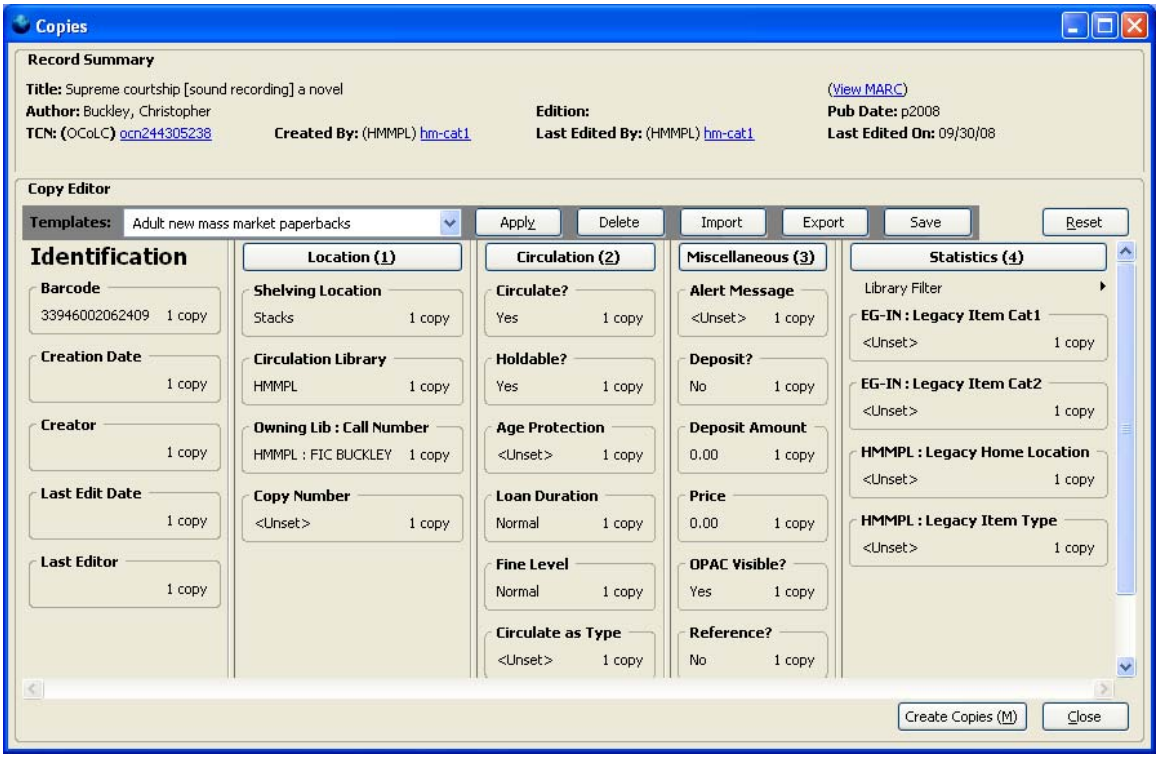
After you have entered in your call number, type the number of copies into the box labeled **# of Copies**. Copies would be identical items with identical call numbers.

An empty, unlabeled box will appear:

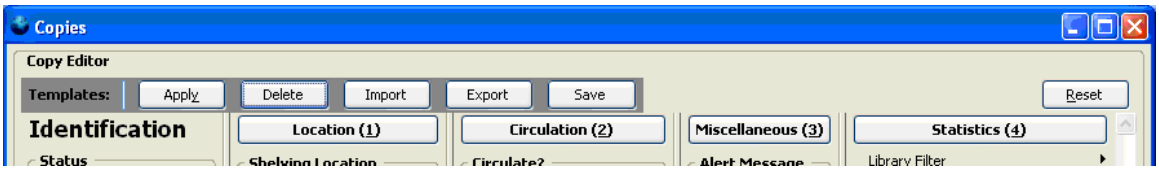
Enter your barcode in the box. Then, click on the button to the right that is labeled **Edit then Create**.

If you forget to enter your barcode, you will return to the Holdings Maintenance screen, and your call number will still be created. See ***Adding Items/Copies*** on page 5.14 if you create a call number with no copies attached***.***

If you entered the barcode, when you click **Edit then Create**, the **Copy Editor** appears:

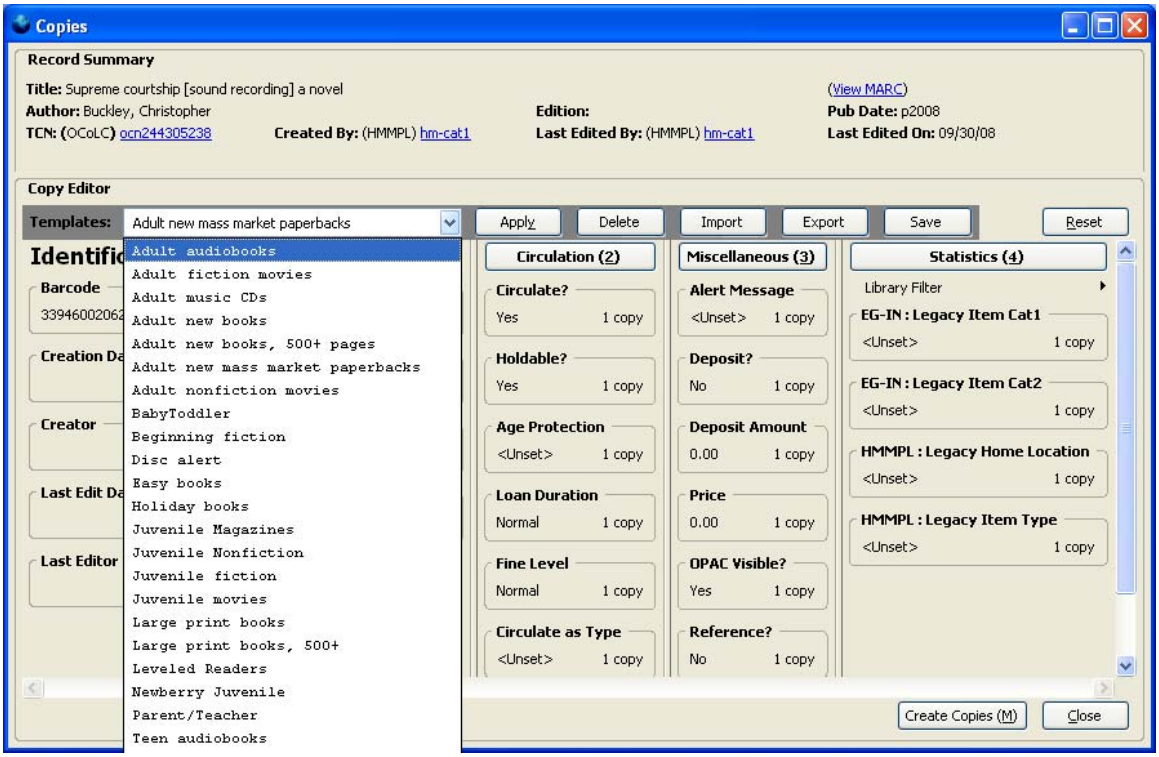


If your template bar has no template drop down box, as shown below, you have not created any templates. See ***Chapter 6 -- Creating Templates.***

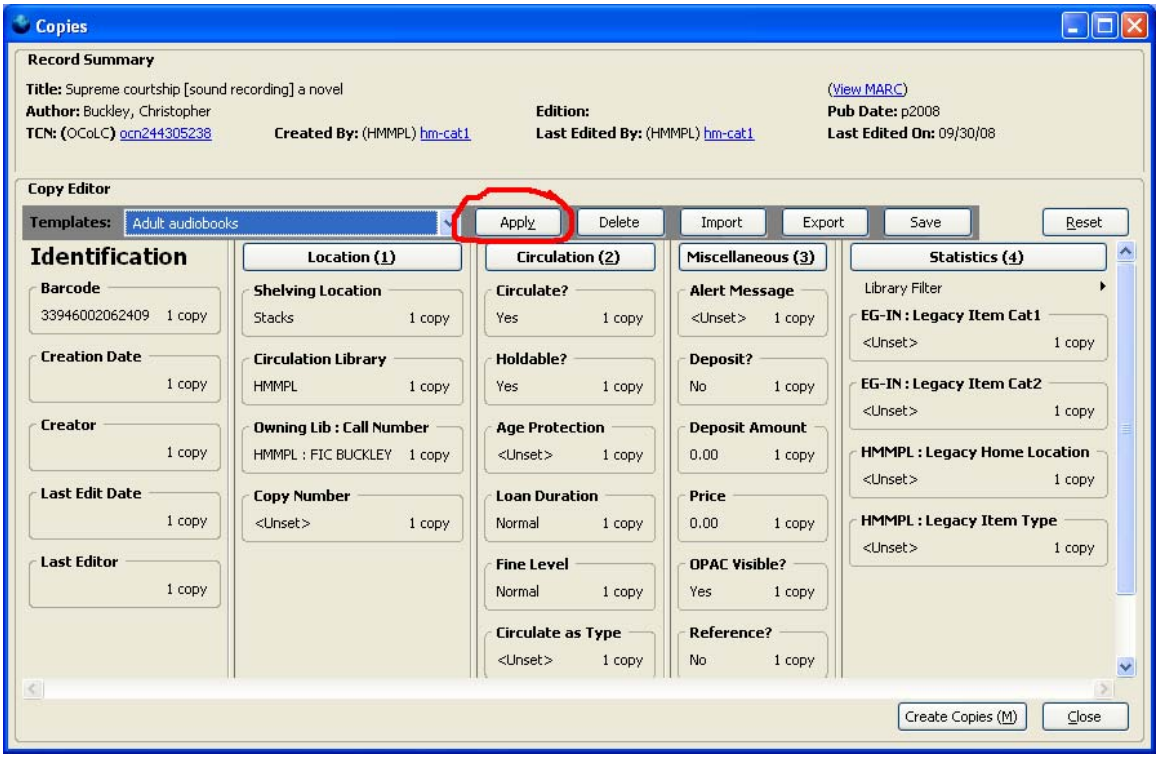


If you have created and applied templates previously, the template you have applied most recently will appear in the template box. If that is the type of item you are cataloging you will not need to select a template from the list. You can simply apply the template.

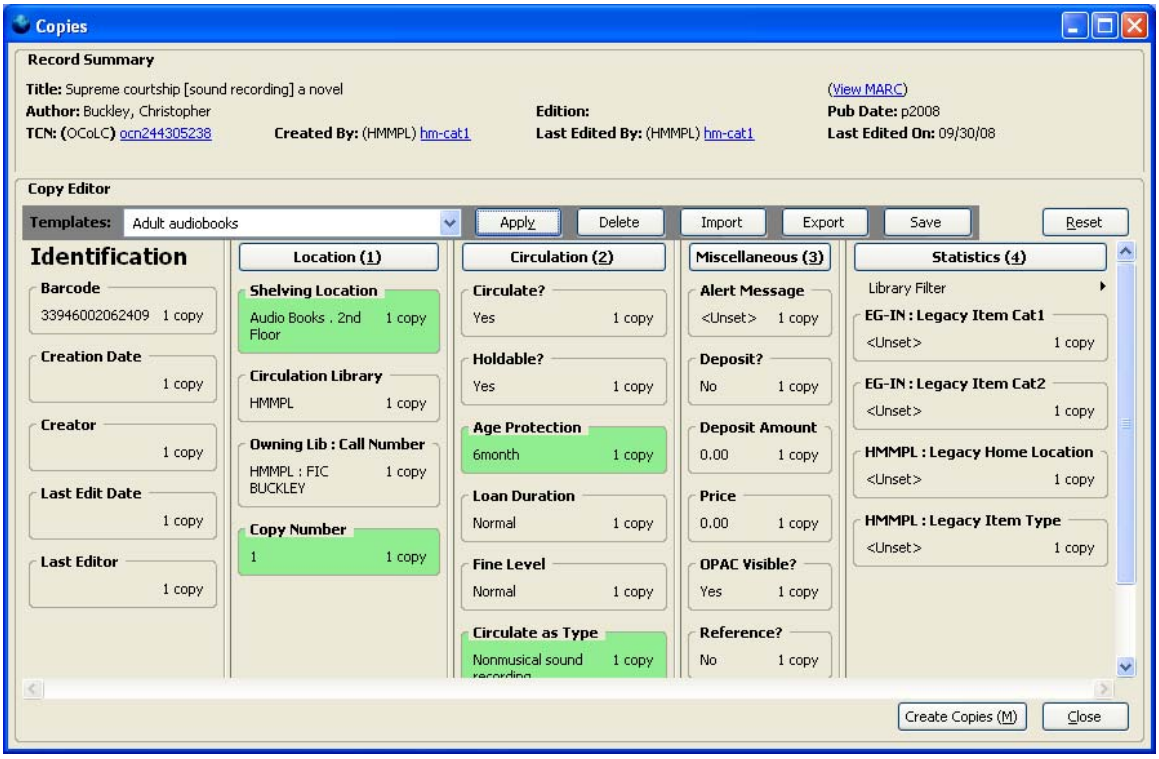
You can now apply your item information. If you have created templates, select your template from the drop-down list. Only the templates created for your log-in will appear on the list, so if you need a new template for this item, see ***Chapter 6 -- Creating Templates.***



Once the template you need is displayed in the template box, click **Apply (Alt +Y).**

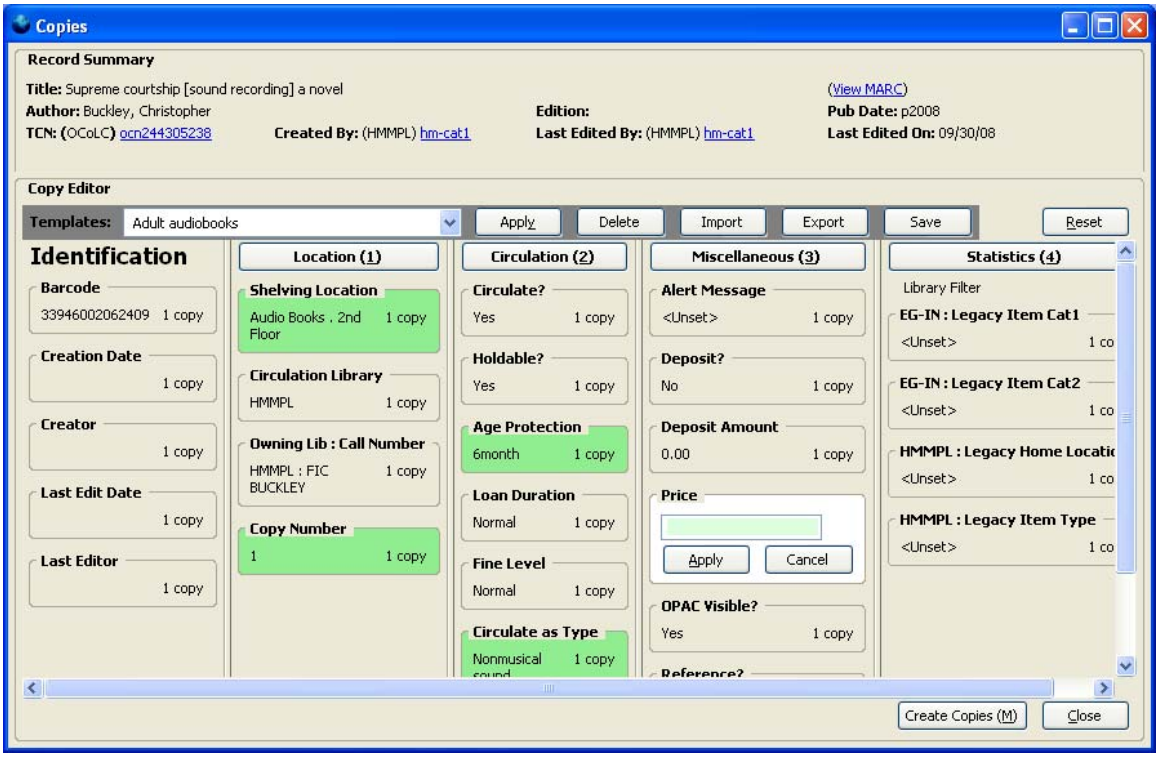


When the template is applied, the fields in that template will turn green and display the selected information.



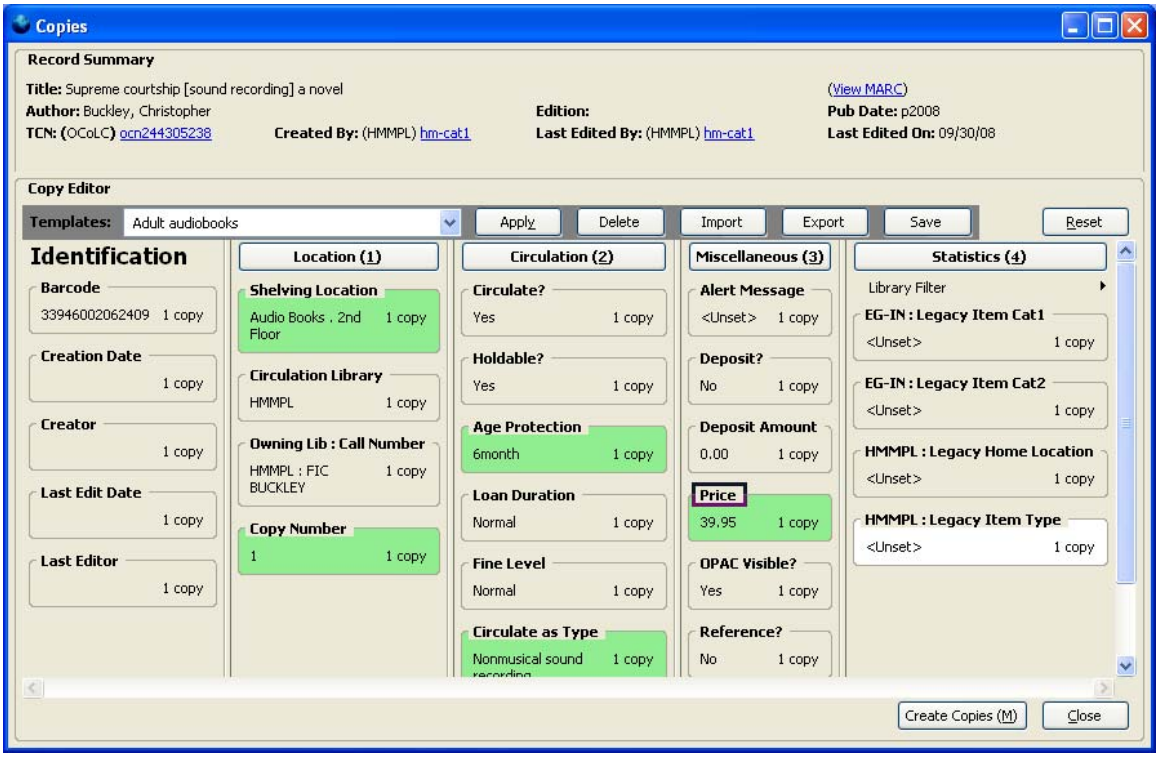
At this point you can edit any other fields desired, for instance, the price. Simply double click on the field you wish to edit, and enter the desired information. You can also press the Tab key to move from field to field, or jump from column to column by pressing **Alt + 1, 2, 3, or 4**. When the field you wish to edit is highlighted, press **Enter** to activate it.

Active fields will have a text box or drop-down list so that information can be applied and an Apply and Cancel button. The Price field is active below. The field is white because the mouse is pointing to it.

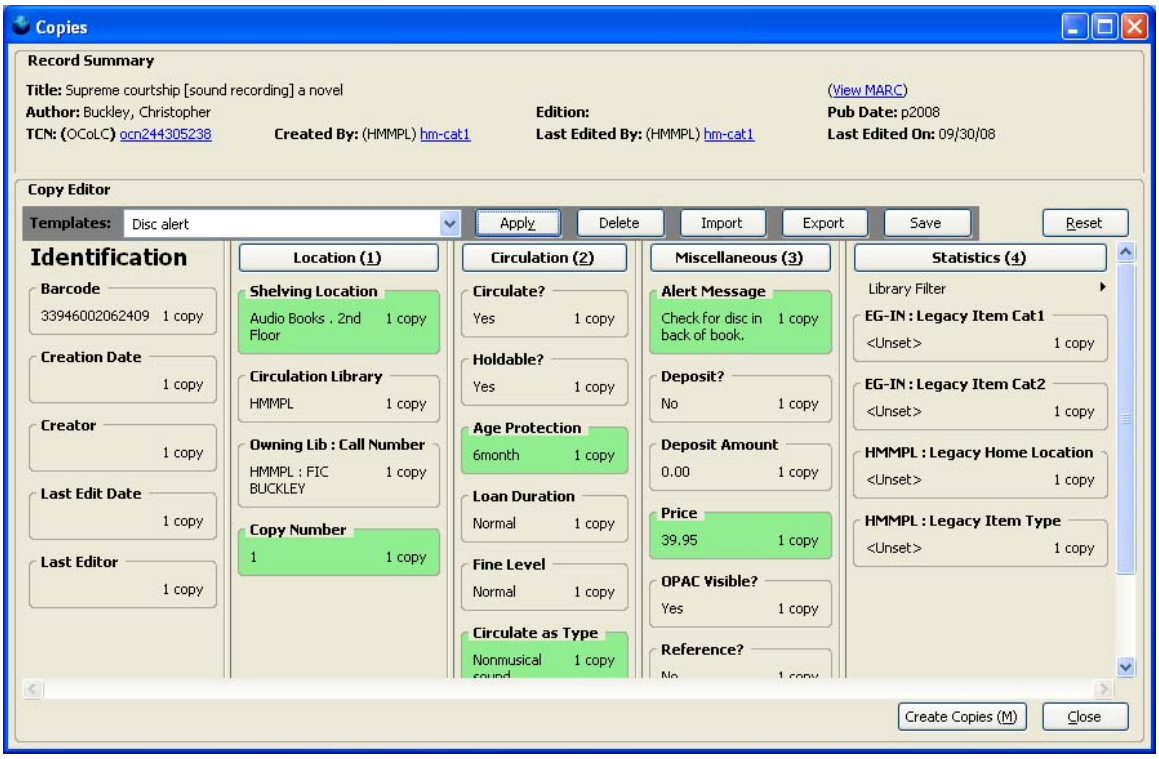


To set the **Price,** enter the number, and click **Apply (Alt +A)**. It does not accept the $ character. If you do not enter the decimal point and cents, the system will add .00 automatically.

The field will then turn green. If the field does not turn green, the information has not been applied to your item.



You can apply more than one template to an item if desired. For instance, you might create a template for an alert message for items that contain additional materials such as a CD-ROM in the back of a book.

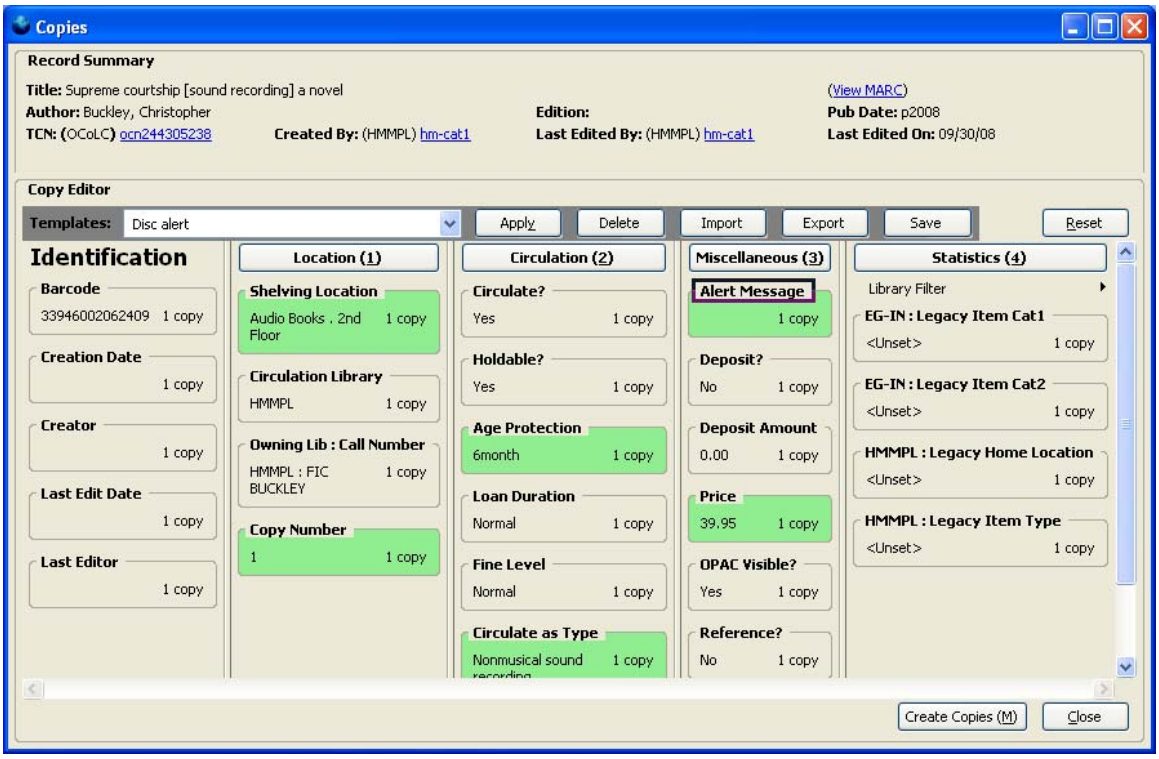


Note that applying the Disc alert template did not affect the fields which were already applied to this item. Applying a new template only affects the fields in that template.

In this case, this alert message is not appropriate, since this item is an Audiobook.

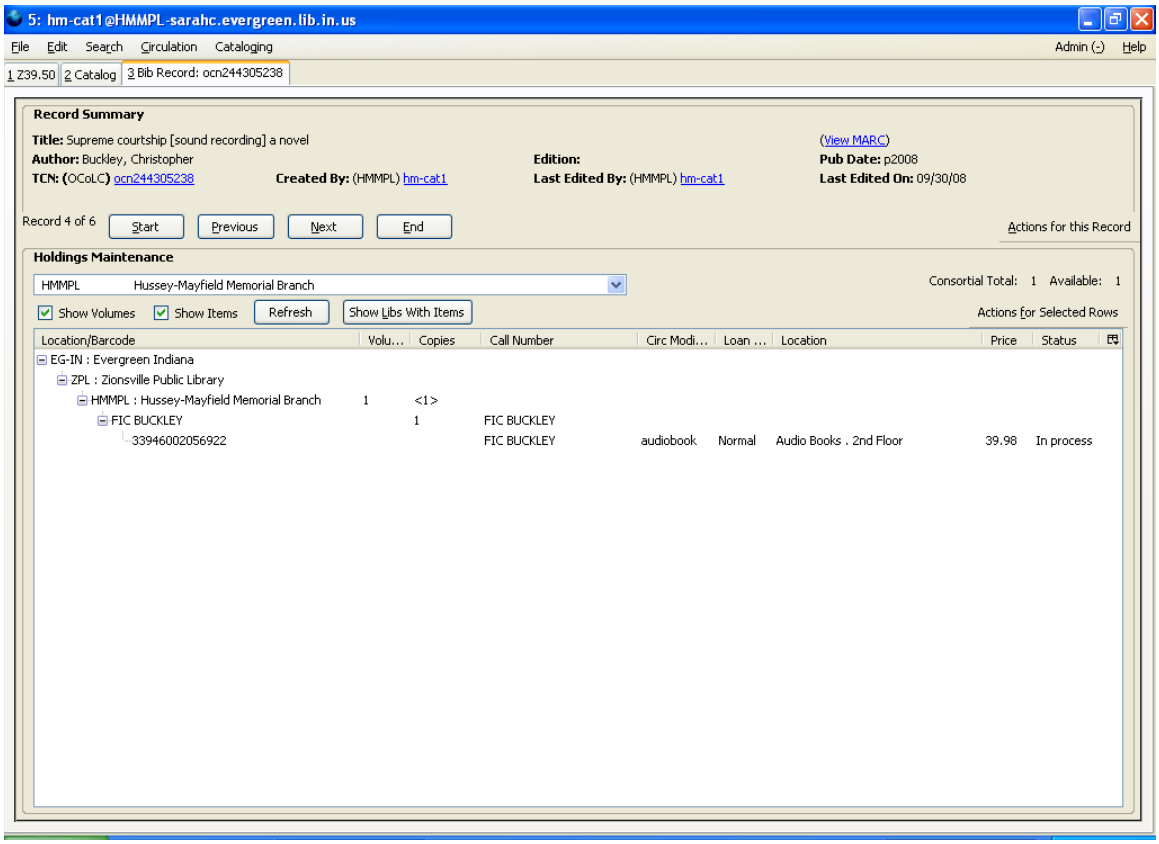
You cannot “un-apply” individual fields. To clear all the current settings, you can click **Reset (Alt + R)** on the right hand side of the screen, next to the Template bar. This would clear all the green fields, so you would then have to apply a new template.

To remove just the alert message, delete the content of the message, and click **Apply (Alt + Y).** The box will remain green.



When you have applied all the desired item information, click the **Create Copies (Alt + M)** button at the bottom right hand corner of the screen.

You will now return to the Holdings Maintenance screen, and your new item information will be displayed:

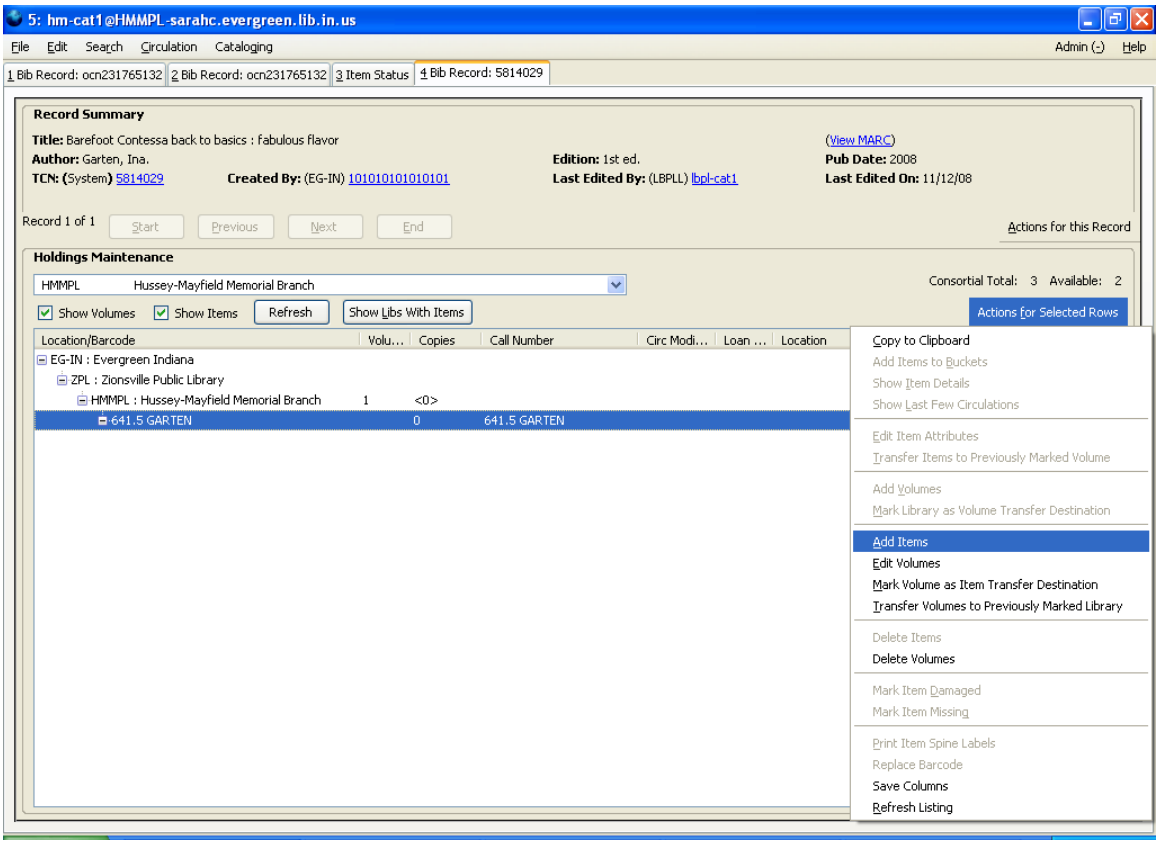


If you do not click Create Copies, then your volume (call number) will be created, but not your item. You will have to add the item individually as if you were adding another copy.

Adding Items/Copies

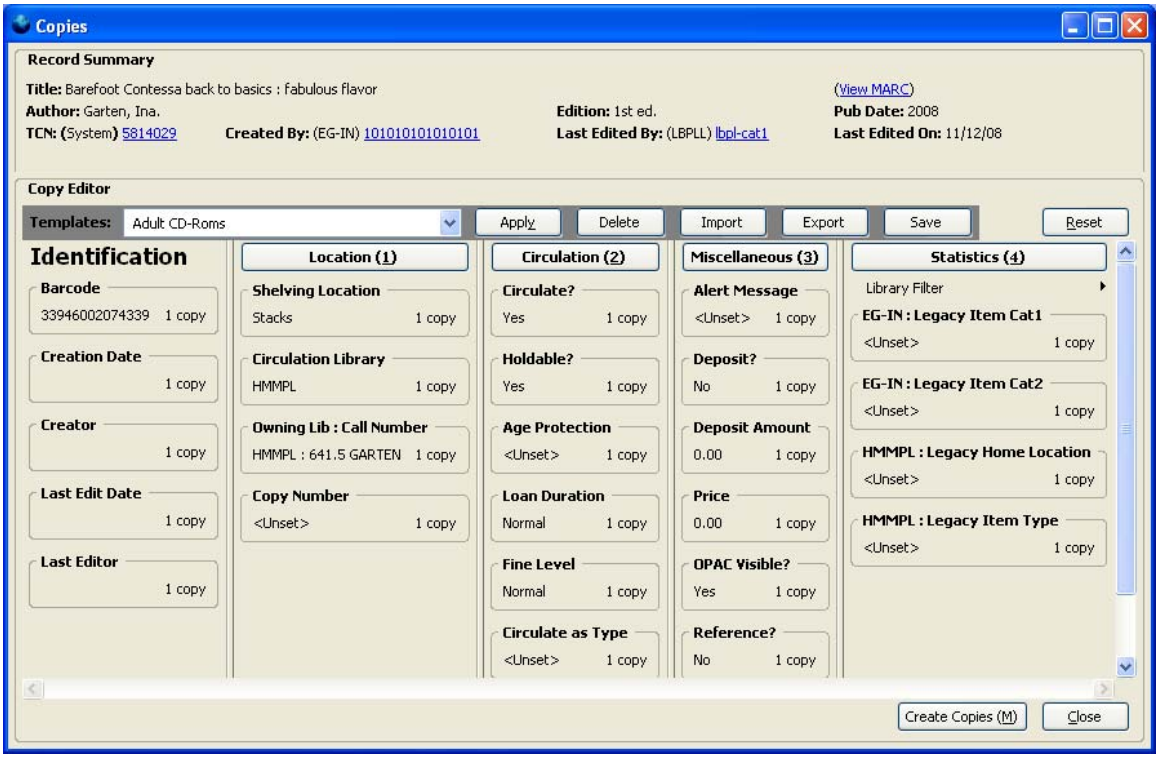
In some cases, such as when you add a second copy at a later date, or when you have created a call number without adding your volume, the call number you need will already be attached to the record. If that's the case, you will need to Add Items rather than Add Volumes.

Highlight the call number where you wish to attach your copy, and under **Actions for Selected Rows (Alt + F)** select **Add Items (Alt +A)**



The Volume/Copy Editor will open up. The call number you highlighted will appear in the call number box, and the call number box will be grayed out. Enter the number of copies you are adding in the # of Copies box. Then the barcode box(es) will appear. Enter your barcode and click **Edit then Create (Alt + C).**

The Copy Editor will open:



At this point you can apply your templates and item attributes as needed and create your copy. Return to page 5.5 for further direction if necessary.