Chapter 3 --   Introduction to Holdings Maintenance

The Holdings Maintenance Screen allows you to view Item and Volume Information associated with a bibliographic record. From this screen you can add, delete and edit your holdings.

To access the Holdings Maintenance Screen, perform a catalog search and click on a title to view a record.   The default view in the Staff Client for records is the OPAC view.
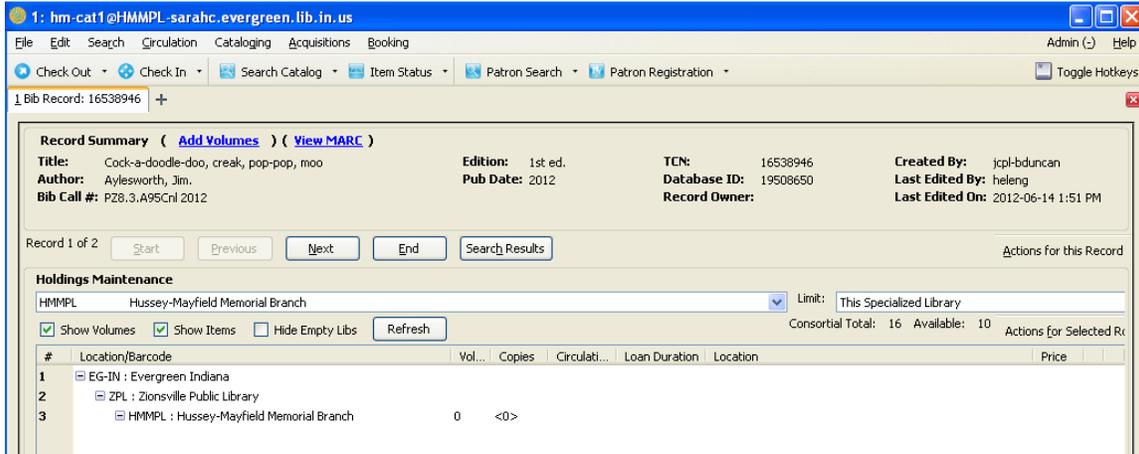
To switch from OPAC view to the **Holdings Maintenance** view, clicking on **Actions for this Record (Alt + R)** at the upper right. Select **Holdings Maintenance (Alt + H)** from the drop down list.
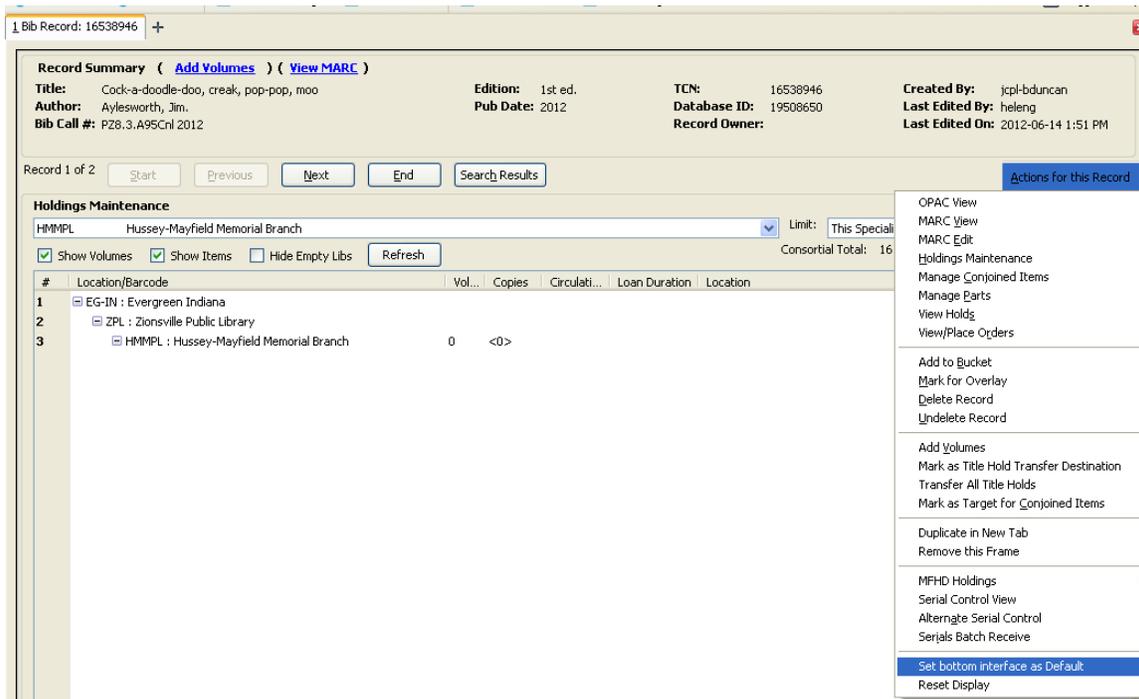
The record display will change from the OPAC view to Holdings Maintenance:

Since this is the view that is used when working with local holdings, you are likely to use this view much of the time.

To set the Holdings Maintenance screen as your default view, click on **Actions for this Record (Alt + R)** and choose **Set bottom interface as default.**

The next time you click on a record title it will take you directly to this screen instead of the OPAC view. You can also change your view to any of the various views listed in the first section of the Actions for this Record dropdown list at any time.

TIP: Different views are needed for different tasks. Your default view is not set in stone, so feel free to change it as needed.

The Record Summary Frame

In the staff client, when working with a bibliographic record, you will see a brief record summary at the top of the screen, regardless of the view you are using. It lists the title and author of the book.

NOTE: If there is no 1xx field on the MARC record, the information from the first 7xx field, if any, will be displayed as the author.

The Title Control Number (TCN), edition statement, if any, and publication date are also displayed in the record summary frame, as well as who created the record, who last edited it, and the date of the last edit.

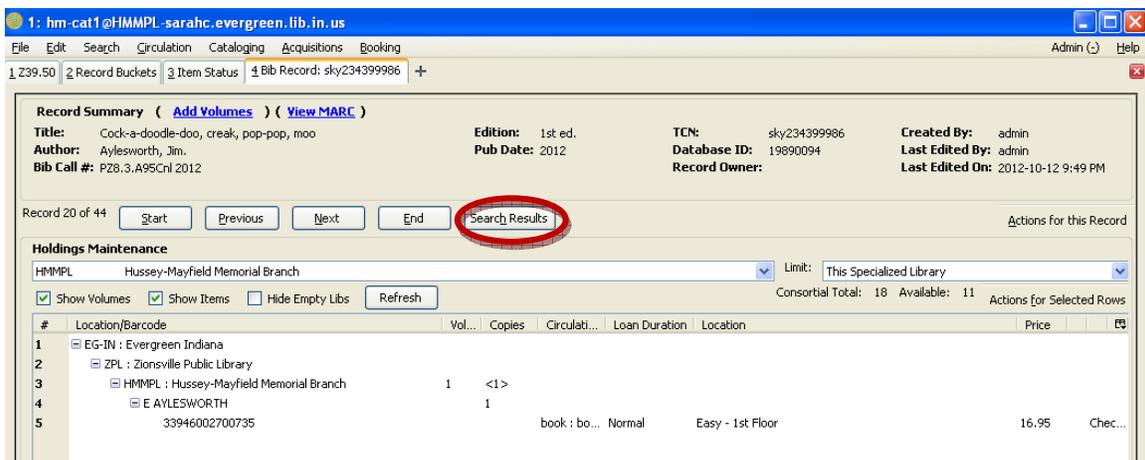If you click View MARC link, the MARC record will pop up in another window:

When you have accessed your record from a list of search results, the record summary also indicates which record in the list of results, and allows you to move from record to record in the list with the **Start (Alt + S)**, **Previous (Alt +P)**, **Next (Alt + N)**, and **End (Alt + E)** buttons.
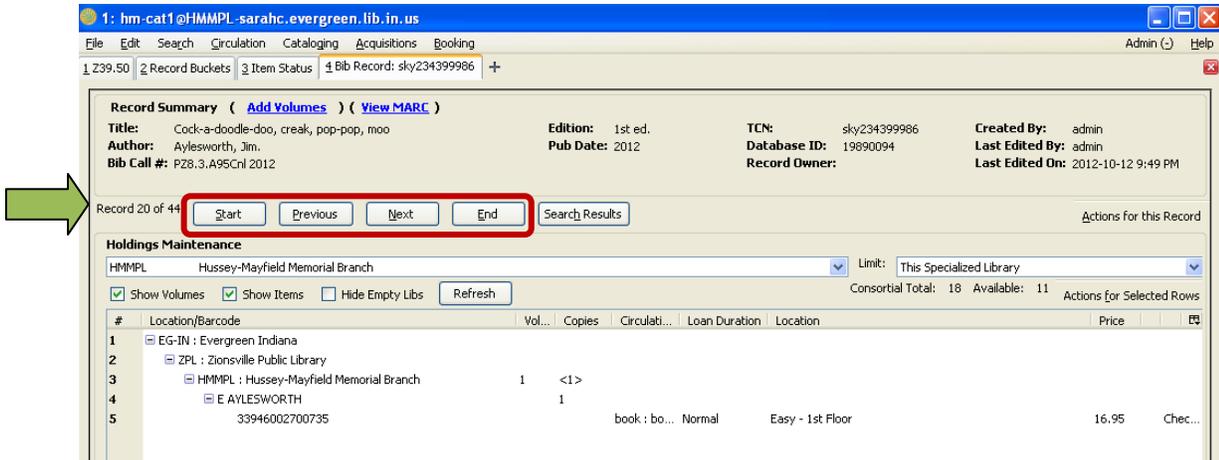
If your record was the only search result, these navigational boxes will be inactive:
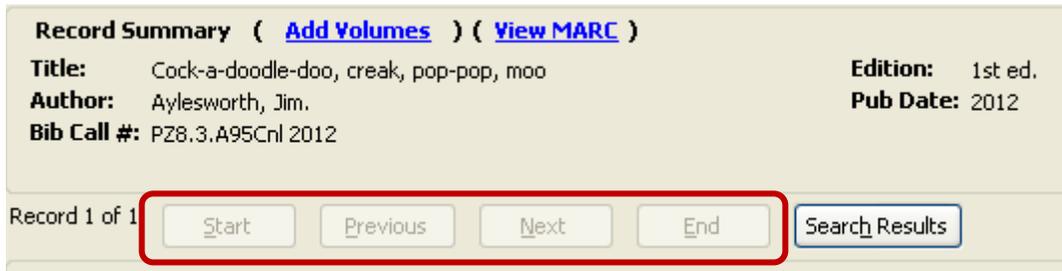
NOTE: You may find that the records are slow to load when using these buttons to navigate search results.

You can also use the Search Results buttons to return to your list of search results.

From here you can navigate to other records as desired, or you can click the Go Back button to return to the bibliographic record you had opened, which will open in OPAC view. To return to holdings maintenance view click **Actions for this Record (Alt + A)**, and select **Holdings Maintenance (Alt +H).**

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To turn off the record summary frame, click on **Actions for this Record (Alt + A)** and select **Remove this Frame**.
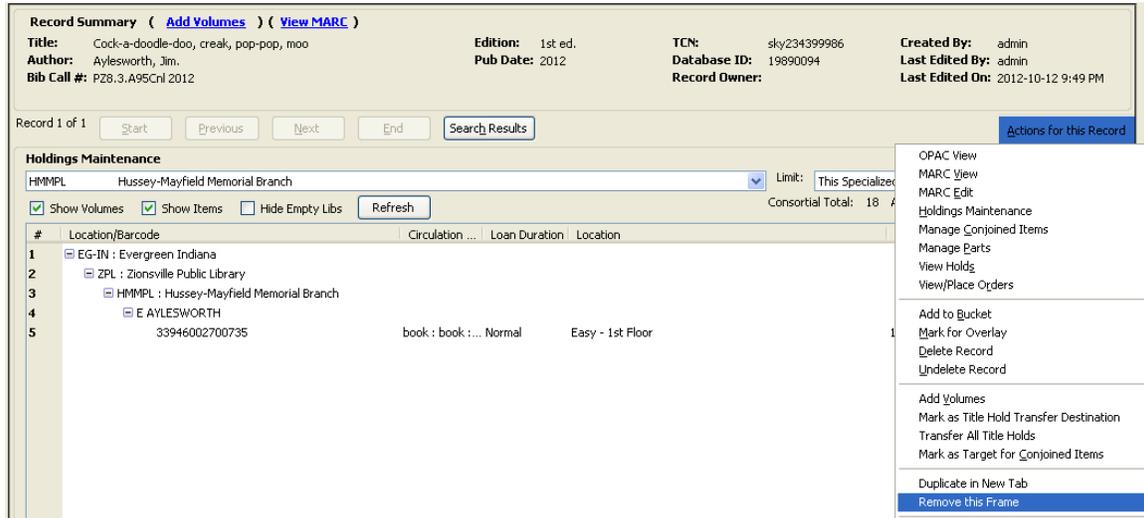
The Record Summary frame will disappear, as seen below, and you will no longer be able to access the **Actions for this Record** menu for that record. When you close the record and open another, the Record Summary frame will be turned back on.
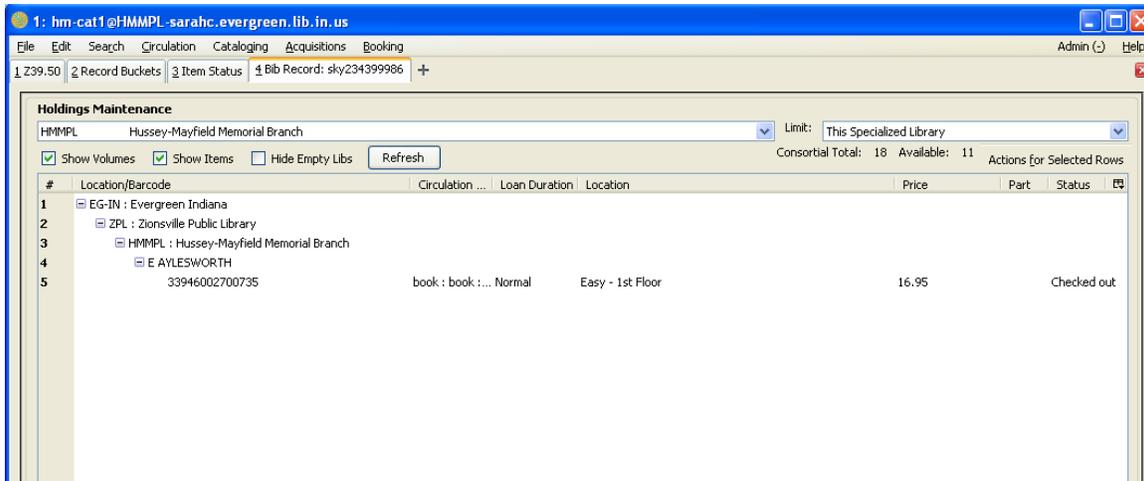
Understanding and Customizing the Holdings Maintenance Display

Below the Record Summary, is the Holdings Maintenance area. The Holdings Maintenance Screen is a Column Picker screen, so you can customize the columns that are displayed. Just click on the column picker icon to make your selections. See *Chapter 4 – Using the Column Picker* for more information.

TIP: *Select the columns that display information that you typically edit using the Copy Editor, so you can see at a glance if the information is correct.*

TIP: *The Holdings Maintenance display is clearer and easier to read if you turn off the Call Number in the Column Picker, as seen below. The Call Number displays in the first column by default. Turning on Call Number just displays the call number in an additional column.*

The **Actions for Selected Rows (Alt + F)** menu allows you to perform various functions associated with volumes and items. In order to perform the desired function, it is necessary to highlight the correct row in the Holdings Maintenance display. If the wrong line is selected, certain functions will not be active.

The Holdings Maintenance screen displays holdings information in a hierarchical fashion. Line number 1 is the Consortium line, line number 2 is the library system, line number 3 is the library branch. Next are displayed the Volume/Call Number line and finally the item line.

To display all the lines at once, make sure the boxes next to **Show Volumes** and **Show Items** are checked. If they are not, you can check them and then click the **Refresh** button. These will remain checked or unchecked for your workstation until you change them.

Take the time to familiarize yourself with the hierarchies and how they display.

If you prefer not to show all items and volumes by default, you can also click the plus signs to view volume and item information.

At the top of the Holdings Maintenance box, note the drop down box that lists your library's name. On the right side of the screen are displayed the total number of items in the consortium that are attached to this record. If you click on the down arrow, a drop down list will open showing the other EI libraries.

Libraries with holdings are indicated with bold text and a green bar on the left side of the dropdown box. To display the holdings of another library, click on the library name.

You can also set your display to show multiple branches at once. Simply select your system name from the list instead of your branch name:

You can also display holdings for all the libraries by selecting Evergreen Indiana.

NOTE: The more holdings there on the record, the longer it will take to load.

*NOTE: Make sure the **Limit** drop down box is set to **This Branch Your Bookmobile** or **This Specialized Library**.*

TIP: You can shorten the display to system names by clicking the Hide Empty Box. Then branch names without holdings will not display, however you cannot leave this toggled for cataloging because your own branch will also hidden on records where you have no holdings.

More information on the following page.

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NOTE: *If you change the library displayed in the Holdings Maintenance screen, it will remain the default until you change it back, even if you log out or open another bibliographic record.*

To change the screen back to displaying your holdings only, you must select it from the drop-down list.